

# Prepare Your Donor Database for Year-End Fundraising

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# Today's Presenters

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#NPOStrength



# TODAY'S AGENDA

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01 – Introductions

02 – Hustle and Bustle of Year-End

03 – Importance of Year-End Fundraising

04 – Preparing Your Database for 2018 Year-End

05 – Data Driven Strategies for 2019

06 – Questions

# Let's See Where We Are as a Group

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## Q1: What database are you using?

Answer Options:

- ✓ Bloomerang
- ✓ Raiser's Edge / eTapestry
- ✓ Donor Perfect
- ✓ Little Green Light
- ✓ Salesforce
- ✓ Other



# The Hustle & Bustle of Year-End

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"Thanksgiving" stewardship  
thank you notes

**Signature Fall Event**

**Giving Tuesday**

Annual Board  
Solicitations



**Online Appeals**

**Email Follow-up to  
Appeals**

Personal major gift solicitation visits

**LYBUNTS & SYBUNTS**

**Giving Pages**

**Follow-up Appeal to  
non-responders**

Direct Mail Appeal

**Quarterly donor newsletter**



# The Best Problem Ever

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Mountains of gifts, but mountains of work too! Increased:

Gift entry/processing

Acknowledgement letters

Thank you calls

Stewardship visits



# Let's See Where We Are as a Group

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Q2: How much of your overall revenue comes from year-end?

Answer Options:

- ✓ 10-25%
- ✓ 25-50%
- ✓ 50% or more
- ✓ I'm not sure



# Importance of Year-End Fundraising

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50% of nonprofits receive the majority of their annual donations October through December

40% report the majority comes between Thanksgiving and December 31

30% report the majority comes December alone

12% say they get the majority of their revenue in the last three days!





# Importance of Year-End Fundraising

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Donors give 80% larger gifts in December

60% of nonprofits make between 1-3 donor “touches” throughout their year-end campaign

74% of donors say their primary reason for giving is because the holidays are a time to be thankful for what you have, and give to those who need help



# Let's See Where We Are as a Group

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Q3: When did you start planning for year-end?

Answer Options:

- ✓ In the springtime
- ✓ During the summer
- ✓ In the last couple months
- ✓ I'm starting today!



# It's Not Too Late to Prepare

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50% of nonprofits begin their year-end planning in October.

Yikes! We are already 18 days into October!



# What To Focus on for THIS Year-End

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Database preparation & gift entry

Acknowledgement process

Report & metrics

Tailored stewardship

AND data driven strategies for NEXT Year



# Preparing Your Database for Year-End

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# Database Preparation & Gift Entry

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## Set yourself up for success and efficiency

- Run AddressFinder or work with your mail vendor to update any addresses
- Run a report/query for those who are missing addressees/salutations and update them
- Review inactive/deceased/no valid address records
- Fix those dups!
- Inactivate all old gift codes and build the new ones
- Record appeals on constituent records as they go out

PLAN  
AHEAD



# Acknowledgement Process

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- Review and update all your thank you letters, including your online receipts
- Utilize the functionality of your database to generate letters
- Schedule volunteers to help you
- Supply up! Get letterhead, postage, labels, envelopes, and everything else you need



# Reports & Metrics

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- Set up queries/reports and get feedback \*before\* the volume increases
  - # of gifts to each appeal
  - Average gift to each appeal
  - Response rate for each appeal
  - Upgrade and downgrade rates

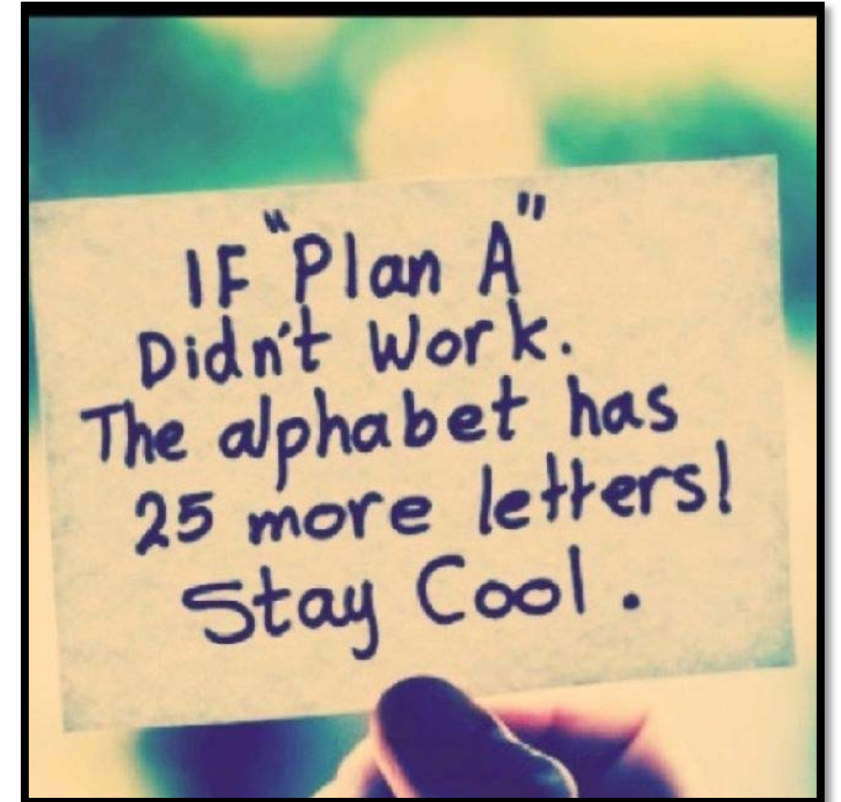




# Reports & Metrics

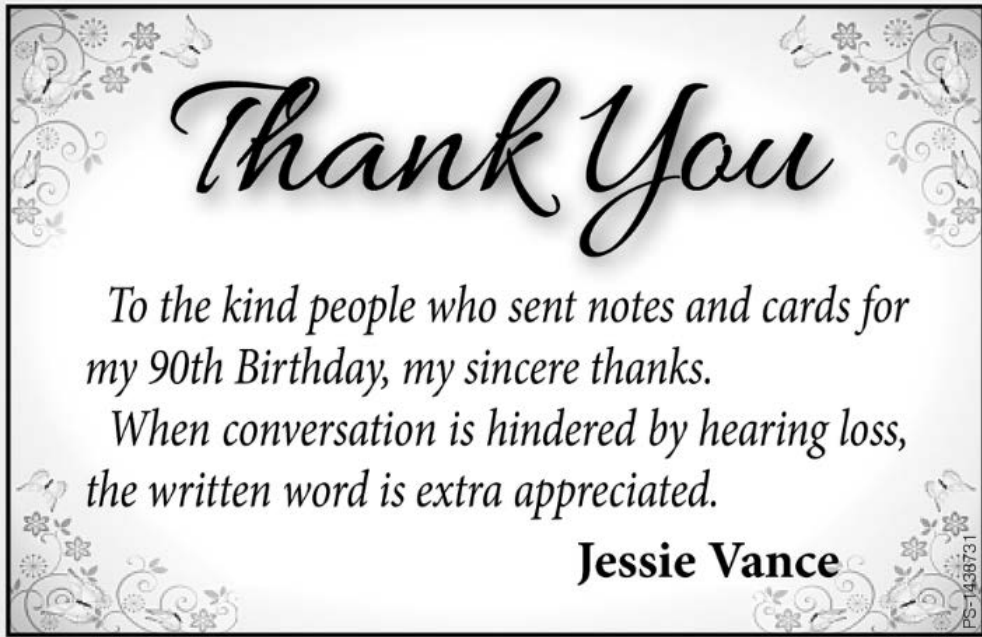
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- Be proactive!
  - Produce and review reports weekly (not Fridays).
  - Anticipate and provide other informational sources
  - Course-correct if needed
- Are my fundraising efforts producing the results I want?
- Do I need to produce an additional, special appeal to long-standing donors who have not yet responded?
- Have all my \$1,000+ donors from last fiscal year renewed their gifts or do they need calls from the Executive Director or Board Chair?
- Have I given my entire donor pool ways to participate in year-end giving?



# Tailored Stewardship

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*Ad from the Springville NY Pennysaver, August 2018*

- Set up queries/reports and provide weekly lists of:
  - First time donors \$250+
  - Donors who reach 5+ years of consecutive giving
  - Significant increases in giving
- Treat your new donors special; treat your recovered donors better; treat your retained donors the best



# Data Driven Strategies for 2019

- In January, sit down and have a postmortem of how year-end went
- Review the data
  - Content matters
- Build your plan for 2019

Appeal	# of Donors   Response Rate	Hard Costs	Revenue	ROI	Median Gift
YE Mailing #1	256   4%	\$2,112	\$28,160	\$13.33	\$110
YE Mailing #2	312   8%	\$1,250	\$42,120	\$33.70	\$135
E-Newsletter	13   2%	-	\$750	-	\$50
12/30 E-mail	21   5%	-	\$7,510	-	\$100
Giving Tuesday	16   1%	\$350	\$250	(\$.71)	\$30
Staff/Board Phone-a-thon	130   10%	\$250	\$50,050	\$200	\$385
Special Mailing to \$500+	86   25%	\$60	\$65,900	\$1,098.33	\$625



# Questions

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# Thank You!

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