• Thanks for joining the webinar! We’ll get started at 1:00 p.m.
• Ask questions via chat in Zoom. We’ll track them throughout the presentation and bring them up during the Q+A section.
• Make sure you’re muted. This helps everyone hear the presenters clearly. Click if joining audio by computer or dial *6 if joining audio by phone.
Services and Resources

Services

• Don’t have HR, Finance, Database Administration, or Tech Support on staff? We also do 990s. Contract for just the amount of expertise you need.

• Need board development, facilitation, strategic planning, communication or other management consulting? We offer services on a sliding fee scale.

• Want to better manage client, donor or volunteer data? We can help you select a database or, if it is the right fit, develop a Salesforce database for you.

• Are you using technology as your ally? Let us build you an intranet and board portal to better manage internal information.
Services and Resources

Resources

• Got a question, need a resource or tool, want a referral to a nonprofit specialist? Contact our FREE Information and Referral Service (Visit www.501Commons.org and choose personalized assistance)

• Quick consults on HR and Finance topics ($25/15 minute consult)

• Want to know what conferences, trainings, coaching services, and nonprofit gatherings are happening: Visit Learning Connections www.501Commons.org/learn. Info on developing your nonprofit career too!

• Nonprofit Resource Directory - 115 nonprofit consultants and service providers recommended by their clients—like the Ostara Group!
Thanks for being a part of GiveBig2020
Together we can make the nonprofit sector stronger!

Remember - Key Dates

• January 6 – Registration Opens
• March 1 – FUNdraising pages can be created
• April 1 – Registration closes, fee payment due
• April 17 – Profiles need to be submitted for approval
• April 22 – May 5 – Early giving (public has access to the platform)
• May 5 – Profiles and FUNdraising pages can no longer be edited
• May 6 – GiveBIG Washington
• June 1 – Last day to review and update direct deposit information
• June 25 – Disbursement of funds to organizations
• Our vision is a nonprofit sector filled with thriving organizations equipped to build a better world.

• Our mission is to build fundraising skills, organizational capacity, and effective leadership in the nonprofit sector.

Campaign Services (Readiness, Planning, Counsel)

Development Services (Assessment, Individual Giving, etc.)

Grant Services (Research, Writing, Strategy)

Strategy and Facilitation Services (Strategic Planning, Retreats)
The Essentials of GiveBIG Success

Rebecca Zanatta, M.Ed., CFRM
Partner, President
The Ostara Group
@rebeccazanatta
Today…

① Planning
② Analysis
③ Audiences
④ Goals
⑤ Matching Funds
⑥ Tools
⑦ Communications
⑧ Stewardship
⑨ Retention
⑩ Next
Planning

Review the Campaign Checklist
• (GiveBIG Campaign Guide 2020)

Make a good Profile Page
• Review Profile Planner

Fundraising Accelerator
• Every two weeks
Planning

Start NOW!

• Plan warm-up and post-GiveBIG communications:
  1 month, 1 week, 1 day, and post GiveBIG

Who is YOUR GiveBIG team?

• Identifying stories, content feedback, and thank-you notes

Multi-channel engagement (pick two)

• Online and...letters, postcards, phone or meetings
Analysis

Questions to ask:

Who has given to GiveBIG in the past?
• Look at GiveBIG lists from the past to guide you.

Number of new donors from GiveBIG
• Is GiveBIG a good acquisition tactic?

Donor retention from last year
• Are you keeping the GiveBIG donors you have?
Audiences

Prioritize!

Patterns in your GiveBIG donors (Linkage)
• Volunteers, board / past board, subscribers, members, program alumni, affinity groups…

Priority groups
• Top-dollar, most-loyal donors and/or new donors…and the networks of your existing donors!

Segmented messaging
• Different stories and personalization
Chat #1

Who is your GiveBIG Team?

Who are your top two audiences for GiveBIG?
Goals (Setting)

Use data to set a realistic, achievable goal

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Goals

Name your fundraising goal publicly

Set internal non-revenue goals (pick one)
  # new donors
  # gifts above $XXX
  $ average gift
  volunteer hours
Matching Funds – Who to ask?

Employer Matching Funds vs. Donor Matching Funds

Matching fund donors
• Often a board member or volunteer

A pool of matching fund donors
• A more democratic/grassroots approach that is still a powerful incentive

Matching Gifts Resource
Tools

Email marketing tools
• If you don’t have one, now’s the time!
• Look for the link in Fundraising Accelerator

*Email is proven to be more effective than social media for fundraising.*

Clean your data (contact information)
• Eliminate/correct bad email addresses… or risk being put in the spam folder!
• *Mail merge* is your friend
Tools - Peer to Peer (P2P)

The best source of new donors? *Your existing donors, volunteers, board...*

- **FUNdraisers**
- **FUNdraising Pages**
- Popular tactic with all ages/generations
FUNdraiser(s)

FUNdraising!
Tools for FUNdraisers - More

P2P requires the time and capacity to find, train and manage volunteers / participants.

Strong volunteer base = well-positioned to leverage FUNdraising Pages for fundraising

Strong tool for board members to digitally engage their networks
Besides money, what additional goal do you have for GiveBIG?

Who are potential FUNdraisers in your organization?
Communications

Less “what,” more “why”
• Center stories on the visionary problem donors can solve.
  No “fill the gap in our budget” messaging!

Prompt values
• Challenge the donor to live up to their ideal vision of themselves. “If you believe….”

Keep it personal, conversational, simple, easy
• Tell one story
Communications

Work with program team/ED to identify stories to tell
- Different lengths and formats on different media

Write ALL your content and graphics at the same time
- Ensure consistent visuals and messages in emails and social media
Communications

Multi-channel media engagement
• Digital: Public Profile Page, Social Media, Email
• Analog: Newsletter, Letters, Postcards

Social media amplification
• Encore media advertising
• Use #Hashtags from website

Graphics Toolkit
Chat #3

What are is your unique value? First, Only, Best.
Stewardship

What is it?
• Care and feeding of your donors through the demonstration of gratitude and impact

Why do we do it?
• Build trust, connection, and commitment

The key to donor retention
• Keep all these new donors you’ll get!
Stewardship Ideas

Instant stewardship: fast and custom

Pre-film a client, alumni, or staff Thank You video

Pre-prep Thank You cards – easy to mail ASAP

Involve your GiveBIG team!
Chat #4

What are your existing stewardship actions?

Can any of these ideas be ported to GiveBIG?

If so, how?
Philanthropy Cycle

Cultivation (60%)

Stewardship (30%)

Solicitation (10%)
Retaining GiveBIG donors

Retention is Key
Stewardship is always critical

First gift – the most difficult
Second gift – the most important

20% vs. 64% retention rates
Integration and Follow-Up

Do you have event before or after GiveBIG?

Follow-up:
• Talk to your GiveBIG donors
• Add them to your newsletter
• Invite them to your next event
• What is next?
Teaching Donors

Focus on impact and outcomes to give donors a *reason* to give!

*Hint: GiveBIG is the opportunity NOT the reason*
Thank you!

Q & A
Upcoming Training Sessions

Creating Your Next Level GiveBIG Campaign (Webinar)
https://nextlevel-webinar-gbwa2020.eventbrite.com
Wednesday, February 26, 1:00 p.m. – 3:00 p.m.
Online (Webinar and livestream)
Presented by Rebecca Zanatta, The Ostara Group
This session will be recorded

The Essentials of GiveBIG Success (Seminar)
https://essentials-seminar-gbwa2020.eventbrite.com
Wednesday, March 4, 1:30 p.m. – 3:30 p.m.
Pacific Tower, Seattle, WA
Presented by Rebecca Zanatta, The Ostara Group
Fundraising Accelerator Newsletter

- **Fundraising Accelerator** is fundraising training email sent to all GiveBIG Campaign Leads and those they sign up additionally that goes out every two weeks with explicit actions and links to resources and tools to keep you moving forward in your preparations for GiveBIG.

- We will also be promoting other fundraising events and resources that may be helpful to your giving day campaign and general fundraising.

- Links to past issues are included with each new Accelerator. Checkout [Fundraising Accelerator #2](#) here and keep an eye out for #3 today!