



GUIDE

3 strategies to boost year-end fundraising starting now.



Bonterra[™]

Believe it or not, year-end is already around the corner. Across the nonprofit sector, fundraising staff are setting and finalizing the plans that will lead them to success in the last months of the year. Many organizations saw giving hold flat or slightly rise in past years, but some are concerned by shrinking donor retention—especially among small-dollar donors. Organizations on our platform broke supporter engagement records but many are refining their strategies after changes to the digital space affected how our whole sector measures the success of our campaigns.

One thing everyone can agree on? The stakes this year-end season are as high as ever. The middle of the year is the perfect time for organizations of all sizes and missions to plan, test, and implement strategies that will set them up for success during year-end. That's why we've compiled this greatest-hits list of three proven techniques nonprofits can start implementing now to take year-end fundraising to the next level.

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Strategy #1: Converting volunteers into donors.

Volunteers are two times more likely to donate to an organization than non-volunteers—which means if you're not cultivating your volunteers toward donation asks at year-end, you could be leaving money on the table. Whether your organization has a thriving volunteer program or is just beginning to explore this type of supporter engagement, you can create or reinforce your volunteer base now to ensure their energy converts to financial support when you make the ask later in the year.

1 Donor conversion starts at the beginning of a volunteer's experience: recruitment and registration.

A positive experience at the beginning of a volunteer's journey with your organization can set the tone for all future interactions. It's important to prioritize stewardship even during the recruitment process.

When promoting a volunteer opportunity to your existing supporters, provide all of the details that they need to feel good about RSVPing "yes," including the total run time of the event, COVID safety precautions you'll take, and accessibility information.

Pro tip: Looking to recruit new supporters into your volunteer program? The Bonterra Mobilize solution allows organizations to tap into a rapidly growing web of millions of dedicated volunteers looking for their next cause to support. Promoting an event via email means you need supporters to open your messages and interact with your call to action, and organizations shouldn't abandon email as a promotion channel, but consider also sharing your event to the Mobilize public network—it's been shown to increase registrations by 40%!

The registration process can make or break your volunteer recruitment efforts. A streamlined, convenient process will always secure more supporters for your event than a clunky one that takes too long or simply doesn't work. Make sure that signing up takes only a few clicks, and automate email and text messages to thank them for signing up and remind them as the event draws near. At the end of the registration process, make it easy for registered volunteers to share your event with their own friends and networks, extending your recruitment reach and improving their volunteer experience even more.

Pro tip: The Bonterra Mobilize volunteer solution provides nonprofits with the ability to fundraise immediately through post-signup donation asks. Over 150,000 grassroots donations have been initiated by supporters after signing up on the Mobilize platform. After a supporter cancels an RSVP is another great time to prompt for a donation!



2 Show extra volunteer appreciation as year-end gets closer.

Cultivation is part of every successful donor conversion. For volunteers who are being asked to donate, it's especially critical that they know you still appreciate their non-monetary gifts: their time and effort.

To prepare for a successful donation pitch at year-end, take extra care to acknowledge your supporters for the critical roles they play in your organization's success. During and after each event, acknowledge and thank your volunteers for their support, and call out key individuals by name when appropriate. As the big giving days get closer, devote extra energy to volunteer appreciation—hosting a special party or virtual celebration for volunteers, sending handwritten thank-you notes, or having one-on-one coffee meetings can go a long way toward ensuring positive responses.

Pro tip: Our Giving Week Report found that volunteers on the Mobilize network were eager to show up for causes that mattered to them around GivingTuesday—especially on Black Friday. Clearly, since this is an important moment to engage supporters just before a big giving day, reinforce how much you appreciate their support, and illustrate how much further their gift can help you take your mission.

3 Make effective, personalized asks to convert volunteers into donors.

Once you're ready to make the ask, here are three steps to mobilize your volunteers to fund your mission.

Start with a personalized thank-you

Illustrate specific needs

Show why donations and volunteer hours are important

Show your volunteers that you know and appreciate how much they've already contributed to your organization. When you're asking a volunteer to make a gift, you might send them a message like this:

Hi Jane!

First of all, thank you so much for being such an amazing volunteer. With your help, we've been able to complete over 5,000 calls to at-risk seniors across the state to ensure that they have access to essential services.

4 Turn your volunteers into fundraisers.

Each of your volunteers has a unique network of friends, family, and coworkers who often share their beliefs and values. By giving your volunteers the right tools and support, you can convert them into donors and empower them to fundraise on your behalf. Peer-to-peer fundraisers are an opportunity to increase revenue, engage your volunteers more deeply, and bring in new support for your organization.

Pro tip: Built-in bring-a-friend features make it easy for volunteers to invite their networks to volunteer, donate, and more. The Bonterra Mobilize network effect means volunteers can connect with their own friends and fellow supporters more efficiently. More than 20% of supporters who have taken action through Mobilize have come from one of our bring-a-friend features, and almost 40% of supporters have taken action with the same people multiple times.

Volunteers have already demonstrated commitment to your organization's mission, and by providing them with a smooth and seamless volunteer experience, showing appreciation for their efforts, and offering clear opportunities to donate and fundraise, you can channel that commitment and energy toward supercharging your year-end fundraising.

With support from the right solution, you can see every action a supporter has taken with your organization all in one place. This makes it easy to segment your supporters based on volunteer and donation history, provide personalized donor experiences, and optimize your fundraising outcomes at year-end and beyond.

[Talk to us to learn more.](#)

Strategy #2: 5 vital fundraising metrics to evaluate and improve before year-end.

Most of us monitor our own personal health indicators and make lifestyle changes based on indicators that matter to us. This is also true for your nonprofit's fundraising program: you need access to the vital signs that tell you whether your donor file is healthy or whether it needs resuscitation, especially as you prepare for big fundraising seasons like year-end.

Predictive analytics now give fundraisers of all data skill-levels the ability to do this type of assessment—you can optimize the work you're already doing by tracking key metrics across channels, and then moving those metrics to meet your funding goals. This guide will give you the key, real-world metrics fundraisers should be monitoring now, in order to achieve success at year-end. energy converts to financial support when you make the ask later in the year.



7 basic questions every fundraiser needs to answer before year-end

We've helped hundreds of organizations optimize their fundraising programs, and one thing is always true: to achieve revenue goals, every fundraiser needs a foundation of knowledge about their donor file and its revenue stream. This knowledge is what you need to define, track, and steer a fundraising program. Here are seven questions your development team should be able to answer as you prepare for year-end:

1. *Is my donor file size growing or shrinking?*
2. *How loyal are my new donors?*
3. *How loyal are my existing donors?*
4. *How much is a donor worth after five years?*
5. *How much has revenue changed from year-to-year?*
6. *On average, how much does each donor contribute?*
7. *What can I do to protect and grow donor retention and revenue?*

In order to answer these questions, you should check your **5 fundraising vital signs**, beginning on the next page.

5 fundraising vital signs

#1: Average gift

Average gift is the most commonly tracked revenue metric. The average gift can be tied directly to how much it costs to obtain a donation. This metric should be benchmarked in two ways:

- *Average first gift (revenue generated from new donors)*
- *Existing donor average gift (revenue generated from donors who have given in previous years)*

The first gift is almost always the most expensive to acquire and has a direct relationship with future value (or the long-term value of the donor that gave the gift,) while typically existing donors have a higher average gift than first-time givers.

Calculate average gifts:

Average first gift	
Revenue from first gifts ("join gifts")	\$300,000
÷ Number of gifts	10,000
Average first gift	\$30

Existing donor average gift	
2021 revenue from donors whose first gift was not in 2021	\$5,000,000
÷ Number of gifts	80,000
Existing donor average gift	\$62.50

#2: Change in revenue

This simple metric should be tracked against both the Consumer Price Index and the sector average. Understanding if your organization is keeping pace with the ever-increasing costs of fundraising, as well as the pace of growth for other nonprofits, is vital to long-term sustainability.

Calculate change in revenue:

2021 gross revenue	\$2,000,000
- 2020 gross revenue	\$2,250,000
Change in revenue	-\$250,000
÷ 2020 gross revenue	\$2,250,000
% Change in revenue	-11%



#3: Donor file growth

Your file's growth score evaluates the number of donors added to the file compared to the number of donors lapsing. This metric is essential to:

- **Balance** your donor acquisition and reactivation efforts
- **Target** your donors who are at greatest risk for attrition
- **Implement** strategies for preventing future donor attrition

#4: Donor retention

Donor retention determines how reliable and predictable your donors are by calculating how many donors are committed to your organization—and how many have become inactive. You'll need to understand how many donors continue to give in order to succeed at fundraising in the future. The donor retention metric should be evaluated for two distinct populations:

- **New donors:** a donor who has made their first gift to your organization.
- **Existing donors:** a donor who has given in at least the two previous years to your organization.

Pro tip: If your goal is to increase donor retention, you can use multiple channels to meet that goal. Boost donor retention by fine-tuning your digital strategy.

Calculate donor file growth:

New donors	1,000
+ Reactivated donors	1,200
= Donors added	2,200
÷ Donors lost (donated last year but not in current year)	2,500
= Growth score	0.88

**A growth score of less than 1 means the file is shrinking

Calculate donor retention:

New donor retention	
2020 new donors who gave again in 2021	300
÷ 2020 new donors	1,000
New donor retention	30%

Existing donor retention	
2020 existing donors who gave again in 2021	52,700
÷ 2020 existing donors	99,000
Existing donor retention	54%

#5: Five-year donor lifetime value

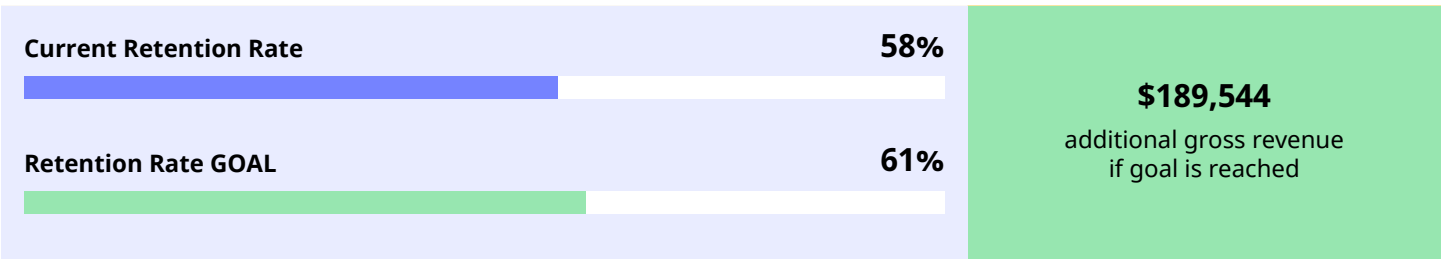
Lifetime Value (LTV) perhaps the most important metric for a fundraiser, indicates how much gross revenue you can expect from your donors over the first five years.

This metric is essential for nonprofits who want to calculate how much they should be investing in new donor acquisition. It's also important for tracking the development and growth of your current donor file.

Calculate lifetime value:

First five years of revenue	\$3,150,000
÷ Donors acquired	40,000
Five-year lifetime value	\$78.75

Moving the metrics and planning for year-end



Pro tip: Make your year-end planning simpler than ever by using the Bonterra Digital solution's predictive analytics-powered Fundraising Optimization Guide to easily calculate the revenue changes you can expect when you increase these metrics.

Once you've done these calculations (or used the Bonterra Digital and Development solution's reporting and predictive analytics tools to do them for you), you'll be able to identify priority areas to focus on during year-end. Whether you focus on upgrading donors, improving new donor retention, or improving existing donor retention, using data to inform your fundraising strategy will help you set clear objectives and prioritize outreach correctly in order to achieve your goals.

With predictive analytics, getting the information you need to assess and improve vital fundraising metrics has never been easier.

[Talk to us to learn more.](#)



Strategy #3: Building community for success on GivingTuesday.

GivingTuesday is one of the biggest and most well-known Giving Days in the world, and it's the prime opportunity to kick off your year-end fundraising.

While some organizations are choosing to host in-person events in 2022 after two years of near-constant change, many organizations are still sticking to a digital-first fundraising approach, especially during high-impact days like GivingTuesday. When your goal is to reach a large pool of donors in a finite amount of time, hosting a Giving Day allows you to connect with your supporters wherever they are and foster engagement online through gamification and peer-to-peer fundraising.

Here are some of the most important strategies to ensure a successful GivingTuesday this year, plus ways to use your results to fuel a record-breaking year-end.

Align your GivingTuesday campaign with a region or network.

Organizations can choose to run individual GivingTuesday campaigns or participate in a collaborative Giving Day event. Some examples include region-based Giving Days such as #GiveBigPittsburgh in Pittsburgh, PA, and network-wide Giving Days like #iGiveCatholic.

By keeping a Giving Day focused within a specific region, you can appeal to a group of supporters with close ties and connections to the participating nonprofits. This means your supporters will be more likely to rally behind specific causes and become more involved with the success of your day. With a region-based Giving Day on Bonterra Donor Engagement's Giving Day solution (formerly GiveGab), you can create a branded website that will be recognizable to your donors and nonprofits and represents the community you all love.



For example, Give Big Pittsburgh is a regional Giving Day hosted by Pittsburgh Magazine to serve nonprofits operating in Western Pennsylvania. In its first year with Bonterra Giving Day in 2017, Give Big Pittsburgh raised \$1.4 million for local nonprofits and has experienced tremendous year-over-year growth since. On GivingTuesday 2021, over 500 organizations raised a record-breaking \$3.2 million!

Caite Miller, Marketing & Events Coordinator at *Pittsburgh Magazine*, was impressed by how her organization uplifted their nonprofit community through a media-led Giving Day on the Bonterra Giving Day solution.

For larger organizations with affiliates or chapters that span different regions, coordinating your efforts for a network Giving Day can be just as powerful. This type of Giving Day was designed to support organizations that operate on a national scale with affiliates or chapters providing services in local communities. Typically, these affiliate organizations are widely spread and vary in needs, size, and capacity, but still work toward a common goal or mission. As a nonprofit network, coordinating a Giving Day for your affiliates means you are providing the means for them to come together and use the momentum of a large campaign to raise awareness for their cause within the local communities they serve.

Essentia Health Foundation is comprised of ten regional foundations that provide support for Essentia Health's integrated health system, which operates in Minnesota, Wisconsin, and North Dakota. In 2020, Essentia Health-St. Mary's Foundation pivoted from an in-person gala to a digital Giving Day, *The Gift Goes On*. After seeing the significant return on investment that a Giving Day could provide through greater reach and engagement opportunities, in 2021, the affiliate foundations joined in. Through the giving site, affiliate organizations could share their stories, post matching opportunities, engage in peer-to-peer fundraising, and more.

Essentia Health Foundation's network raised \$174,000 with 44% of online gifts attributed to peer-to-peer fundraising, through a Giving Day hosted by Bonterra Giving Day.





Recruit peer-to-peer fundraisers to spread your campaign.

Using peer-to-peer fundraising is a proven way to raise awareness for your organization and get new donors, so call upon your staff and your biggest supporters to reach out to their own networks and boost your fundraising initiatives on GivingTuesday. GivingTuesday is one day every year that donors are actively seeking organizations to give to, and if they see that their friend or family member is involved and is advocating for the organization, they will be much more likely to give. Throughout the Bonterra Giving Day solution, we typically find that one peer-to-peer fundraiser introduces four new donors to your organization—something that will be especially important for year-end, given that the Fundraising Effectiveness Project’s data showed donors who gave \$500 or less weren’t retained as well as those who gave over \$500.



Through the Bonterra Donor Engagement’s Peer-to-Peer Fundraising solution, nonprofit supporters can sign up to fundraise on behalf of an organization by creating a “mini-campaign,” and you can also send out personal invites to top supporters. Each volunteer fundraiser will have their own toolkit and profile, but the donations will come straight to your nonprofit. By empowering your volunteer fundraisers with the tools to set their own goals, tell their stories, and get their family and friends involved in a cause they care about, you’ll be giving them a fun and easy way to support your organization and also broadening the reach of your message.

Pro tip: Have your board members sign up to become peer-to-peer fundraisers to create some fun competition amongst them.

Promote friendly competition.

Playing a game is a great way to make fundraising fun and bring people together into a sense of community and shared vision. For organizations using the Bonterra Peer-to-Peer Fundraising solution, peer-to-peer fundraisers can come together to form fundraising teams. These teams then compete to raise the most money toward the campaign. This is an effective—and fun—way to get people more motivated to collect donations and spread the word about the campaign.

Use matches and challenges.

You can use matching funds to generate more excitement around your GivingTuesday campaign. Businesses, board members, and even major donors can pledge to match donations up to a specified amount based on donations received during your campaign. This encourages your donors to give more because they are able to see that their gift can make a much larger impact for the organization.

Set up similarly to matching funds, a “challenge” is a gift that can be unlocked by meeting a goal. This goal can be measured by total dollars given or total donors engaged. Once the specified goal has been set, funds will be released to your overall total once the goal has been met. This creates a sense of teamwork amongst donors to “unlock” those extra funds for your organization. Discover how you can double your donors’ impact with a match.

Pro tip: Want to amplify your GivingTuesday fundraising results even more? Consider enabling corporate matching—Giving USA’s latest report shows corporate giving spiked recently. You can learn more by scheduling a demo with our friends at Bonterra Corporate Social Responsibility.



Use GivingTuesday to kick off your year-end fundraising.

Don't be afraid to ask GivingTuesday donors to give again at year-end. Instead, use the momentum and what you learned from your GivingTuesday results as a natural segue into your year-end fundraising efforts. When thanking your supporters, remind them that the new year is approaching and there's still time to make a final donation to help your nonprofit reach its goals for the year (and for donors to use as a charitable tax deduction.)

You'll want to introduce your year-end fundraising efforts when thanking your supporters for their contributions following a donation or other act of giving. Let them know in your messaging that the success of your GivingTuesday campaign has contributed greatly to your annual fundraising goals.

Provide your supporters with a campaign link that contains information about your year-end goals or a specific need you're looking to fill. Just as with your GivingTuesday campaign, make sure this one is also customized and branded to your cause and includes a compelling story that inspires action.

Nonprofit organizations of all types and sizes can use the urgency and community spirit of Giving Days to build their supporter lists, convert that support into donations, and ultimately raise more for their missions. Talk to us to learn more about how the Bonterra Giving Day solution can help you power your Giving Day.





Closing

The middle of the year is an ideal time to implement a new fundraising strategy (or three). Done right, any of these techniques—converting new donors from volunteer opportunities, assessing your donor file health, and building community around a Giving Day—can help you raise the funds you need to advance your mission at year-end and beyond.

Learn more about how these strategies can work together in a unified or highly-integrated CRM. Visit bonterratech.com to contact us or request a demo.