



THE 2017 ULTIMATE GUIDE:

Year-End Fundraising

A STEP-BY-STEP GUIDE
TO PLANNING YOUR
YEAR-END CAMPAIGN

PLUS: CREATE AND PRINT OUT
YOUR OWN CUSTOMIZABLE
CALENDAR!

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01

STEP ONE:

Setting the Foundation

REVIEW LAST YEAR'S CAMPAIGN

ANALYZE FISCAL STATS

ANALYZE STRATEGIC GOAL PROGRESS

SET GOALS FOR CAMPAIGN

01

Setting the Foundation

REVIEW

ANALYZE

SET GOALS

Sometimes in order to take a step forward, you need to take a step backward first. Use this week to focus on the bigger picture of your organization's past campaign performance, current budget situation, and goals for this year's campaign. It'll help put things in perspective and provide a realistic foundation for your year-end fundraising.

REVIEW LAST YEAR'S CAMPAIGN

If you did a year-end campaign last year, you may have notes (formalized or in your head) on what went well and what you'd like to do differently. Make sure to review those, so you can improve in those areas this year.

This is also a good chance to refresh your memory on who contributed, how much was raised, and start thinking of new strategies to improve your performance this year.



Data can be a powerful guide as to what direction your organization should take when setting goals. One of the best tools available is the free [Fundraising Report Card](#), which can take any set of donations data and give benchmark reports for items like retention, reactivation, and growth. [Learn more.](#)

Some things to consider:

- How much was raised last year? Was it above or below expectations? Why?
- How many supporters engaged with your campaign?
- Who donated to your year-end campaign? Have they engaged with your organization since?
- What was the theme of your campaign last year? How did people respond to it?
- What materials, channels, and strategies did you use to engage your audience? How effective were they?
- How did you follow-up with and thank supporters for their contribution?
- How were funds raised used to further your mission?

If possible, try to get last year's team/leaders with this year's team/leaders to debrief and discuss challenges, successes, and advice for this year. It will help to make sure everyone's on the same page in terms of expectations and goals.

01

Setting the Foundation

REVIEW

ANALYZE

SET GOALS

ANALYZE FISCAL SITUATION

Your year-end campaign is all about fundraising, so it's crucial to take your current budgetary situation into consideration when setting goals for this campaign.

In addition to your last campaign's results, you should think about:

- How has the organization's financial situation has changed in the last year?
- Are there any unmet financial needs?
- How will the funds raised affect your mission and operations?

Depending on your organization's finances, you may want to consider integrating some of those numbers into your campaign theme. But be sure to frame it in a positive way, not a desperate call for donations. We'll get more into this later — but it's something you may want to keep in mind as you plan.

ANALYZE STRATEGIC GOAL PROGRESS + OPERATIONS

Just like you did with your finances, it's helpful to take stock of your organization's day-to-day operations and [progress with your strategic goals](#). As nonprofits know all too well, operations and strategic goals are closely linked to budget requirements.

This will help you determine how the funds raised could affect your operations, and fulfill anything your organization has not been able to do due to budget concerns. If there are surpluses, think about where funds can go to strengthen and expand services.

SET GOALS FOR CAMPAIGN

An effective year-end initiative should go beyond just a specific financial goal, and include goals for where the money raised can be used. This may also help you create a campaign theme.

Obviously, the ultimate goal of your campaign is to increase revenue — but a more specific idea will help give your campaign additional direction.

Don't be afraid to think outside the box with your goals. Your year-end campaign is a great opportunity to brand the organization, acquire new donors, raise your public profile, or even recruit volunteers. Aim for whatever makes sense for your organization, but remember to keep goals realistic, measurable, and specific.

02

STEP TWO:

Create your Action Plan

BUDGET FOR YOUR CAMPAIGN + APPEALS

SCOPE OF YOUR CAMPAIGN

SELECT YOUR TEAM

CREATE YOUR TIMELINE + MILESTONES

02

Create your Action Plan

BUDGET

SCOPE

TEAM

TIMELINE

Now that you've put your end-of-year campaign into context by getting familiar with last year's campaign and your organization's current financial and operational situation, it's time to focus on this year's campaign. We'll create a working road map for your campaign, so you can stay on track for the months ahead.

Even though this stage is about diving into the details, it's important to stay focused on the big picture. Remember: Every detail is an intentional step toward the results you want.

BUDGET FOR YOUR CAMPAIGN + APPEALS

Before you start brainstorming ideas and materials for your campaign and appeals, you need to [set a budget for how much your organization can spend](#). Having a number (or at the least, a range) will help when translating your idea to the execution phase.

Although this will be closely tied to your organization's current operations and budget situation, remember to keep in mind the monetary goal you hope to raise with the campaign. You know what they say — you gotta spend money to make money.

SCOPE OF YOUR CAMPAIGN + APPEALS

Once you have a budget in mind, it's time to develop the scope of your campaign. There are no set rules or limits when it comes to year-end appeals, so determine the approach that will be most effective for your organization.

Some things to consider:

- Who is your target audience? What channels will you reach them through? When and how long?
- What is your approach for prospective donors vs. current supporters?
- How will you handle follow-ups and thank yous?
- What metrics will you track to determine success?

02

Create your Action Plan

BUDGET

SCOPE

TEAM

TIMELINE

SELECT YOUR TEAM + ASSIGN RESPONSIBILITIES

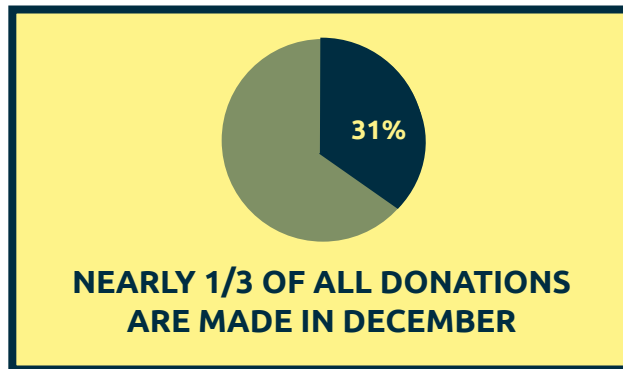
Depending on your organization, the year-end [campaign team](#) may be any combination of staff, [board members](#), and volunteers. Be sure to make responsibilities and tasks clear to each member, including leadership roles.

You may want to lean on volunteers, especially for highly technical or specialized skills. If graphic design is not your personal strength, don't waste hours working on it yourself — assign it to someone who can do it easily.

CREATE YOUR TIMELINE + MILESTONES

With your team, budget, and scope set in place, it's time to determine the [timeline of your year-end campaign](#). This includes internal milestones, like major deliverables for team members leading up to the launch.

At this point, it's important to remember that a huge chunk — nearly $\frac{1}{3}$ — of donations to nonprofits are made in December. And 12% are made in the last 3 days of the year. Giving ramps up during the end of the year, and your campaign should follow that trend.



**NEARLY 1/3 OF ALL DONATIONS
ARE MADE IN DECEMBER**

[SOURCE: NPTECH FOR GOOD](#)



**12%
OF ALL DONATIONS ARE MADE IN
THE LAST 3 DAYS OF THE YEAR**

[SOURCE: CHARITY NAVIGATOR](#)

#GivingTuesday allows nonprofits to kick off the year-end giving period even earlier. While #GivingTuesday donations may only be a small chunk of your year-end total, it is a great opportunity to engage new donors and an outside audience. Make a splash on #GivingTuesday, then turn your focus inward to follow-up with your existing donors who are most likely to contribute.

Even though #GivingTuesday does extend the giving season, don't get too carried away. Your campaign should not last more than 6 weeks. We recommend kicking off a bit before #GivingTuesday and continuing your push through year's end.

03

STEP THREE:

Putting it into Focus

CREATE A THEME + OVERALL NARRATIVE

MAKE IT HUMAN

KEEP IT ABOUT YOUR DONORS

03

Putting it into Focus

THEME

NARRATIVE

MESSAGING

Now that you've completed (most of) the prep work, it's time to dive in and determine the theme that will tie your campaign together. This is what a successful year-end campaign is all about: telling a story that resonates with your supporters and inspires them to give.

CREATE A THEME + OVERALL NARRATIVE

Choosing a [theme](#) is all about crafting a call-to-action that will inspire your supporters to contribute to your cause. No matter what channel you'll be making your direct appeal through, the core idea and overall narrative should translate across channels.

Pick an overarching narrative that fits in with your organization's mission. Whatever the content or format, it should instantly relate to your mission and remind your audience why your cause is worthy of their support.

When you're choosing your theme, be sure to consider [imagery](#). Whether it's photography or graphic design, the imagery you use should reinforce your theme and remain consistent throughout the campaign. A compelling combination of messaging, copy, and imagery will create an impactful appeal for your supporters.



When developing a story, aim for the heart, not for the head. Stats are hard to relate to and lack the emotional pull of a human-driven story. If you're looking for help in crafting a captivating story, [find the very best on-demand nonprofit experts at Enact Impact](#).

03

Putting it into Focus

THEME

NARRATIVE

MESSAGING

MAKE IT HUMAN

You may want to prove how effective your organization is with some compelling statistics to illustrate your success. This is great supporting material to further encourage your prospective donors, but not a great way to start the conversation.

Instead, focus your efforts on telling a [compelling story](#) that illustrates your organization's impact in a human way. Maybe it's about the success of a former program participant, the impact a recent event or achievement made, or a testimonial from a constituent. It should be something your supporters can easily understand, and highlights how effective your program is.

When in doubt, craft your narrative around one single individual or achievement. Focusing in one thing is more likely to resonate with supporters on a personal level.

KEEP IT ABOUT YOUR DONORS

Your organization may have a handful of compelling stories about your staff, your operations, or your constituents that you're thinking about sharing with your supporters. That's great! Just be sure to frame those stories in a [donor-centric way](#).

That means keeping it positive. Donors want to feel like their donations are making dreams happen, not solving your problems. Likewise, donors are less likely to contribute to an organization that is perceived to be extremely financially stressed. Keep the narrative focused on your organization's success stories.

Even though your organization has plenty of wonderful news to share, be sure to let prospective donors know how important they are to your cause. After all, your donors are part of the reason your organization is able to do the important work it does. Be sure to give those heroes the recognition they deserve.



04

STEP FOUR:

Know your Audience

CREATE SEGMENTS

IDENTIFY TARGET AUDIENCE + PROSPECTS

ESTABLISH GIVING LEVELS

04

Know your Audience

SEGMENTS

PROSPECTS

GIVING LEVELS

Now that you've created a theme for your appeal, it's time to get to know your audience. In order to send the most effective appeal possible, you'll need to put yourself in your supporters' shoes and create a message that resonates with them.

CREATE SEGMENTS

The key to resonating with your audience is creating the most personal message possible, so it seems like your organization is speaking directly to each individual supporter. Although personalized messages will get you the best results, there's realistically no way your organization can send a unique appeal to every person on your list.

That's where segmentation comes in. Dividing your list up into groups based on giving date and/or gift amount will help you create targeted messages for each group.



Each one of your supporters has unique behaviors and traits and interacts with your organization in different ways. To get an idea of how to create segments based off fundraising and behavior, check out this [infographic from Klavivo](#).

At the very least you can segment your audience into three main groups: current donors, lapsed donors, and prospective donors.

If you have recurring donors, don't forget to take the opportunity to thank these donors for their support throughout the year. It's a great way to remind them of their value to your organization — and it's likely they may contribute to your year-end campaign, even without a direct ask.

04

Know your Audience

SEGMENTS

PROSPECTS

GIVING LEVELS

60%

...of the funds you'll raise during your annual campaign will be from major gifts, according to DonorSearch.

Prospect research will help you focus in on those who have the resources and drive to be major donors.

IDENTIFY TARGETS + VIP PROSPECTS

When you're segmenting your list based on past giving dates and amounts, there may be some supporters that stick out as particularly likely to donate to your year-end campaign. Especially if these supporters have given large gifts in the past, you'll want to put some extra effort into creating the perfect appeal for them.

If your donor database includes gift rating or gift scoring, you'll want to include that in identifying your target audience. Also, you may want to consider using prospect research tools to identify potential major gifts.

Depending on the potential gift size and your organization's capacity, you'll want to make appeals for these VIP donors and prospects as personalized as possible. Consider creating individual appeals or alternative approaches, like phone calls and in-person asks, if applicable.

Although the extra attention to these certain donors will take up a large chunk of your organization's time, it's worth the effort to focus on the supporters whose gifts will make the most impact on your campaign.

ESTABLISH GIVING LEVELS

Even the most enthusiastic and dedicated supporters may want to support your mission, but have no idea what donation amount is expected of them. That's why it's crucial to provide suggested [giving levels](#).

Even if you're a smaller organization or mainly grassroots-focused, guiding your prospective donors with specific gift amounts will greatly increase the likelihood that you reach your fundraising goals. To create realistic giving levels, you should look at your past donations to see if there are certain levels that come up frequently — or if there's a ballpark average among your donor base. You can also do some number crunching with your year-end fundraising goal and the number of likely donors you're reaching out to.

But always be sure to leave a blank amount for those supporters who would prefer to give a different amount. You don't want to alienate any supporters who would like to contribute, but can't afford your suggested giving levels — a small donation is better than no donation.

And once you've established giving levels that make sense for your organization, consider branding them with names relevant to your mission. You could also use this as an opportunity to recognize donors with impact-driven giving level names, or with inclusion to a giving society. Keep in mind that your donors are motivated to give for many reasons — not everyone will want recognition.



05

STEP FIVE:

Crafting the Ask

SELECT COMMUNICATION CHANNELS

CREATE APPEALS

PERSONALIZE APPEALS

05

Crafting the Ask

CHANNELS

APPEALS

PERSONALIZE

You've created an action plan, decided on a theme, and gotten to know your audience. Now it's the moment you've been waiting for: [making the ask](#). This is the message that will need to inspire your audience to contribute to your cause, so make it count!

SELECT COMMUNICATION CHANNELS

Though you'll be creating a campaign around one theme, you'll be making the ask across [many different channels](#). Picking the appropriate channels — and the content you'll be using for each one — will depend on your audience and their communication preferences.

Of course, each communication channel has its own advantages and disadvantages. But here are a few popular channels you may want to consider:

- Direct mail
- Phone
- Email
- Social media
- In-person (for any very important donors and prospects)

For each channel, [identify key metrics](#) you'll need to track to monitor performance. And even though all materials should revolve around a similar theme, you should create unique content optimized for each channel.

When creating content for each channel, be sure to consider your audience's preferences and what messaging will work best for each channel. Consistency is key, but you'll want to make sure you aren't harassing your audience by repeating the same exact message in each channel.

MOST POPULAR CHANNELS FOR YEAR-END APPEALS



Direct Mail	100%
Email	92%
Website	50%
In-Person	17%

SOURCE: [NONPROFIT HUB](#)

05

Crafting the Ask

CHANNELS

APPEALS

PERSONALIZE

CREATE APPEALS

Obviously, the ask itself is the one of the most critical aspects of your year-end campaign — and key to getting the fundraising results you want. Your appeals should communicate a cohesive message that compels your audience to donate to your cause.

Here are some things that will [take your appeal to the next level](#):

- **Keep it donor-centric.** Your appeal should be related to your mission, but it can't be all about you. Remind donors that their donations allow you to keep doing the important work they support.
- **Inform and inspire.** Use an inspiring narrative that can simultaneously communicate what your organization's mission is all about, while telling a compelling story. Include imagery, video, and other innovative content that can help pull heartstrings.
- **Use an irresistible call-to-action.** No appeal is complete without a clear and convincing ask. Make your audience feel a sense of urgency, and don't forget to take advantage of the P.S. to hammer it home.
- **Set the stage for the follow-up.** Your year-end campaign is about so much more than a fundraising goal — it's about building relationships with your supporters. While crafting the appeal, start thinking about follow-ups and thank you messages that can keep building those relationships moving forward.

And of course, there are some things you should [never do in your appeal](#). Explaining intricate program details, painting a desperate financial picture, and focusing too much on donations are all no-gos. People donate to your cause because they want to be a part of it, so your appeal should go beyond program specifics. Think bigger.

LET'S GET PERSONAL

Segmenting is a great tool for [making your appeals more personalized](#). But to take it to the next level, you can use your existing data to make your appeal sound like it was written just for each reader.

There's nothing less personal than "Dear Friend." Including constituent data (like names) will let your donors know that you care about them, and help you build relationships.

At the very least, this is what you should include in your appeal:

- Name
- Last gift amount
- Last gift date
- Any other type of donor engagement (like event attendance)

With effective data management and some merging tools, you'll be able to make each appeal sound unique and increase your likelihood of receiving a donation.



06

STEP SIX:

Following Through

YOUR FOLLOW-UP PLAN

CREATE THANK YOU MATERIALS

RECOGNIZE YOUR DONORS

06

Following Through

FOLLOW-UP

THANK YOU

RECOGNIZE

You might think the success of your year-end appeal lies in the appeal itself. That's true, and it will impact your fundraising total for the campaign. But in terms of long-term success, your follow-up is what will make donors feel valued and keep coming back, year after year.

WHAT'S YOUR FOLLOW-UP PLAN?

Once the appeals have been sent, the campaign is far from over — it's just beginning. Throughout the rest of your campaign, you'll be following up with donors to remind them about your year-end campaign and why they should contribute.

Some methods to consider:

- Additional mailings (postcards, flyers, etc.)
- [Email](#)
- [Phone bank](#)
- [Social media posts](#)
- Call-to-action on your organization's website

Ideally, you should be spending almost all of your time on the small segment of donors most likely to give — the target audience and VIP prospects you identified before sending out the appeal. Don't waste too much time speaking with low-end or unlikely donors. Think about what can be automated, and what kind of follow-up techniques will get you the most bang for your buck with each segment.



Over the last year, there has been a remarkable increase in the amount of people who are now comfortable donating on Facebook. This number is rapidly increasing and it's important for you to understand how to make Facebook fundraising work for your nonprofit. [Check out ActionSprout's guide to get you fundraising in less than an hour.](#)

06

Following Through

FOLLOW-UP
THANK YOU
RECOGNIZE

CREATE THANK YOU MATERIALS

Even before the campaign officially launches, you'll want to have your [thank you materials](#) ready to go. A timely follow-up is crucial to making your donors feel valued, so you should have everything ready to go as soon as the appeals are sent out.

No matter the size or channel of the gift, be sure to send a personalized thank you as soon as possible that reiterates the impact of the donation and how it will be used to support the cause.

Do not include any additional appeals as part of the thank you. Simply express gratitude now, and they'll be more likely to donate again later when re-engaged.

59%

...of nonprofits make between 1 - 3 donor "touches" for their year-end campaign. About 10% of organizations make more than 5, and 28% of nonprofits make zero touches.

HOW WILL YOU RECOGNIZE DONORS?

Thank you messages are a vital part of the donor retention process, but going above and beyond with public recognition can make your donors feel even more valued. Consider using your website or other PR opportunities to honor your year-end donors, especially those who have contributed a large amount.

You may also want to establish giving societies for donors who have contributed at a certain level. This should be linked to your giving levels, as discussed earlier.

Remember: Recognition can be a nice perk, but your supporters are most likely donating because they believe in your cause, not for PR opportunities or local notoriety. For some donors, public recognition might even be a turn off if they prefer to stay anonymous. Bottom line, be sure to know your donors and understand their expectations and motivations behind donating.

07

STEP SEVEN:

Promoting your Cause

MARKETING VS. OUTREACH

MARKETING OPPORTUNITIES

DIGITAL TIE-IN + EVENTS

MARKETING TO NEW DONORS

07

Promoting your Cause

MARKETING

DIGITAL

EVENTS

NEW DONORS

Fundraising goals aside, your year-end campaign is a great chance to engage your audience. But it's also a chance to think bigger: How can you piggyback off your campaign's momentum and market your campaign — and cause — to a larger audience?

MARKETING VS. OUTREACH

Although most of the outreach you'll be doing for your year-end campaign will go directly to your audience, there's a great opportunity to translate that messaging into a public-facing campaign that can reach more people outside of your audience.

For every audience outreach as part of your campaign, think about how you can take that messaging and tweak it for a public audience. You may also want to consider creating an overall marketing strategy to promote your campaign, depending on your campaign's theme and your organization's capacity.

WHAT MARKETING OPPORTUNITIES CAN YOU TIE IN?

Either through traditional press releases or more of a digital marketing approach, a year-end campaign provides your organization with several opportunities to issue updates and announcements.

#GivingTuesday, now an established international day of giving, can also be used as a marketing tool to promote your cause.

From your organization's goal announcement to the final results, there are dozens of campaign milestones that are worth making a splash about. Be sure to use blog posts, social media, and press releases to communicate these updates to your audience.

DIGITAL TIE-IN

When thinking of your campaign's [digital marketing presence](#), you can't just re-use the same message across every channel. You'll need to think about what makes sense for your audience in each channel.

For example: Your supporters probably did not get on their social media account to make a donation to your organization. Stick to campaign updates or educational posts about your mission, rather than a direct ask on social media. On the other hand, if a supporter is on your website, they might be there to make a donation. Be sure to feature a donate button and information about your campaign prominently throughout your website.

07

Promoting your Cause

MARKETING

DIGITAL

EVENTS

NEW DONORS

EVENTS

If your organization puts on an [annual event](#) to support your year-end campaign, that's a great marketing opportunity to promote your campaign. Be sure to include information about your organization and your campaign in any event promotion, programming, and follow-up.

Capturing data from event attendees is a crucial step for event follow-up and campaign promotion. Not everyone who attends your event is a current or past donor, so you'll want to be able to follow-up and further engage them. They may be great supporters of your year-end campaign or others down the line.

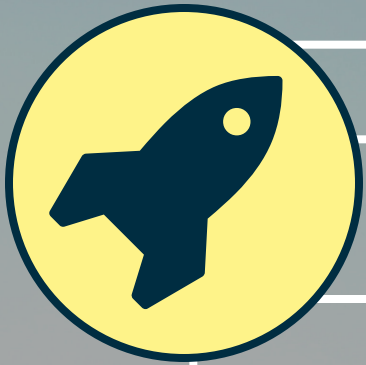
WHAT ABOUT NEW DONORS?

We've focused on your existing donors for most of this guide, and there's a reason for that — they are the people most likely to donate to your year-end campaign. These are your safest bets, or where you'll get the most bang for your buck. That's why we think you should focus on them.

But that doesn't mean there are some opportunities for new donors built into your year-end campaign. #GivingTuesday is a great way to kickoff your campaign with a splash and earn the attention of new donors. If your year-end campaign includes an event, be sure to follow-up with attendees — they might be interested in donating, or could become donors some day.

Depending on your campaign goals, you may want to consider a different call-to-action that encourages new donors. Some organizations (especially for #GivingTuesday) might ask their supporters to tell a friend about their mission and consider donating. You could also set up a peer-to-peer campaign, which will rely on your supporters' own social audiences for donations.

You can structure your campaign in a way that may bring you new donors, but it has to be right for your organization and your goals. There are ways you can attract new donors outside of your year-end campaign, without sacrificing your fundraising total. When in doubt, focus on your existing audience during your year-end campaign. It's the most effective way to reach your fundraising goals.



LAUNCH!!!

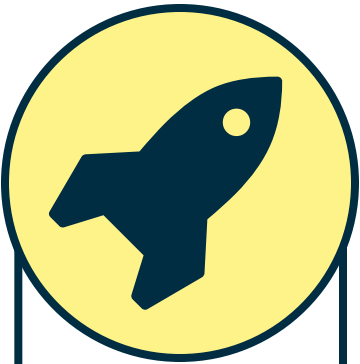
Kicking Things Off

CREATING YOUR TIMELINE

FOCUSING YOUR LAUNCH EFFORTS

WHY #GIVINGTUESDAY?

FOLLOW-UP



Kicking Things Off

TIMELINE

#GIVINGTUES

FOLLOW-UP

With all your materials and staff ready to go, the only question is: “When?” You know your organization and audience best, so you should pick a launch timeline that you think will be most effective. But we think [kicking off your launch with #GivingTuesday](#) is a great opportunity to make a marketing splash and get people excited about your campaign!

CREATING YOUR TIMELINE

For best results, we suggest launching your campaign publicly about a week or two before #GivingTuesday. This gives you time to engage your audience and get them ready to participate on the day of.

Remember, #GivingTuesday is the first Tuesday after Thanksgiving. Be sure to plan around any holiday downtime to ensure your audience receives your message.

You can send out your personalized outreach — physical appeals, email appeals, phone appeals — either when you launch or right after #GivingTuesday. Either way, make it clear that you are kicking off your campaign with #GivingTuesday, so your audience knows they aren’t getting hit with two asks back to back.

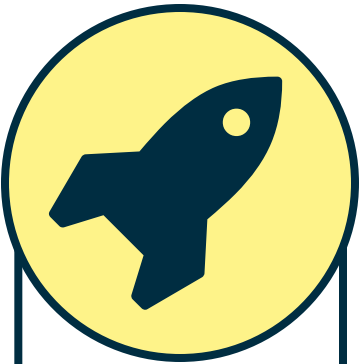
As with any campaign, make sure to have thank you and follow-up materials ready for #GivingTuesday. Because all of your donations will be coming in during a 24-hour period, it’s important to have your thank yous ready so they can be sent out promptly after donations.

FOCUSING YOUR LAUNCH EFFORTS

Due to the nature of #GivingTuesday, the day will be better geared toward a specific audience. Don’t encourage your target audience or VIP prospects to donate, as they’ll likely contribute to your year-end campaign later on.

Instead, focus on low-end or unengaged donors who may only be able to contribute a small donation to the campaign anyways. Make use of social sharing tools, so these donors can share their donations with their own social networks — and encourage their friends to contribute.

So much of #GivingTuesday is about making a splash digitally. Make sure to update your website, and be engaging with supporters on social media throughout the day.



Kicking Things Off

TIMELINE

#GIVINGTUES

FOLLOW-UP

WHY #GIVINGTUESDAY?

For some organizations, [participating in #GivingTuesday](#) might seem counter-intuitive. At the start of the holiday season, it's right before your year-end campaign — will it cannibalize your donations? Even distract from your year-end goals?

Although #GivingTuesday is about getting donations for your organization, it's also about raising your public profile, engaging supporters, and winning new donors. And because it happens mostly on social media and public-facing channels, it shouldn't interfere too much with the individualized channels you'll be using at the start of your year-end campaign to communicate with your audience.

#GivingTuesday gives you the opportunity to make a splash with your launch and start your campaign with some momentum. If anything, focus your #GivingTuesday efforts on low-end or unengaged donors who are less likely to donate large amounts to your campaign. That way, you can focus the rest of your campaign on following up with the most important donors and prospects.

If you're still unsure about asking for donations on #GivingTuesday, consider encouraging your audience to invite their friends to donate, or use social media to show their support. It's a great way to engage your base and grow your audience — without asking for their money. [To learn more, visit the #GivingTuesday website.](#)

FOLLOW-UP

After the craziness of your launch and #GivingTuesday have passed, you can start engaging your target audiences and your more significant donors. This is where the really significant fundraising for your year-end campaign will happen.

Start your follow-up soon after your audience has received the original appeal, and remember to vary your follow-up appeals across multiple channels. Consider tying in campaign updates and milestones, to ensure your message isn't getting repeated throughout the campaign.

Continue your follow-up appeals (and thank yous!) throughout the rest of the campaign, even down to the last minute. Remember, more than 10% of all donations are made on the last day of the year — good luck!



WRAP-UP:

Looking Ahead

ANALYZING RESULTS

MAKING IMPROVEMENTS

THANK YOU



Looking Ahead

RESULTS

IMPROVE

THANK YOU

You've done it! The appeals went out, the donations came in, and the fundraising goal was achieved — that's a wrap on your year-end campaign!

Well, not quite yet. Your campaign is over, but there's still some internal wrap-up work to do. Now it's time to analyze, debrief, and plan ahead for next year — yes, next year! Taking the time to do a comprehensive team wrap-up now will make next year's campaign even better.

ANALYZING RESULTS

Before you can set your sights on the future, you'll need to [analyze the outcomes](#) from this year's campaign. What went well? What could have been improved? Why?

At the very least, you'll want to track the results for each segment you sent an appeal to, as well as each communication channel. Find out what segments and channels were the most successful, and keep that in mind while creating appeals for next year.

In terms of individual results, you should update your donor database to track who donated and what communications were most effective for each donor. This will help when creating segments and sending out follow-up appeals next year.

Also, consider your results from #GivingTuesday. How were donations and audience engagement? Is there a different call-to-action or campaign tie-in that might improve your performance next year?

MAKING IMPROVEMENTS

Once you've analyzed the data, it's time to share it with your team and reflect on the campaign. Debrief everyone on the results, then have an honest discussion about the campaign and how it went.

You may also want to conduct a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, either with the team as a whole or each area of the team individually. This will show how you can improve your strategy for next year, and develop your team in any areas they struggled with.



Looking Ahead

RESULTS

IMPROVE

THANK YOUS

THANK YOUR DONORS

We know, we've said it a hundred times — and we could say it a hundred more! For any donors you haven't thanked yet, send them a thank you ASAP.

Expressing your sincere gratitude for a donation is the best way to build a relationship with and retain your donors, ensuring they'll continue supporting your cause again and again.

...AND YOUR STAFF/VOLUNTEERS!

Your donors aren't the only people who deserve a thank you! Be sure to thank your team of staff and/or volunteers for sticking with it during the notoriously stressful year-end appeal season. Praise them for the success of this year's campaign — and take some time to celebrate! Pulling off a year-end campaign is hard work, and you'll want your team to stick around for next year.

BUILDING NEW YEAR MOMENTUM

Yes, year-end fundraising is over once we hit the new year (with the exception of any stragglers that missed the deadline and want to contribute). But finishing your year-end campaign is reason to celebrate — and a great success you'll want to share with your audience!



Be sure to update supporters on how successful your campaign was, and how donations raised will help further your mission. Don't directly ask for more donations, but do reinforce that you're looking forward to their support in the new year.

Check out these resources for more info:

- [6 New Year's Resolutions for Nonprofits](#)
- [Exceed your Fundraising Goals in the New Year](#)
- [Planning your Fundraising Campaigns for the New Year](#)



BONUS:

Your Customizable Year-End Calendar

**PRINT OUT AND BUILD YOUR VERY
OWN YEAR-END FUNDRAISING
CALENDAR FOR YOUR ORG — BASED
ON NONPROFIT BEST PRACTICES**

September 2017



S	M	T	W	T	F	S
					1	2
3	4 LABOR DAY	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

KEY TASKS

- Review last year's campaign
- Analyze finances and strategic goal progress
- Set campaign goals
-
-
-
-

DEADLINES

November 2017



S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11 VETERANS DAY
12	13	14	15	16	17	18
19	20	21	22	23 THANKSGIVING DAY	24	25
26	27	28 GIVING TUESDAY	29	30		

KEY TASKS

- Create appeals for all channels
- Follow-up plan and thank you materials
- Marketing plan
- Launch!!!
-
-
-

DEADLINES

YEAR-END CALENDAR

December 2017

F

S



S	M	T	W	T	F	S
3	4	5	6	7	1	2
10	11	12	13	14	8	9
17	18	19	20	21	15	16
24	25	26	27	28	22	23
CHRISTMAS EVE	CHRISTMAS DAY	DAY AFTER CHRISTMAS (OBSERVED)			29	30
31						
NEW YEAR'S EVE						

KEY TASKS

- Send thank you messages to donors
- Follow-up with target audiences
- Marketing updates
-
-
-
-

DEADLINES

REMEMBER: Nearly 1/3 of all donations are made in the month of December. And 12% of those are made in the last 3 days of the year. Make this month count!

Want to learn how to fundraise more effectively all year long?

DOWNLOAD ANNUAL FUND GUIDE

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