



Essential Practices for Annual Giving Programs

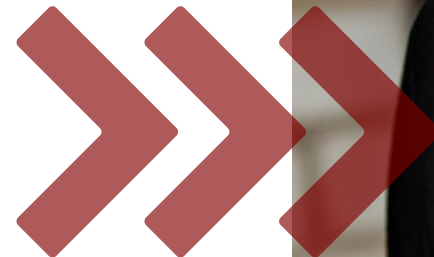
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President & CEO, Kennari Consulting



Introduction

Laura Kruisenga

President & CEO, Kennari Consulting



A vertical banner on the left side of the slide, featuring a grid of 12 small, faded portraits of diverse women smiling. Overlaid on this grid is the text 'About KENNARI CONSULTING' in white.

About KENNARI CONSULTING

Our Mission

To change the face of philanthropy, moving nonprofits of all sizes to greater capacity and meaningful impact within the communities they serve.

Services in:

- Campaign Consulting
- Grant Strategy Consulting
- Project/Program Development
- Annual Giving Consulting

Today, we'll discuss:

- Donor Segmentation
- Year End Appeals

...as a few essential components of a robust Annual Giving Program.

Segmentation

**Relationships are
mutually beneficial
and *always personal.***

Why Segment?

Increased donor engagement

Better understanding of your work, impact, and needs

Leads to higher fundraising results

Renews donors and helps fight lapsing



Let's Discuss:

What prevents you
from segmenting?



Common Barriers to Donor Segmentation:

Systems

Messy Data

Time



- Prioritize
- Make a plan
- Engage other people

**Start with
these steps:**

Groups to Segment

in order of priority

- Sponsors
- Major Individual Donors
- Monthly/Recurring Donors
- Event Donors
- Lapsed Donors

Sponsors

- Make specific asks, don't send general mailings
- Send individualized emails and hard copy
- Call ahead of sending solicitation or right after
- Prioritize in small groups: not more than 5-10 at a time



Major Individual Donors

- Donor/Household giving is \$500 or more in a year
- Individualized cultivation and solicitation plan
- Appeals should work into that plan and the timing the donor typically gives in
- Live signature, hand addressed enveloped, and personal note



Monthly/Recurring Donors



- Ask so recurring donors are ongoing until they say otherwise
- ALWAYS acknowledge their current giving before asking again
- Remind them of their impact
- After 12–18 months, ask for an increase
- Consider a “branded” monthly giving club/program



Event Donors

- Typically renew the way they come in
- Plant the seed ahead of the event
- Make sure they will attend
- If not attending, make a plan
- Do mission-centered events – and share updates throughout the year on what was shared at the event

Lapsed Donors

- First, prevent them from lapsing!
- Quickly try to recapture
- Definition: Gave in a time period and hasn't given at all in the following 12 months
- Be clear – “we miss you and hope you'll give again”





**Segmenting takes extra time,
increases data collection/tracking,
and generally costs more.**



Year End Appeals



It's important to plan ahead, because:

- **30% of annual giving** comes during year-end.
- The majority of year-end giving comes in the last three days of December, *and you need a multi-channel approach.*



Tasks

- Identify impact story, draft letter and remittance device
- Determine segments
- Schedule time for the board/committee to write personal notes on letters to people they know
- Send appeal in Oct/Nov (mail and email) and do follow ups in December
- Utilize holidays and Giving Tuesday as natural reminders
- Enter data quickly and get acknowledgments out within 48 hours





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Q & A

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