The Ultimate Year-End Fundraising *Checklist*

Nonprofit Library

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Inside Look...

This guide will cover the following topics:

Welcome!

Savvy nonprofit professionals know that as the end of the year winds down, donations go up — *way* up. Raising spirits while lowering taxes, year-end giving inspires donors to give to your campaign — more than a quarter of nonprofits raise close to half their annual funds in year-end campaigns, a little over 10 percent of that occurring in just *the last three days of the year.* With our Ultimate Year-End Fundraising Checklist, you'll be well on your way to a Happy New Year with a boost in your bottom-line worth breaking out the bubbly for.

01. Get Pumped!

Jumpstart your year-end fundraising checklist by first setting your goals. It may seem obvious — or maybe not! — but before you can realize your goals, you have to know what they are. Goals should be both clear and measurable, so you can track your progress and adjust your strategy when needed. Maybe it's to achieve a certain number of new donors or members or raise a certain amount of funds. Whatever it is, be specific and make it the cornerstone of your campaign.

Now that you know the "What," you need to know "Who," as in which donors to target. To identify your donors, you'll need an up-to-date database showing who has given what gifts and when. Does someone contribute to only significant events, or regularly throughout the year? Are they major givers? Maybe they gave last year but unfortunately not this year (LYBUNTs).

When you know who and how much, you can segment your donors into categories and target them with specific appeals.

YOUR PLANNING PUNCH LIST SHOULD ALSO INCLUDE:

- Inspiring your donors with personal, compelling stories;
- Drafting phone scrpts, emails and letters; and
- Updating your forms, website and social media

A word about drafting campaign materials: Is your writing specific and personal? Is it clear, genuine, and grammatically correct? Is it inviting and easy to read? Take your message to the next level with this guide.

02. Your Fundraising Checklist All-Stars

A year-end campaign doesn't run itself! So you will need to get your people on board to ensure everything runs smoothly.

MOBILIZE YOUR STAFF:

Communicate your fundraising checklist goals to staff and make sure your team is available for extra year-end tasks. This includes tasks such as sending engaging mailings and emails, ramping up your social media posts, and launching new website materials, like banners, lightboxes, and compelling content.

ENLIST VOLUNTEERS:

In addition to staff, now is the time to reach out to your volunteers. The holidays can provide an excellent opportunity for the whole family to get involved in fundraising activities that make them feel good and can help your organization take advantage of year-end generosity.

Volunteers can hold potluck events or an open house to bring awareness to your nonprofit and get everyone involved in a personal way that makes them feel connected.

They can also help with office tasks, such as stuffing envelopes and preparing your fundraising materials. They can help with website updating, phone call thank-you's and appeals, and much more. Don't be afraid to reach out! Many people love to help and show off their skills.

Not only can volunteers give of their time, but consider asking volunteers to donate. After all, you already know your volunteers are philanthropically minded and value your particular organization. Research by Volunteering and Civic Life in America (consider adding a link) concluded that volunteers are nearly twice as likely to donate to charity, with almost 80 percent of volunteers giving. Don't risk losing their potential funds: If you don't ask, you will never receive.

Longtime volunteers who already love your nonprofit are invested in the success of your fundraising campaign. If they are new, your year-end fundraising campaign is the perfect time to get them engaged!

TAP BOARD MEMBERS:

Year end is also an excellent time for your Board of Directors to step up — in fact; it's in their job description!

Board members are — or should be — your nonprofit's most prominent advocates. Board members can conquer your fundraising checklist's top to-do tasks:

- Write and/or sign appeal letters
- Send thank-you cards to donors
- Recruit donor prospects
- Get the word out about how great your nonprofit is
- Volunteer for your organization
- Participate in phone campaigns
- Hold a fundraising party at their homes

Besides, board members should be your top donors. After all, if they are not your organization's most significant and loudest of supporters, who is? So, one of the most important, if not overlooked, things to do is to include your board members in your fundraising.

BRANCH OUT:

Sure, maybe you *don't* know any high-profile donors or perhaps have already enlisted their help, but chances are, you know someone who does know someone, or your board members do, or your staff. Now is the time to have all "hands on" deck. Ask everyone to put the word out on social media, via email, or to reach out by phone or in person.

Don't forget corporate sponsors and partners. They might be willing to spread the word as well. Retail partners might be willing to ask customers to give a little extra at the till when making purchases. Don't be shy about reaching out; it's one of the most crucial things you can do on your fundraising checklist.

03. Demystify Your Database

We already talked above about determining who your target donors are. You can't do that without a top-notch database and best practices.

It's natural for your donor base to shrink at least 10% each year for various reasons. whether through death, people moving away or no longer giving. That's why it is absolutely crucial to know who your existing donors are — so you also know who they are *not* and can recruit new donors and prospects accordingly.

SOME DATABASE METRICS TO CONSIDER:

- Retained donors
- New donors
- Donors making monthly gifts
- Donors upgrading their gifts or frequency of giving
- Donors who are downgrading their giving

Paramount on your fundraising checklist should be good database practices that will help you track donor activity.

To keep your database clean and uncluttered — and not to mention accurate! — what goes in must come out. In other words, having exceptional data entry habits and skills to begin with, will help you identify the right information the first time, without having to spend costly cleanup time later (commonly known in some large-scale operations as Merge, Purge and De-Dupe).

SOME GOOD DATABASE HABITS:

- Decide what information to track
- Limit database access
- Standardize data entry
- Check for duplicates before inputting new entries
- Practice address standardization
- For the love of all that is holy, don't email dead people

04. Start with Thank You

Sure, the point of your fundraising checklist is to take advantage of year-end giving trends to fulfill your campaign goals, but before you get to The Ask, you need to contribute as well.

Taking time to pick up the phone, direct-mailing, or emailing your donors letting them know that you appreciate them helps deepen your relationship — and remind them that now is an excellent time to renew their gift and what their impact is.

And, there is no time like calendar year-end to ensure that your donors are well-informed about how their investment into your organization is making a difference in the lives of others.

There are several ways that you can ensure that your donors are kept well informed during the calendar year-end giving season. Be sure to collect stories, photos, and even videos about the impact that you are having on those that you serve and share these stories with both your donors and non-donors.

Consider a "year in review" highlighting all the things a donor has made possible through their giving to your organization throughout the past year.

05. Ask

You know you need to appeal to new prospects and current donors, but one category of donors that often gets overlooked is lapsed donors — supporters who have given in the past but haven't lately. Don't omit these folks — often they have forgotten. It's not too late to get in touch with a friendly and straight-forward reminder.

A great strategy to consider is running a list of all lapsed donors and tiering them by their past gifting amounts. You surely want to keep your focus on your major donors that are lapsing. That could be a significant loss if they "fall off of the fold." Depending on when you mail and/or email out your appeal, you will need to plan on following up with the top donors, at the very least. You may do this by either in-person visits or by telephone to ensure that you reach out to them before the end of the year.

For other donors, you may want to consider a more personalized email and/or telephone call from your CEO or even a Board member, trying to recapture their giving & kindness before it lapses. In some other instances, if you have several lapsing donors, you may want to consider a more concerted telephone calling effort.

One great way to engage Board members is by having Board members call lapsing major gift donors, or those who have given early, and ask them to make another contribution before the end of the year. One thing you do not want to do is assume that you have a major donor who has given early and would not be interested in giving again. Reach out to them anyways by mail and ask them if they would be interested in providing a donation again. Let the donor decide.

All in all, a good strategy post-campaign is outlined in Step #4 above – Always Start and End with a Thank You. Donor stewardship is a critical element towards building stronger relationships with your donors and works towards donor relapse prevention. The more that you steward donors for their giving, the more that they will stay connected and engaged to the organization. Some have found that organizations that employ a higher level of stewardship towards their contributors have higher donor retention rates and less lapsing of donors.

Consider how a matching challenge gift can be secured and used to inspire your donors and possibly even attract new donors to your organization. If done correctly, a matching gift announced later in the campaign can create a sense of excitement and urgency. This alone can inspire second contributions from current campaign donors and new gifts from those who have never given to the organization before. This could also re-engage any lapsed donors to give again.. You can solicit a large gift from one donor or smaller number of gifts from multiple donors to form a matching dollar-for-dollar gift “pool” or a “bulked matched gift.”

Be sure to work with matching gift donors to define parameters on how the gift is matched, by whom and when. Consider forming a coalition of board members to pool their traditional year-end gift into a more significant challenge to the community. A board member, preferably the chair, is likely to be the best person to lead this challenge. Matching gifts are great hooks to use to boost overall giving by leverage across email and social media channels, especially during the final days of the year.

Other groups sometimes overlook their staff, board members, and volunteers. When reaching out to new folks, nothing is more crucial or impressive to those outside your organization than being able to say that those already within it stand by supporting you wholeheartedly — and put their money where their mouth is.

Be sure when you are soliciting gifts that you suppress all those giving to your campaign. There is no quicker way to lose a donor than by continually asking for contributions after they have just given.

Support from within, especially from Board and staff, shows potential donors just how effective your nonprofit is and makes them want to be a part of it too.

06. Supercharge Your Social Media & Website

ARE YOU OPTIMIZED FOR MOBILE?

Your donors certainly are!

Almost 80% of time spent on social media is through a mobile device (and with Facebook dominating all other platforms), make sure your message is getting across with mobile optimization.

GO BIG OR GO HOME:

Social media never sleeps, and neither should your nonprofit when vying for year-end dollars.

SAVVY STRATEGIES FOR YOUR FUNDRAISING CHECKLIST SHOULD INCLUDE:

- Scheduling daily posts
- Make it personal
- Include visuals
- Remember the “Ask”
- Consider adding ads
- And, don’t forget a donate button or link

Shape up your social media and website by checking links to make sure they work. Ensure your forms are short, simple, and easy to use; and organize your donation information front and center.

LOVE IT OR HATE IT, THE LIGHTBOX:

Many online visitors claim to hate them, but research shows, these call-to-action pop-ups work! Mostly because visitors can't help but see them.

They may not work for everyone (or your team may be adamantly opposed), but with myriad configurations to choose from, if one doesn't seem effective, you can always change it up. Do some testing, have some fun, and get your call-to-action in front of donors.

As an alternative to the lightbox, transforming your home page into a donation page for your year-end campaign puts your message out there as well.

Consider how you can merge digital strategies into your efforts. Today, Facebook has changed its algorithm so that Facebook Pages are receiving less attention. Furthermore, Facebook does not provide donor contact information back to your organization when donors choose to use the "donate" button on Facebook. Giving on the Facebook platform ultimately limits the health and growth of your development program. Given that, consider how targeted Facebook Ads can be used to drive traffic off of your Facebook or other social sites onto your website. Ideally, you should drive prospective donors to a campaign-specific landing page that engages them, whether through a direct ask for a donation, or through a survey, quiz, or any another engagement stream.

Whatever you do, you must increase your social presence at the end of the year.. Increase your posting cadence to a minimum of three times per week. Highlight the impact of your programs and it's volunteers, profile a major donor, etc. Be sure to ask for gifts as well, but don't include that on every post, best practice would be every third post.

LASTLY, PUT SOME THOUGHT INTO YOUR ONLINE THANK-YOU'S.

A powerful autoresponder message inspires donors and makes them feel good about their gift. Online transactions can be impersonal, so putting forth great effort when showing your appreciation will stand out and make for a very positive experience.

07. Take the Lead in Following Up

Phew! Your direct-mail and email campaigns have gone out. You've spent weeks planning, drafting, executing, stuffing, and mailing — now you sit back and wait for the donations to roll in, right?

Not exactly. Maximize your appeal's effectiveness with these simple follow-up steps.

Track weekly progress with a fundraising goal thermometer. Donors respond to "thermometer" like visual goal tracking methods as a way to inspire giving. Visual methods act as a way to provide momentum and urgency to any campaign. However, you must design such a thermometer that allows donors to see even the smallest of incremental progress; otherwise, these tools can become demotivating.

Send out reminders that include pledge forms. There needs to be a solid process and system in place for pledge fulfillment. It cannot be left to a donor to remember when their pledge is due. Organizations that accept pledges need a system that manages pledge schedules and amounts. The system must be able to track this information quickly and efficiently. It should be able to provide early and frequent reminders to donors about making payments towards their promised pledges.

Mail holiday greetings out to your major donors. Consider sending a non-ask holiday greeting to them. One way that you can stand out from the "competi-tion" is through scheduling in a series of non-ask moves. Greetings for significant holidays could include Thanksgiving, Christmas, and New Year's without including a donate button or a request for funds. Some organizations also go as far as sending out holiday gifts to their top donors.

It is vital to use the spirit of generosity and gratitude that comes with the holiday season to express gratitude to your donors for their giving and kindness.

Consider a second mailing and email to those who have responded. One mailing is usually never enough to gain attention during what is a very hectic giving season. Your Calendar Year-End Campaign requires a thoughtful strategy that includes metric goal design, adequate stewardship, and a plan for follow-up. Plan to mail your first direct mail appeal letter by mid-November with a second appeal letter scheduled for the first or second week of December. This letter would be sent to all those not responding to the first appeal letter.

You may even want to consider additional follow-ups using methods like in-person visits to your major donors. Telephone calls and personalized emails for your mid-level donors, and e-appeals and large phone efforts to your smaller givers. Consider mailing even a third appeal sometime after the new year to all those not responding. Certainly, you want a strong plan in place for the final days of the year when a significant number of gifts are made. Be sure to plan a concentrated campaign of e-appeals and social media to your donor base using the urgency to act before the final days of the year are over.

08. Fundraising Checklist Year-End Blitz

The last three days of the year — December 29, 30 and 31 — are the top three days of giving in the entire calendar year. Crafting targeted emails on all three of those days can encourage donors and provides a sense of urgency to donate during the closing of the year.

Use the urgency of the calendar year-end to your advantage. Surely sequence out a series of e-appeals that create an increasing need. Phrases such as "Time is running out! "Please help us reach our goal." and "Give before midnight on December 31st!" all the while mentioning where you are at against your campaign goal – think visual like the campaign goal thermometer we discussed previously.

Be sure to send a thank-you email to all those who contributed to this blitz and include an update on dollars raised and good tidings for the New Year.

09. Get Jacked for January

Yep, January! Wait, you thought you were done?! Nomy friends, the end of the year is just the beginning of wrapping up your successful year-end campaign and laying the groundwork for future donations from the relationships you've cultivated.

Despite your year-end direct-mail and email appeals, your ramped-up social media presence, your call to action, the phone calls, the personal asks, and follow-ups, there will be some donors who didn't get the message or forgot. They're interested in giving; they've just somehow missed all your efforts. Now that things have slowed down and people aren't traveling as much, January is the perfect time to try one last time.

JANUARY IS A GREAT TIME TO FUNDRAISE FOR PLENTY OF OTHER REASONS AS WELL:

- Many donors focus on their finances in January.
- This is the time of opportunity to share your organization's plans for the new year and showing your donors the impact of their past dollars and possible future gifts.
- Many sponsors plan their annual giving in January; it pays to ask first.

January is also a crucial time to work on retaining the donors you've worked so hard to acquire. Whether they are longtime givers, those from the past year, or new donors from your year-end efforts, this is your moment to thank your donors, inspire further engagement, share new initiatives, and entice more giving. Consider thanking your donors through social media, sending hand-written notes to your major donors, as well as mid-level donors who have the potential to upgrade their donations in the future.

Thank you phone calls can also go a long way to building relationships with new and/or promising donors. You can leverage board members to make these calls but be sure to provide a script.

Keep your board well informed and attuned to your fundraising via email—use the email blast feature in your donor management system to share some statistics, pictures, and highlights from your fundraising.

If you don't already produce an annual report, use the email blast feature to compile a simple statement that can be shared with your entire contact base. Or upload a PDF of your annual report to your website and link it in the email blast.

ALSO, BE SURE TO EVALUATE THE SUCCESS OF YOUR CAMPAIGN INTERNALLY.

Spend the last two weeks of January creating an internal campaign to highlight results and lessons learned. Ensure your data from the year-end campaign is clean and organized in your donor management system. Identify first-time donors and put them into a new donor welcome engagement stream, providing them with a specialized introductory and updated content. Consider sending these new donor's a welcome kit or welcome series that includes a welcome letter and brochure. **Now is the time to set yourself up for continued fundraising success in the new year.**

10. End With a Thank You

Thank-you's may follow gift-giving but they are looked at in a different way. They are just the start of your donor relationships for possible future fundraising and your efforts to spread the impact your organization has made within the community.

Thank-you letters are the linchpin of your success, and the ultimate checkmark on your Ultimate Year-End Fundraising Checklist. So remember to let your donors know just how much they are appreciated by you.

Be sure to send direct mail or email thank you letters to all your donors and prepare to include an updated 2019 donation summary.

More critically, you should plan on creating a series of stewardship touches for donor relationship building for the upcoming donation year.

THINK ABOUT THE FOLLOWING:

- How will you welcome your new donors who have given during this giving season?
- How will you recognize your current donors who have continued their giving kindness
- How will you thank your recurring donors for increasing their annual donations?

Think about what segments of donors you have and work to develop a custom-tailored stewardship plan that reports back to them on how their giving has made a difference and what, through their giving, they have made possible. Ideally, you should consider at least a stewardship "touch" once per month following your campaign until your next "ask."

Consider such things as a donor-specific newsletter that shares events and "things happening," specifically reporting back on the impact and importance of giving. Consider handwritten thank you cards to top donors, thank you calls to mid-level donors, and even special video greetings. For some donors at the higher-end of giving, you may want to establish a schedule of personal visits to share updates with them throughout the new year.

All in all, once the giving season is over, the critical work must begin. Thanking donors is a crucial and often missed opportunity to engage your donors in ways that will ultimately develop deeper and stronger relationships with them that will lead to more considerable future investments towards your organization's mission.

Conclusion

Fundraising can be a year-round challenge, but there isn't a more crucial time when half of the nonprofits receive the majority of their annual donations — some $48 billion on average.

This Ultimate Year-End Fundraising Checklist helps you to get pumped up and ready to go, by identifying your fundraising "All-Star" team, and demystifying your database. You will begin with a thank you; ASK to GET; to supercharge your social media and website, and take the lead in the follow-up. It doesn't end there either; you then need to get jacked for January, and end your efforts on a high note with a thank you.

Follow these steps, and I can guarantee that your Calendar Year-End will hit the goal and possibly even surpass it.

But, now, it is time to kick-off your most successful year-end campaign yet with this Ultimate Year-End Fundraising Checklist.

Thanks for Reading!

Meet the Author

Robin L. Cabral is a Certified Fund Raising Executive (CFRE) with twenty-five years of experience and millions of dollars raised, assisting non-profit organizations as a development professional. She has overseen all aspects of fund development, from annual funds to capital campaigns to donor communications. Her non-profit career includes positions as Director of Development and Marketing throughout the Northeast, including her role as a regional and worldwide Director of Development.

Robin has obtained a Bachelor of Arts degree in Sociology from the University of Massachusetts Dartmouth, and a Masters of Arts in Philanthropy and Fund Development from Saint Mary's of Minnesota. She currently holds the designation of Certified Fund Raising Executive (CFRE) and is a graduate of Leadership Southcoast (2010).

Robin is an active member of the Association of Fundraising Professionals (AFP). She is also a member of the Fundraising Institute of Australia (MFIA). She was on the Board of AFP-RI and was a recent AFP-RI Conference Planning Committee Co-Chair. She is also an AFP Master Faculty Trainer and has served on the AFP International Education and Training Committee.

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