

Overflow

How to promote non-cash giving with

# Data-Driven Fundraising

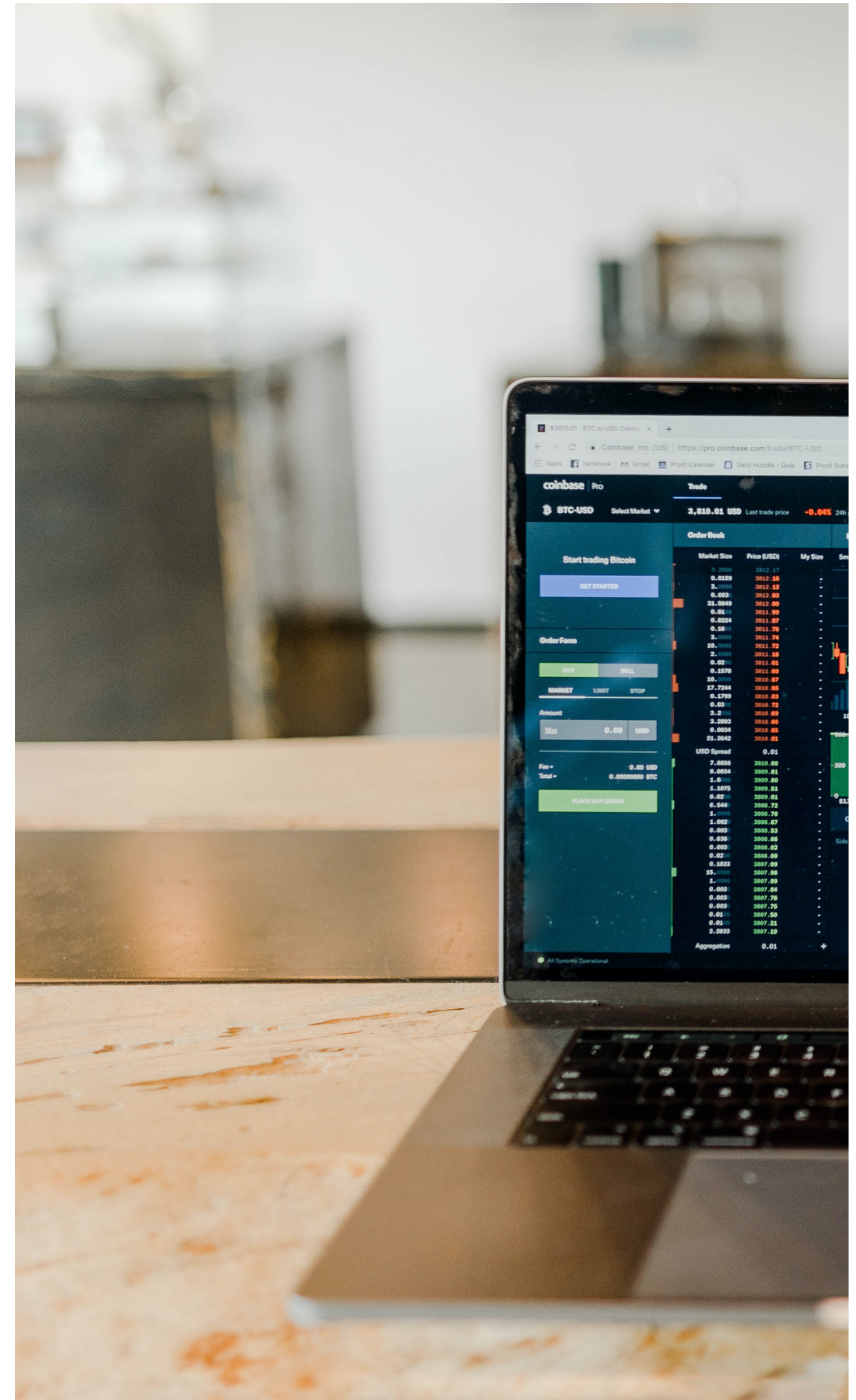
[overflow.co](https://overflow.co)

#1

# Game Plan Purpose

The goal

Use the donor data already available to you to make strategic fundraising decisions.





#2

# Additional Outcomes

From data-driven decisions

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Increase donor engagement and satisfaction \_\_  
Establish your organization as a fundraising leader  
in the industry \_\_ Raise more consistent and  
higher value donations throughout the year (not  
just in December!) \_\_ Develop a fundraising  
roadmap to use year after year.





#3

# What do you mean by "data-driven"?

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Many fundraising decisions are made based on what has worked in the past. But the generosity landscape has changed, and your organization needs to evolve with it. By leveraging the treasure trove of valuable donor information already available, you can design fundraising strategies that will actually move the needle. This game plan will walk you through which data matters, where to find it, and how to use it to increase fundraising revenue.





#4

# How

Using this game plan

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This game plan has two specific tools you can use to champion data-driven fundraising at your organization; analyzing when your donors' employee stock can be traded (and donated!) and how to reach out through text message to encourage stock donations at that time. . We hope these tools will serve as a jumping-off point for your organization to develop other strategies specific to your fundraising needs.



# TOOL <sup>#1</sup>

# Donation Match Data

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With Overflow's Workplace Employer Match feature, you have incredible information about your donors: where they are employed! Why does this matter? Because through Overflow you have the ability to accept employee stock, meaning shares that are paid out to employees as part of their compensation or bonus package. Employees receiving these shares often don't know what to do with them, and they definitely have an overflow of resources they could use to be generous to your organization.

By leveraging the workplace information you receive from Overflow when donors choose to match their donation, you can build relationships with your donors through relevancy. Relevant communication is a message that is delivered at the right time, with the right content, to the right person. For tech employees, this means asking for a donation from their stock portfolio exactly when they are able to donate those shares. Follow the worksheet below to find out how to do this well.

# TOOL # 1: HOW TO USE THE DATA IN YOUR DONATION MATCH PLATFORM

one	Review all the communications from Overflow regarding which donors have requested a match from their employer. These emails tell you where your donors are employed - and therefore the type of shares they most likely own in their stock portfolios.
two	Based on the list you compiled above, research when each company will have its upcoming earnings call. You can easily find this information by searching online with the term "next earnings release" for that particular company.
three	Create an excel document to track when each donor's company trading windows will most likely open. (See example below). Although not public information, typically company trading windows open a couple of days after the company's earnings call, and will stay open for about a month or so after that. A "trading window" is the time during which employees can sell (or donate!) their employee stock. Employee stock is more restricted than publicly-traded stock and therefore your donors can't always freely donate their shares to your organization.
four	Now that you know exactly when a donor that works for a particular company can donate their stock, you can reach out with an extremely relevant message! Use Tool #2 to design a communication strategy armed with this information.

## EXAMPLE EXCEL WORKSHEET

## YOUR TURN

COMPANY	DONOR NAME	EARNINGS CALL DATE	ESTIMATED TRADING WINDOW	BEST OUTREACH DATE	OUTREACH COMPLETE?



# TOOL #2

# TEXT ENGAGEMENT

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To sustain growth, nonprofit organizations must focus on engaging donors more efficiently. The data-driven approach outlined in tool #1 is the first step to crafting engaging and efficient donor communications. The next step is to decide which communication channels to leverage to get your message out. One medium you may not have considered but is highly effective is text messaging. Fundraising via text allows you to send custom messages to all of your donors at once at a low cost. Not only does texting have a 98% open rate, but it also has a 209% higher response rate than phone, email, or social media! Many nonprofits use texting to reach their audience for several reasons<sup>1</sup>:

- Share helpful resources and information
- Coordinate and recruit volunteers
- Reduce pledge defaults with automated reminders
- Cultivate relationships with top tier donors
- and of course, share donation appeals and updates!

Use the templates and tips below to deliver a powerful message via text and encourage your donors to give via stock right when their trading window opens.

<sup>1</sup> tech jury- <https://techjury.net/blog/sms-marketing-statistics/>

## TOOL #2: TEXTING ENGAGEMENT - EXAMPLES

<b>One-to-Many</b>	<ul style="list-style-type: none"><li>• Thank you for your continued support. (organization) can now accept stock and crypto donations! (hyperlink to giving page)</li><li>• Did you know that donating stock or crypto is the most tax-efficient way to donate? More info here (link to FAQ page)</li><li>• Thank you so much for supporting [event]! Together, we managed to reach [milestone]. Together we can do even more good with your stock donations!</li><li>• Thanks to your support, we managed to pass [milestone]. However, thousands of children/animal/women still need your help. Please continue to help us by making another contribution, by or sharing this with your friends: [website].</li></ul>
<b>One-to-One</b>	<ul style="list-style-type: none"><li>• Hey [name], Thank you for joining our [event] today. If you'd like to learn more about donating stock and its tax benefits please visit (link to website)</li><li>• Hi [DONOR NAME], it's [YOUR NAME] with [ORG]. As one of our most loyal supporters, I want to thank you for your continued generosity. I'd love to learn more about you and your dedication to our mission. Would you have time to grab a quick virtual coffee this week?</li><li>• Hi [DONOR NAME], it's [YOUR NAME] with [ORG]. I want to thank you for your recent gift of [AMOUNT / GIFT TYPE]. I thought of you this morning after another donor from California made a similar gift, but in stock. She was surprised to learn that she'd save up to 20% on taxes by giving this way, and thought you'd be interested in learning about this as well. Are you free Thursday for a quick call?</li><li>• Hi [DONOR NAME], it's [YOUR NAME] with [ORG]. Thank you for always offering a helping hand in our volunteer efforts. Many of our loyal supporters, like you, have chosen to donate via stock and crypto. I thought you might be interested in learning about how you can make a larger impact with this type of gift. Would you have time to hop on a call this Thursday?</li></ul>



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## TOOL #2: TEXTING ENGAGEMENT - PRO TIPS

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**Pro Tips**

**Make an Impact**

Share with your supporters the purpose of this text message and your desire to be their philanthropic partner. Focus on the first important "Why?": Why should the donor give to your organization? What is your need? Why does their philanthropy matter?

**Keep it Clear**

A clear call to action (CTA) in every text message is imperative. Your donors and subscribers should always know what you are asking of them.

**Keep it Simple**

Simplicity is key. Subscribers and donors prefer short, easy-to-digest texts instead of novels. To achieve quick responses, your goal should be to send skimmable text messages.

**Keep It Personal**

Those who donate to nonprofit organizations want to feel connected to the causes they care about. Make sure that your message is personal as that is much more likely to catch a donor's attention.

**Add a Visual**

With MMS messaging you can include eye-catching content like images, GIFs, and videos to create more engaging and attractive messages. They're also extremely effective at getting your subscribers/donors to remember what you said. When you read or hear information, you only remember 10% of it three days later. But if you add an image or a video, your donors will remember 65% of it.

**NOW GO OUT AND INSPIRE  
THE WORLD TO GIVE!**

**Overflow**