



Navigating End of the Year Giving



MEET YOUR PRESENTER

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Session goals

- *Encouragement*
- *Best practices*
- *Group sharing*
- *Tools to plan*
- *Immediate action items*



Welcome

Share with us in the chat..

1. Where you're joining from

2. Your organization

3. The size of your fundraising staff



A quick reminder...

- ✓ Be authentic
- ✓ Be vulnerable
- ✓ Be flexible
- ✓ Trust your gut
- ✓ We are all human
- ✓ These are wild times
- ✓ Give yourself grace
- ✓ Mindset matters



Share with us

Poll: What is your biggest challenge or obstacle when you think about EOY giving?



Best Practices

- ✓ Focus on donor retention and stewardship
- ✓ Show gratitude
- ✓ Simplify your message
- ✓ Be transparent
- ✓ Don't make assumptions
- ✓ Cross-promote ways to give
- ✓ Make a plan!



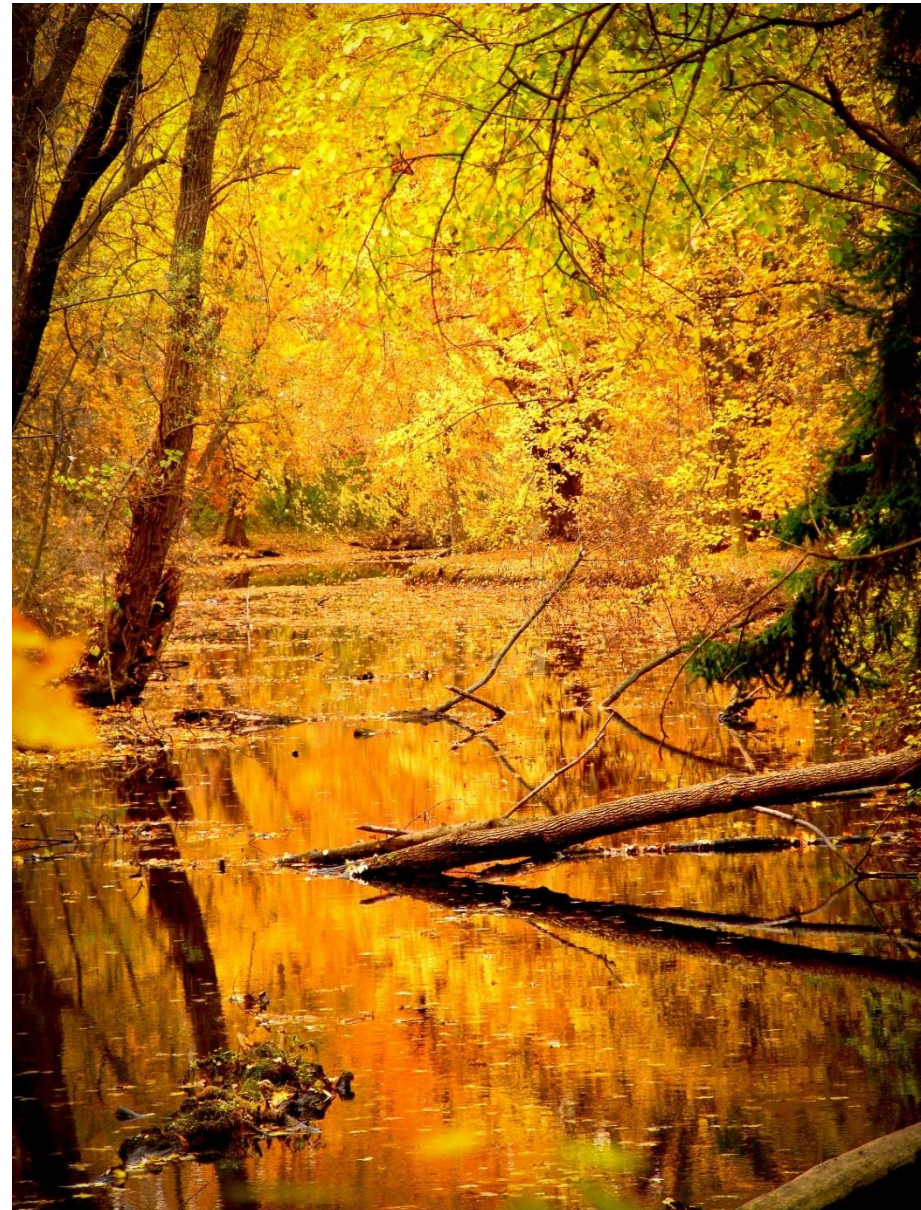
Share with us

Poll: Do you
have an EOY
giving plan?



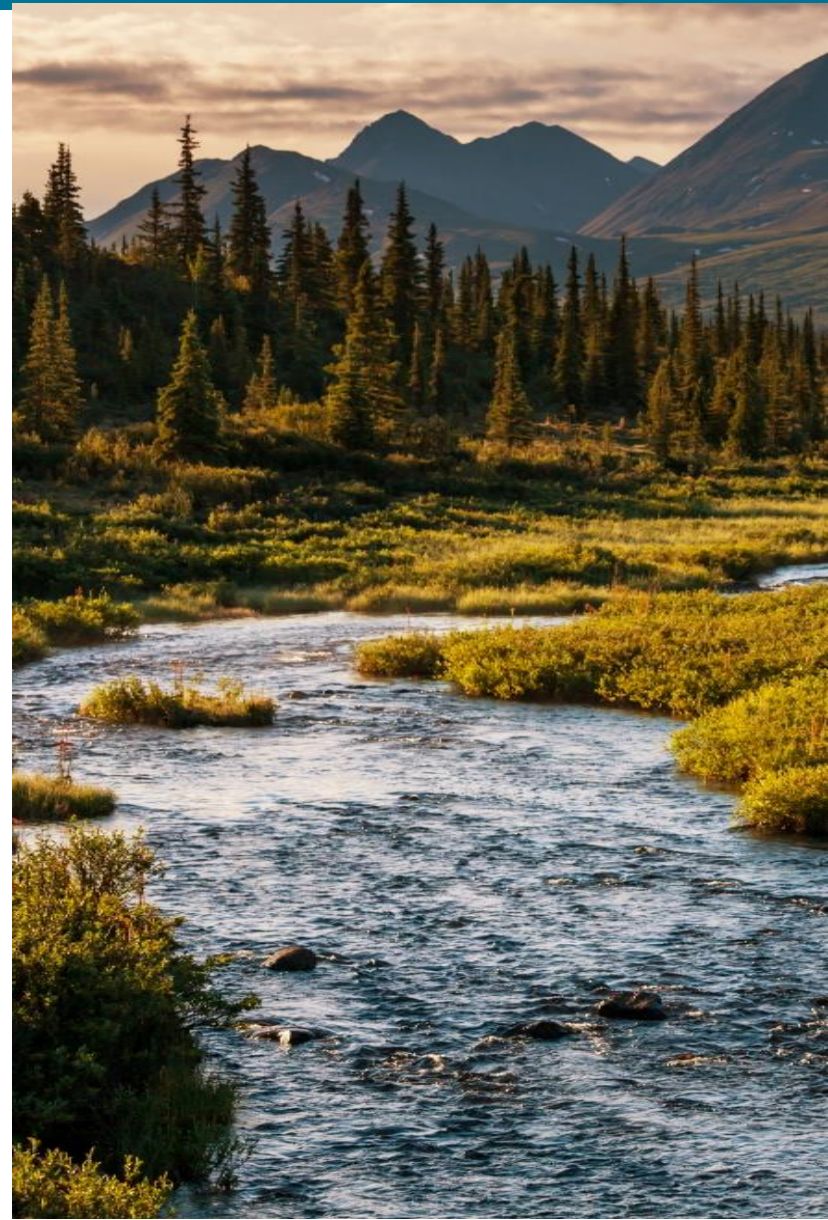
Share with us

Would anyone
like to share
any best
practices we
missed?



Make a plan NOW!

- ✓ Do you have a plan for November & December?
- ✓ Recruit staff, board and volunteers to help
- ✓ Update your messaging and imagery
- ✓ Prep for Giving Tuesday and other local giving days
- ✓ Plan your year-end appeal
- ✓ Make a contingency plan/be flexible



New opportunities

- ✓ Millennials are being more generous than ever!
- ✓ DAFs
- ✓ Zoom tours/coffee chats/appreciation events
- ✓ New “crisis” donors
- ✓ Donor or volunteer-led fundraisers
- ✓ Reconsider your “major donor”
- ✓ CARES ACT



CARES ACT DETAILS

New Deduction Available: Up to \$300 per taxpayer (\$600 for a married couple) in annual charitable contributions. This is available only to people who take the standard deduction (for taxpayers who do not itemize their deductions).

New Charitable Deduction Limits: As part of the bill, individuals and corporations that itemize can deduct much greater amounts of their contributions. Individuals can elect to deduct donations up to 100% of their 2020 AGI (up from 60% previously).

Required Min. Distributions Waived in 2020 for Most Donors: Required minimum distributions (RMD) that would have had to start in 2020 do not have to start until 2021, including distributions from defined benefit pension plans and 457 plans.

*Source: Make A Wish Foundation of America
<https://wish.org/stimulus>*

Sample Year-End plan

NOW:

- Update/scrub/segment your mailing list/database
- Create scripts or toolkits for donor stewardship calls & Giving Tuesday
- Recruit volunteers, communicate with colleagues about plans and upcoming engagement
- Identify a matching opportunity for Giving Tuesday/final December push

NOVEMBER:

- Donor stewardship calls
- Mail annual appeal (week of Nov. 15 recommended)
- Thank you email/note (week of Nov. 23)
- Ramp up email and social media efforts for Giving Tuesday

DECEMBER:

- Giving Tuesday! (and follow-up)
- Annual appeal follow-up
- Lapsed donor follow-up
- Consider matching gift opportunity for December 29 - 31

Take action TODAY!

- ✓ Finalize your EOY plan
- ✓ Recruit volunteers
- ✓ Update messaging & imagery
- ✓ Plan follow-up/stewardship
- ✓ Plan time to REST!



HOW'D WE DO?

1. Do you feel encouraged?
2. Do you have best practices?
3. Do you have tools to plan?
4. Do you have immediate action items?





*Thank
you!*

Presentation will be available online