



*Strengthening charities and
congregations to change the
world through generosity.*

End of Year Giving

2020

Mike Ward, Partner

The Case

- How will a gift to your organization now make a difference for the Kingdom?
 - Make a case for why you need extra giving
 - Not the budget
- “When revenue exceeds expenses we will...”
 - Don’t reserve 100% of a surplus
 - Mike’s suggestion is to deploy 50% of a surplus this year and hold the other 50% until the end of Q2 2021, at which time a decision will be made

Who to Ask

- Segment 1—LYBUNTS/SYBUNTS
 - Key is to re-engage unengaged members due to pandemic
 - Last Year But Unfortunately Not This
 - 25-33% of donors from last year are currently non-renewed
 - Risk losing their involvement if not renewed financially as well

How to ask this group

- Targeted effort
 - Matching gift
 - Phone follow up
 - Letter (demonstrate outcomes)
 - Ask is for what they gave last year
 - Social Media
 - Be sure to give reply device and online option
 - Personalize—put a note on each letter if you can

Who to Ask

- Segment 2—Current donors
 - Ask for additional gift for a specific reason
 - If to help balance budget, still share what you will do with any leftover money at end of year—stay positive
 - Only ask after a leader announces that they will make an extra gift

How to ask Segment #2

- Generosity witness first
- Outcome stories embedded
- Ask happens in a personalized, mailed letter, but must be reinforced—ask for extra gift—be grateful for other generosity this year
 - Social media
 - Announcements
 - E-newsletter
 - Generosity stories

What to ask for

- Segment #1--LYBUNTS—renewal
 - Ask for what they gave last year
 - Personalize
 - Give reply device
- Segment #2--Current donors—extra gift
 - Give guidance
- Frame both asks in terms of “when revenue exceeds expenses, we will...”
 - Promise a project (council approval?)

Important factors

- 35% of giving in America happens from Thanksgiving day until the end of the year
- Ask should come in late November—first week of December is the latest you should start
- Cares Act--\$300 deduction is helpful, but not the lead
- Stock values are up, make sure you can receive these gifts