50 Things You Can (Still) Do Before Year-End!

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Countdown to 12/31/19

- **AUGUST**: Set goals for your campaign. Outline the theme of your appeals.
- **SEPTEMBER**: Pull your campaign reports. Segment your donor list.
- **OCTOBER**: Make your year-end appeals. Prepare your initial giving channels.
- **NOVEMBER**: Review and finalize your campaign. Send first round of appeals.
- **DECEMBER**: Solicit donors' end-of-year gifts. Send follow-up cards. Thank donors for their support.
- **JANUARY**: Report on your progress. Celebrate your year-end success.
Database

- Run your LYBUNT and SYBUNT reports
- Clean up your database
- Run the Fundraising Fitness Test
  ◦ afpfep.org

Database

- Update your database (COA)
- Review all fund, appeal and attribute codes
  ◦ Report generation
  ◦ Information capture
Communications

- Impact of 2017 Tax Reform beginning to show
- Don’t hit the panic button!
- Network for Good blog – tax deductions not listed as one of the top 14 incentives for charitable contributions
- Remind your donors of their philanthropic intent
- Your story of impact and what their donations make possible for the community is more important than ever

Communications

- Share your story
  - Not an elevator speech
  - Individualize
- Stagger story communications every two weeks
- Integrate your stories through your platforms
Communications

- Communicate how donor gifts made a difference BEFORE you ask
  - 72% of donors say that impact and results are very important factors in deciding to give

Communications

- Year-at-a-Glance communication
- Research/report on PR over the year
- Send a holiday greeting card using a client’s story
Communications

- Launch a social media campaign
- Thank your colleagues
  - “I am nothing without you”
- Fine tune your marketing tools and revisit messages sent to target audiences

Cultivation

- Host a year-end major donor gathering
  - Reflect on the 2019
  - Interesting host/location
  - Sneak preview for 2020
- Board thank-a-thon
Cultivation

- “Because of You” communication
- Complete your Stewardship Calendar
  - Don’t have one? Top of the list for 2020

Solicitation

- Giving Tuesday
- Send digital solicitation communications to non-respondents the last 4 days of the year
  - Suppress those who already gave
- Run an employee campaign
Solicitation

- TEST your messages
- Multi-channel
- Integrate giving options
  - Links in direct mail
  - Donate Now buttons
  - Matching/Challenge/Stock Gifts
- Board giving at 100%!

Solicitation

- Add a personal P.S. to solicitation letters
- Hand-address envelopes
- Do a handwritten ask
- Send a note with a picture of a program recipient
- Personal follow-up
Solicitation

- Mobilize your volunteers through a peer-to-peer campaign
  - Empower friends and family
- Hone your messages for each segment
  - Same
  - Upgrade
  - Downgrade
  - Lapsed

Solicitation

- Make the most of every day – 50% of all gifts are contributed between October and December
- Don’t drag in December
  - The average person makes 24% of his/her donations between Thanksgiving and New Year’s
  - Donors who don’t give until December give 52% more
Operational

- Optimize your website for giving
- Submit required Secretary of State filings
- Pay sales taxes on unrelated or ongoing business income

Operational

- Maintain your registered agent status
- Obtain/renew charitable solicitation licenses
- Review solicitation and donor receipts
Operational

› Hold an Annual Meeting
› Conduct a Board 360 assessment
   ◦ Board
   ◦ Self
   ◦ Chair
   ◦ Include staff feedback

Operational

› Conduct a year-end review of departmental milestones
   ◦ Be honest about the highs and lows
› Annual Report
   ◦ Consider an infographic
   ◦ Spelling, alphabetize
   ◦ Double-duty for stewardship
Operational

- Ensure all final grant reports have been filed
- Review your 2019 strategic goals
  - What did you achieve?
  - What gets moved to 2020?
  - What gets dropped?
- Review your Diversity Policy
  - Don’t have one? Top of the list for 2020

Future-Forward

- Get your plan ready for this time next year – SMART goals

Nonprofits that develop a dedicated and strategic campaign to engage donors can experience as much as 70% growth in year-end giving
Future–Forward

- Prepare 2020 tax letters
  - Separate from donor thank you
- Whatever worked for you in 2019, get ready to refine and re-launch in 2020 . . . budget for it!
- Outline your 3 milestones for 2020
  - Based on industry trends (FEP)

Final Thoughts

- Get the mail!
- Take time to take stock
  - Order your tools for 2020
- Clean your office
  - A literal clean slate
- Recharge your batteries
- Remember: 2020 is another year!
THANK YOU
and hope you have your best year-end ever!

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