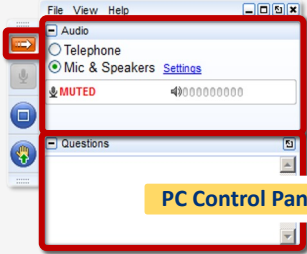
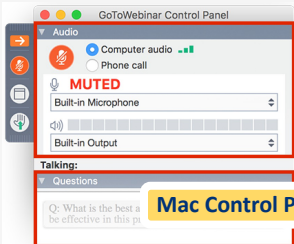




GoToWebinar Housekeeping



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).



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Training Resources for the Environmental Community
Presents:

End of the Year Fundraising



Presented by:

Bruce Passmore, TREC Consultant

September 20, 2022

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Fundraising Trends

Promising strategies

Conducting an EOY Review

Creating EOY Plan





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Fundraising Trends

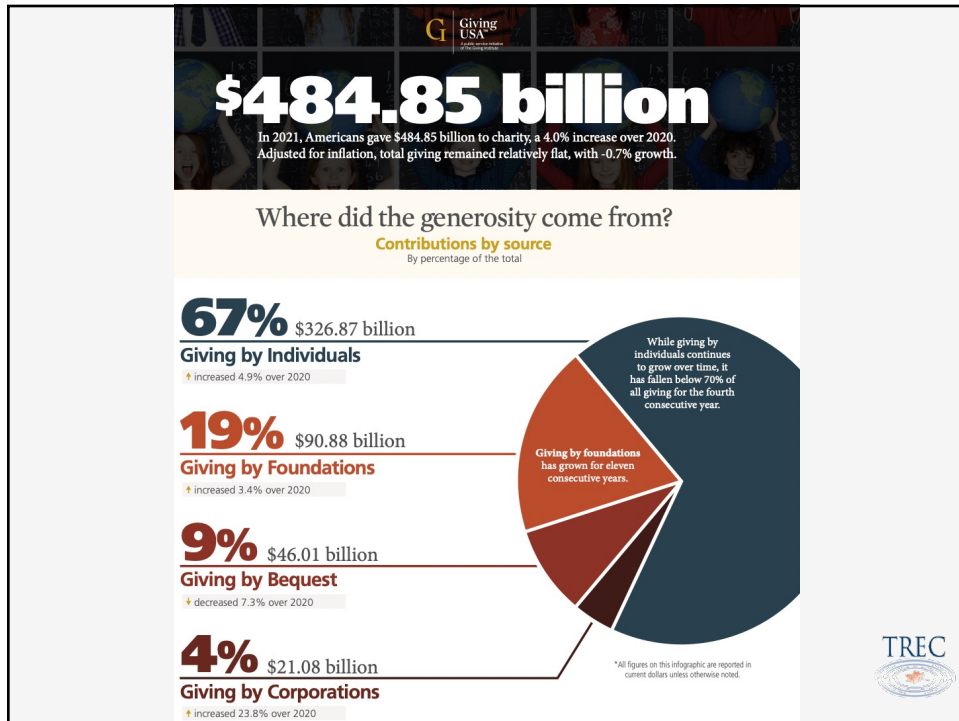


Some good news too though...



**Future is unclear
global... local...**

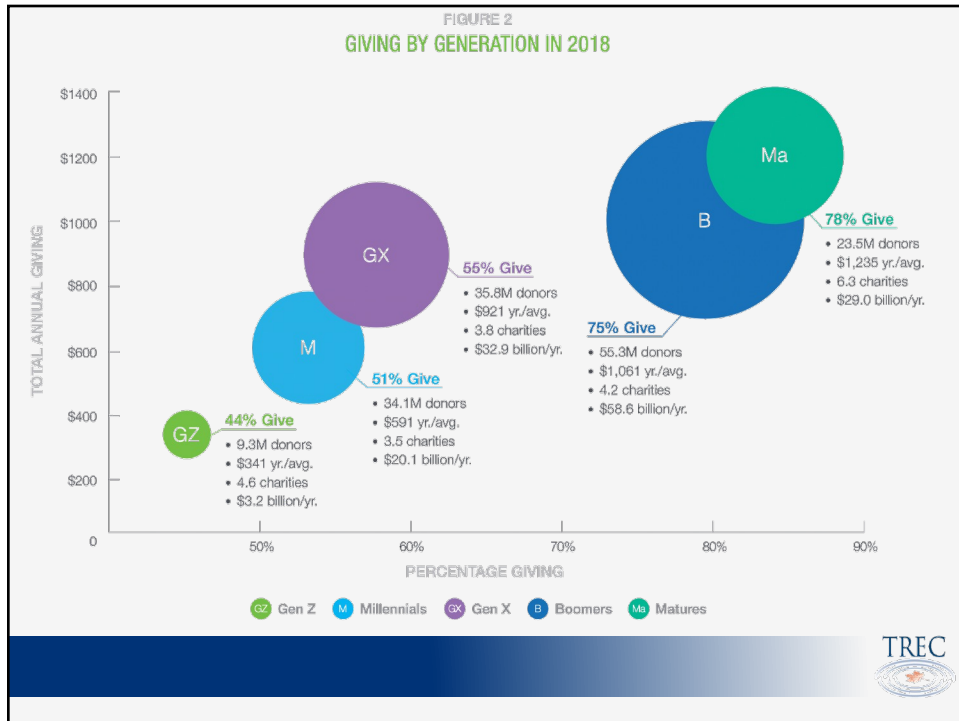




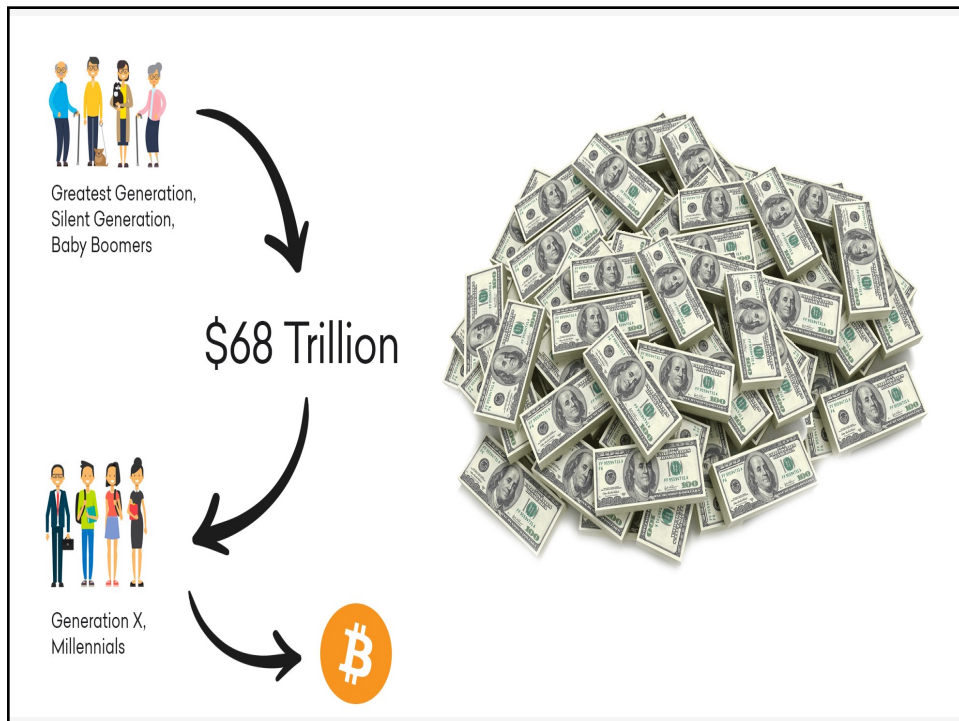
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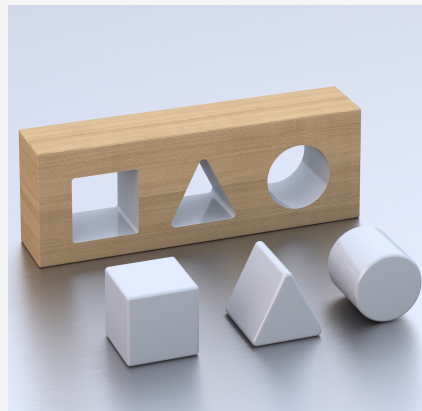
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Promising strategies



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- Legacy
- Use your data
- Multiple points of contact
- Focus on the impact
- Re-occurring giving
- Accessible



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- Thank yous
- Follow-up
- Don't under-estimate smaller donors
- Use your data
- Try something new



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Conducting an EOY Review



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It's that time of year...



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31% of annual giving occurs in December

12% last three days in December

28% raise between 26-50% through year-end asks

Data Dive



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Review: Campaign

What was your end of year campaign theme? Timeline?

Who was your target audience?

What strategies did you use to reach them?

What metrics did you track?



17

Review: Fiscal

Has org financial situation changed in the last year?

Do you have adequate reserves?

Are there unmet financial needs this year?

Are you running a deficit or surplus based budget?



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Data Dive

- Balance Sheet
- Profit & Loss Statement
- Budget and Cash Flow Forecast



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Review: Fundraising

How much was raised? Did you meet your goal?

Where did you experience most/least growth?

What % of gifts were made online?

What was your retention rate?



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Data Dive

60% of the funds you will raise during year-end campaign will be from major gifts according to Donor Search

45% of worldwide donors are enrolled in a monthly/recurring gift program



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Creating EOY Plan



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- What is your budget?
- Who is your target audience? Segments?
- What metrics are you tracking? Milestones?
- What is your timeline?
- What are your communication channels?
- How will you follow up and recognize your donors?





Fundraising Plan Template

XYZ Fundraising Plan

Drafted by: _____

Approved by: _____

Fiscal Year: _____

Date: _____

Adopt goals, strategies and actions that make sense for your organization at this time. Be realistic!

STRATEGY	GOAL	FINANCIAL GOAL	KEY ACTION STEPS	WHO	WHEN	STAFF TIME	TOTAL STAFF HRS	NON-STAFF COSTS
Total Staff Hours: 0		Total Non-Staff Costs: \$0		Financial Goal less non-staff costs: \$0				
Total		Non-Staff Costs: \$0		Financial Goal less non-staff costs: \$0				

ONE PAGE
EOY PLAN

TREC Fund Development Form

TOTAL STAFF HOURS: 0

TOTAL NON-STAFF COSTS: \$0

FINANCIAL GOAL LESS NON-STAFF COSTS: \$0

TOTAL STAFF HOURS: 0

TOTAL NON-STAFF COSTS: \$0

FINANCIAL GOAL LESS NON-STAFF COSTS: \$0



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STEP ONE: Personalize with name of donor(s).
Dear Caleb,

STEP TWO: Start with a story that draws in the reader and elicits emotion.
Nicole and Carlotta were living in a moldy leaking mobile home...

STEP THREE: Share your organization's vision/success.
Today, Nicole and Carlotta are partnering with ORGANIZATION where they are growing food for their family and grow alongside their new community neighbors.

STEP FOUR: Make your first of at least three asks.
Will you help us to...?

STEP FIVE: Share more about the story.
Nicole and Carlotta look forward to growing in their garden where they can grow food for their daughters. They are also looking forward to being a part of a community.

STEP SIX: Make another ask and tell the donor how they can easily make their gift.
*Your year-end gift to ORGANIZATION helps us to...
 Please return your gift using the enclosed envelope.*

STEP SEVEN: Thank the reader.
Thank you for your compassion for families who urgently need...

STEP EIGHT: Personalized signature and/or note.

STEP NINE: Use the P.S. section to make a gift request again.
P.S. Please make your gift today and consider joining us as a monthly supporter for as little as \$5 a month."

STEP TEN: Include a remit envelop for easy gift return.



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1: Develop eq·ui·ty prompts

- Am I checking my biases?
- Are we highlighting partner nonprofit's work in our communications (with their permission)?
- Is it a “We” or “You” moment?
- Are donor dollars tied to certain programs, behaviors, etc. or unrestricted?



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2: Learn more about your donors' giving history and capacity

What is prospect research?

- Way to learn more about past giving histories & philanthropic motivations to evaluate a prospect's ability to give (capacity) and warmth (affinity) toward an organization.

How can you do this?

- DIY list your very top donors and research
- Purchase access to screening tool



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3.Focus on retention

4.Highlight a matching gift

5.Try something new



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Action Plan Example October 15 - January 15

Direct Mail
appeal and
a second
reminder
postcard

Video
message
emailed to
donors and
contacts

Social media
posts
scheduled

Phone calls
to select
donors/sup
porters

January
thank yous
x 3



30

You made it!



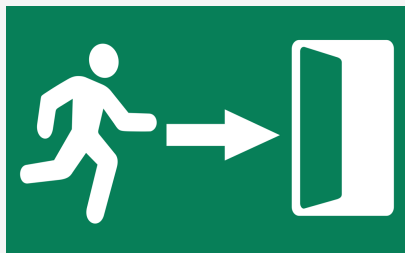
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Evaluation of this webinar

As you exit the webinar...

Please fill out our brief survey!



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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.

