

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

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Countdown to 12/31/19



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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