

## Get Ready to Ask for Year End Gifts for your Historic Site

By Donna Ann Harris

I have been teaching and writing about yearend gifts for about ten years now and believe that they are an excellent way for your most ardent supporters to support your history organization, since they are already primed to be generous to their favorite charities during the holiday season.

### Why do it?

According to Network for Good, thirty percent (30%) of all donations happen in December, and ten percent (10%) of all giving happens during the last three days of the year. Given these **facts and others**, you should be planning a fundraising campaign during the six weeks of the year-- between Thanksgiving and New Year's Eve.

### Set a stretch goal

While these gifts are motivated by the end of year tax deadline (December 31), donations from your supporters can be extraordinarily powerful for your public history organization if you create a reasonable but stretch goal for your campaign. Pick both a monetary goal (say \$5,000 to \$15,000) for your year end appeal, as well as a number of contributor's goal (say 50 to 125 donations) to motivate board members and volunteers to successfully implement this campaign.

### When to begin

The most effective year end appeal starts the week before Thanksgiving and ends on New Year's Eve. You will raise more money if you use more than one solicitation channel—direct mail, email, personal visit, Facebook page etc., so consider sending two direct mail letters and ten email solicitations on specific dates to create urgency. Also include personal visits to your top contributors this year. **We have created a calendar to help you schedule these mailings and meetings.** You will need to support this effort with a traditional public relations blitz to reinforce the messages of the campaign—the great work that your historic sites does for your community,

### Gathering stories to tell

To get ready to conduct a year end appeal, you will need to identify ten different stories that you will use in your letters and emails to your supporters over six weeks. These stories should brag about your organization's successes during the last year. Here are some story ideas:

1. Report about the importance of your educational programming, tours, school programs or hands on educational activities. Don't forget the photographs of happy people at your educational events.
2. Write about a new member or board member and why they decided to join and what their particular interests are at your site or organization. . Include a photo of the person.
3. Talk about a family in town enjoying your biggest event from last year and include several photos of them having fun.
4. Create some infographics about the increase in attendance, donations, or school kids that use your site, and use the charts and graphs or photos to illustrate this story.
5. Chronicle a fruitful partnership you have with another nonprofit organization in town accompanied by some photos and what your partnership means to both organizations.
6. Write about a specific object in the collection and the story it tells about the house or the community and what it is important that is part of your archive or on exhibit. Include photos.
7. Report on a beloved former member who dedicated countless hours to your organization in the past, especially note if they included your organization in their estate plans.
8. Show pictures of recent renovations and restoration of your site or the grounds. Show people how well you maintain your property and what else you could do with their support. Include some quotes from Board members about the importance of maintenance.
9. Recount your most impressive project this year, to show the impact of your organization on the community. Tell your supporters why their gift matters to your organization and what you will do with increased support as a result of the year end appeal.
10. Tell about the anticipated projects for the coming year to show that preservation work is never done!

Focus on people that you assist: the schools that visit, other charities you partner with, a members at an educational event, or other community inspired activity. . Make sure all the photos have people on the house, on the grounds, or admiring the new restored buildings. Include quotes, testimonials, statistics, commendations, awards and other positive news about your work in these ten stories. Tug at the heartstrings.

Use these several of these stories and photographs/infographics in your two, two to four-page direct mail appeal letters. **Here is an outline for your direct mail letter.** For the ten email blasts, focus on one story per email. The email stories don't have to be long, about two or three

paragraphs each. Here are some suggested **email subject lines** for the last week of the year emails. In both your direct mail letters and in each email solicitation, please be clear about why your organization is making a difference in the community in the final paragraph. Finally, ask your supporters to make a gift before the December 31 deadline.

### **Start planning now**

Spend the next several weeks dealing with the mechanics of the campaign to make it easier. Here is your task list.

- Talk to your postmaster about when to send your direct mail letters to reach your supporters before Thanksgiving if you use bulk mail.
- Get estimates from your mailing house for the cost for direct mail letters.
- Work with a designer on your reply envelope and design your direct mail letters. They don't have to look like letters if they include photos and graphics, but they should be mail merged and personalized if at all possible.
- Set dates for "signing parties" to include hand written notes on direct mail letters.
- Test your Donate Now button on your web site to make sure it works flawlessly
- Automate and add an immediate and heartfelt thank you message if someone donates through your web site. Use the same language for paper thank you letters to everyone,
- Review your email and mailing lists, clean them up, and have a volunteer add new email addresses to your database.
- Collect ideas for 10 stories that you can use for your emails, gather photos and statistics.

### **Dealing with donors**

Your Board members will be making personal visits to your top contributors (donors are people who gave over \$250 this year) as part of this campaign. To assure that these donors are not solicited through an email, make sure you remove their names and email addresses from the data bases you will use for this campaign. Don't wait, do this now,

Right after Thanksgiving make appointments with your donors. You know all of these people very well, because they are key sponsors, long time members, board members, prominent folks in town. Ask for a meeting with all of your donors to ask them to give to this campaign. Your donors have invested heavily in your organization in the past, and they deserve a personal visit to discuss your year end appeal.

### **Challenge gifts**

Challenge gifts are a highly effective way to create urgency for a year end campaign. Work with your board members to bundle their year-end gifts together to create a challenge grant. Market this during the last week of the campaign. Say "Our Board Members will match your gift to our year end campaign up to X dollars, if you donate before midnight on December 31." A

challenge grant may encourage more people to contribute to your campaign to get you close or over your goal.

### **Thank you!**

Finally, write a sincere thank you letter now, so you have it ready for the checks and online donations when they come. Anyone that gave to this campaign should get a paper thank you letter, an email thank you if they gave on line, and be listed in some kind of wrap up report that you post on line or in your next newsletter thanking everyone again, for their support,

### **Tell us how it went!**

I hope you will consider asking for year end gifts from your supporters this year, especially if you have never done it in the past. Good luck! Please email me [donna@heritageconsultinginc.com](mailto:donna@heritageconsultinginc.com) and tell me how your campaign worked!

### **About the author**

Donna Ann Harris is the principal of Heritage Consulting Inc., a Philadelphia-based consulting firm that works nationwide in downtown and commercial district revitalization, historic preservation and nonprofit organizational development. Prior to starting her consulting firm fourteen years ago, Ms. Harris worked for the Illinois Main Street program, and as an executive director for statewide and local preservation organizations. Her 2007 book *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*, has been the bestselling work in the American Association for State and Local History publication series since its publication. She is at work on a second edition now. Contact her at [donna@heritageconsultinginc.com](mailto:donna@heritageconsultinginc.com).

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