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# Doing More By Doing Less—Tips for Managing the Year-End Fundraising Frenzy

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# Nice to meet you!

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# What We'll Learn Today...



Why Q4 is the Superbowl of Fundraising



Why Effective Fundraising Doesn't Mean Doing It All



How You Can Keep Impact In Your Sights for Better Donor Relations

# Get ready for the busy season...



# December is the biggest fundraising time



- **1/4** of annual nonprofit revenue is raised in December
- **17-34%** of online donations are raised in December
- Giving Tuesday **\$3.1 billion in 2023**—it is truly a worldwide generosity movement
- Focus of giving is **on last three days** of December



# Lessons from Anna on How Less Can Still Be Effective

Anna Wagner Keichline  
(1889–1943)



# The K-brick that changed architecture



# Which area would you most like to improve for your year-end fundraising campaign?

POLL

- A.** Developing compelling impact stories from program data.
- B.** Using data to build trust and inspire larger gifts.
- C.** Knowing what to focus on given limited bandwidth and time.
- D.** Engaging donors more effectively using impact metrics.

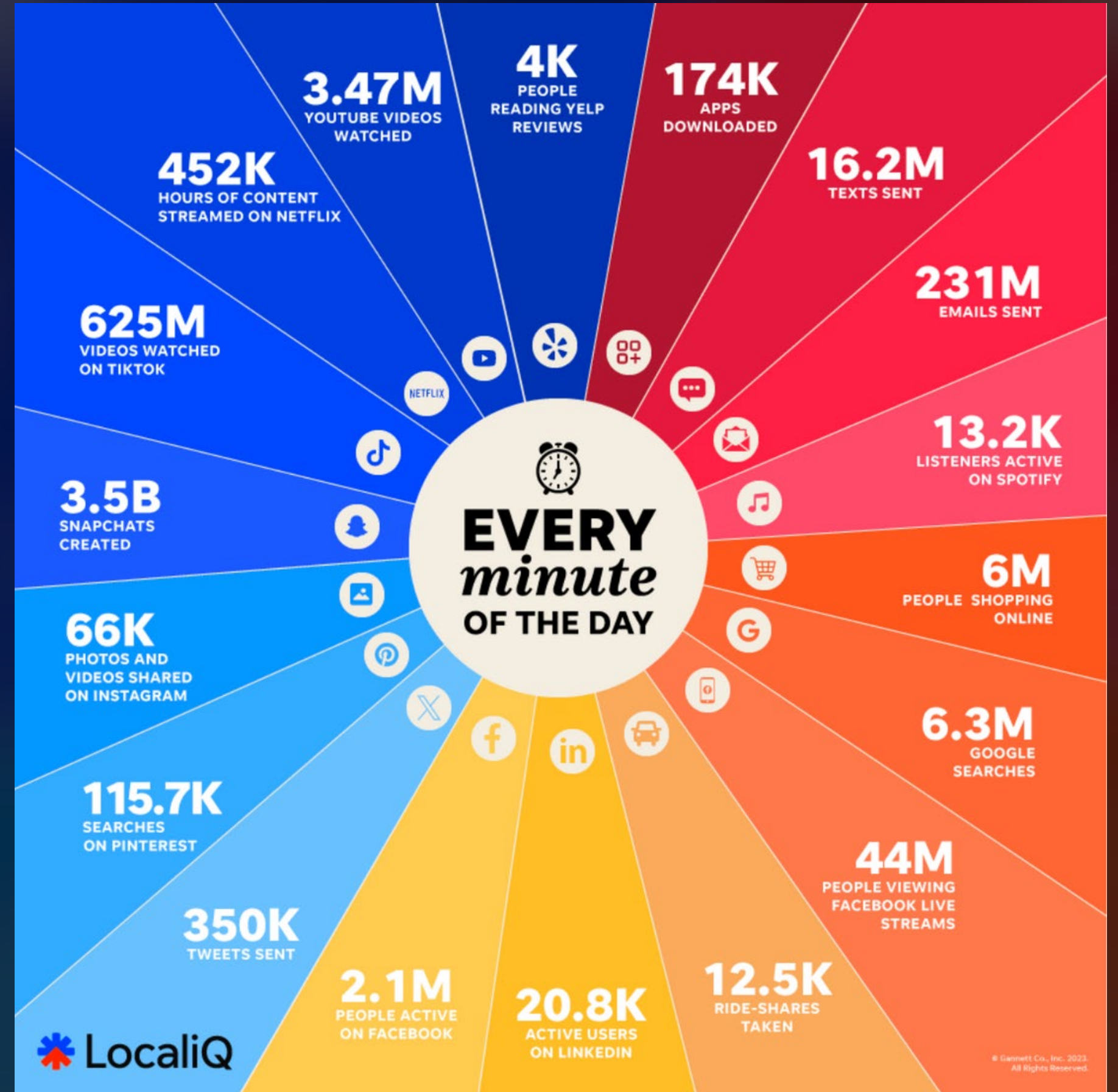


# #1 Fundraising is a Year-Round Marathon Not a Year-End Sprint



# 2024

## This is What Happens in An Internet Minute



# #2 Optimize Your Year-End Communications



# Prioritize Your Donors to Close Year-End Gifts



## 1. Last Year Not Yet this Year Donors

- Who hasn't yet made their gift this year but supported you last year?

## 2. Current/New Donors

- Are there any additional gifts you can secure?

## 3. Inactive Donors

- Any donors who gave to you 2 years ago to try to reach?



# Leverage Matching and Challenge Grants



- The amount doesn't matter. It's the idea of leveraging our gift that does.

## Match ideas include:

- All gifts of or above a certain amount
- All upgraded gifts to a certain gift level
- All renewed gifts from inactive donors



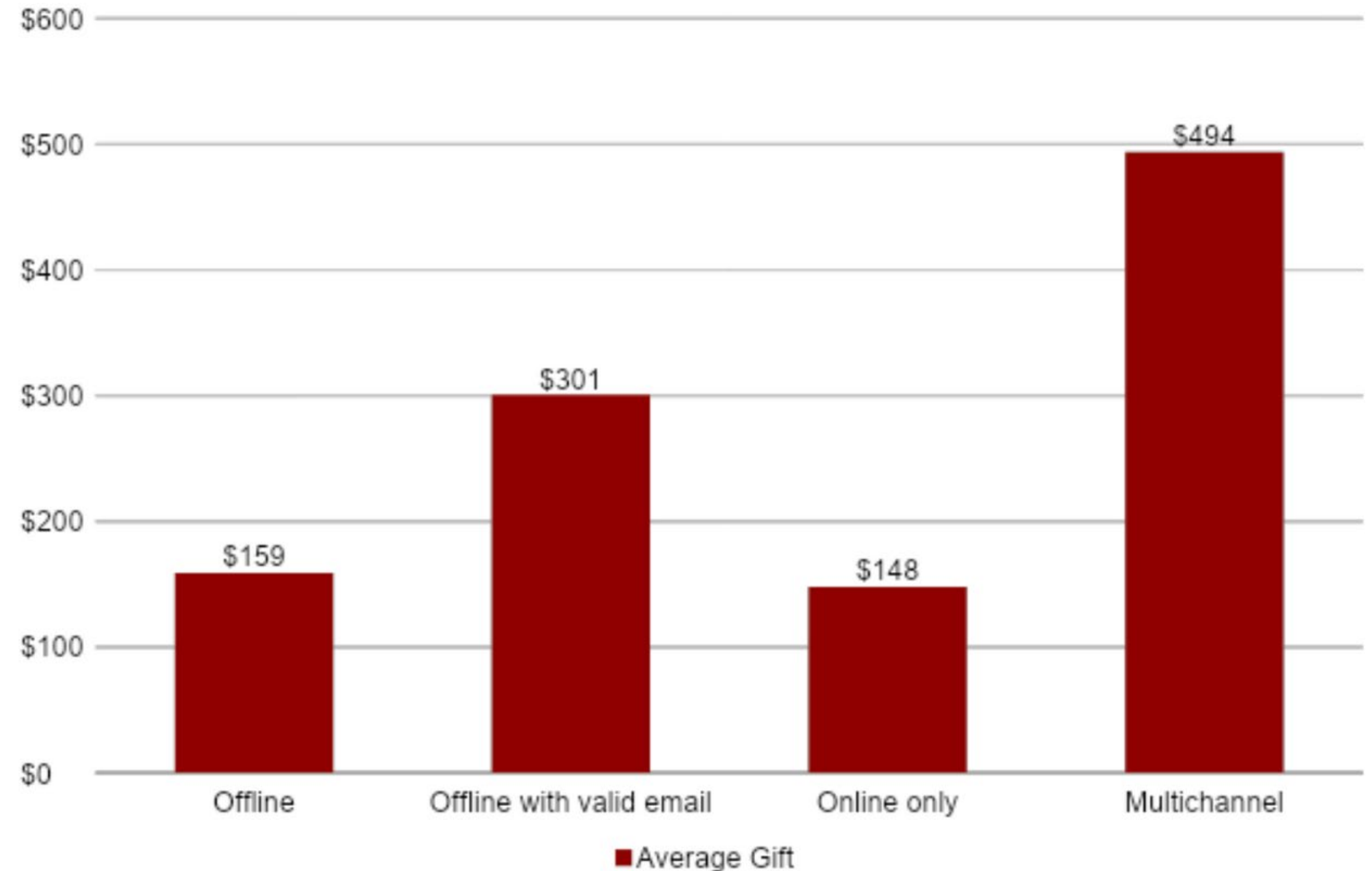
Make it concrete and tangible—how much more can be done with this matched contribution?

# Multi-channel Raises More Money



Multichannel donors **3X** more than online or offline only donors.

Donor Retention rate more than **2x** higher than online or offline only.



*NextAfter The State of Multichannel Donor Communication 2020*

# #3 Learn and Iterate in 2025 with a Focus on Donor Retention



# Assess and Build Your 2025 Plan



**Did you thank quickly and meaningfully?**

**How did donors make their gifts?**

**Who didn't renew their support?**

**Who made a first-time gift?**



# #4 Build a New Mindset Around Fundraising Better Doing Less



# When it comes to your fundraising, what consumes the most of your time and effort?

POLL

**A.** Planning and organizing fundraising events.

**B.** Balancing fundraising with other non-fundraising priorities.

**C.** Drafting donor communications and managing production of emails and print appeals.

**D.** Other (please specify in the chat).



**Block Time on  
your calendar  
everyday for  
“DEEP WORK.”**  
Hold that time  
SACRED.



**Take Control of  
Your Email.**  
Define your  
emails by what  
needs to  
happen with  
them.



**Evaluate Everything On  
Your “TO DO” List.**  
Must Do, Would-Be-  
Great-to-Do, Have to Do  
but Not Important, and  
Not Now.

**What’s the most valuable use of your time?**



**Intentionally and  
honestly identify what  
comes first.**

Keep it front and  
center – channel your  
limited time and  
energies most effectively.



**Finally, and perhaps  
most importantly, give  
yourself grace.**

You are doing your best.  
And you cannot do it all.

# You're likely leaving money on the table and don't even realize it.

Our holistic and data-informed approach to fundraising leads to more money raised for our clients.

# We help organizations peel back the layers to power up their fundraising.

With our windmill workflow, we walk with you in your journey to do more. We are your thought partners in the work.

We help you get curious and intentional so that you can dream, plan, do, assess.

# The Windmill Hill Consulting Way

## 01 Assess where you are

We do deep discovery and analyze your data to understand the unique trends of your donor database and where your best untapped opportunities are.

## 02 Dream with practicality in mind

We help you envision your most ideal organization and bring practical, accessible solutions to you that you can implement and maintain.

# The Windmill Hill Consulting Way

## 03 Plan how to get there

We use what we learn from your data to recommend the plan that's best fit for your capacity and mindset to reach your goals.

## 04 Doing with coaching and training

We stay by your side coaching and training staff and board members as you implement your new fundraising plans so you can step into your best fundraising self.



## CASE STUDY:

# Task: Leverage Year-End Fundraising

## Before

- One year-end print appeal, a few emails, Giving Tuesday posts with low ROI

## Our Work

- Assessed donor trends and recommended strategies for growing file and upgrading donors
- Created a calendar of touchpoints to jumpstart engagement and lead into Q4
- Activated board to make calls/write notes to donors



## CASE STUDY:

# Result: Doubled their year-end results and saw 3x result from their Giving Tuesday campaign

## How We Did It

- Designed a plan for regular communications to engage/re-engage their audience
- Focused the Giving Tuesday communications
- Increased the number of solicitations—print and email
- Combined personal outreach from executive and volunteer leaders



We **reframe fundraising** to focus not just on money raised but on what you need to build sustainable and scalable donor engagement.

# Enhance End-of-Year Fundraising with Impact Metrics



# Donors, Grantors & Foundations are Demanding Impact Data



- **97%** of major donors state the #1 reason they give to an organization is directly based on the organization's impact.
- **2 out of 3** funders state that positive outcomes (not outputs) are the best indicator of the impact an organization is making.
- **Millennials and Gen Z** donors are much more interested in quantifying social change to maximize an organization's impact.

# What does “impact” really mean?

- Impact has become an overused buzzword
- At Social Impact Solutions, we define impact as...

**Measuring change over time**

# What is your biggest challenge when it comes to incorporating impact metrics into your year-end fundraising?

POLL

- A.** Identifying the right metrics to showcase.
- B.** Communicating impact in a way that resonates with donors.
- C.** Limited capacity to track and analyze data.
- D.** Other (please specify in the chat).

# When it comes to capturing impact data...



## Many nonprofits

- Do have output numbers
- Do not have outcome or impact metrics
- But what is the difference between outputs, outcomes & impacts?



# There are many ways to capture impact data...



- Make sure you have measurable goals, objectives, and KPIs for each program
- Data capture efforts should be strongly based on measurable goals, objectives, and KPIs that work in tandem with your Theory of Change
- Data capture methods
  - Surveys
  - Pre/post assessments
  - Participant feedback questionnaires
  - Key informant interviews
  - Focus groups

# Surveys, Assessments & Feedback Questionnaires

## Examples of platforms that can be used to capture quantitative data

- Google forms & Google sheets
- SurveyMonkey
- Kobo Toolbox
- Tableau, PowerBI
- Paper forms are an option, but this makes the data analysis process much more cumbersome.

# What about negative feedback & results?

## Transparency & Authenticity are Key

- Stakeholders want to know the truth
- They want to know the positive, neutral & negative results of your programs and initiatives
- Honesty and transparency will get you much further than only reporting the positive results
- Have a plan for improving or resolving undesirable outcomes

# Highlight Your Impact Data in Marketing & Fundraising Efforts

## Marketing Collateral

- Email campaigns
- On your website
- Social media
- Create an Impact Report

## Fundraising Examples

- Donor phone call scripts
- Donor email scripts
- Fundraising campaigns - highlight impact reports specific to each campaign

# The Power of Story + Numbers



**Combining stories of transformation with impact metrics is a powerful way to establish trust and engage current and prospective donors!**

- Highlight a powerful story from an individual or family who participated in your program(s)
- Share a photo or video if appropriate
- Emphasize metrics relevant to your entire program population

# Create an Impact Report for Maximum Results



## Items to Include in an Impact Report

- Intro letter
- Mission, vision & values
- The impact your organization creates
- The problem your organization aims to solve
- Overview of your flagship programs
- Highlight the change these programs are creating
- Stories of transformation from key stakeholders
- Visuals, charts, tables, etc.
- Clear calls to action

# How to Maximize Your Impact Report



- Post it as a lead generator on your website
- Circulate it internally to employees and volunteers
- Distribute it to board members
- Send it to existing donors
- Share it with corporate sponsors and partners
- Use it in your GivingTuesday and End of Year campaigns
- Express sincere gratitude to all stakeholders who have make your organization's impact possible!

Want to **learn more about how to measure and market** your nonprofit's impact?

Take our **free fundraising quiz!**

**FundraisingQuiz.org**





# Key Tips as Fall Fundraising Approaches...



- Focus on 1 initiative at a time
- Define the results you want to achieve
- Showcase impact metrics related to the program(s) your fundraising campaign is supporting
- Have 1 clear call to action
  - Give Today
  - Donate Now
  - Volunteer Here
  - Join Our Community

# Key Tips as Fall Fundraising Approaches...



- Utilize tech & AI
- Ensure your website is updated
- Ensure your fundraising pages are functioning properly
- Showcase a digital version of your impact report
- Create a powerful thank you strategy!
  - Make sure your donors are thanked quickly and authentically
  - Be specific in your thank you messages
  - This is another opportunity to connect your organization's impact to the donor's involvement

# Key Tips as Fall Fundraising Approaches...



- Even if you don't have impact metrics for this Fall, you can still highlight
  - Output metrics
  - A Theory of Change for each program
  - Projected outcomes
  - Projected impacts
- It's never too late to start measuring your nonprofit's impact!
  - Start small
  - Leverage technology
  - Get buy-in from your team

If your nonprofit needs help

- **Measuring impact**
- **Marketing impact**
- **Creating an impact report**

Contact our team at

**info@socialimpactsolutions.com**

Schedule a call at

**socialimpactsolutions.com**



# Questions?



**Windmill Hill**  
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Get on the  
waitlist for our  
MasterMind  
Coaching  
Cohort



Take our free  
fundraising  
quiz!

[FundraisingQuiz.org](https://FundraisingQuiz.org)