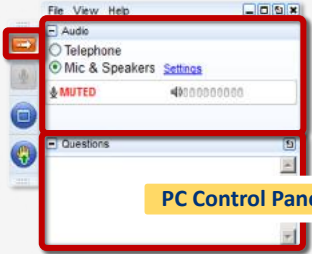




GoToWebinar Housekeeping



PC Control Panel



Mac Control Panel

Attendee Participation

Using your control panel...

Join audio:

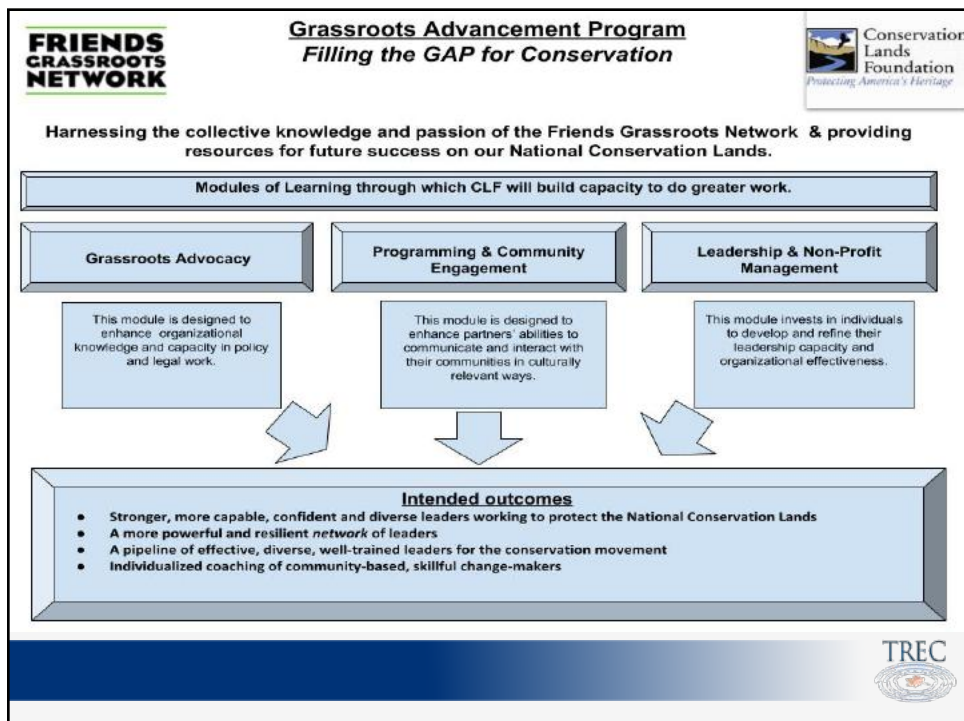
- Choose "Mic & Speakers" or "Computer Audio" to use VoIP
- OR choose "Telephone" or "Phone Call" and dial-in using the information provided

Submit questions and comments via the Questions panel.

Note: Attendees are muted and your webcams are disabled (listen-only mode).



1



2

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Training Resources for the Environmental Community
Presents:

Incredible Year-End Appeals



Presented by:

Katie Davis, *TREC Associate*

September 15, 2020

3

Today's Topics

- What are the phases of a year-end campaign?
- What does it take to write an effective appeal?
- Appeal samples and successes

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4

2020 Temperature Check



5

Year-end campaign phases



6

Phase 1: Review last year's campaign

What to focus on:

- Last year's fundraising results
- Last year's learnings
- Your current fiscal situation
- Capacity of staff/board
- Timing of the campaign

Questions to answer:

- How much did the campaign raise?
- What strategies did you utilize? Were they effective?
- What was your campaign theme?
- Are there any current unmet financial needs?
- How has org financial situation changed this last year?



7

Internal	<u>Strengths</u> • Greatest fundraising program assets? • High performing revenue areas?	<u>Weaknesses</u> • Underperforming revenue areas? • Systems and processes improvements?
External	<u>Opportunities</u> • New funding opportunities? • Partnership opportunities with communities? (Community-Centric)	<u>Challenges/Threats</u> • What do we need to be paying attention to out there that may impact messaging or giving?



8



9

Phase 2: Create your year-end action plan

What to focus on:

- A realistic budget
- Timeline for campaign
- Major and minor deliverables
- Your campaign theme

Question to answer:

- How reliable is your data?
- Who is your target audience?
- What does success look like?
- What story do you want to tell?
- What strategies are you going to use?

10



Training Resources for
the Environmental Community

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Fundraising Planning | Income Budget Template

TREC Fund Development Resources

SOURCE OF FUNDS	Prior Fiscal Year	New Fiscal Year-BEST	New Fiscal Year-LIKELY	New Fiscal Year-WORST
Individuals				
Board of Directors	\$ 12,000.00	\$ 15,000.00	\$ 13,000.00	\$ 11,000.00
Major Gifts	\$ 22,000.00	\$ 21,000.00	\$ 18,000.00	\$ 13,000.00
Direct Mail				
Campaign Appeals				
Monthly/Recurring				
Unsolicited				
Subtotal, Individuals	\$ 34,000.00	\$ 36,000.00	\$ 31,000.00	\$ 24,000.00
Institutional				
Foundations				
Sponsorships				
Event A				
Event B				
Federal Grants				
State Grants				

Budget
Likelihood
Subcategory



11

Phase 3: Launch your campaign

What to focus on:

- Timeline for outreach materials
- Gift acknowledgement process
- Who is doing what

Question to answer:

- Do we have staff available to process gifts?
- Will our mail be accessible year-end?



12

Communication channels

<https://www.neoncrm.com/year-end-fundraising-ultimate-guide/>



MOST POPULAR CHANNELS FOR YEAR-END APPEALS

Direct Mail	100%
Email	92%
Website	50%
In-Person	17%

59%

...of nonprofits make between 1 - 3 donor "touches" for their year-end campaign. About 10% of organizations make more than 5, and 28% of nonprofits make zero touches.



13



The final push...

Data courtesy of NEON Year-End Fundraising
<https://www.neoncrm.com/year-end-fundraising-ultimate-guide/>

Nearly **1/4** of online donations are made during the **last 2 days** of the year

34% of all charitable giving is done in the **last 3 months** of the year

12% of all individual giving happens in the **last 3 days** of the year



14



15

Digging into Appeals

- Why do we send appeals?
- What makes a good appeal? (email and mail)
- What do you do once you have sent the appeal?
- How do you boost your fundraising appeal success rate?

16

Campaign versus Appeal

A **campaign** is the reason why you are asking for money

An **appeal** is how you asked for that money



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An **appeal** is how you asked for that money



17

The appeal of special appeals (Direct mail is still useful)



- ✓ Update on campaigns – build member loyalty
- ✓ Invitation to get involved
- ✓ Make the case for additional support
- ✓ Simple for donors to increase support



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- ✓ Update on campaigns – build member loyalty
- ✓ Invitation to get involved
- ✓ Make the case for additional support
- ✓ Simple for donors to increase support



18

Email versus Paper. No “write” or wrong

Email Appeals

- Inexpensive
- Easy to schedule ahead of time
- Limited opportunities to tell stories

Campaign Appeals

- Time consuming
- Expensive
- Opportunity to share additional resources in envelope



19

Tips & Tricks to Make It Appeal-ing



- Make people FEEL something
- Make it personal & casual
- Use matching gifts
- Say thank you for past gifts
- Take risks
- **Make the important stuff STAND OUT!**
- Engage them further (Monthly donors?)
- Provide suggested giving levels



20

Tips & Tricks to Make It Appeal-ing



- Header (short, snappy, clear, urgent)
- Salutation (NOT “Dear Friend”)
- Short attention-grabbing sentence
- Tell a story – present the “why”, “how”, “what”
- Call to action (ex: please use the enclosed envelope and make a gift today, please make your gift \$20 online)



21

Tips & Tricks to Make It Appeal-ing



- Reiterate the value of the gift today. What will it do?
- Sign off with handwritten signature or personal note
- P.S. (people sometimes scan and go here first) – reminder about deadline, or something else you want to highlight
- **Include remittance slip/envelope**



22

GLUE GOES HERE

☐ Please add me to your email list for alerts, news and event invitations.

Please contact me with more information about:

☐ Volunteering
☐ Legacy giving
☐ Other _____

Sky Island Alliance is a 501(c)3 charitable organization, Tax ID number 86-0796748
 Contributions to Sky Island Alliance are tax-deductible.

PHONE 520 624 7080 EMAIL siainfo@skyislandalliance.org WEB skyislandalliance.org

☐ YES! I would like to protect our mountain islands and desert seas by making a:

☒ Monthly gift of: ☐ \$10 (great introductory level!) ☐ \$30 (a dollar a day!)
☐ One-time gift in the amount of:
☐ \$35 ☐ \$50 ☐ \$100 ☐ \$250 ☒ \$ _____ surprise us!

Name(s): _____ Phone: _____
 Address: _____ City, State: _____
 Zip: _____ Email: _____
☐ Check payable to Sky Island Alliance ☐ Visa ☐ MasterCard ☐ American Express
 Card No.: _____ Exp. Date: _____
 Security Code: _____
 Signature: _____

For monthly donations: I understand contributions will be charged to my credit/debit card automatically for the amount shown above. At any time, I may change or stop my pledge by contacting Sky Island Alliance.

23

HELENA MT 59601-5704
 30 S EWING ST
 MONTANA WILDERNESS ASSOCIATION

**LET'S WALK
TOGETHER**

 MONTANA WILDERNESS
ASSOCIATION

24

"Yes, I will speak up for the wolves and wolf recovery in the Southwest!" Here is my contribution to the Grand Canyon Wolf Recovery Project to protect wolves and meet your challenge grant from Earth Friends Conservation Fund.

The easiest way to give is to donate online at www.gcwolfrecovery.org:

☐ \$35*
 ☐ \$50
 ☐ \$100
 ☐ \$250
 ☐ Surprise Us \$ _____

*Recommended individual membership

Your name will not be shared or sold and you will not receive junk mail from us. You will receive updates and information about our work to bring back wolves and restore ecological health in the Grand Canyon region.

Grand Canyon Wolf Recovery Project - Restoring the Balance

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____
 e-mail: _____

Thank you for standing up for wolves by supporting
 Grand Canyon Wolf Recovery Project!
www.gcwolfrecovery.org


 GRAND CANYON
 WOLF RECOVERY PROJECT

Please make checks payable to: Grand Canyon Wolf Recovery Project - GCWC. All contributions to the Grand Canyon Wolf Recovery Project may be tax deductible through our fiscal sponsor, Grand Canyon Wildlands Council (GCWC).



25

Sent. Now what?

What to focus on:

- Donor follow up plan
- Metrics and benchmarks
- Cost of fundraising strategies
- Effectiveness of chose strategies

Question to answer:

- How are we following up with donors during the campaign?
- Do we have thank-you materials ready?
- Are we doing anything special with new donors?
- What is our response rate?



26

Measuring Fundraising Effectiveness

<https://boardsource.org/research-critical-issues/measuring-fundraising-effectiveness/>



27

Measuring Fundraising Effectiveness

- **Total Fundraising Net =**

Total Amount Raised - Total Fundraising Expenses

- **Dependency Quotient =**

Sum of Contributions from 5 Largest Donors or Funders / Organizational Expenditures

- **Cost of Fundraising =**

Total Fundraising Expenses / Total Fundraising Net



28

It is never too soon to be thinking about 2021



29

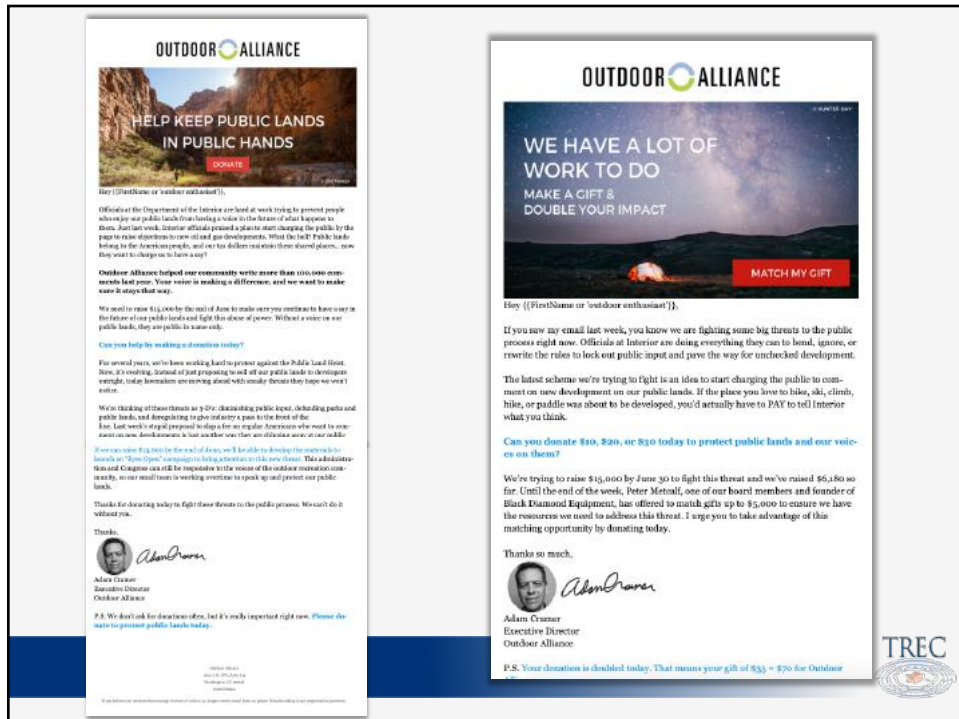
Sample Appeals

Just Say Thanks

You are NOT invited



30



31

OUTDOOR ALLIANCE

Your message has been sent!

Thank you for taking action.

Now, please consider taking an additional step by making a donation to protect the future of the places we get outside. Bottom line: your gift makes protecting public lands possible.

Not LOGAN KNOWLES? [Click here to log out.](#) [fastAction](#)

Contribution Information

☐ Recurring contributions make a huge difference! Make this contribution Monthly

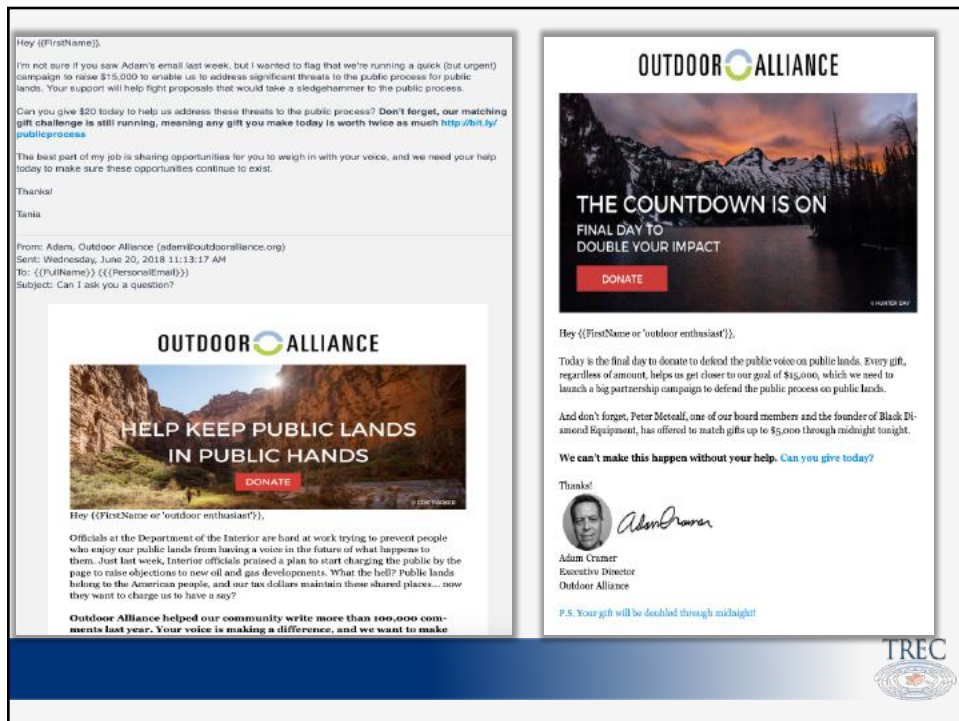
Your Billing Address

First Name Last Name

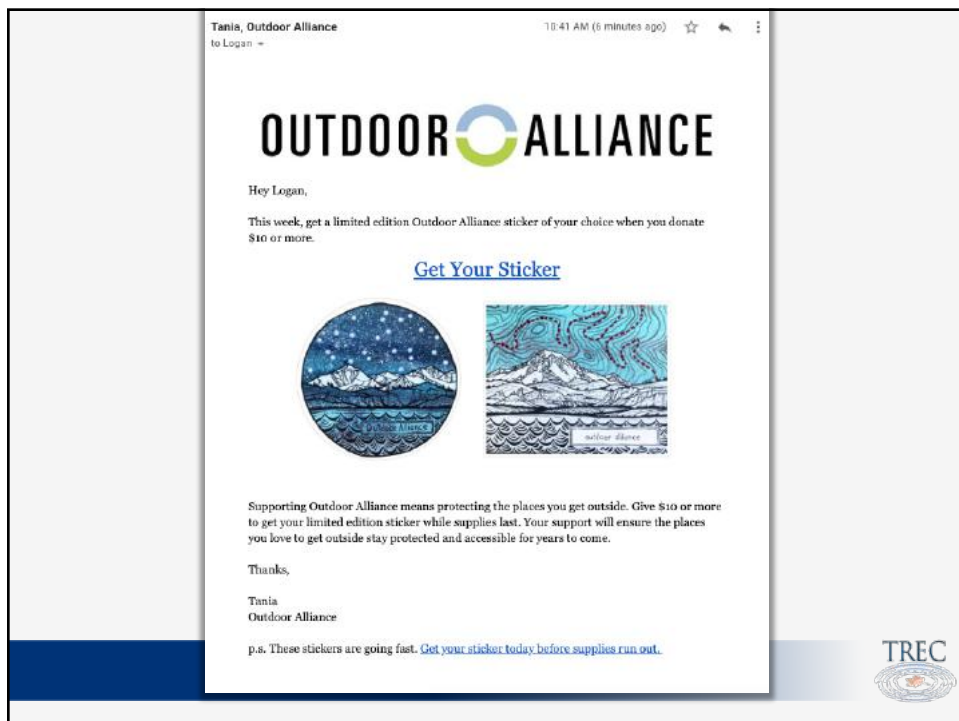
Street Address

TREC

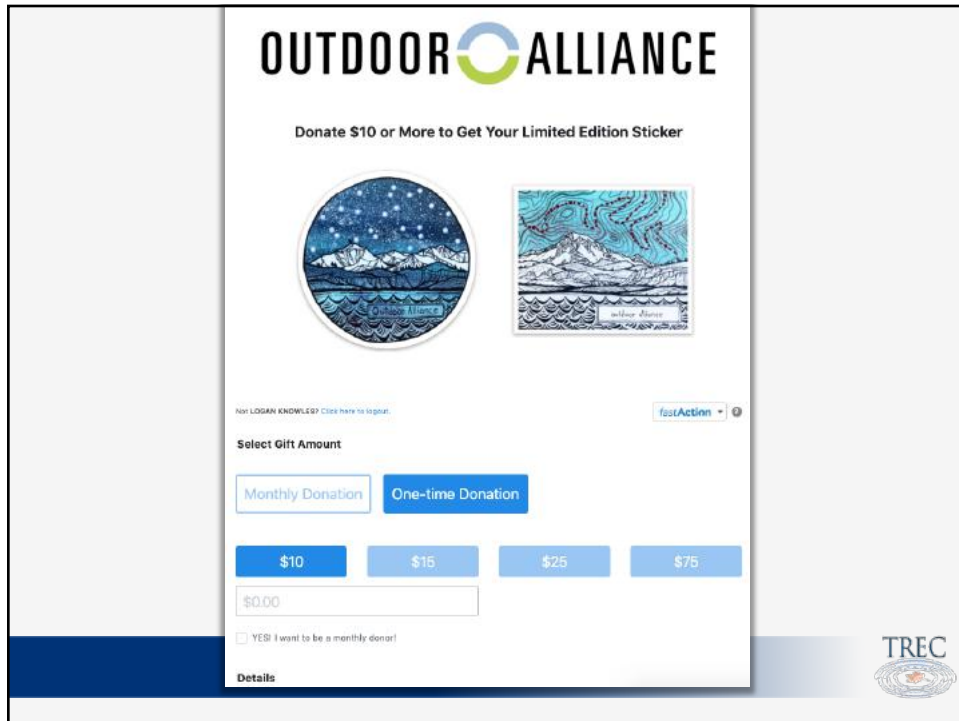
32



33



34



35

Evaluation of this webinar

As you exit the webinar...

Please fill out our brief survey!

36



Questions?



How to Participate

Using your control panel...

- **RAISE YOUR HAND** if you would like to be unmuted to speak your question
- OR continue to submit questions and comments via the **Questions** panel.

Thank you for attending today's webinar! We will stay after to answer your questions, but feel free to exit the webinar if you need to go.

