

Year End Appeal

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Have some PIE

- P - Planning
- I - Implementing
- E - Evaluating



Planning

- Big Picture
- What does success look like?
- What tactics to use to maximize giving?
- Create a calendar

Planning – Create a Calendar

- September
 - plan, get the lists, secure the match
- October
 - write/photograph/video tape for content
 - Update your donation page
 - Update your website
 - Earned media?
 - Prepare board, staff, volunteers
 - Create Acknowledgement System

Planning – Create a Calendar

- November
 - Start the campaign: date zero and first email, date mail, SM postings
 - Personalized notes, calls
- December
 - Email update, SM posting
 - 2nd and 3rd ask emails, SM posting, update website?
 - Dec. 31st – final reminder email
- January
 - Thank You email
 - Evaluation

Implementing

- The Story
- The Ask
- The Thank You

- Multi Media
- Multi Channel

- Board, Staff, Volunteers
- Systems

It is about the donor!

words, pictures, video
mail/email/social media

It's about the Donor!

- Tell a Story
- Readability and Comprehension
- Be sure to ask – every time
- Donor Centric communication – it is not about you

Donor Centric communications

Donor Negligent:

“We did this. We did that.
We were amazing.
Oh, by the way, thanks.”

Donor Centric:

“With your help, all these
amazing things happened.
And without your help
they won't.”

About e-mail

- Content matters
- “From” and “Reply to” address exists, monitored
- Subject line
- Include unsubscribe link
- Format intelligently
- Make it mobile friendly
- Check the links

Social Media

- Engage with donors is key
- Keep it simple
- Choose your outlets
- Use technology (Hootsuite, Tweetdeck, Act.ly)
- Integrate in your communications calendar

Evaluating

- Did you meet your goal?
- Lessons learned?
- What will you change next time?

Some things I have learned:

- Planning
 - Start at the end: what's the follow up, thank you
 - Plan ahead across disciplines
 - Copy from others (Flatter me!)
- Implementing
 - Systems, simplify
- Evaluating
 - Statistics: Know what has worked in the past and what didn't



Questions?

Resources:

- The person you are sitting next to
- Your colleagues
- Online guides like
<https://www.salsalabs.com/hubfs/Salsa-NBP-PDFs/Essential-Guide-to-End-of-Year-Fundraising.pdf>
- AFP, webinars, conferences
- Me: Jseelen@CalTrout.org

Thank you!