WINTER IS COMING!

Now’s the Time to Plan Your End-of-Year Campaign

Wednesday, August 21, 2019
fundraise

YOU’VE GOT A CAUSE
LEARN HOW TO FUND IT.

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TODAY’S PRESENTER:

Katie Adams Farrell

Co-founder, Kerredyn Collaborative and Trainer, Sanford Institute of Philanthropy
The Most Wonderful Time of the Year

Good news!
30% of charitable contributions to nonprofit organizations come in December

Bad news!
Every organization is asking for money
Objectives for Today

- Learn tips for crafting a successful year-end campaign
- Learn how to use Cause Selling Cycle basics to strengthen your storytelling
- Sample some year-end campaign formats and timelines to meet multiple objectives
Do you or your organization participate in Giving Tuesday?

Yes!
No
What is Giving Tuesday?
I have not, but I am planning on it this year
For those of you who have participated in Giving Tuesday, how do you weave it into your campaigns?

- **Giving Tuesday is the kick-off of our annual campaigns!**
- **We haven't integrated Giving Tuesday into our campaigns**
- **We have never planned a Giving Tuesday**
- **Other! (tell us in the chat box!)**
The Cause Selling Cycle

THE EIGHT-STEP CAUSE SELLING CYCLE represents the steps good fundraisers take to become great fundraisers.
Pieces of a Successful Campaign

- Early planning
- Distinct goal
- Great storytelling
- Multiple touches
- Involves major donors
- Stewardship
Three Phases of a Campaign

1. Planning
2. Execution
3. Follow-up
## Three Phases Checklist

<table>
<thead>
<tr>
<th>PLANNING</th>
<th>EXECUTION</th>
<th>FOLLOW-UP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluate <strong>past campaigns</strong></td>
<td>Build the campaign webpage</td>
<td>Double dose of <strong>gratitude</strong></td>
</tr>
<tr>
<td>Define <strong>focus</strong> and <strong>components</strong></td>
<td>Send a <strong>save-the-date</strong></td>
<td>Details on <strong>donor’s impact</strong></td>
</tr>
<tr>
<td>Set <strong>target markets</strong> and <strong>segment lists</strong></td>
<td>A/B test your emails</td>
<td><strong>Evaluate</strong></td>
</tr>
<tr>
<td>Set a <strong>goal</strong>!</td>
<td>Stay strong the last few weeks, <strong>day-to-day</strong></td>
<td><strong>Document</strong></td>
</tr>
<tr>
<td>Make a <strong>detailed task map</strong> with dates</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gather assets</strong></td>
<td></td>
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</tbody>
</table>
Goal Setting

A campaign with a **defined goal** will lead to better results.
Goal Setting

What to consider:

- Past years’ performance
- Your target markets and lists
- Your major/annual gifts asks
- Do you have a match?
Tell a Good Story

• Choose **one** story/focus

• Remember the **story arc**
  (connect across emails and channels)

• Structure using the **Cause Selling Cycle**
Presentation Tools

• Grab their **attention**
• Get them **involved**
• Paint a picture with a **metaphor**
• Quantitative visualization
Multiple Touches

• Don’t be Afraid to Reach Out
  If you are not keeping top-of-mind, someone else is.

• Integrate your communications challenges:
  • Direct mail
  • Email
  • Social media
  • Phone calls, etc.
Major Donors

• Secure year-end annual gifts
• Enlist peer-to-peer fundraisers

Major Gifts Tools

• Giving catalogue
• Challenge/match
• Upgrade loyal/long-time donors
Follow-up

Three keys to Donor Retention:

- **Think** like a donor
- Say **Thank You** like you mean it
- Treat everyone like a **major donor**

*Be sure to tell them what’s next!*
## Sample Timeline

<table>
<thead>
<tr>
<th>Month</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>Build the Plan</td>
</tr>
<tr>
<td></td>
<td>Evaluate</td>
</tr>
<tr>
<td></td>
<td>Define focus</td>
</tr>
<tr>
<td></td>
<td>Set targets</td>
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<td></td>
<td>Get feedback</td>
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<tr>
<td></td>
<td>Segment</td>
</tr>
<tr>
<td></td>
<td>Task Map</td>
</tr>
<tr>
<td>September</td>
<td>Stage for Execution</td>
</tr>
<tr>
<td></td>
<td>Gather assets</td>
</tr>
<tr>
<td></td>
<td>Get feedback from donors</td>
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<tr>
<td></td>
<td>Write content</td>
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<tr>
<td></td>
<td>Design</td>
</tr>
<tr>
<td></td>
<td>Website</td>
</tr>
<tr>
<td>October</td>
<td>Execute</td>
</tr>
<tr>
<td></td>
<td>Save-the-Date</td>
</tr>
<tr>
<td></td>
<td>Major Gifts - Secure Match</td>
</tr>
<tr>
<td>Month</td>
<td>Activity</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>November</td>
<td>Execute Launch!</td>
</tr>
<tr>
<td></td>
<td>A/B Test (emails)</td>
</tr>
<tr>
<td></td>
<td>Giving Tuesday</td>
</tr>
<tr>
<td>December</td>
<td>Execute: Go Time!</td>
</tr>
<tr>
<td></td>
<td>Editorial calendar that maximizes channels</td>
</tr>
<tr>
<td></td>
<td>December 15 – Match</td>
</tr>
<tr>
<td></td>
<td>December 27 – Final blitz</td>
</tr>
<tr>
<td>January-February</td>
<td>Follow-up</td>
</tr>
<tr>
<td></td>
<td>Thank you</td>
</tr>
<tr>
<td></td>
<td>Onboard</td>
</tr>
<tr>
<td></td>
<td>Document</td>
</tr>
<tr>
<td></td>
<td>Evaluate</td>
</tr>
</tbody>
</table>
Sample eCard

HAPPY HOLIDAYS
I GAVE IN HONOR OF YOU.

MERRY CHRISTMAS!
I JUST MADE A GIFT IN HONOR OF YOU

OPERATION BROKEN SILENCE
In November, your donated dollars will go twice as far! Throughout this month, each donation made to Satilla Riverkeeper via Georgia GA Gives Day will be matched, dollar for dollar, up to $5000! Help us kick off this "30 days of giving" and reach our goal by donating, sharing or join as a fundraiser today!

Support the Satilla Riverkeeper!
shar.es

Satilla Riverkeeper is participating in Georgia Gives Day! Please help spread the word and donate to help us protect, restore and educate about the beautiful and ecologically unique Satilla River!
Dear Jill,

Peek! We've got a sneak peek of our 2013 Holiday Giving Catalog just for you! Get a head start on your holiday shopping. You can feel great about giving your loved ones meaningful gifts this year.

Here are just a few of the life-changing gifts you will find in the Holiday Giving Catalog this year:

- Warm, cozy blankets ($25) for a family of five staying in an emergency shelter.
- Military comfort kit ($60) with items such as a robe, shower shoes and toiletries to make a hospital stay better for an injured service member.
- Hot meals ($100) for 10 people to provide comfort and strength following a disaster.

Don't wait—early bird access to the 2013 Red Cross Holiday Giving Catalog is available just for you!

Check one (or 10!) things off your holiday to-do list today and give something that means something to all the special people in your life.

Happy shopping!

Sincerely,

Gail McGovern
President and CEO, American Red Cross

P.S. Share with family and friends so they can get a jump start on shopping too!
Recurring Donation

Join with a recurring donation and automatically support a new Watsi patient every month.

Give monthly
A Few Things to Remember

Your year-end campaign will only be as successful as your audiences are engaged.

Be sure your website donation page is super easy to use.

Segmenting is important for a Donor-centric, personalized approach.

You can exclude individuals who have given in the past 30-60 days.

It takes about 1,000 email to raise $36 (so email shouldn’t be your only channel).
Community Share: What Has Worked For You?
Questions?

Please send them in the chat!
Takeaways: What Will You Implement?
CONTACT KATIE!

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linkedin.com/in/katieaaf/
2nd Edition

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WANT TO LEARN MORE ABOUT THE CAUSE SELLING CYCLE?

Join our Cause Selling email list:

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DON’T MISS OUR NEXT WEBINAR!

Thought Leader Series: *The Happy, Healthy Nonprofit* with Beth Kanter

September 18, 2019
11:00am – 12:00pm PST
2:00pm – 3:00pm EST

[Register Today!](#)
Thank you

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