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insights, strategies, solutions

**Discover why you should START NOW to acquire your best prospects for your organization's year-end campaign.**



**February 16, 2022 | 11:00am – 12:00pm**

**Rachel Broom, MPA, Consultant at The Rome Group**

# YE Campaign Goals

It is not uncommon for nonprofits to raise most of their annual fundraising revenue during the fourth quarter at the end of the calendar year.

How do you compete with so many organizations asking for funds at the same time?

You start now.

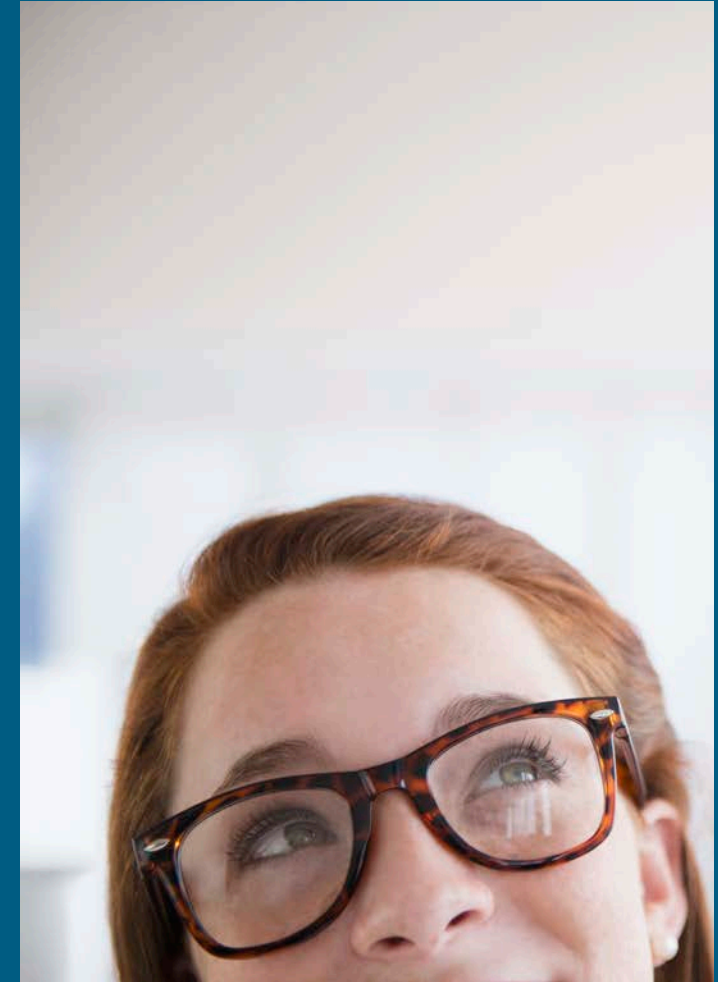


# Planning Successful Campaigns

You're probably thinking you need to finish the spring appeal and the gala sponsorship materials before you can even think about the YE Appeal.

I get it. But if you do just a handful of activities now, **YOU WILL** set the organization up for success.

You will see a much larger audience participating and realize higher revenues.





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## **What Activities Need To Be Started Now?**

1. Start Acquisition Strategies
2. Find Target Audiences
3. Prioritize Your Web Presence
4. Identify a Case for Support & Theme

# 1

## Start Your Acquisition Strategies

- You need to find people that have shown an interest in your mission especially over the past year.
- Much easier to get positive results from audiences that already believe the work you're doing is meaningful.
- Yet often we spend too much of our **TIME** and **MONEY** appealing to audiences that need to be convinced to love the mission and donate.
- Attract like-minded people and look-a-like audiences.



# 2 Find Your Target Audiences

YE Appeal target audiences most often include:

1. Current Donors,
2. Lapsed Donors, and
3. Prospects





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## How do you find organic prospects?

1. Start by looking for people that have an affinity for your work.
2. Does your nonprofit have processes in place to acquire new audiences?
3. If not, add them now giving you more time to increase your prospect pool before year-end.

# Internal Practices for Best Prospects

- Find out if your team members are collecting valuable information from the public and make sure all the different organizational components are interfacing smoothly.
- You need to make sure you have processes in place now, so your prospect pool is not only larger, but the pool is filled with the best prospects possible.
- You want to collect names, addresses, and emails and make sure the participants are “opting in” to receive information from the organization throughout the year.
- You also want to collect how the person expressed an interest in your mission so you can segment them into appropriate audiences



# Prospect Mining Practices

## Talk to your team members:

- Meet with the ticket sales representative.
- Museums with a membership program.
- Does your gift shop collect emails to announce sales and promotions?
- Do you host webinars, give live demonstrations or lectures?
- Do you host donation drives?
- Are you at a social justice nonprofit collecting signatures for petitions?

“The fortune is in the follow-up”.



- Jim Rohn

## Seek Out Referrals

- Ask a board member or volunteer to host a cocktail event now to introduce your mission to like donors.
- Host a walk, an open house event, a social “happy hour” asking your donor base to refer their friends.
- Remember the gala you are currently working on? Make sure you collect and utilize new guests that your current donors have invited.

# 3

## Prioritize Your Web Presence

1. Spotlight YE campaign on front page
2. Create a campaign landing page



This Photo by Unknown Author is licensed under [CC BY](#)

3. Make it easy for donors to learn more and donate
4. Use it to collect prospect information



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# Did You Know?

**90%** of interested people will visit a website before calling

**96%+** will leave the website without taking action

# Prioritize Your Web Presence

**Make your organization's web presence a priority and put a free widget on your website now.**

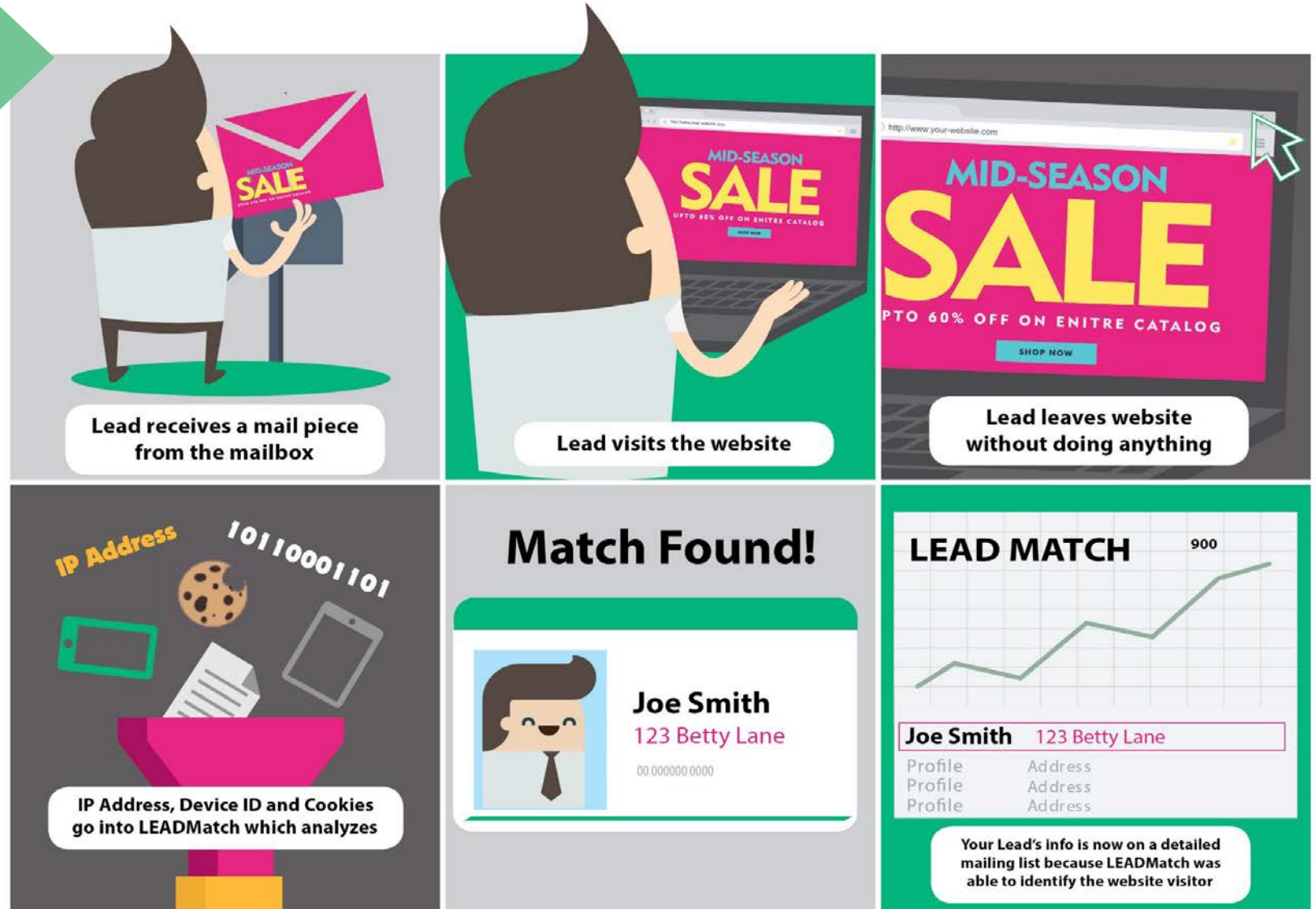
- A widget is a web application that is embedded as an element of a host web page
- Widget management systems offer a method of managing widgets that works on any web page

# LEADMATCH

Mail your YE Appeal to unique visitors who came to your website who weren't on your mailing list.

Get a list of who came to your website from the mailing list and what actions they took.

In addition, LEADMatch gives you the opportunity to mail to website visitors who came not as result of your mailing.



# ONLINE FOLLOW-UP

- Website visitors who are retargeted with display ads are 70% more likely to convert on your website
- With retargeting, the percentage of users who return and complete conversion process increases to 26%
- In one study, retargeted ads led to a 726% lift in site visitation after four weeks of retargeted ad exposure

**REMEMBER: 96% of visitors LEAVE without TAKING ACTION**



# DirectCONNECT

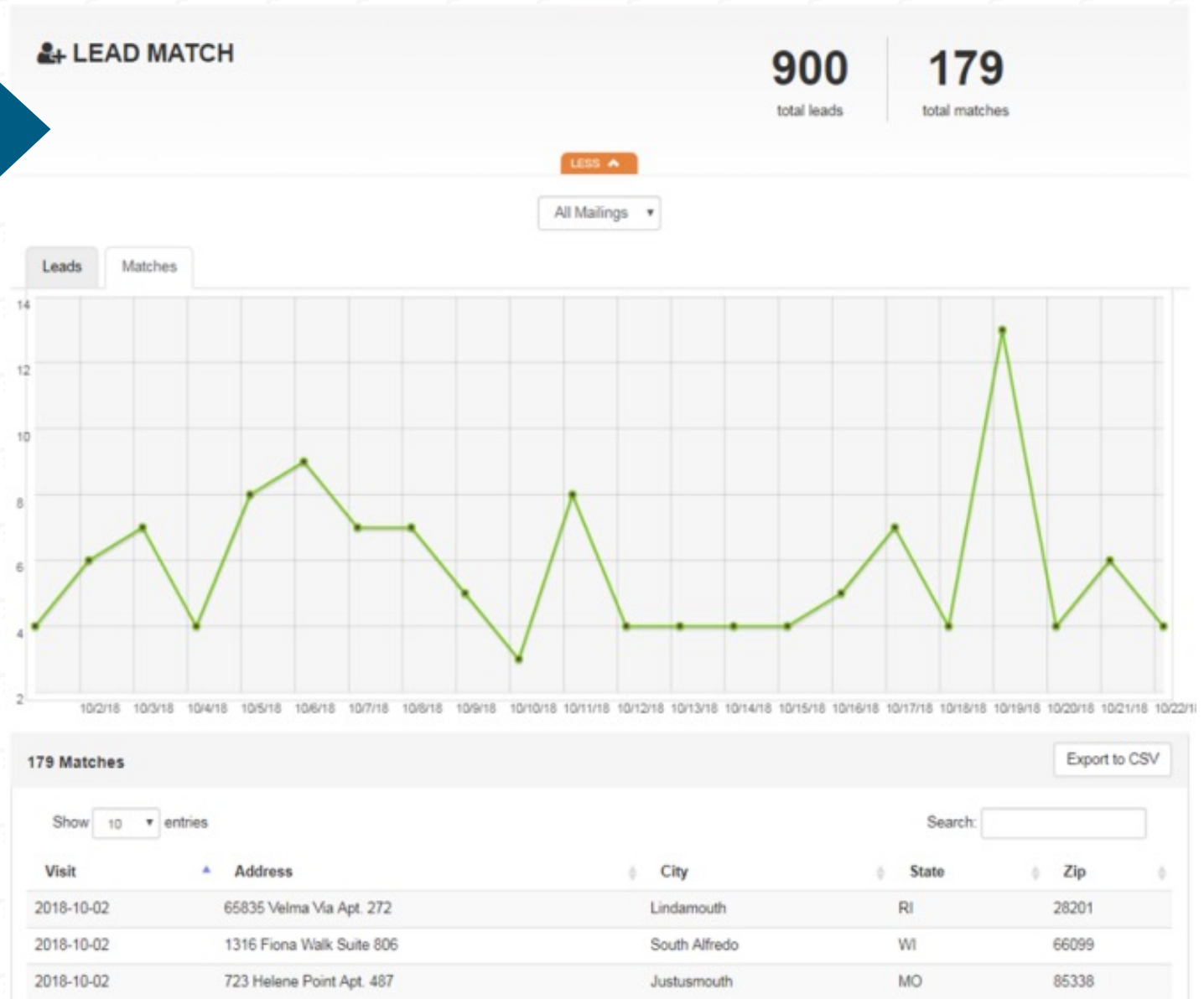


DirectCONNECT is a marketing-based solution that is designed to track the effectiveness of your direct mail campaign while enhancing results through the integration of digital platforms like Google, Facebook and Instagram.



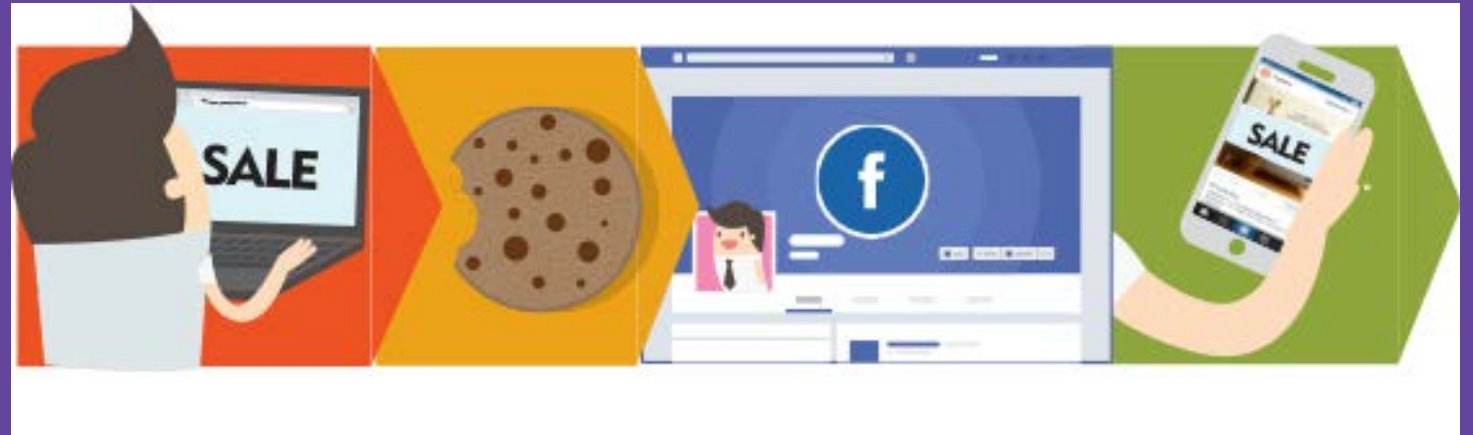
# What You See on Your Dashboard

- The total number of visitors who came to your website and were matched back to a postal address (75% on average)
- The number of visitors that came to your website who were also on your mailing list
- What actions did website visitors take on your website so that you can tailor your message to them based on their actions



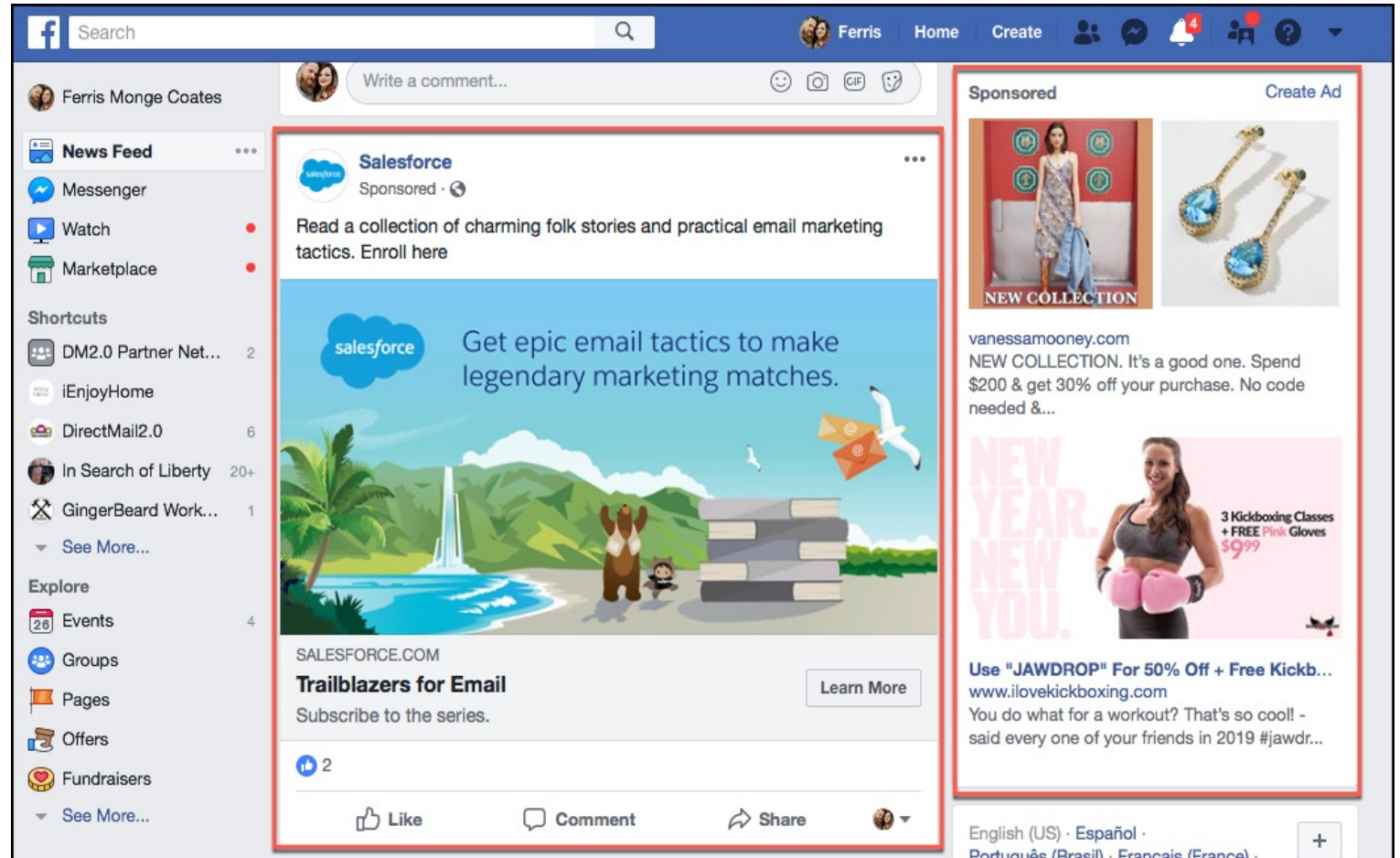
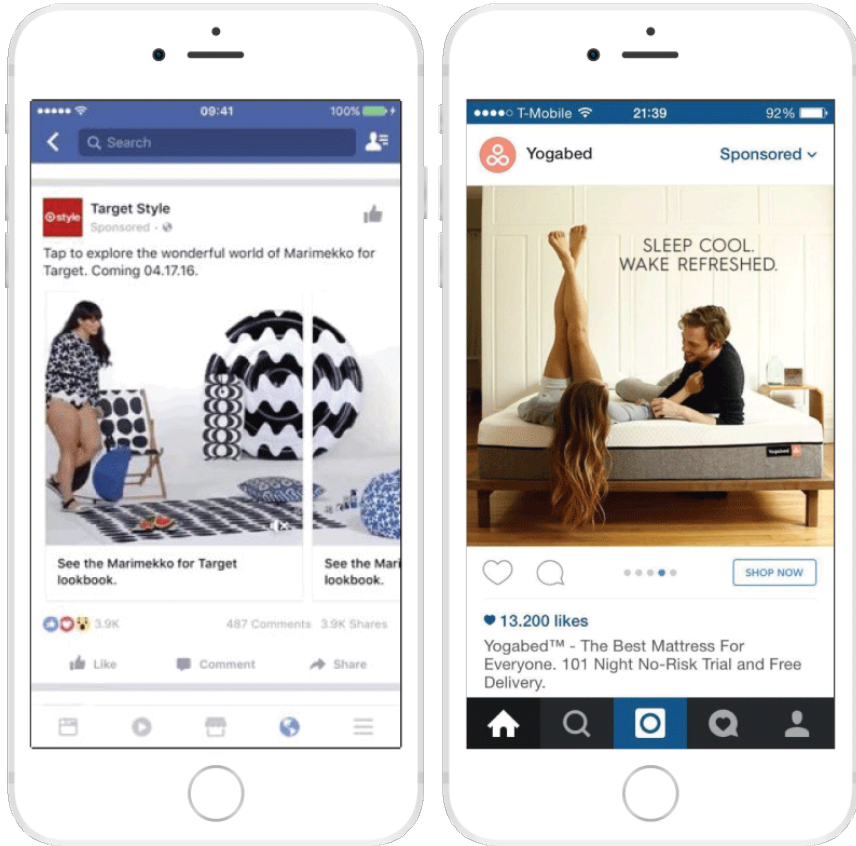
# SOCIAL MEDIA FOLLOW-UP

- Website visitors will receive a cookie on their Facebook and Instagram profile
- Prospects will see your ad on their newsfeed on any device once logged-in
- Re-engage website visitors by reaching them with multiple impressions on their Facebook & Instagram newsfeeds



# Social Media

Unique visitors that are identified as social media users can be retargeted on their social media newsfeeds



# 2019 HOLIDAY APPEAL

Total Pieces: 6,074

Last Mail Date: 12/4/19

Call Tracking Numbers: 0

Follow-Up Ads: 1



Total Ad Displays

169,734

Engagements

751

Total Visitors

590

Total Leads

835

Lead Matches

29

“We are seeing a 30.5% increase in overall gifts for our year-end. This includes people that gave through mail and online. We saw people donating earlier in December after seeing the ads running. We have also been utilizing the data from the dashboard to see how we can adjust our mailed appeals moving forward. All in all... we love the data!”

- **Lacie Jett-Ricketts, Wildlife Rescue Center**

# Case Study: Higher Education

- Mid-sized university in the Midwest was experiencing lower enrollment, fewer prospects, and less onsite visitors
- Their challenge was to increase “on-line campus visit engagement” through direct mail and grow enrollment
- They did two mailings, incorporated and used all of DirectConnect’s technologies including LEADmatch
- The LEADmatch list was segmented into website visitors from a mailing and those that did not
- Used retargeting strategy with ads
- They exceeded their goals!

## RESULTS:

- 14% increase in target audience
- 12% increase in applications received
- 22% increase in student admission to completed applications
- 53% increase in total deposits
- 20% increase in website views
- 25% response rate from Direct Mail retargeting to LeadMatch leads



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**4**

**Start developing a case for support and a theme for your YE Appeal Campaign**

# Identify a Case for Support and Theme

Brainstorm ideas throughout the year. Are new initiatives being launched?

Do you have a major donor or several major donors willing to let you leverage their generosity to encourage others to give? See if you can incorporate a match.

Why are you asking for money? What will your nonprofit do with the money?  
How much needs to be raised?

# Campaign Videos





# Use Compelling Copy in Your Appeal

## **Becoming a parent is life changing.**

It's joyful and messy, inspiring, and humbling.

It often challenges us to re-examine our own upbringing, see things differently, and do better.

Who we become as parents impacts who our children will be.

Maybe you, like us, grew up in a household where race wasn't talked about. The trouble is, if we're not comfortable talking about racial equity and the challenges facing our city our children won't be either.

That's why **We Stories** exists.

We Stories uses the power of children's literature to create conversation, change, and hope in St. Louis.

## **Every page turned, every discussion, every action taken adds up to something more: a growing commitment to change.**

But there is more to do. We must continue to scale our work, so we can achieve the kind of transformational change St. Louis needs. We must reach more families with our Family Learning Program AND provide them with more resources.

We need partners like YOU to invest in *We Stories*. <<**personalized sentences**>> Your support will make St. Louis stronger, more equitable and inclusive for all.

Sincerely,  
Executive Director

PS: Any gift made between now and December 31, 2018, **will be matched dollar for dollar up to \$15,000!**

# Show Your Theme in the Appeal Letter



## OUR MISSION:

Inspired by the intelligence and emotional wisdom of young people, we create professional theater, foster inclusive community, and nurture meaningful learning through the arts.



Thank you metro for doing the play I loved it and it was so interesting and when got in a argument I will know what to do!   
-Paliyah  
-Metro theater.



## DEAR (SALUTATION),

"Inspirational, thought-provoking, joyful, fun" are words young audiences used to describe MTC's 2021 productions. As a streaming or live audience member over the last several years, you have played an important role in providing that gift of theater to more than 2 million young people over MTC's history. We hope this holiday season you may be inspired to make a donation to help us further that impact in the year to come.

In 2021, Metro Theater Company worked to ensure every child in the St. Louis community had access to the transformational power of theater through:

- **Innovating new ways** to bring theater into classrooms and to families with hybrid streaming, in-person, and even animated events, adopting COVID-safe protocols, and utilizing outdoor spaces.
- **New collaborations** with such partners as AARP, to connect families across generations nationwide, and Head Start, to bring bilingual theater to our region's youngest audiences.
- New **"Pay What You Can"** ticketing for live and streaming performances, and a continued commitment to producing **stories that reflect the daily, lived experiences of young people** in our region.

Almost two-thirds of our budget each season is funded by generous supporters, who like you began as audience members.

We imagine you share our passion for meaningful learning through art. (NAME), this holiday season, **would you consider making a one-time gift or recurring monthly gift to help ensure that more and more young people can continue to experience the impact of theater?**

Your tax-deductible gift helps transform our community and build the creative potential of our young people, an urgent need now as they emerge from the pandemic to face critical learning and interpersonal deficits. A gift of any amount makes a meaningful impact as we end this year. Thank you.

Sincerely,

JULIA FLOOD JOE GFALLER

Metro Theater Company | 3311 Washington Avenue St. Louis, MO 63103 | [www.metroplays.org](http://www.metroplays.org)



Since the pandemic began, MTC has streamed performances and arts integrated curriculum to audiences from 42 states and as far away as Singapore, Brazil, Italy, Japan, and Australia. As live performances resume, we continue our commitment to streaming, to break down geographic barriers wherever young people may be.

With *The Very Hungry Caterpillar Show*, MTC offered the first full run of a professional production for live audiences in the St. Louis region in 2021. Over 5,000 saw the production outdoors or streaming during its extended run.

MTC's animated streaming production of *Jacked!* provided a resource for families and classrooms to discuss substance use issues in a safe, age-appropriate environment. It continues to be booked for schools nationwide.

After extraordinary audience response last year, MTC's all-St. Louis reading of *A Christmas Carol* returns live Dec. 7, with streaming beginning Dec. 18, featuring such beloved St. Louisians as Ellie Kemper and Ken Page.

MTC partnered with 40 theaters nationwide to co-commission *A Kids' Play About Racism*, which was viewed by 75,000 people in a single week.

Featured Photos: *Digging Up Dessa*, *Say Something, Do Something*, *The Very Hungry Caterpillar Show*/*La Oruga Muy Hambrienta Espectáculo*, *Jacked!*, and *A Christmas Carol*. Photos by Jennifer A. Lin. Animated still art of *Jacked!* by Nick Kryah.

# Use Appeal Themes In All Campaign Materials



3311 Washington Avenue  
St. Louis, MO 63103

Any gift, any amount, helps others to  
**IMAGINE, REACH, & INSPIRE.**



## IMAGINE - REACH - INSPIRE

Help provide the experience of live theater and  
provide arts integration in classrooms.



Because of you,  
funding is never a  
barrier for a child.

**GIVING  
TUESDAY**

**Donate Today!**

## Website Landing Page



Double My Donation

Raised so far **\$1,008,599.00** Fundraising goal **\$1,000,000.00**

\$0.00 \$500,000 \$1,000,000.00


### Donation

\$25	<b>\$50</b>	\$75	\$100	\$500	\$1,000
\$2,500	\$5,000	\$10,000	\$25,000		
Other					


Create YE campaign landing page on your website:

- Include campaign theme
- Use same pictures and video featured in campaign materials
- Add campaign copy
- Use a donation thermometer to show campaign progress
- Feature a Donate Now button

# Social Collaterals



**SAVE SPECIES WITH US**



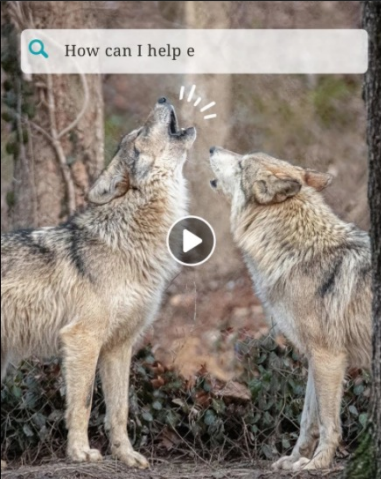
**DOUBLE MY DONATION**

For "top dogs" in the wild with entire ecosystems resting on their shoulders, there is no time to waste. Your matched donation will support our mission of recovery, reintroduction, and education. Here's how:

- Save Endangered Species
- Inspire Action through Education
- Community-Based Conservation Initiatives
- Carry on our Wildlife Hero Legacy

Now that's something to howl about! Donate today to double your impact for endangered wolves.


How can I help e



ENDANGEREDWOLFCENTER.ORG  
There is no time to waste - wolves need your support. [Learn more](#)





**\$1 MILLION FOR WOLVES CHALLENGE** **UPDATE!**

**Endangered Wolf Center**  
Published by AdEspresso · December 6 at 3:49 PM


We're raising \$1 million for wolves - Join Us!

As "top dogs" in the wild with entire ecosystems resting on their shoulders, there is no time to waste. Your matched donation will support our mission of recovery, reintroduction, and education. Here's how...



**1**

**Save Endangered Species**  
Rewild wolves. [Learn more](#)



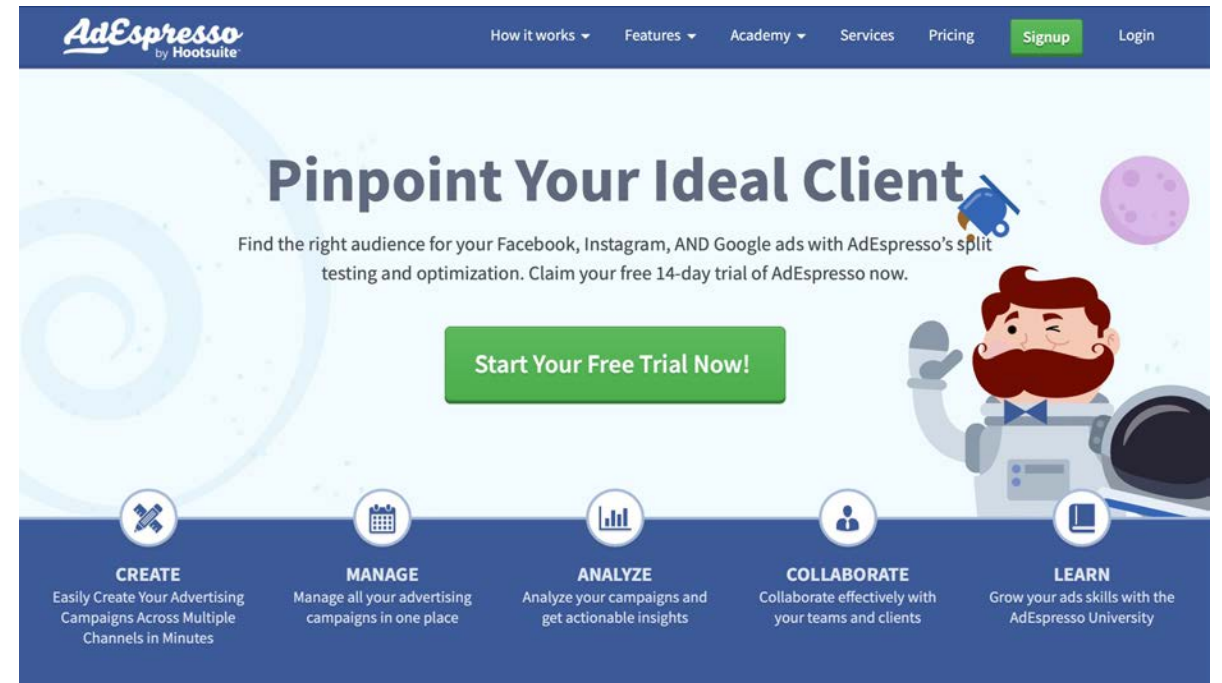
**2**

**Inspire Action through Education**  
Teach future conservati... [Learn more](#)

558 24 Comments 65 Shares

# Social Media Advertising Tools

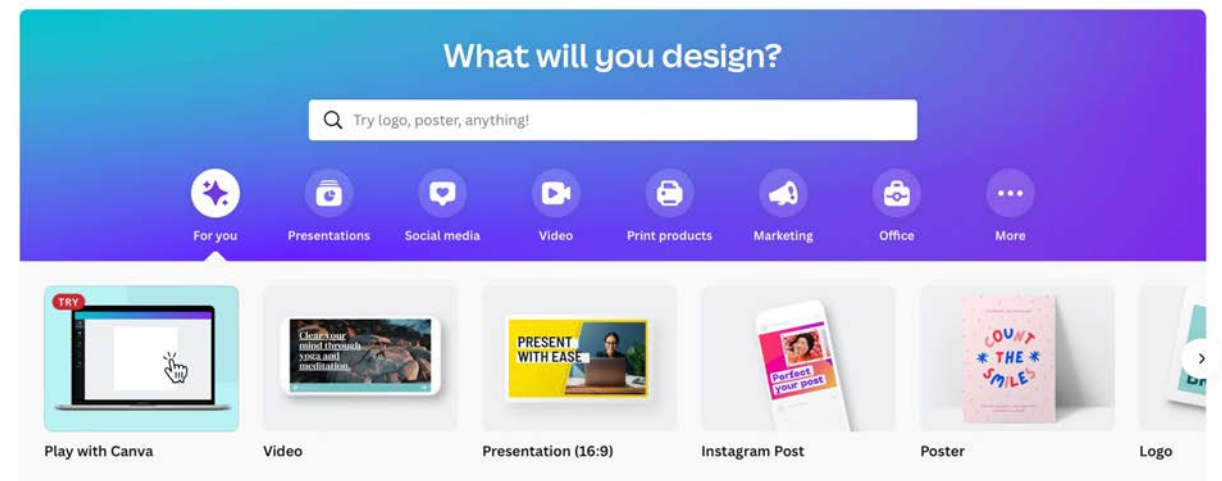
- AdEspresso
  - Manages your advertising campaigns across multiple channels
  - Analytics included
  - A/B testing seeing
- Facebook Custom Audiences
- Canva
  - Graphic designs
- Buffer, Hootsuite
  - A social media scheduling tool
- Trello
  - Project management



The screenshot shows the AdEspresso website. At the top, the logo 'AdEspresso by Hootsuite' is on the left, and navigation links for 'How it works', 'Features', 'Academy', 'Services', 'Pricing', 'Signup', and 'Login' are on the right. The main headline is 'Pinpoint Your Ideal Client' with a sub-headline: 'Find the right audience for your Facebook, Instagram, AND Google ads with AdEspresso's split testing and optimization. Claim your free 14-day trial of AdEspresso now.' A prominent green button says 'Start Your Free Trial Now!'. Below this is a row of five icons representing the tool's features: 'CREATE' (Easily Create Your Advertising Campaigns Across Multiple Channels in Minutes), 'MANAGE' (Manage all your advertising campaigns in one place), 'ANALYZE' (Analyze your campaigns and get actionable insights), 'COLLABORATE' (Collaborate effectively with your teams and clients), and 'LEARN' (Grow your ads skills with the AdEspresso University). An illustration of a bearded man in a space suit is on the right side of the page.



The screenshot shows the Canva website navigation bar. It includes the 'Canva' logo, followed by links for 'Home', 'Design', 'Templates', 'Features', 'Learn', and 'Plans'. On the right side, there are links for 'Log in' and 'Sign up'.



The screenshot shows the Canva website's design options. The main heading is 'What will you design?' with a search bar below it containing the text 'Try logo, poster, anything!'. Below the search bar is a row of icons for different design categories: 'For you', 'Presentations', 'Social media', 'Video', 'Print products', 'Marketing', 'Office', and 'More'. Below these icons is a row of design templates: 'Play with Canva', 'Video', 'Presentation (16:9)', 'Instagram Post', 'Poster', and 'Logo'. Each template has a small preview image and a label below it.

# Campaign Videos



# Recap of YE Campaign Activities to Start Now

1. Start Acquisition Strategies
2. Find Target Audiences
3. Prioritize Your Web Presence
4. Identify a Case for Support & Theme







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**“A little progress each day  
adds up to BIG RESULTS”**

**–Satya Nani**

# Resources






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| 2116 Schuetz Rd., St. Louis, MO 63146  
| [allegramarketingprint.com](http://allegramarketingprint.com)



## Victoria Ziglar

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## THE ROME GROUP

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### Our Vision

Stronger nonprofits. Stronger communities.

### Our Mission

Strengthen the nonprofits that strengthen our community.

### Our Core Beliefs

- **Mission** drives decisions and actions
- **Data** should always inform insights
- **Experience** makes a difference
- Nonprofits deserve nonprofit **specialists**
- **Relationships** are everything

Please let us know if you need relevant and meaningful insights and strategies to assist you.