


Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

# Welcome to Bloomerang Academy

Thank you for joining us!

Please drop into the chat and tell us where you are joining us from  
and what the weather is like where you are!

Large, vibrant green Monstera leaves with characteristic holes, positioned on the right side of the slide.

# Housekeeping

**Live Transcript**

We all know what we want to do is spend  
administration and more time Doing the w

Hide Subtitle

View Full Transcript

Subtitle Settings...



Chat



Raise Hand



Q&A



Live Transcript

**Share ideas**

**Ask questions**

# Housekeeping

Dial in audio access: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to [support@bloomerang.com](mailto:support@bloomerang.com). Our support team is amazing!

# Poll



# Margie Worrell

Curriculum Manager

Margie Worrell is the Curriculum Manager at Bloomerang. She serves on the board of the Peace Learning Center in Indianapolis, and has worked extensively with nonprofits as both a staff member and a lead volunteer. Her passions include education, theatre, her two children and her two small dogs.



# Year-End Appeals: Tips and Tricks



# What will we cover today?



1. Determine EOY Fundraising Goals
2. Year-End Mailing Appeals & Follow-ups
3. Year-End Email Appeals & Follow-ups
4. Biggest Giving Days of the Year: *Giving Tuesday, Dec. 30, Dec. 31*
5. Holiday messaging & stewardship
6. Matching Gifts
7. Demo
8. Q&A/Resources



A quarter of all 2021 online revenue was received in December.



Most nonprofits begin their year-end fundraising planning in **November**, but **7.7%** start as early as **September**.



Most nonprofits generate at least two “touches” with supporters during the year-end fundraising season using a variety of marketing platforms.



Direct mail is the most popular year-end giving marketing method.



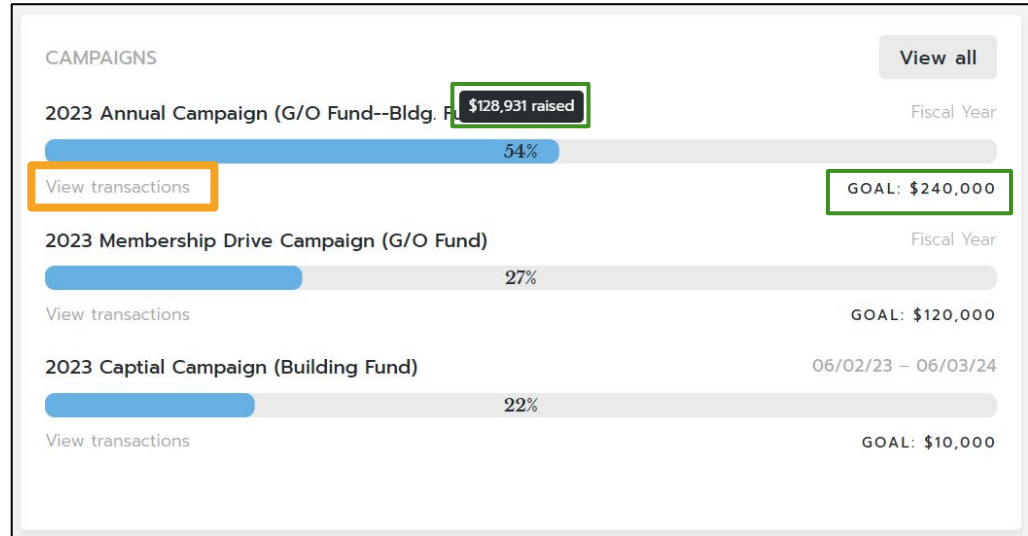
of offline-only first-time donors are retained for over a year, versus **25%** of online-only first-time donors.

# Why year-end appeals matter...



# Determine EOY Fundraising Goals

- What is left of your Annual Campaign Goal?
- Assess past year-end giving results
- Use your Development Plan to determine how many appeals are left that were planned for
- Segment appeals if possible
- Properly communicate to staff & board what your stewardship plan is for end of year



The **Campaigns** section of your dashboard gives you a high-level overview of where you stand today. **View transactions** allows you to get a report of the transactions that have gotten you to this point.

# Create your stewardship plan

Stewardship should NEVER be an afterthought.



# The ingredients in a typical end-of-year fundraising plan



- Theme
- Key Messages
- Tactics
- Timeline
- Targeting and segmentation
- Roles and responsibilities
- Goals and metrics
- Budget

<https://bloomerang.co/blog/use-these-11-metrics-to-evaluate-your-end-of-year-fund-raising-campaign/>  
<https://bloomerang.co/blog/the-essential-guide-to-writing-a-fundraising-plan/>

# Year-End Mailing Appeals & Follow-ups

## Appeal

- This is your last big ask of the year - step it up!
- Paper appeal recipients, in most cases will meet the following criteria and not have an email address:
  - LYBUNT Donors
  - Given in the last X years
  - Constituents who have given between X and X amount THIS YEAR
- Include a remittance envelope
- **What do you have to say that you have not already said in past mailers**
  - Try a new approach!

## Follow-up

- Keep this short and simple - consider a postcard
- Be consistent in the messaging
- Give your URL
- Handwritten or printed is fine

## Reports Needed:

**Appeal:** Anyone you have decided to include

**Follow-up:** That list, minus anyone who gave to your EOY Appeal

# Year-End Email Appeals & Follow-ups

## Appeal

- This is your last big ask of the year - step it up!
- Your audience should have the same parameters as your paper appeal. Send to anyone who meets those parameters and has no address; also send to anyone who gave SYBUNT, excluding LYBUNT
- Link straight to your giving page
- **Message should be identical to your paper appeals!**

## Follow-up

- Make this follow-up short
- Be consistent in the messaging
- Link straight to your giving page

## Reports Needed:

**Appeal:** Anyone you have decided to include

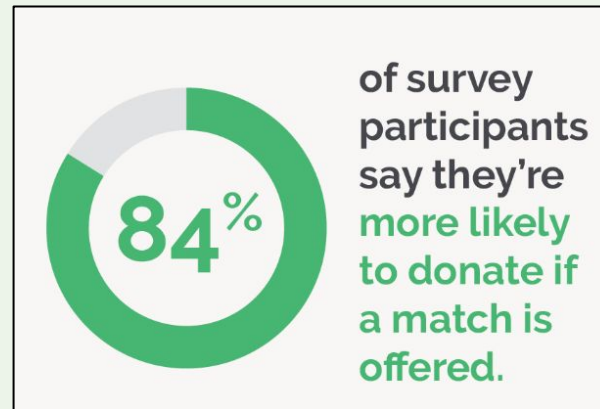
**Follow-up:** That list, minus anyone who gave to your EOY Appeal

# Easy Solicitation Formula tip

- Establish/Re-establish your donor's relationship with your organization through solicitation
- Remind them of your mission (tell a story - make this personal)
- Give them gift impact statements - specifically, what can gifts of certain amounts can do (relate it back to the story, if possible)
- Ask them for their support

# Matching Gifts tip

- Corporate Employee Matching Gifts
- Fundraising Event Matching Gifts
- Corporate Volunteer Matches
- Matching Gift Challenges for Major Donors
- Matching Gifts for Board Members
- Matching Gift Corporate Partnerships



# EOY Database Set-up in Bloomerang

## Appeals to consider:

- 2021 EOY Appeal
- Giving Tuesday Appeal
- New Years Day Appeal
- Matching Gifts Appeal

## Report Templates to consider:

- LYBUNT
- SYBUNT
- Downgrades
- Loyal Donors
- Top Donors
- High Potential Donors

### ***Campaign vs Appeal***

Campaigns are overarching efforts - your EOY push is most likely going to meet your annual goal. If so, your campaign should be your annual campaign.

Appeals are asks, or ways the money is coming in. Asking for a gift through a year-end mailing is an appeal. Add appeals for each separate effort to bring in money through the end of the year.

You can customize with columns for:

- Lifetime Revenue
- Number of Gifts
- Engagement Level
- Whatever you need to see!



# 11 metrics to evaluate your end-of-year fundraising campaign

1. Total revenue
2. Total number of gifts
3. Average gift size
4. Median gift size
5. Response rates for each channel used
6. Email open and click-through rates by campaign (and/or subject line)
7. Retention rate of last year's campaign donors
8. Number of new donors acquired
9. Number of donors who upgraded their gifts
10. Donor demographics
11. ROI (return on investment)

# Biggest Donation Days of the Year

- Giving Tuesday
  - Begin messaging before GT
  - Create a goal for the day & communicate throughout the day
  - Challenge your Board to bring in gifts
- December 30 & New Years Eve
  - Remind people these are the last giving days of the year

	TOTAL NUMBER OF GIFTS	AVERAGE SINGLE GIFT AMOUNT	TOTAL GIFT REVENUE
Giving Tuesday	7,644	\$168	\$1.28M
December 30	3,617	\$432	\$1.56M
December 31	7,737	\$397	\$3.07M

Nearly 30% of nonprofits raise 26-50% of their annual fund-raising from their year-end ask. That's the end of the calendar year, not your fiscal year.

# Holiday Messaging & Stewardship

## Holiday Messaging Ideas

- ★ Update your website for the season!
  - Add a holiday message to your landing page
  - Add favorite things about winter to your employee bios
  - Add warm wishes from your board
  - Remind people of any cold weather events/drives/programs you have
- ★ Say Happy Holidays!
  - Send handwritten cards to your donors
    - Segment by giving level (Board for highest levels, Employees by Seniority, Volunteers, Consumers (if appropriate))

## Stewardship Ideas

- ★ Make your EOY stewardship fun!
  - Make thank you calls
  - Send fun holiday videos
    - Carol singing
    - Playing in the snow
    - Show how you celebrate your holidays!
- ★ Make it personal
  - Make thank you calls
  - Share your New Year's Resolutions
- ★ Surprise & Delight
  - Random acts of kindness
  - Host a socially-distanced event

# Start the New Year off Right!

Send a VERY early **January Newsletter: 2023 Year in Review**

- Highlight the highs
- Be transparent with the lows
- Share 2024 goals
- *Be optimistic about the future*

Encourage your donors to start the year off right by adding to the good  
in the world!

**-SAY THANK YOU-**

Send this to all of your 2023 Donors and to anyone you sent your end of year appeals to, even if  
they did not give!

**Into the database we go!**

# Other Resources

## Knowledgebase

[Bloomerang Academy: Creating a Development Plan](#)

[Letters section](#)

[Emails section](#)

[Reports Basics section](#)

[Year-End Appeals: Clean Up Your Database - HD](#)

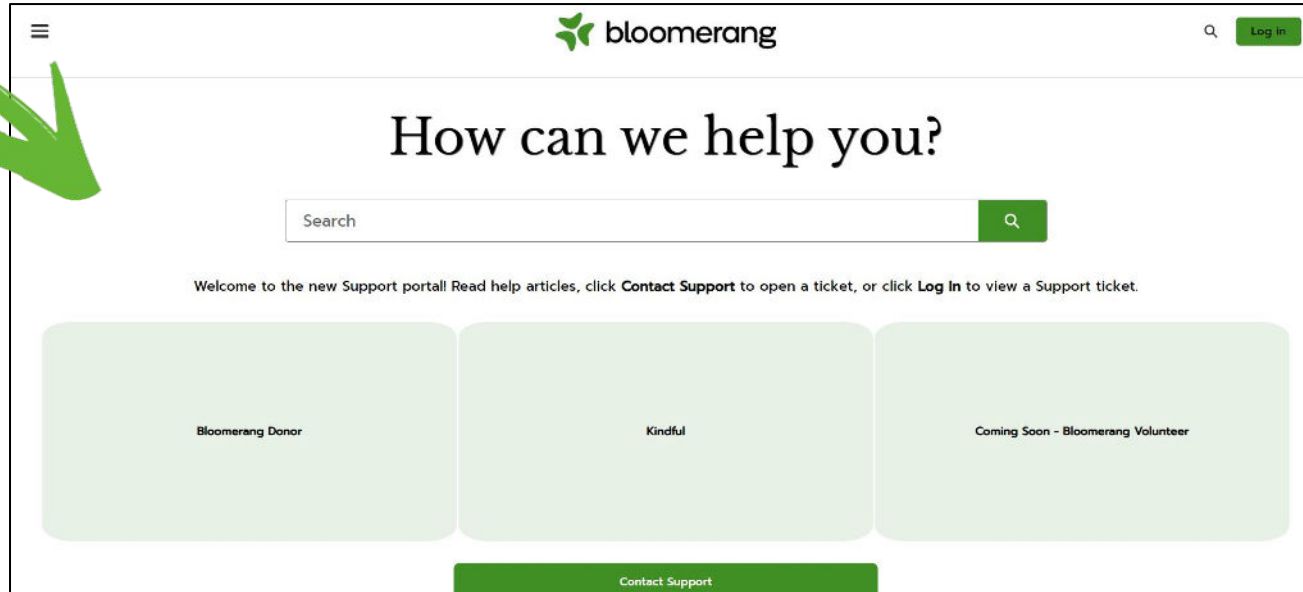
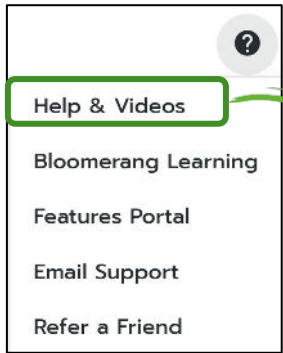
[Year-End Appeals: Prepare Baseline Reports - HD](#)

- [New Donor Cultivation Timeline](#)
- [Appeal Letters Template](#)
- eBook: [The Definitive Year-End Fundraising Checklist](#)
- eBook: [Fundraising Offers](#) (Impact Statements)
- [The Ultimate Guide To Year-End Giving For Nonprofits](#)
- [Nonprofit Digital Reports: Showcasing Year-End Fundraising Efforts](#)
- [8 Simple Tips To Make Your Year-End Appeal Better](#)
- [Use These 11 Metrics To Evaluate Your End-Of-Year Fundraising Campaign](#)
- [Why You Should Send More End-Of-Year Fundraising Emails Than You Usually Do](#)



# Resources

## Bloomerang Knowledgebase and Support Portal



# Resources

Bloomerang Learning – our new on-demand learning platform

?

Help & Videos

**Bloomerang Learning**

Features Portal

Email Support

Refer a Friend


bloomerang

Contact Support Upgrade My Account Visit our website Search MW


## Welcome to Bloomerang Learning

Home Dashboard Learning Paths Catalog Events


### Content by Product



**Donor Database**  
Access learning for your Bloomerang Donor Management System



**Fundraising**  
Access learning for your fundraising tools within Bloomerang Donor

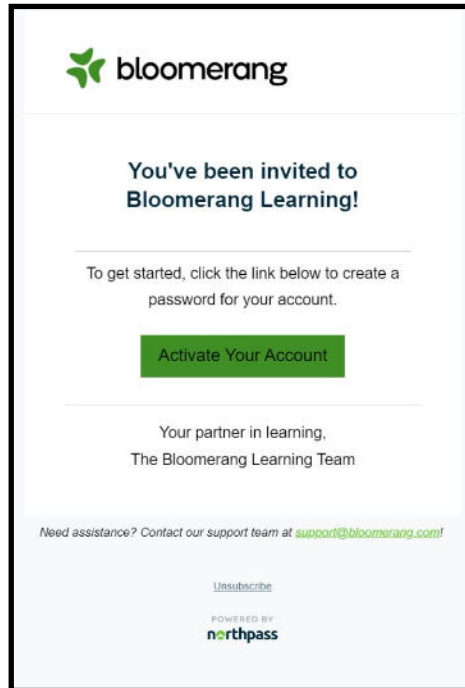


**Volunteer Management**  
Access learning for your Bloomerang Volunteer System

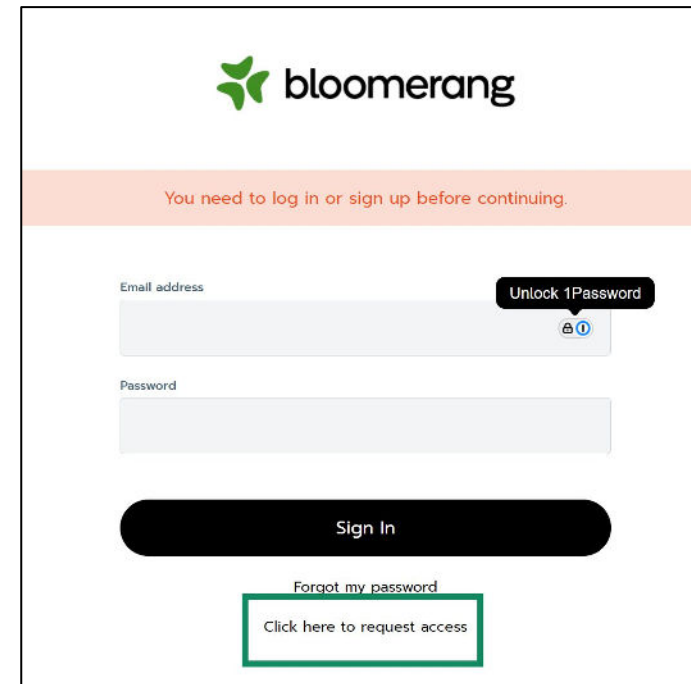


# Resources

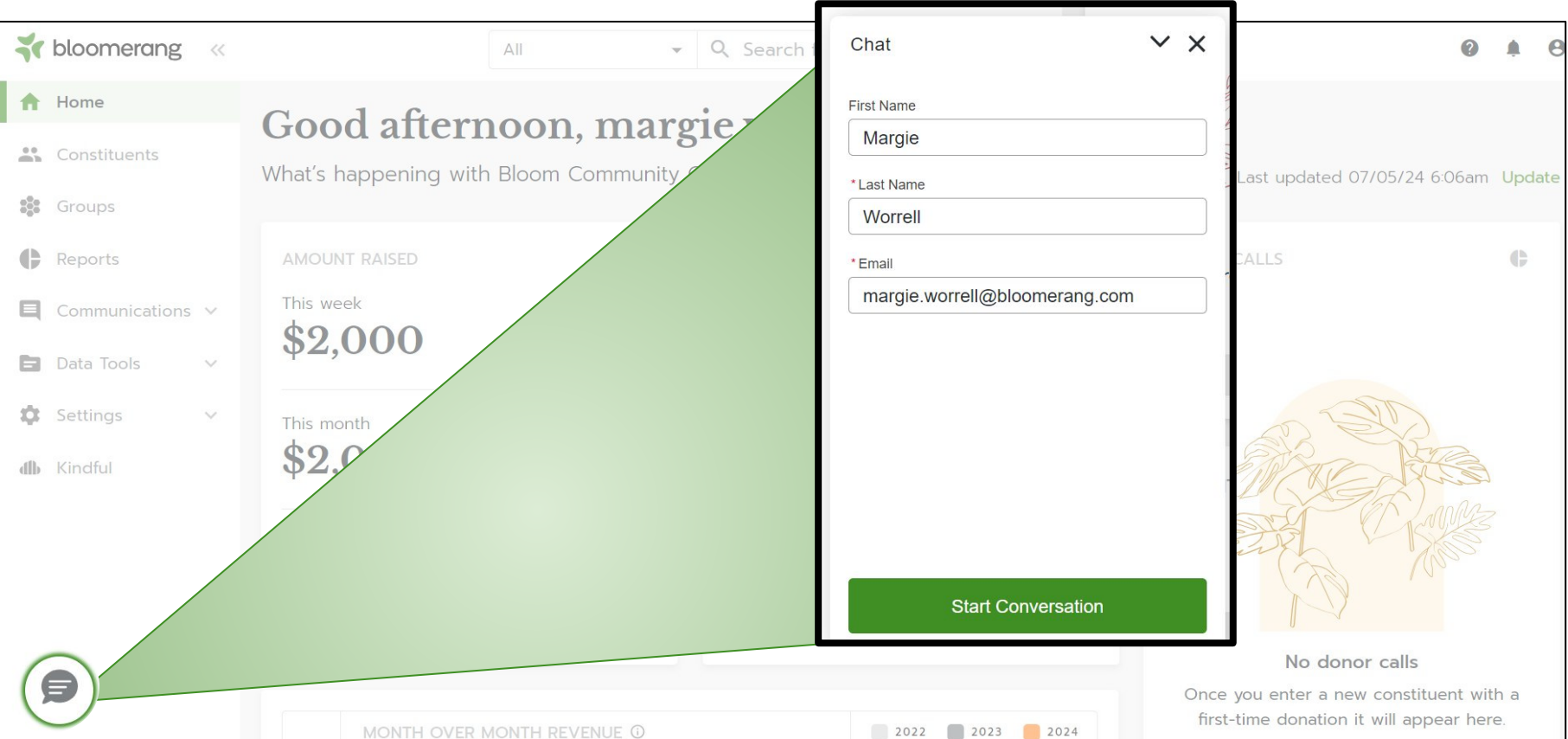
## Bloomerang Learning – our new on-demand learning platform



If you did not receive this email to activate your Bloomerang Learning account, please click on the Bloomerang Learning link and request access. You will receive the activation email shortly after submitting!



# Live Chat to get online assistance immediately



The image shows a screenshot of the Bloomerang dashboard with a chat window overlay. The dashboard includes a sidebar with navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main content area displays a greeting "Good afternoon, margie" and a section for "AMOUNT RAISED" showing "This week \$2,000" and "This month \$2,000". A search bar and a dropdown menu are visible at the top. The chat window, titled "Chat", contains a form with the following fields: "First Name" (filled with "Margie"), "\*Last Name" (filled with "Worrell"), and "\*Email" (filled with "margie.worrell@bloomerang.com"). A green "Start Conversation" button is at the bottom of the chat window. Below the chat window, there is a section titled "No donor calls" with a note: "Once you enter a new constituent with a first-time donation it will appear here." A decorative illustration of a plant is also present.

Home

Constituents

Groups

Reports

Communications

Data Tools

Settings

Kindful

Good afternoon, margie

What's happening with Bloom Community

AMOUNT RAISED

This week  
**\$2,000**

This month  
**\$2,000**

Search

All

Chat

First Name  
Margie

\*Last Name  
Worrell

\*Email  
margie.worrell@bloomerang.com

Start Conversation

CALLS

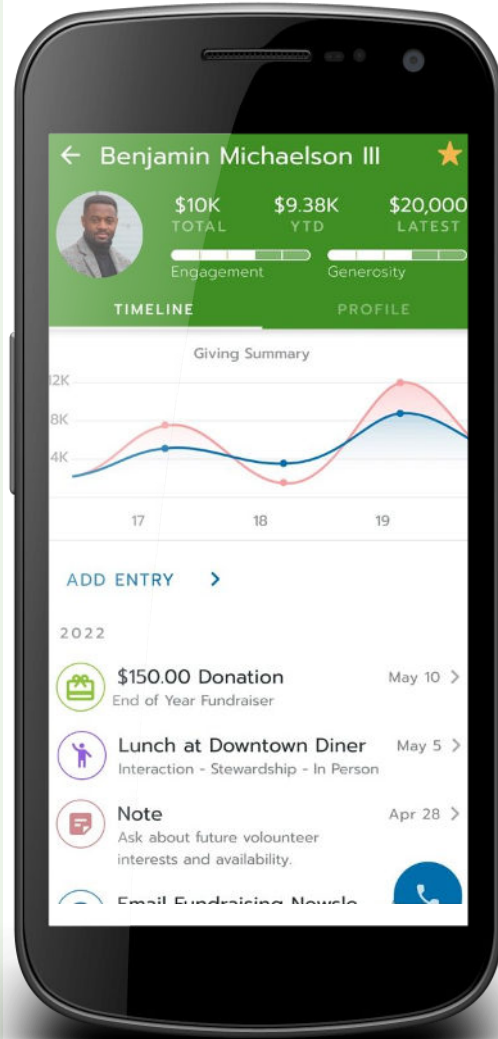
No donor calls

Once you enter a new constituent with a first-time donation it will appear here.

MONTH OVER MONTH REVENUE

2022 2023 2024

# Use the mobile app to track where you are with EOY giving!



With our free mobile app, you can be connected to your data from anywhere.

[Download on the App Store](#)

[Get it on Google Play](#)

# Bloomerang Giving+

Powered by Qgiv, the Giving+ package offers a robust set of fundraising tools to help you raise more, enrich your donor data with fundraising insights, and propel your mission forward.

Attract new donors, build lasting impact, and inspire limitless generosity.

Automatically tap into your supporters' strengths and passions to build lasting relationships and inspire them to give time, dollars, or talent.

- + Unlimited donation forms and event registration
- + Integration from Qgiv to Bloomerang
- + Text-to-Donate
- + Table and seating management
- + Enhanced donation and event features





## GIVING+

# How can Qgiv donation forms help your mission?

**30%**

higher overall donation page conversion rates

**\$108**

The recurring gift average on the Qgiv platform, 4x the industry average.

**\$180**

One-time gift average on the Qgiv platform, 50% higher than the industry average

**25%**

increase in recurring donor conversion rate

# Poll

**I would like to hear more about how Giving+ can help my organization have a more successful end of year campaign!**

- Yes, please—reach out to me!
- No, thank you. Not at this time.



**Thank you for attending!**

**And thank you for the work you  
do in your community!**

Visit our website to see more upcoming  
Bloomerang Academy webinars!

