



# A Fundraising Breakthrough!

**Double Your Year-End Impact**

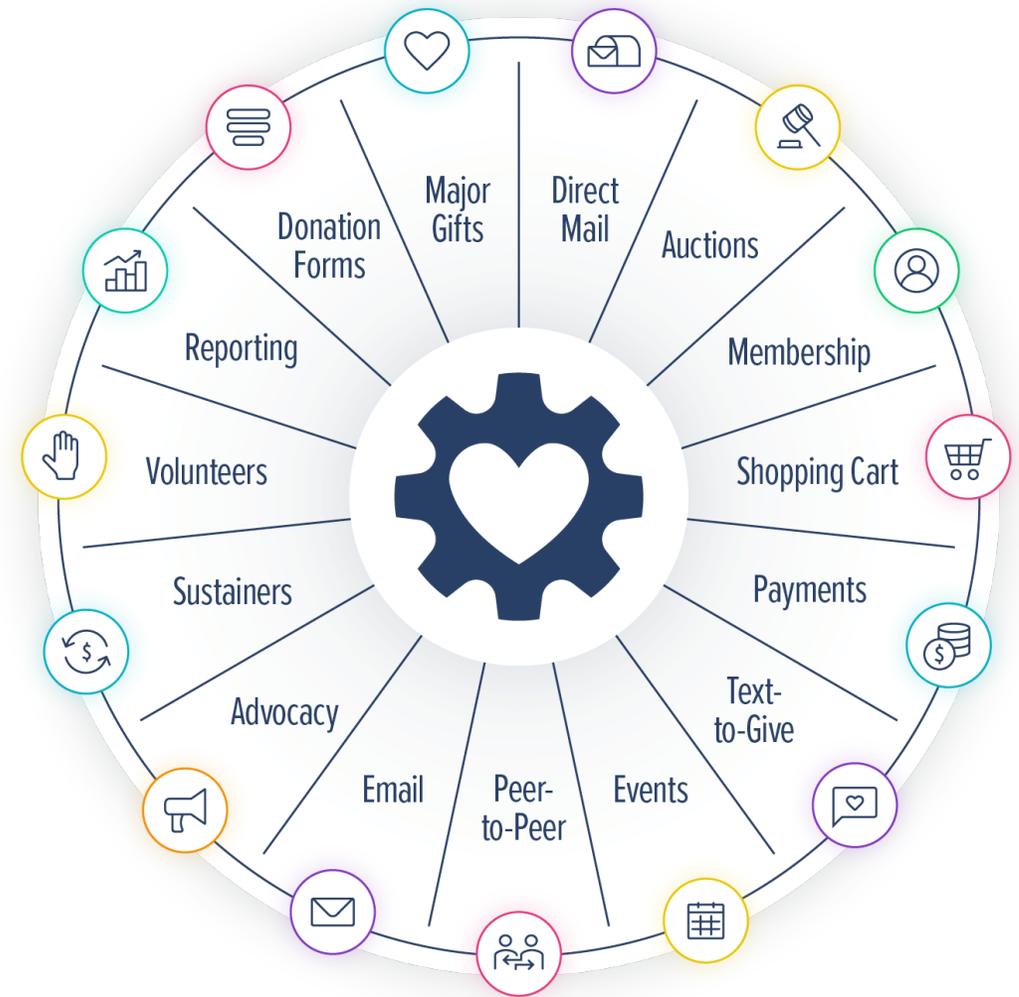


**Maryellen Gleason**

**ALIGN**  
PHILANTHROPY

# CharityEngine and Transformational Fundraising

- Any nonprofit can transform their fundraising
- The only authentic all-in-one fundraising platform
- An industry-leading payment processor
- Software tested at enterprise levels
- A resource for nonprofits: you ask, we answer!



# Guest Speaker: Meet Maryellen

I am 6x nonprofit CEO-turned-philanthropy consultant, and my purpose is to help board and staff teams improve funding and **fundraising** to enable next-level impact for their mission.





# Audience Poll

Who at our webinar today is thinking about or “re-thinking” about their calendar year-end campaign?



# What Are We Talking About Today?

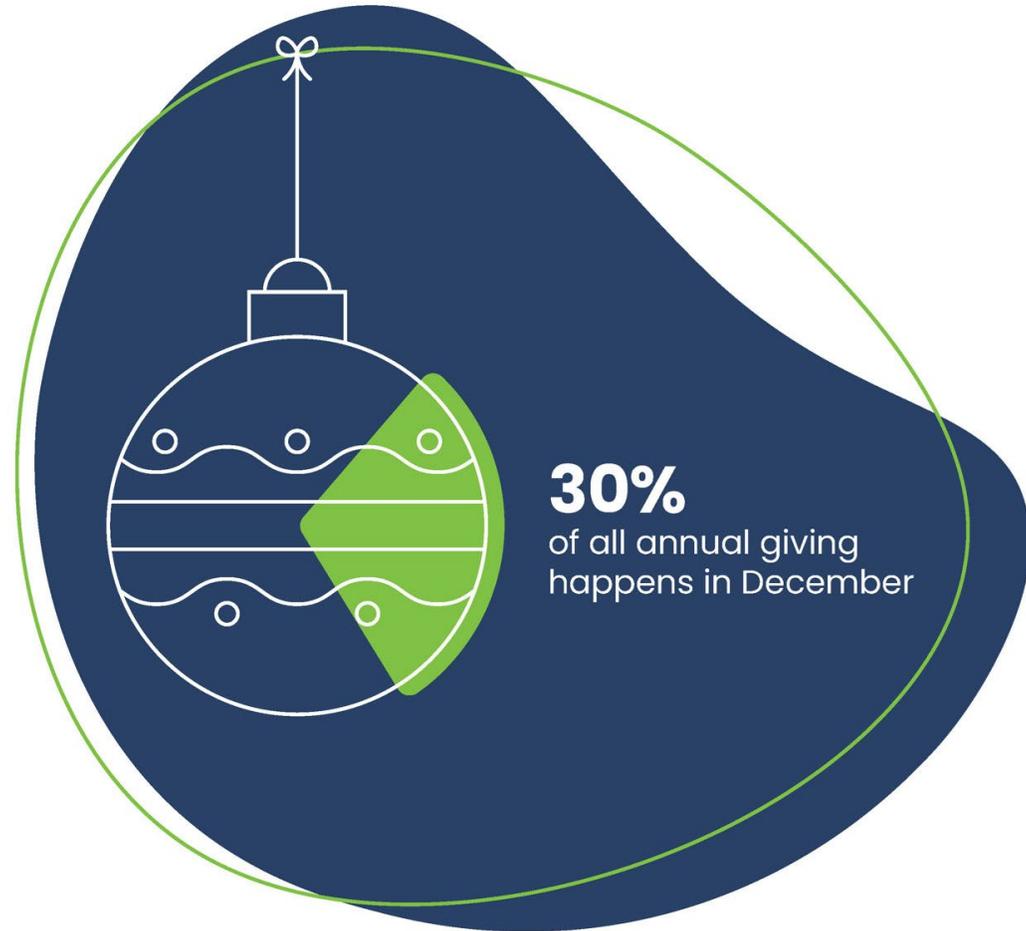


# Ten Reasons Why Year-End is Optimal

1. Year-End Giving Tradition
2. Tax Considerations
3. Holiday Bonuses
4. Giving Tuesday Momentum
5. Increased Outreach by Nonprofit Community
6. Matching Gift Campaign Opportunity
7. Deadline Urgency
8. Corporate Matching Gifts
9. IRA Required Minimum Distributions (RMDs)
10. Volume of Giving in the Last Week of December



# 30% is a Good Reason to Think About December



Source: CharityEngine

# Planning is a Holiday Tradition!

## Year-End Giving Statistics



### Giving Tuesday

Around \$3.1 billion was raised in the U.S. in 2023.



### October

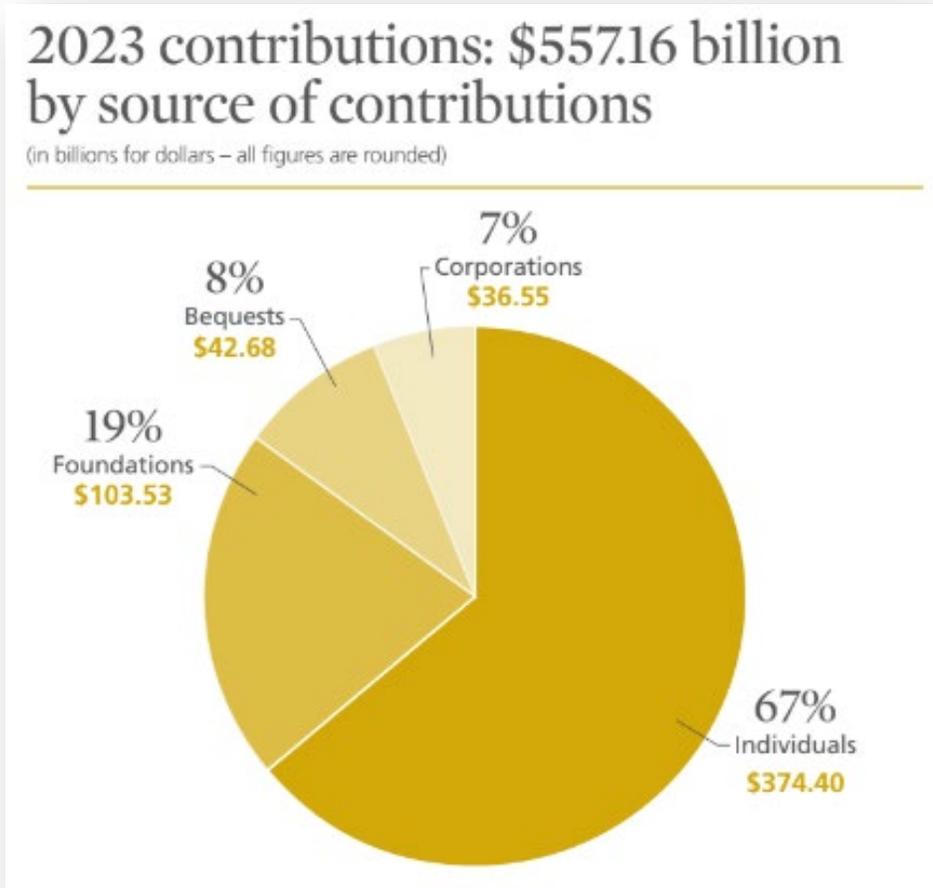
Over 50% of all nonprofits start planning an end-of-year campaign in October.



### Recession-Proof

Even as giving wobbles, savvy nonprofits see steady year-end results.

# Educational Moment for Boards and Staff



- No matter how you slice the pie, even if you were to isolate individual giving alone, the total in the USA was ~ 75% of \$557.16B in 2023 and ~ 30% is raised in December or \$112.3B
- I think we can agree that December is a big number

Source: Giving USA 2024 Report



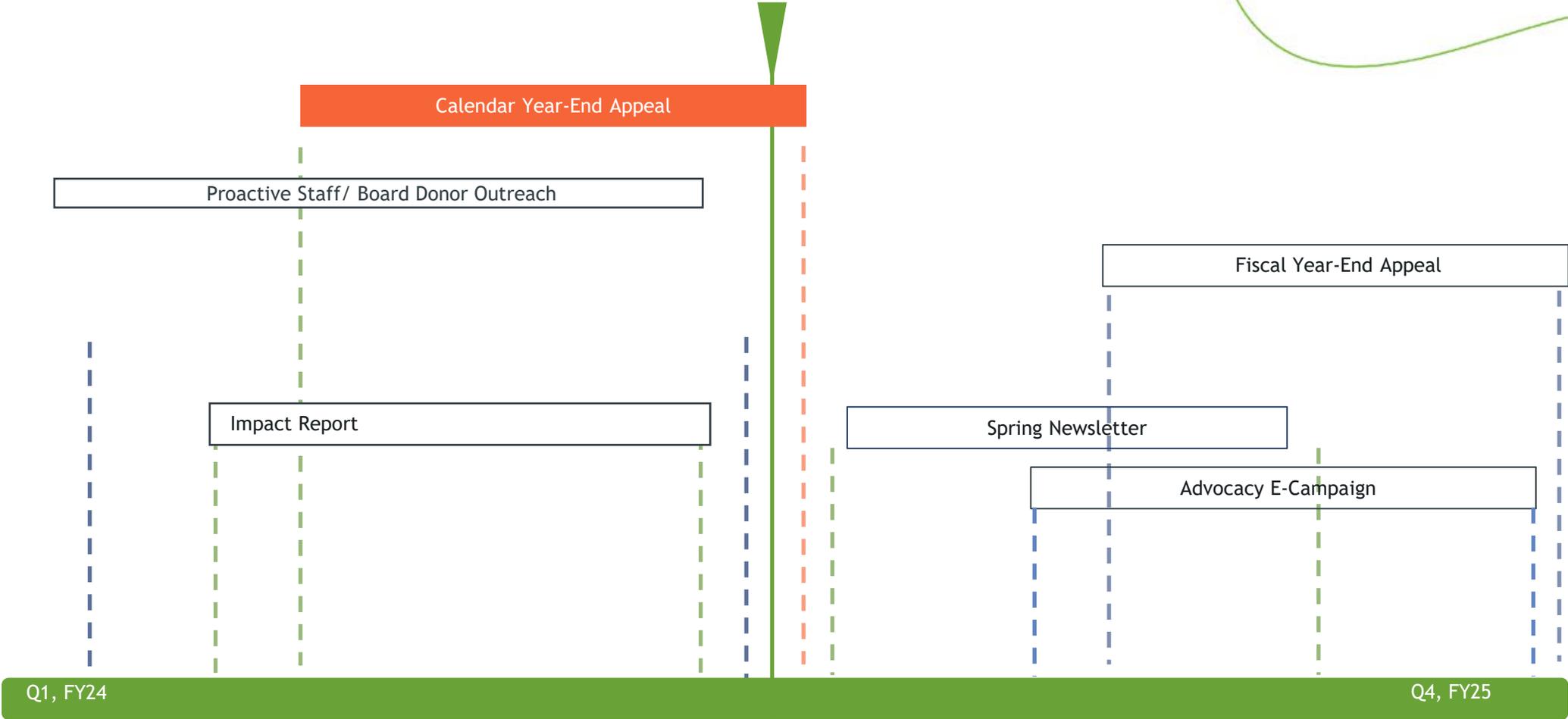
**Not Just One  
Size Fits All**

**ONE SIZE DOES  
NOT FIT ALL**





# Strategic Calendar Impact



# Case Study



# Case Study: Form a Core Team

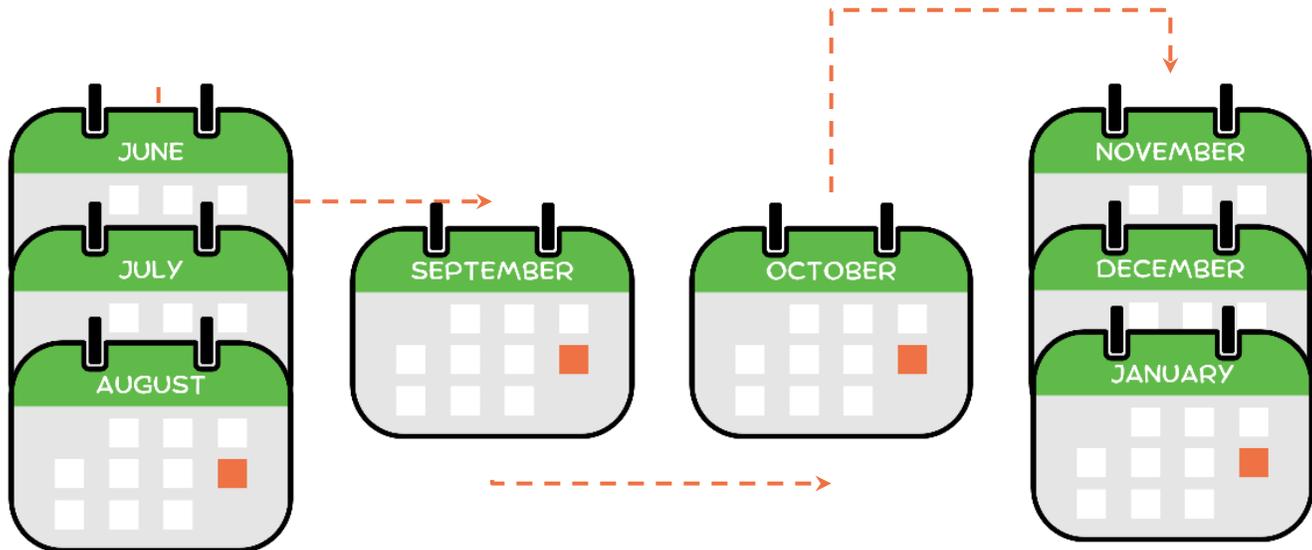


- The DOD and or ED are the captains of the team
- Opportunity to “de” mystify” fundraising
- Secure strategic input on programs and impact
- Demonstrate the art and science of philanthropy in metrics and tracking
- Share successes and build partnerships
- Educate your org on investment and returns
- Gain an expanded appreciation for your mission

# Case Study: First Establish a Baseline

Item	FY22	FY23	difference
Revenue	\$102,093	\$162,534	+59% or <b>+\$60,441</b>
Gifts	112	370	+258 or 3x the gifts
Letters Sent	2,721	6,042	+3,321
Emails	10	17	+7
Campaign cost	\$6,500	\$20,885	<b>(\$14,385)</b>
Per letter cost	\$2.39	\$1.80	reduced
# of gifts from email	-	200	-
Response rate (email)	-	1.80%	-
# of gifts from letters	-	112	-
Response rate (DM)	-	1.85%	-

# Case Study: Establish the Calendar



- Preparation

- Launch
- Impact report

- Anchor Holidays
- Multi-channel deployment
- Countdown
- Finale

# Case Study: Set a Weekly Meeting

*Hint: Tuesdays are best because you have time to book gifts from over the weekend*

Role	Job at the meeting
Director of Development	Lead the meeting and engage the team for input
Development Coordinator	Reads out the results and is the tracker and reporter
Program Director	Reflect on the results and offer content for the campaign
Finance person/other leader	Critical connection with Finance for booking pledges and or reconciliation with on-line giving

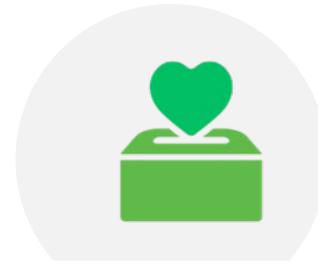
# Case Study: Compose a Clear Challenge



Double your money  
– dollar-based  
challenge



Monthly donors



Double gifts



New donors



Triple the gifts  
– unit-based  
challenge



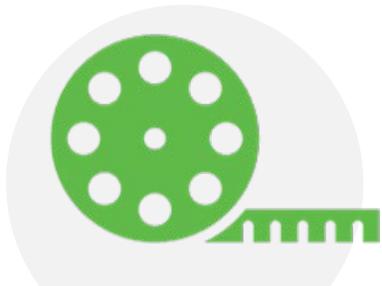
Consider a sweetener/accelerator  
announced on Giving Tuesday

# Case Study: Decide on Channels



# Case Study: E-Mail Themes and Messages

Highest response rates:



Patient personal journeys “biopics”



Announcement of the sweetener



Mails and social posts with videos



Countdown emails at the end



Board members calling to thank for “previous year” giving



Drawing for sports memorabilia

7 days left  
3 days left  
24 hours left  
Three hours left

# Case Study: Outcomes



Reached a new high

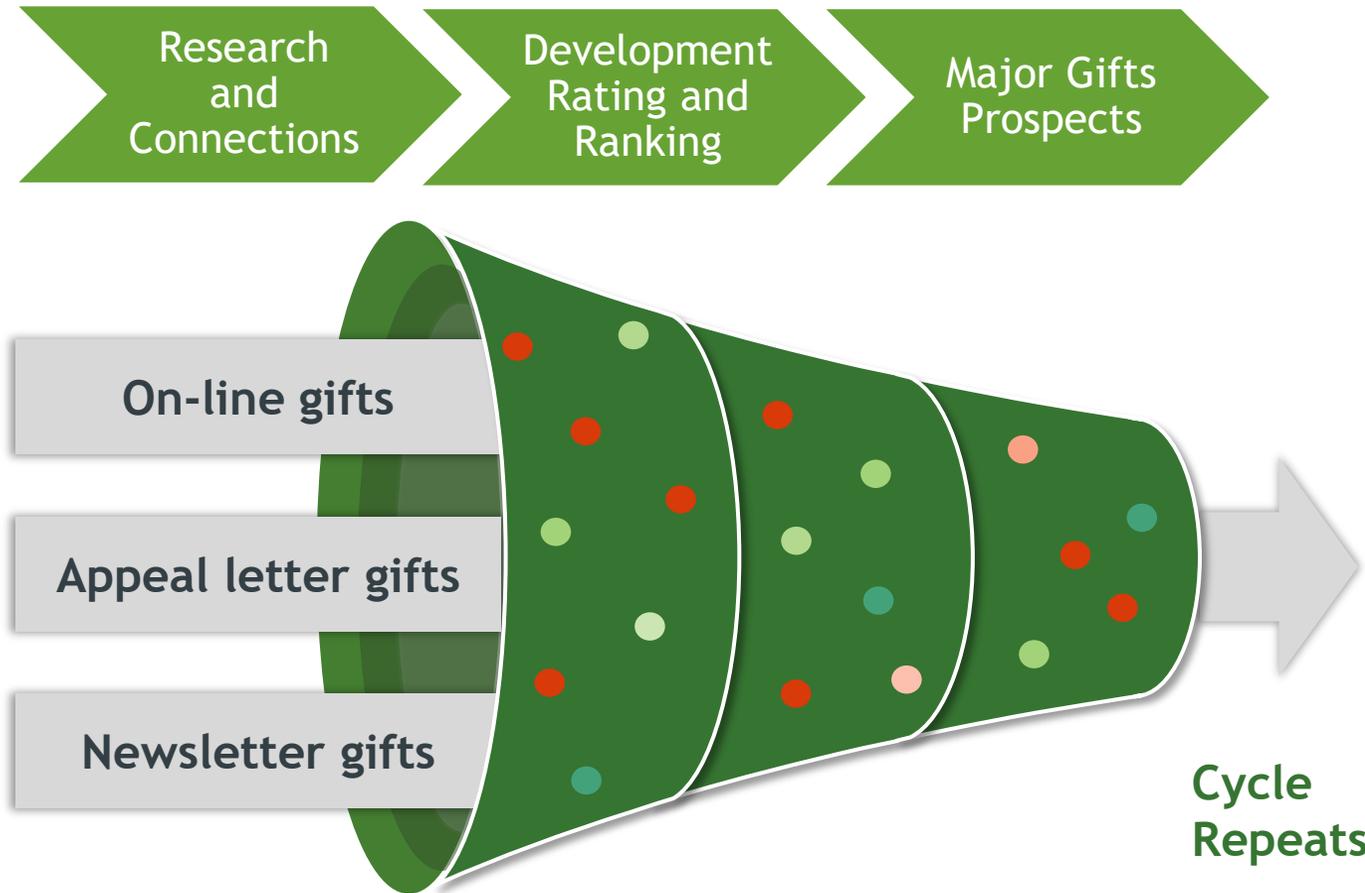


Proved that a challenge and multi-channel integrated campaign can work



Set the org up to focus on donor acquisition and cultivation in the February through April timeframe

# Year-End Appeal as a Funnel to Major Gifts



# Development Department Manages the Funnel

## BEHIND THE SCENES DEVELOPMENT DEPARTMENT

Rating and ranking of donors

Organized into rated groups/portfolio

Impact Report

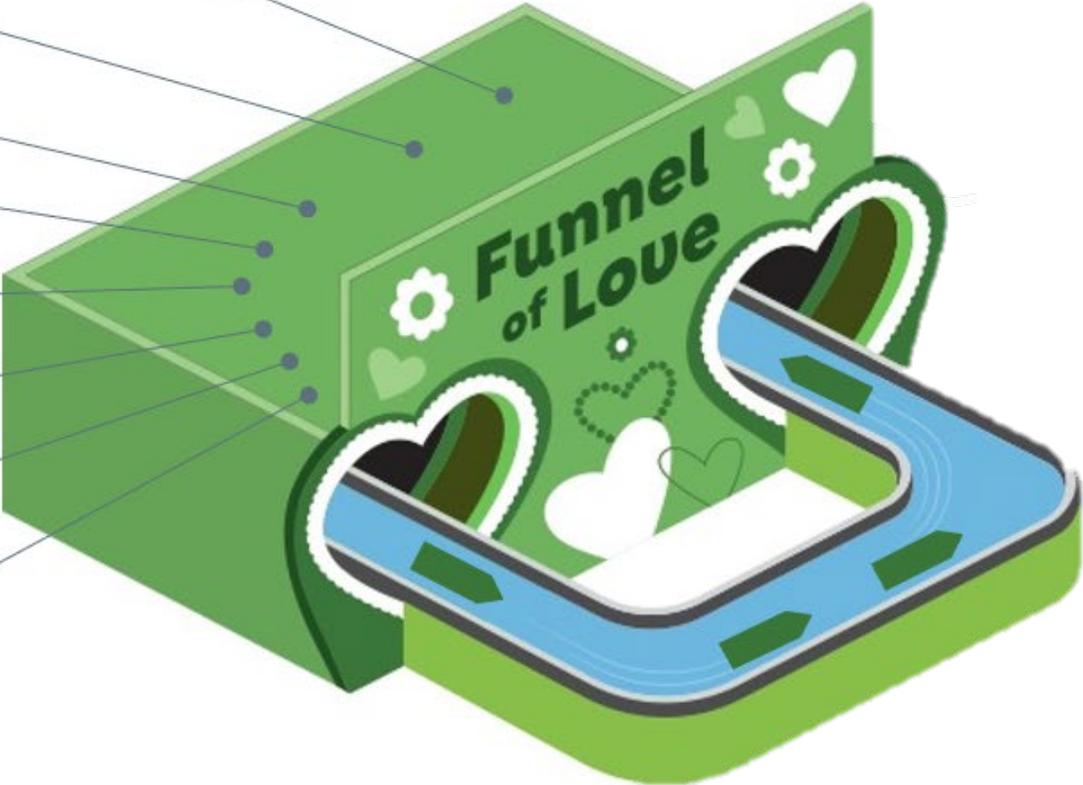
Acknowledge and Thank You

Plan for upgrades

Major gift solicitation

Repeats annually

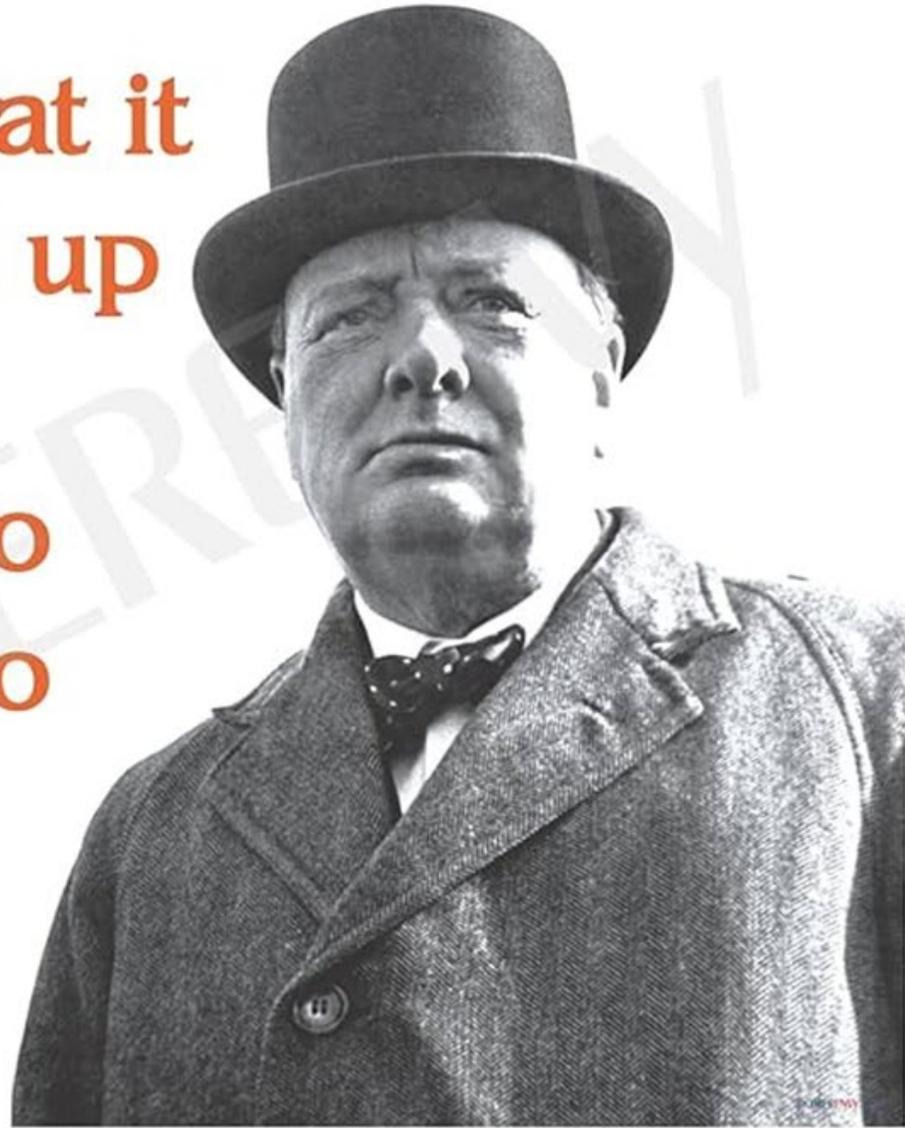
Ultimately could lead to estate giving



Courage is what it  
takes to stand up  
and speak.

Courage is also  
what it takes to  
sit down and  
listen.

- Winston Churchill

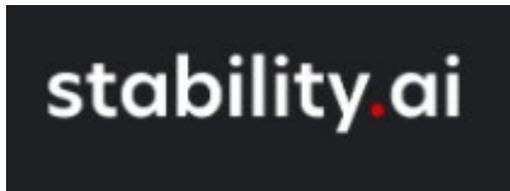


# How Could the Board be Involved?



- 100% giving participation (could be an email)
- Thank you calls, handwritten notes
- Introductions to their contacts
- Hosting lunches for you to “ask”
- Report out at the board meeting with metrics
- Serving as “chair” of the campaign
- Mounting a financial challenge
- Being “cheerleaders” for the staff

# Technology Tools 2024





# Q&A

# Campaign Connections

Weekly Zoom Conference Call to Discuss Campaigns

Starts on October 26 at noon EST and you're invited!



# What's Next:

**Maryellen Gleason Principal**

[mgleason@alignphilanthropy.com](mailto:mgleason@alignphilanthropy.com) Cell: 602-418-0588

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