

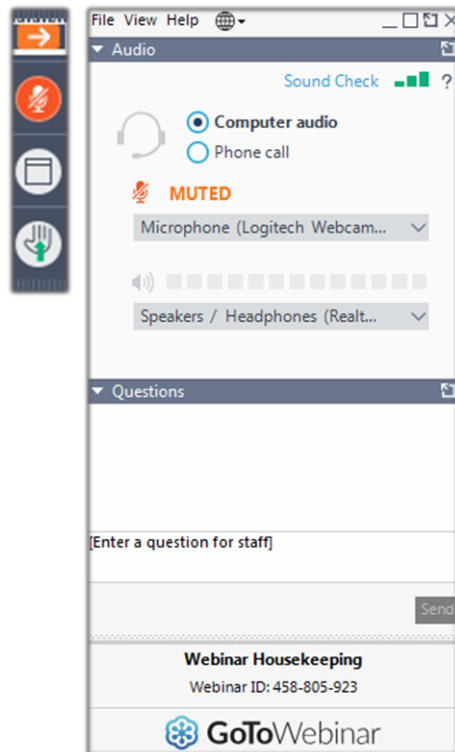


Futures in Education
FOR BROOKLYN AND QUEENS
Changing Lives Through The Gift Of Education



SCHOOLS & ACADEMY WEBINAR #6:
End of Year Giving & Looking Ahead to 2021

Webinar Logistics



To join audio:

- Choose “Computer audio” to use VoIP and listen through your computer
OR
- Choose “Phone call” and dial using the information provided. International numbers available.
- Throughout the webinar please type your questions here for discussion later

Points for Discussion

1. What are the impacts of year end giving?
2. What are steps you can take to active a year end approach?
3. Additional Resources



CCS's Experience with Independent Schools and Religious Organizations



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Generations
of Faith



ARCHDIOCESE
of
NEW YORK



Today's Presenters...



Sean King
Executive Director
CCS Fundraising



Kaitlin Leonard
Vice President
CCS

10% of Annual Giving occurs in the last **3** days of the year.

30% of annual giving occurs in December.

Average gift sizes in the US tend to be **53%** higher during the last three months of the year compared to the rest of the year.

2020 Matters

HOW DOES THE CARES ACT IMPACT YEAR-END GIFTS?

- The Coronavirus Aid, Relief, and Economic Security (CARES) Act has established two temporary changes to how charitable donations are treated this year.
- The CARES Act will allow taxpayers who take the standard deduction, can claim an additional deduction up to \$300 for charitable gifts made in cash. This means that married families filing jointly will get a deduction of up to \$600.
- The adjusted gross income (AGI) limit for cash donations was increased for individual donors. Donors can now deduct qualified contributions of up to 100% of their AGI (up from 60%).
- **Separate from the CARES ACT, donors of a certain age and stage can consider a gift from their IRA.**

2020 Matters: Sample Text

- Concise, simple text
- Add in a contact number and email
- Provide a link to give directly in the email!

Dear Kaitlin,

As 2020 comes to an end, so do the time-limited tax benefits in the Coronavirus Aid, Relief, and Economic Security (CARES) Act. We wanted to remind you that now through December 31, 2020, every dollar counts and your cash gifts to Catholic Charities Brooklyn and Queens can have an even greater impact – for us, and for you.

- If you take the standard deduction, you may now deduct up to \$300 (\$600 for couples) in qualified charitable contributions of cash to Catholic Charities Brooklyn and Queens and other qualified charities. Normally, no deduction is permitted.
- If you itemize, you may deduct cash gifts up to 100 percent of your adjusted gross income in 2020 – up from 60 percent. (Please note: gifts to donor-advised funds and private foundations are not eligible.)
- Although required minimum distributions (RMDs) from retirement accounts are suspended in 2020, if you are 70² and older you may make a qualified charitable distribution of up to \$100,000 from your IRA. This direct distribution to Catholic Charities Brooklyn and Queens would not be included in your taxable income.

Evaluate Your Donor Data

Constituents

Active Donors - Recent Gifts

148 Constituents List updated 5 minutes ago

Save Columns Share Export Add/Exclude More Find in this list

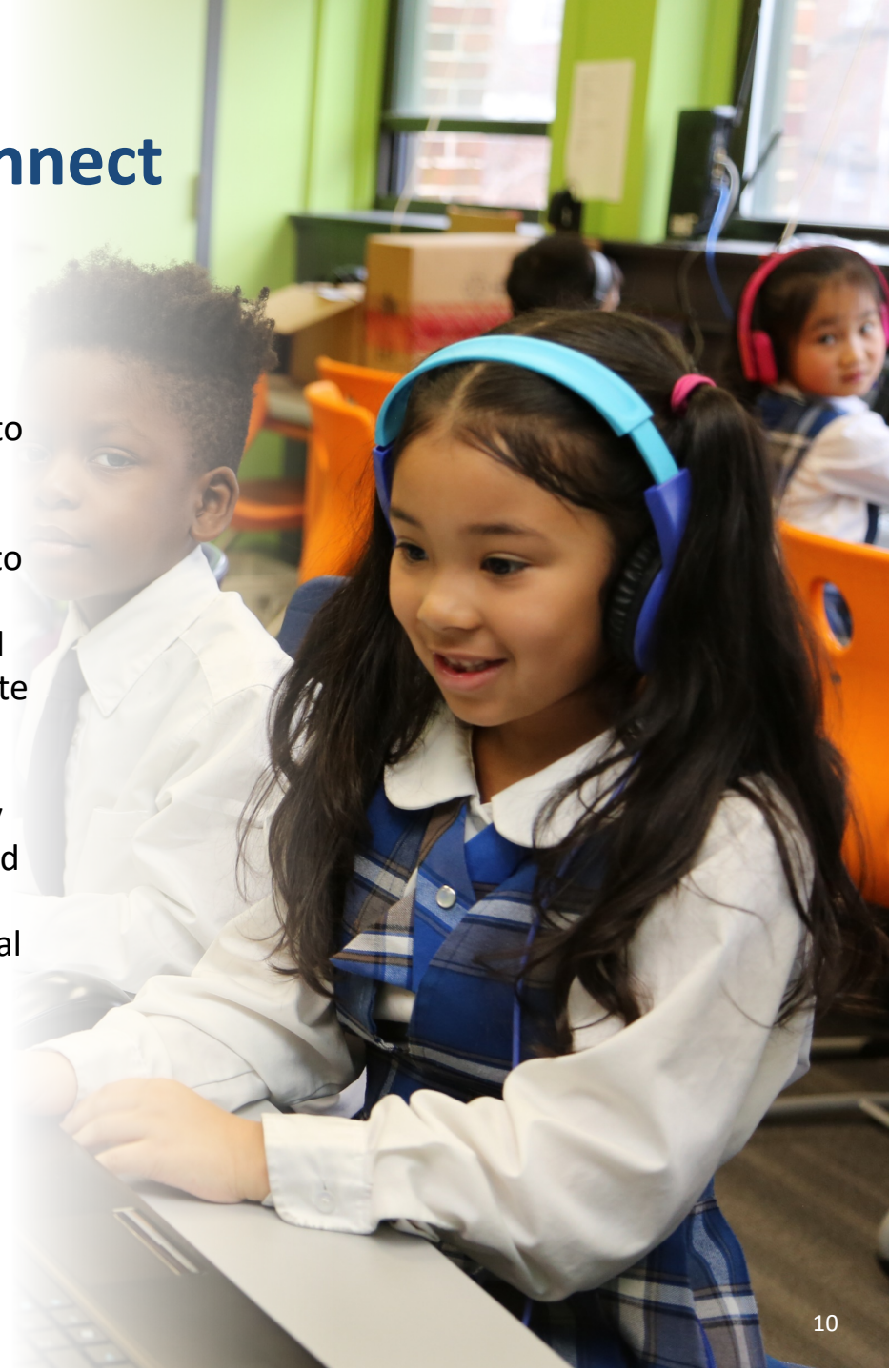
Filters: Exclude solicit codes: Do Not Mail Total giving: 3 selected Clear all values

Constituent summary	Lifetime giving	First gift	Latest gift	Greatest gift	Donor Type	Elementary Graduation Year	Graduating Grammar School	2020 Planned Giving Prospect	2020 Prospect Tier	Last action	Next action
	\$25	\$25 one-time gift 11/4/2020 Holy Family Catholic Academy	\$25 one-time gift 11/4/2020 Holy Family Catholic Academy	\$25 one-time gift 11/4/2020 Holy Family Catholic Academy	Alumni	1978	Holy Family School		Tier 6 8/21/2020	None	Non

1. Knowing who your donors are, their propensity and capacity to give, and their specific interests will inform your actions.
2. Consider pulling your donor data from Raiser's Edge to take a look at high potential donors.

Think About How You Connect With Donors and Friends

- **Millennials: Age 22-36** donors are most likely to donate via mobile, watch campaign videos, and prefer to give online. These supporters respond to text and are active daily on social media.
- **Generation X: Age 37-51** donors are most likely to fundraise on behalf of your organization, make a pledge, and volunteer. These supporters respond to email, phone calls and texts and stay up-to-date on social feeds and trends.
- **Baby Boomers: Age 52-66** donors are most likely to make recurring gifts. These supporters respond to phone calls, check email regularly, and are mainstream adopters of text messaging and social media.
- **Greatest Generation: Age 67 and up** donors are most likely to respond to direct mail and give by check. Wealthy seniors are more likely to donate by credit card.



Fire Away on All Channels!

1. Direct Mail (100% of non-profits)
2. Email (92% of non-profits)
3. Website
4. In-Person

Craft Your Messaging

1. **Keep it donor-centric.** Your appeal should be related to the mission of the School. Remind donors that their donations allow you to keep educating the next generation of Catholic school students.
 - **Don't say, "It's annual giving time again, so please make a gift."** Make the ask about your donor, not about you. Don't say, "Help us meet our fundraising goal" or "Last chance to make your year-end gift."
 - **Donors care about what *they* can do to make a specific *impact*.** Use action words that encourage them to help, save and change the world in a manner that's near and dear to their hearts.
2. **Inform and inspire.** Use an inspiring narrative and tell a compelling story. If you can, include imagery, video, and other innovative content.
3. **Use a call-to-action.** No appeal is complete without a clear and convincing ask. Make your audience feel a sense of urgency.

Craft Your Messaging

4. **Acknowledge the landscape.** COVID-19 has had on your School in the short and long term. Use it as a way to unite donors and explain to them that their donation would help you keep your doors open and support those students you serve.
5. **Set the stage for the follow-up.** Your year-end campaign is about building relationships with your supporters. While crafting the appeal, start thinking about **follow-ups and thank you messages that can keep building those relationships moving forward.**

Plan for a December Push

- 1. Inspire in early December:** Highlight some of the amazing work your School has done this year with succinct storytelling.
- 2. Convert to donations in late December:** Make your appeal as to why they should donate to your School.
- 3. Plan a final email push the last days of the year.** You can wrap up your year-end communications after Christmas with an email push that offers donors a last chance to give. Consider sending the first of your final emails to your entire donor file, less those who have already given. Then, for the next send, suppress the names of those who opened the previous last-chance email and resend the email again.
- 4. Thank in January:** Don't delay your stewardship activities until later in the year. Make sure to thank those who gave right away in January and keep them engaged into the new year. Through carefully crafted digital campaigns an

**Early
December**
*(Week of
December 7)*





Mid December *(Week of December 14)*

- **Remind people that you're only two weeks away from Christmas and the End of the Year**
- **10 Days Prior: Email all supporters**
 - Describe your fundraising goals, and the impact you plan to make.
 - Share information about tax advantages of year end giving and the CARES Act.
 - Ask recipients to spread the word and provide them with an option to give now.

Late December

*(Week of
December
28)*

- **Promote giving opportunities on social media**
- **Email all supporters**
 - **Early in the week**
 - **December 30-1**
- **Giving can be an impulse buy – make it simple and easy!**

Samples to Consider

Sample Text:

- *Annual Giving is vital to our mission. Without the generous support of donors like you, we would not be able to provide financial assistance to those in need. Thousands would miss out on the pure joy of play, the value of outdoor education, the gift of stewardship, and the benefits of friendship made within our diverse, inclusive community.*

<https://www.mounthopeschool.org/spirit-of-giving/year-end-giving/>

Support the Mount Hope Community

As we reflect on all the things we are thankful for this year as a school, we are grateful most of all that you and your family are a part of the Mount Hope community. Your support and generosity are appreciated more than we can possibly express.

As you know, the mission of MHCS is to educate the child as a whole. We feel that children should be developing in the following five areas: academically, socially, physically, emotionally and, most importantly, spiritually. Our students are being transformed daily into the image of Christ through the combined efforts of both the home and school to become tomorrow's leaders.

GIVE NOW

Samples to Consider

Why Should I Contribute?

You may wonder, why am I asked to contribute to Mount Hope outside of tuition? Annual gifts support the people and programs that make Mount Hope Christian School special. This means gifted teachers, smaller teacher/student ratios and exceptional academic resources. To remain accessible to more families, we keep tuition lower than the actual cost of a student's education and the school relies on contributions from a variety of donors to cover the gap in the operating budget. These funds allow us to advance the building and programs in ways we would otherwise not be able to. Every gift, no matter the size, makes a difference.

[READ OUR NEWSLETTER](#)



What Did We Learn This Year?

1. An over-reliance on one “type” of fundraising, particularly events, leaves you open to drops in revenue.
2. One Person Can’t “Go At It Alone”
3. Being Pro-Active Drives Fundraising Results, Even During Difficult Times
4. Entrepreneurial Approaches Are Needed

What Does This All Mean?

1. You must have a plan approach donors across **multiple channels – phone, email, social media, virtual events.**
2. **Identify Your Team Now:** Who can help you? Who would be an effective ambassador? Who is dedicated to your Academy and can give their time?
3. **Make a Plan.** Plotting out your prospective activity is important and we would encourage you to use the templated plan in this presentation.
4. **Don't be afraid to pivot.** If an opportunity presents itself, or the landscape changes, don't be afraid to add to, delete, or change an approach.

What Are Our Key Tactics

- 1. Think about how you connect with donors through each channel**
- 2. Messaging and Frequency is important**
- 3. Approach it month by month**

Sample Plan

Month	Personal Donor Outreach	Event Outreach	Phone Outreach	Mail Outreach	Email Outreach	Social Media	Website Content
January			Thank you calls to leading holiday donors	Thank you notes to leading holiday donors	Thank you e-blast to all donors		
February		Virtual event email eblasts	Virtual event phone outreach		Emails for Catholic Schools Week campaign	Catholic schools week social media content with giving opportunities	
March	<i>Personalized outreach for virtual event</i>	<i>Organization of potential virtual event</i>	Virtual event phone outreach		Easter Eblasts for Lapsed Donors		
April	<i>Personalized outreach for virtual event</i>	<i>Organization of potential virtual event</i>				Profiles on scholarship donors to align with FIE Angel recipients	
May				Thank a teacher/graduation mailing		Thank a teacher/graduation social media content with giving opportunities	
June			Thank a teacher thank you calls	Thank a teacher thank you notes	Year End Eblast focused on graduation	Graduation social media content/year in review with giving opportunities	
July	<i>Personalized outreach for virtual event</i>	<i>Organization of potential event</i>					
August	<i>Personalized outreach for virtual event</i>	<i>Organization of potential event</i>					
September							
October							
November							
December							

Next Steps: Looking Ahead

Futures will continue the *Futures Fundraising Academy* into 2021, with webinars highlighting best practices, and showcasing examples for our Model Schools:

1. January: Alumni & Donor Communication
2. February: Developing Donor Stewardship & Communication
3. March: Making a Plan for Virtual and Non-Virtual Events for 2021
4. April: Approach Individual Donors
5. May: Planning for a New School Year

*This presentation will be uploaded to the
new Virtual Library being created at
www.catholicschoolsbq.org*

We can help!

Please reach out to

cap@futuresineducation.org or
schoolsupport@futuresineducation.org

QUESTIONS & DISCUSSION





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