

Plan Smart: Don't Leave Your End of Year Campaigns to Chance

July 2009



Q&A

You can ask a question at any time using the **Q&A chat box at the top of your screen**.

All questions will be answered at the end of the presentation.



Presenters



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Agenda

- Examine why end-of-year campaigns are so important
- Review types of successful emails
- Discover 6 steps you can take towards your year-end campaign
- Review Checklist
- Q&A



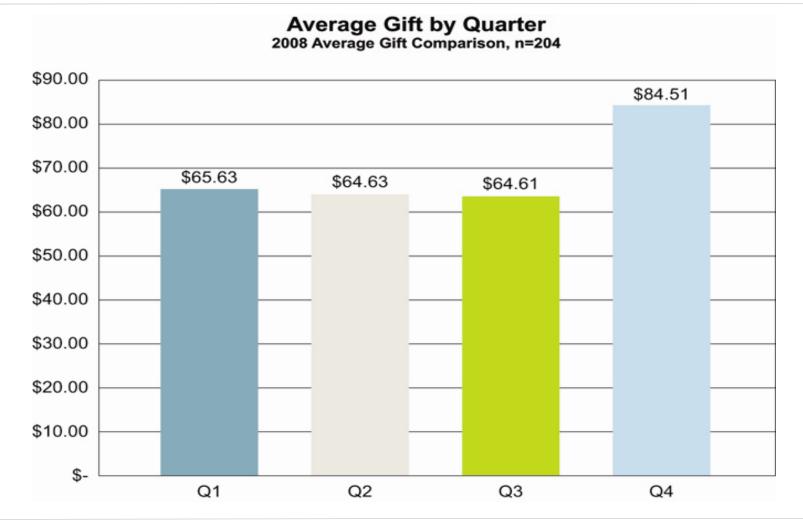
Why are end-of-year campaigns so important?

• The numbers speak for themselves

- 89.5 million US consumers planned to give \$3 billion to nonprofit organizations in the holiday season of 2008. Despite changing economic conditions, you can expect the same this year too.
- 35-42% of online giving happens in November and December each year.
- The average online gift during the year is \$67.47.
- The average online gift during the final quarter of the year (October December) is \$84.51.

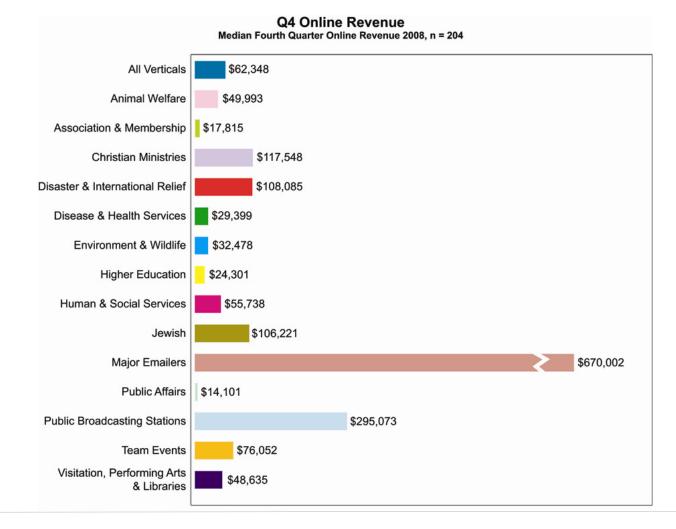


Why are end-of-year campaigns so important?

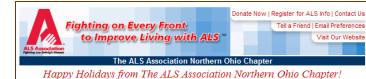




Why are end-of-year campaigns so important?



The ALS Association Year-end Campaign



"Practice gratitude. Lend a hand. You can make a difference and give us all a reason for hope." ~ Julie, mother of two, wife, daughter, and living with ALS

Dear Darius,

I want to talk to you about my friend Julie who wrote those words and how you can give a reason for hope to all those facing Lou Gehrig's Disease.

Julie, mother of an 8 and 11 year old, received her ALS diagnosis four years ago. Despite the relentless progression of her ALS—Julie is now in a wheelchair full time and she has lost all ability to grasp with her hands—she hasn't let this devastating illness stop her. With the support and services of The ALS Association and supporters like you, Julie is able to face each day with her children and family with good spirits, gratitude and **hope**.

We can't let ALS stop Julie's hope. Please <u>make a donation today</u> to The ALS Association Northern Ohio Chapter to help us help people with ALS, like Julie, and their families cope with the realities of Lou Gehrig's Disease.



The ALS Association Northern Ohio Chapter is an invaluable lifeline for many of our neighbors and friends who often feel they have nowhere else to turn. Your <u>donation today</u> will help make sure we are always available for those in our community with ALS and their families.

The money we raise also supports close to 100 leading scientific investigations in the search for treatments and a cure for ALS—giving hope to Julie, even as her symptoms progress.

Please make a generous gift this holiday season so that we can continue to offer hope to neighbors like Julie.

Warm wishes to you and your family,

Convio[®]

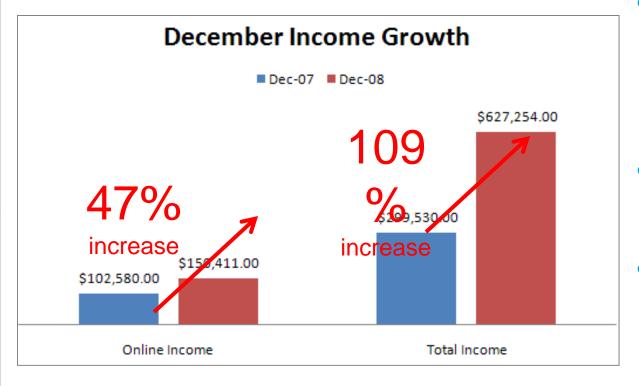
Brad Sussman Executive Director The ALS Association Northern Ohio Chapter

> The ALS Association Northern Ohio Chapter (216) 592-2572 - 2500 East 22nd Street - Suite 102 - Cleveland, OH 44115 6 2004 A suscellance Alignate steved Donate Now (Register for ALS Info (Contact Us Tell A Friend I Email Preferences | Visit Our Website

- 1st time ever doing coordinated multi-phased year end online appeal
- Majority of income comes from special event season; year-end appeal offers additional window for donations
- Messaging and timing integrated with year-end offline direct mail appeals
- 3-part email series
 - December 23, 2008: Holiday support
 - December 29, 2008: Tax deductible opportunities
 - December 31, 2008: Last day for tax deductible donations!



Dramatic Income Increase



- Drove overall results across chapters online and off.
- Tee'd up strong January start
- Opportunities:
 - Start earlier in month to capture momentum earlier



Year-End Email Appeal Opportunities

- Standard holiday donations
 - Additional gifts from current donors
 - Annual gift opportunity for prior year and non-donors
- Accomplishments
 - Recap prior year accomplishments and secure support for upcoming years
- Holiday eCards with donation
 - Provide service to constituents in conjunction with giving opportunity
- Gift giving
 - Gift memberships
 - eCommerce
- Tax deductible
 - Secure last-minute year-end donations with tax deadlines



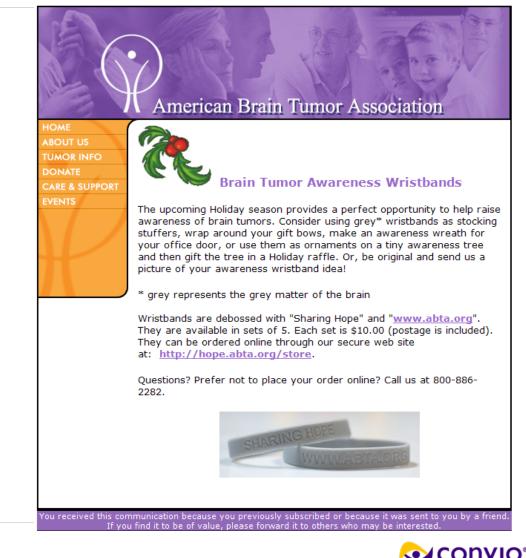
Accomplishments Example

- Recap prior year accomplishments.
- Set tone for challenges of coming year.
- Secure financial engagement to maintain momentum.



eCommerce

- Provide tangible benefit for holiday giving
- Tangible and intangible opportunities
- Provides opportunity for add-on gifts from current donors
- Last-minute gift giving



eCommerce

Intangible gift

 Engages new audiences in mission



SPREAD SEASON'S GREENINGS!

When you give your friends and family alternative gifts through Conservation International this holiday season, you help to curb climate change, stop the deforestation of habitats worldwide, save species from extinction ... and you show them you really care - enough to protect our planet for future generations. These gifts represent just a small part of the important work that CI does around the world every day. Your contribution will be used where it's needed most to preserve our living heritage.

Enter the quantity of each gift you'd like to give and click "Checkout." You'll have the option to send e-cards to your gift recipients on the next page.

Save a Lemur	Preserve the Bastard Quiver Tree	Support the Sea Turtle Flagship Program	Protect a Tiger	Help an Eagle Soar
Click to learn more	click to learn more	click to learn more	cick to carr more	Cick to learn more
\$20	\$35	\$35	\$35	\$50
Quantity:	Quantity :	Quantity :	Quencty:	Quantity:
Protect Madagascar	Keep Freshwater	Put a Walking Shark	Preserve a Whale	Save a Gentle Giant
from Climate Change	Flowing	in the Water	Birthing Ground	
click to learn more	click to learn more	dicktoleam more	click to learn more	click to learn more
\$50	\$100	\$100	\$250	\$500
Quantity:	Quantity:	Quencty:	Quentity:	Quantity:

Gift memberships

- Add on giving opportunity
- Build membership file
- Providing a service easy shopping
- Last minute giving message opportunity



Conservation International is looking to make 2007 the year for engaging the public in actions to protect our Earth. And we're looking to you, as a member of CI, for help in making it happen.

For a limited time only - until December 31 - CI is offering discounted gift memberships for just \$20. To take advantage of this limited-time offer, and to help us engage as many people as possible in conservation, click here:

getinvolved.conservation.org/giftmembership

Your gift recipient will receive a special-edition, members-only screen saver featuring stunning CI photography from Earth's biodiversity hotspots.

Also in time for this holiday season, CI is offering its full gift membership starting at \$35, which includes a subscription to CI's *Conservation Frontlines* magazine, as well as our special-edition screen saver. To give someone a full gift membership to CI for \$35, click here:

getinvolved.conservation.org/giftmembership

Additionally, a premium \$50 gift membership is available, including CI's 2007 wall calendar featuring even more brilliant photos from biodiversity hotspots, a subscription to *Conservation Frontlines*, and our specialedition screen saver. For a premium \$50 gift membership to CI, click here:

getinvolved.conservation.org/giftmembership

That's not all! <u>Click here</u> for even more Cl gift membership levels and benefits, and give your friends and family the gift of conservation this year.

*** FORWARD TO A FRIEND**



Holiday Honorary eCard

THE MARROW FOUNDATION®

In Support of the National Marrow Donor Program

 Opportunity for incremental gift from current donors

Dear Jonathan,

Happy Holidays from The Marrow Foundation!

Thanks to you, we have a lot to be thankful for as 2008 comes to a close. In challenging times, your support has helped our programs a continue to provide hope to more patients in need of transplant. Together, we are committed to saving lives and furthering t Marrow Donor Program (NMDP).



We hope you will renew you help continue providing patis adding to the national Regist you can select a holiday e-C:

*Make an honor or memorial gift and choose from one of our four eCard designs to send as notification In memory of your loved one, I've made a gift to The Marrow Foundation[®] in support of the National Marrow Donor Program.[®]

Special Giving Program

- Matching gift/challenge program provides built in goals with deadline.
- Tap into year-end deadline momentum



Dear Rachael,

Thank you for your 2007 support. What a watershed year for global conservation!

Everywhere you looked, people took action on the triple threats of climate change, forest destruction, and species extinction. We haven't experienced this level of interest in global conservation in years.

As an Emerald Circle partner, your financial support helped us spread the message of global conservation to a whole new generation of conservationists. Thank you for your support.

To build on the recent successes, we're inviting your immediate participation in an exciting opportunity to make your year end gift to Conservation International go twice as far.

As CI board members, we have created a special fund called The Friends and Family Challenge. We established the Challenge to encourage all CI members to make their tax deductible, year end

gift to CI by December 31st. Through the Challenge, we will make a dollar for dollar match of every gift made to CI up to the Challenge limit of \$5 million.

Will you consider making a gift to CI before December 31st? Through the Friends and Family Challenge, your gift will have double the impact.



DOUBLE Your Gift

December 31st is the deadline to have your year-end gift DOUBLED through the Friends and Family Challenge.

Click here to make your gift.



What can you do?

Best practice tips you can start today



6 Steps to Take

- Plan
- Cultivate
- Lock down
- Kick-off
- Ask
- Analyze



Plan

• August

- Identify year-end campaign messages and schedule look at both online and offline
 - Find out dates of direct mail drops
 - Lay out dates of events, etc.
- Revisit what giving programs you already have
 - Matching
 - Year-end campaigns redesign
 - Direct mail
- Identify and book components where will promotions take place
 - Facebook or other social networking
 - Homepage
 - Email/E-newsletters
 - Events



Cultivate

September

- List building opportunities—build housefile committed to mission early enough to gain loyalty in time for year-end programs
- Stewardship campaigns to remind constituents of value and connection to mission

 — use annual report or quarterly reports, message from the board
- Engagement—Surveys and petitions gather constituent attention and capture commitment prior to heavy donation series.



Cultivation Email

- Report on successes
- Thank constituents for their role in realizing successes

The Nature Conservancy Protecting nature. Preserving life SEE HOW YOU HELPEI NATURE

Dear Loyal Conservancy Supporter,

Your support of The Nature Conservancy has made a difference in our natural world and we invite you to <u>view</u> <u>what you helped make possible</u>.

In <u>The Nature Conservancy's 2008 Annual Report</u>, you can read how your support is helping our practical, effective brand of conservation work on an unprecedented scale — protecting a remarkable 2.7 million acres around the world in fiscal year 2008.

Our collaborative approach to conservation allows us to ensure <u>meaningful and lasting results for the long-</u> <u>term</u> through our projects in all 50 states and more than 30 countries around the world.

<u>view our audio slideshow</u> to explore some of the places where your support is helping the Conservancy to achieve critical conservation successes, including:

 The Garcia River Forest near Mendocino, California became one of the first forests to be certified as a



Your support is helping conserve nature worldwide. Learn more by reading our 2008 Annual Report.

Download Now »

- source of carbon credits by the most rigorous set of standards worldwide, taking lessons from Conservancy successes in Bolivia, China and Belize.
- Conservancy successes in the islands of Micronesia have inspired a coalition of Caribbean islands to protect at least 20 percent of their marine and coastal habitats by 2020.
- The Conservancy successfully replicated the methods established by the Quito Water Fund, which taps contributions from water users to perpetually fund conservation of the watershed in São Paulo, Brazil, Bogotá, Colombia and three more cities in Ecuador.

Science guides our work, but your contributions have made our critical programs possible. We are proud of the successes that your support has helped us to accomplish and we hope you take pride in the tangible results of your commitment to nature.



Cultivate

- Engage constituents in fall with programs that will carry through into year-end appeal messaging.
- Create "stickiness" through year-end.



NATIONAL TRUST FOR HISTORIC PRESERVATION®

Dear Abby:

Celebrate the places that matter to YOU and be entered to win a digital camera!

The National Trust for Historic Preservation and Fireman's Fund Insurance are proud to announce the start of the **Summer 2009 Places that Matter Photo Contest**. Submit photos of your favorite places — whether they're national monuments or right in your own backyard — and be eligible to win one of three digital cameras.

Entering our contest is easy!

1. Download our This Place Matters sign - or make one of your own!

- 2. Take your photo in front of a place that matters to you.
- 3. Add it to our pool of places that matter across the country!

You may enter as many digital photos as you wish between now and **Tuesday, September 15, 2009**. Ten photos will be selected as finalists, after which a **public online vote** will determine the final winners.

The photo with the most votes will win the grand prize of a Panasonic Lumix ZS3 digital camera! Each of two runners-up will receive a Panasonic Lumix ZS1 digital camera, and all three winners will also receive a Sandisk Extreme III 8GB SD memory card.

To enter one (or more!) images, visit our This Place Matters website and use our free photo upload tool.

Too often, places that matter to us can be lost in a heartbeat — sometimes even before we realize they will be missed. The best way to save a place that matters is to call attention to it and value it before it is endangered.

Thank you for all you do to showcase the places that matter — inspiring others to protect, enhance and enjoy the places that matter to us all. And good luck!



Pre-Holiday Engagement

- Initial holiday engagement campaign in November
- Sign a card to troops—tee's up holiday campaign to support the troops

Having difficulty seeing the images in this message? View it online.



The Official Site of VETERANS of FOREIGN WARS of the UNITED STATES

CELEBRATING THE SEASON!

Send Christmas cheer to our wounded troops!

Sarah,

For most of us, the holidays are a time for thankful and cheerful gatherings. But for America's wounded troops, holidays may be spent away from loved ones, recuperating from injuries sustained while protecting our freedom.

Help make Christmas brighter for our injured heroes. VFW will be delivering a giant Christmas card to wounded troops recovering at the Madigan Army Medical Center in Fort Lewis, Wash., and we want your signature to be included.



SIGN THE CARD

We are collecting names through December 5th to include on this amazing display of thanks and appreciation to our troops. So don't delay...<u>add your name to the Christmas card today</u>.



Every signature means so much to wounded troops.

SIGN TODAY!

TELL A FRIEND

DONATE

Leam how the VFW supports wounded troops all year long.



2007 VFW Christmas Card present at the James A. Haley Veterans Hospital in Tampa, FL)



Lock Down

- October
 - Production/editorial schedule finalized
 - Copy and design elements finalized
 - Confirm giving program availability (matching gifts, special gift membership benefits)
 - Prepare all pieces for fulfillment mail house, testing,
 - Discuss internal calendar who will be out and when



Kick-Off

- November
 - Schedule and timing
 - Thanksgiving feel good "thank you" message
 - Be prepared to starting asking after Thanksgiving
 - Black Friday e-commerce opportunity
 - Launch
 - Week preceding Thanksgiving, post preliminary site promotions, Google ads, activate donation forms.
 - Day after Thanksgiving: complete activation of holiday initiatives
 - Monday after Thanksgiving: drop first email in series.



Thanksgiving Cultivation Email

- Shows wrap-up of year.
- Features compelling story for emotional resonance.
- Sets the stage for December giving campaign.



Dear Donna,

There are two simple words we'd like to say to you -- thank you.

Because of your support, we've provided help, hope and answers to 1.2 million children and adults living with disabilities, and to the families who love them across the United States, Puerto Rico and Australia.

Their stories tell the story of Easter Seals -- and how your support is changing lives, every day.

You can be confident that we are putting your dollars to work effectively.

More than 90 percent of Easter Seals' revenue supports services in the area where funds are raised. We also exceed all of the Standards for Charity Accountability set by the <u>BBB Wise Giving Alliance</u>.

Our heartfelt thanks go to you, our family and friends, who support Easter Seals' work and who give your time, talent and resources to improve the lives of others in the true spirit of philanthropy. We are passionate about helping more people, and we can't do it without you.

Our best wishes for a happy and healthy Thanksgiving.



Easter Seals early childhood intervention specialist provides therapy to a young child with Down syndrome.



Thanksgiving Cultivation Email

Recaps year's accomplishments.



Dear Loyal Conservancy Supporter,

Thanksgiving is almost here — and as I reflect back on my first five months as president and chief executive officer of The Nature Conservancy, Im still heartened by my son's words: He told me he was proud of me for taking this job.

Like him, I'm proud, too — proud to work at an organization that has earned the commitment of passionate supporters like you.

Thank you on behalf of myself and all of The Nature Conservancy's staff, volunteers and partners across the globe.

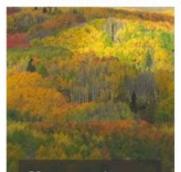
Along with our innovative science, you are at the heart of The Nature Conservancy's mission. Your support of our work in the United States and around the world is critical to our success now and for future generations.

And because of your commitment to conservation, this year we've been able to work on an even larger scale and advance conservation to new frontiers. I hope you take pride as you read a sampling of our 2008 conservation successes.

Our institutional efficiency will help us weather the downturn during these difficult economic times. But one thing is certain: The need for conservation will not diminish.

In fact, the need will only increase — as some seek to sacrifice our natural heritage for immediate return. We know you understand that our mission cannot be put on hold.

As we celebrate Thanksgiving, well be thinking of you and hoping you know we're grateful to have you standing with us on behalf of our natural world. Your continued support during these uncertain times is as important as ever.



Your commitment to conservation is inspiring and it's part of why we are able to work on an even larger scale.

<u>Thank You!</u>



Fun Holiday Wishes



Holiday wishes with mission reminder



Philip (RIF Kid) Phoenix, Arizona

My favorite children's book: Captain Underpants

Why this book gives me joy: He is super silly and super cool, just like me.



Lisa and Jimmy (RIF Kid) San Antonio, Texas

My favorite children's book: Chicka Chicka Boom Boom

Why this book gives me joy: This is our favorite RIF book. The whole class likes it and we even made up a Chicka dance.



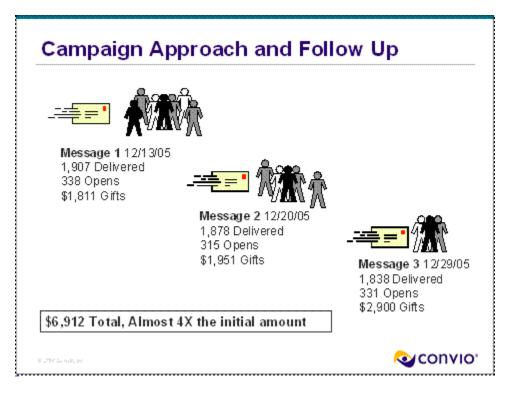
Ask

November-December

- Direct Mail/Email ask series
- Extra latitude for increased email pace—tap into power of multiple messages.
- Opportunity for a variety of messages:
 - Fun holiday approach
 - Card and gift emails
 - Tax deductible



Power of Multiple Asks



* Results from an actual client program

- Series of emails vs standalone initiative
- Email messages #2 and #3 are significantly easier to produce than the 1st email message
- Opportunity to significantly increase giving
- Year end giving acquisition and appeal strongest candidates



Potential Year-end Message Schedule

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
11/22	11/23 Thanksgiving message	11/24	11/25	11/26	11/27 Black Friday eCommerce	11/28
11/29	11/30	12/1 Ask #1— traditional	12/2	12/3	12/4	12/5
12/6	12/7	12/8 Ask #2—gift membership	12/9	12/10	12/11	12/12
12/13	12/14	12/15 Ask #3— accomplishme nts	12/16	12/17	12/18	12/19
12/20	12/21	12/22 Ask #4—last- minute gift giving	12/23	12/24	12/25	12/26
12/27	12/28	12/29 Ask #5—tax deadline	12/30	12/31	01/01 Happy New Year!	8

Traditional Ask

Standard email ask



The Official Site of VETERANS of FOREIGN WARS of the UNITED STATES



This has been a tough year for all Americans...

Abby,

This has been a tough year for all Americans—but especially for our troops and veterans:

- · Wounded heroes slipping into poverty as they wait for VA benefits
- · Reservists returning home to find themselves jobless and hopeless
- Military families facing foreclosures in record numbers

This Christmas, thank our heroes for the gift of freedom with your donation to the VFW.

DONATE

The demand for our programs is higher than ever. The VFW is rapidly responding to the crisis and stretching every dollar to the limit. But we can barely keep up.

Your tax-deductible gift right now provides immediate help like:

- Free phone time, to keep heroes in Iraq and Afghanistan connected with loved ones
- Emergency assistance for military families who can't pay the rent, feed their children or cover other necessities
- VA benefits assistance, so our disabled veterans get the benefits they need to survive

I know the economy is having an impact on you-but please we can't do it without you.

You will make a huge difference by remembering to support our veterans and troops.

Thank you for supporting our troops and remembering our veterans.

REMEMBER THE TAX BENEFITS...

Donate by December 31, 2008, to increase your tax deductions for the year. Thank you for all you do to help our heroes, especially at this time of year.

TELL A FRIEND

DONATE



Alternative Giving

- Last minute giving.
- Get creative with options
- Providing service easy shopping but also non-traditional giving concepts (ecommerce, honorary, and gift memberships)



Dear Friend of WWF,

Happy Holidays to you and yours! The beginning of winter is the perfect time to send warm wishes to let your family and friends know you are thinking of them. Share joyful greetings with all of your loved ones by sending <u>WWF's free</u> holiday e-cards.

Need a last-minute gift? Choose from two:

Adopt an animal and your gift recipient will receive a free online personalized adoption certificate on any date you choose! You can schedule the e-mail delivery of this certificate for any day or holiday, including Christmas day. Your adoption kit will follow in the mail in 1 - 2 weeks.



Pick a Gift Adoption Card and let your loved one choose their favorite species to symbolically adopt. Simply make a donation and select one of four animal card designs--polar bear, panda, tiger or orangutan. Donate by 2 pm ET today, December 23, and select the FedEx Overnight Delivery. Your gift recipient will receive WWF's Gift Adoption Card the next day--and can visit the adoption center at anytime to choose their animal.



Choose any one of these popular festive e-cards:











Send an E-card



Deadline

- Urgency
- Prepare for challenges for upcoming year



Dear Friend of WWF,

As we approach the end of 2008, we want to share with you some of our special accomplishments from this year.

- Protecting core habitat for the endangered Siberian tiger with the establishment of Russia's Anyuiskii National Park, which spans nearly 1 million acres.
- Creating the first comprehensive map and database of the diversity of life in the world's freshwater ecosystems, giving conservationists vital tools they need to understand patterns of biodiversity and the threats to it.
- Strengthening the governance and sustainable livelihoods of nine impoverished Huilliche communities in Chile, allowing local people to improve their quality of life while conserving their natural resource base.

These successes are just three from a long list of incredible 2008 milestones that WWF reached with your ongoing support.

Thanks to you, we've been able to reverse some of the degradation of our planet's natural environment and we've worked to build a future in which human needs are met in harmony with nature. Here are a few more examples of our successes this year:

Make your gift by Dec. 31 for the 2008 tax year!





Tax Focused

- Last couple of days, organizations switch gears
- Online is the best way to remind
- Still can have some messaging around mission but goal is about the tax year



Every single day, the ASPCA is there fighting for those who cannot speak for themselves. We are their voice! Because of generous supporters like you, we can continue to provide lifesaving programs, medical care and protection that abused, abandoned, lost and homeless pets desperately deserve.

You can still help make a difference in the fight to end animal cruelty and get a last minute tax deduction. Your gift today will help us continue our fight to put an end to all acts of cruelty and neglect. Animal lovers like you, who care passionately about protecting animals give us hope. Your commitment brings us one step closer each year to ending all forms of animal cruelty and finding permanent, loving homes for America's adoptable animals. Please help the ASPCA continue to fight cruelty with this last minute year end gift today!

Thank you for your support and happy holidays from the ASPCA!





Always remember to Make Pet Adoption Your First Option®! ASPCA | 424 E. 92nd St | New York, NY | 10128 Visit our website: aspca.org Update Your Profile Unsubscribe

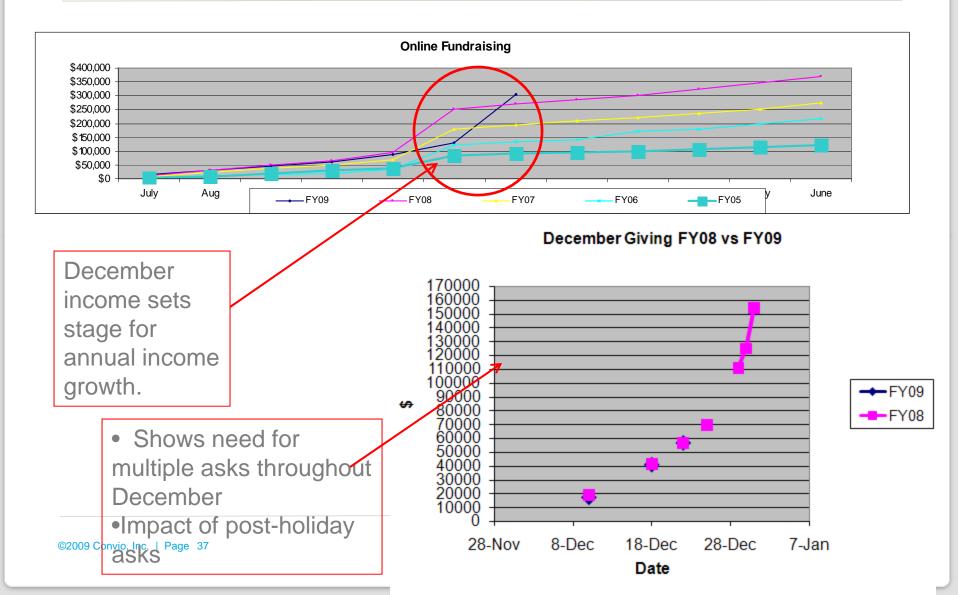


Analyze

- January
 - Communicate: Don't let radio silence steal your momentum!
 - Look forward to new year—resolutions, plans
 - Thank constituents for successes in prior year and the need to stay engaged for continued growth.
 - Communication with non-givers.
 - Welcome series to new donors and members
 - Learn: Analysis to improve results and predict growth
 - Email responsiveness
 - Giving trends



Hypothetical Analysis



Checklist

Month	Task	Complete
August	 Identify year-end campaign messages and schedule – look at both online and offline Revisit what giving programs you already have Identify and book components – where will promotions take place Start brainstorming and copy writing 	
September	•Start to build your email list •Teasers •Petitions •Pledges •Build emails, forms, and related pages	
October	•Get all pieces lined up for fulfillment •Production/editorial schedule locked •Finalize, approve and proof copy, design elements and campaign details •Get direct mail to printers •Start discussing with board member a matching program	
November	 Kick-off end-of-year campaign Send direct mail, emails, stewardship pieces with donation ask 	
December	•Start tax deduction conversation - urgency after Dec 26 th •Last chance to donate email on Dec 31 st	
January	 Send thank you emails Sum up the year Analyze results from the previous year: what worked and what didn't Continue stewardship/cultivation campaign 	



Better prepared, Better Results

• Be Prepared

- Year-end campaigns are culmination of engagement—not one-shot activities
- Ask, ask and ask again
 - Holidays are a busy time—repetition key to securing your spot in the holiday traffic
- Variety is the Spice of Life
 - Many giving opportunities and options to present constituents



Thank you!

Questions?

Email Convio at info@convio.com or call us at 888-528-9501 ext 1.

Charity Dynamics: info@charitydynamics.com or call us at **512-241-0561**.

