



# End of Year Fundraising Plan

A Quick Reference Checklist

**GiveSmart**<sup>®</sup>  
by communitybrands

## The season of giving is almost here!

**Donors tend to donate generously to nonprofits and schools between Thanksgiving and New Year's, making it a fundraiser's high season.**

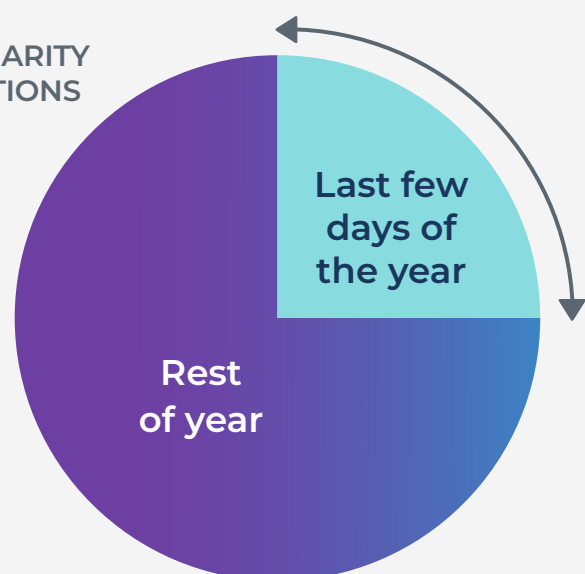
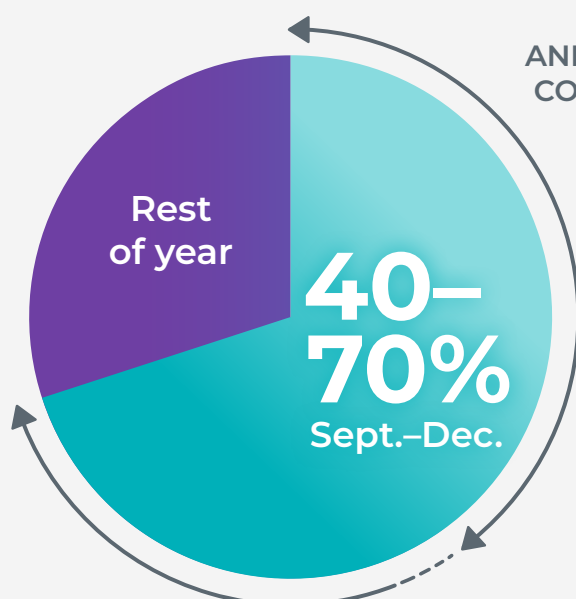
Perhaps it's because donors are feeling particularly thankful, and consequently charitable, this time of year. Or maybe they need to spend the remainder of their allotted charitable dollars to make up for lost time or to prepare for tax filing.

Your organization must be poised and ready if you want your nonprofit or school's voice to be heard above the proverbial clanking bells of the season. And this means you need to start your end-of-year (EOY) campaign planning and prepping well in advance.

So, where to start? Our fundraising experts at GiveSmart put together this quick reference checklist to help guide your planning, month-by-month to the year's end.



Whatever the motivation, charities receive between 40–70% of their annual contributions in this window. And nearly a quarter of total donations can come in the last few days of the year.



## September

### ☐ Review last year's EOY campaign

Due date: \_\_\_\_\_

Pull reports with data that include dollars raised, number of donors, number of donations, number of new donors, number of repeat donors, and average gift size. This will drive your goal-setting for the upcoming fiscal year and campaigns.

Also, look for successes and failures, so you can do more of what worked and discontinue what didn't. Consider what has changed at your organization this year so your team can adapt accordingly.

### ☐ Establish your goals

Due date: \_\_\_\_\_

Review last year's EOY campaigns. Set new stretch goals based on last year's number of donors and dollars raised.

### ☐ Develop your key personas

Due date: \_\_\_\_\_

Donor personas are central to successful fundraising because they can help you understand who your donors are, what they expect and value, and what ties them to your mission. Once you've developed your personas, you can segment your database and target appeals that are meaningful and relevant.

This type of personalization is paramount to donors.

### ☐ Brainstorm campaign concepts

Due date: \_\_\_\_\_

What are your campaign themes, title, and overall story? What current events can you include in your storytelling to further communicate the timeliness of your need? Are there individuals whose stories you can share with potential donors to more clearly illustrate the need?

Content is king. Make sure your story is captivating and pertinent.

### PRO TIP!

Use GiveSmart's Goal Planning Worksheet to establish your goals step-by-step.

[Download the resource now.](#)

## September

### ☐ Conduct a website audit

Due date: \_\_\_\_\_

You'll want to work with your communications/marketing department to accomplish this task. Also, ask for honest feedback on your website from volunteers, board members, family members, etc., and then implement the suggestions with the most merit. You can then run these same audits again once you have your campaign set up and ready.

#### Ask your auditors/testers to:

- Donate
- Sign up for your email list
- Describe what you do
- Take other actions relevant to your site or campaign

### ☐ Test your technology

Due date: \_\_\_\_\_

Review your entire donor giving flow from your email/mail, to your landing page, the donation form, the thank you message, and finally to your follow-up messages. Be sure all the necessary information is recorded in the appropriate locations. Make any necessary changes/tweaks now.

### ☐ Get your creative concept(s) reviewed and approved

Due date: \_\_\_\_\_

Does your executive director and/or your board need to sign off? If so, get the ok now, before you get too far down the development road.

### ☐ Begin collecting stories

Due date: \_\_\_\_\_

You'll want to tell compelling stories during your fundraising campaign(s) about individuals your organization has served. Stories can inspire your supporters, help communicate exactly where donations are going, and show the passion for your cause. Identify those in your community you could spotlight in these stories. Collect more than you think you need; you can always use them in social media, emails, and other communications. And don't forget to get photos to accompany your stories!

## PRO TIP!

Our Social Media Strategies Guide can help you elevate your social media game.

[Access the resource now.](#)

## September

### ☐ Build out your integrated editorial calendar **Due date:** \_\_\_\_\_

Your EOY campaign is anything but a one-and-done undertaking. Diversifying your appeals can help maximize revenue, and this requires a coordinated campaign with multiple touch points via various channels.

#### For example, in November send:

- An email or direct mail piece that includes a thank you for the continued support and an update on the year's progress (no ask)
- Several #GivingTuesday promotional emails
- Several #GivingTuesday social media posts
- EOY campaign theme introduction email or direct mail (with a story)

#### Then, in December send:

- Five to seven emails over the course of the month (with more stories, of course)
- Three emails in the final three days of the year
- Personal phone calls to your loyal donors
- A text-to-donate appeal once per week
- Social media posts to extend the buzz
- Website updates to reinforce your message
- Follow-up communications to your #GivingTuesday donors as a thank you

This list contains more communications than you're probably comfortable with, but there's a lot of noise and distraction this time of year, so you need to remind and motivate your donors with multiple, diverse touchpoints.

### ☐ Recruit board members to help with your EOY efforts **Due date:** \_\_\_\_\_

Help your board members be better fundraisers. This doesn't mean they have to do the asking. Instead, they can identify potential donors, make introductions, tell the story about why they're on the board, and share campaign stories with others.

## PRO TIP!

As you close out the year, you're likely reflecting on what you accomplished and what you're planning for 2023. A question you may be asking yourself is, "Am I best using all of the tools I'm already paying for?"

Pace Center for Girls asked themselves the same thing. They needed a tool that could work for their multiple chapter structure, scale as they grow, and maybe even deliver more than was expected. GiveSmart was the solution they needed. [Read more.](#)

## October

### ☐ Clean up your data

Due date: \_\_\_\_\_

The time is now to scrub your data and make sure you're entering giving season with all the latest information on your donors.

### ☐ Build donor journeys based on personas

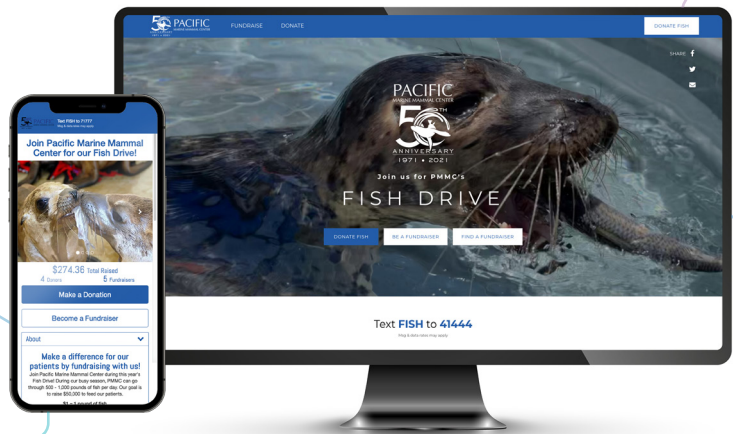
Due date: \_\_\_\_\_

Each donor's experience should feel personal, depending on his/her/their persona. For example, the giving process for a major donor to a zoo who has a passion for red-eyed tree frogs should look and feel different than the process for your \$50 donor who likes polar bears.

### ☐ Create web content

To create these various donor journeys based on personas, you'll need targeted landing pages, stories, blog posts, donation forms, etc.

Due date: \_\_\_\_\_



### ☐ Create campaign-specific donation forms

Due date: \_\_\_\_\_

You'll want to continue the campaign theme all the way through the giving process, including your forms. This keeps the conversation going in the donor's head, which is a much better scenario than sending them to a generic donation form right after reading an amazing, relevant story.

For online donation forms, a powerful tool like GiveSmart will allow you to create unlimited, customized donation forms to meet the unique needs of every donor journey.

### ☐ Write email and direct mail appeals

Due date: \_\_\_\_\_

Refer to the editorial calendar you created last month (page 5) that details all communications needed and start crafting them now. If all planned content is ready to go, then you'll have more time to react to current events, updates, or inevitable challenges that arise during the campaign.

## October

### ☐ Seek asset/appeal approval

Due date: \_\_\_\_\_

Does your executive director need to sign off? Do you need board approval? What about the subjects of your stories? Even if it's just a courtesy review, circulate your content and get the necessary approvals now.

### ☐ Review appeals and donation forms with accounting

Due date: \_\_\_\_\_

It's always wise to circle up with your finance team to ensure funds are restricted or unrestricted as you both expect.

### ☐ Write super awesome EOY thank you letters

Due date: \_\_\_\_\_

Make sure your thank you messages match your personas and continue your stories. After all, it was your meaningful, relevant stories that piqued donors' interests to begin with, so keep it going through the thank you and even the follow-up next year.

### ☐ Identify corporate partners/sponsors

Due date: \_\_\_\_\_

Corporate sponsorships offer infinite opportunities to extend your campaign. Secure their support now.

### ☐ Make sure #GivingTuesday is part of your overall plan

Due date: \_\_\_\_\_

#GivingTuesday is a no-brainer. In 2021, more than 35 million adults participated in many ways. Giving in the U.S. alone totaled \$2.7 billion, a 9% increase compared to 2020 and a 37% increase since 2019. You should absolutely take advantage of the widespread (and growing) awareness and observance of this special day.

#GivingTuesday is always on the Tuesday after Thanksgiving. Add these dates to your calendar for the next few years:

November 29, 2022 | November 28, 2023

December 3, 2024 | December 2, 2025

[Date], [Year]  
[Donor Name]  
[Address]

Dear [Donor Name],

Many thanks for your generous donation of [amount] received on [date] in support of [appeal or event name].

Your generosity enables us to fulfill our mission, and we greatly appreciate your support!

All of us at [your organization's name] appreciate your thoughtful gift.

Gratefully,

[Your Name]

*Please retain this letter for tax purposes. It is your receipt in grateful acknowledgement of your generous contribution. No goods or services were received by you for this donation.*

## November

### ☐ Final campaign approvals

Due date: \_\_\_\_\_

It's almost go-time, so campaign approvals should be signed, sealed, and delivered.

### ☐ Finalize all communication assets

Due date: \_\_\_\_\_

Make sure you have everyone's approval and give materials one final once-over.

### ☐ Send your warm-up communication

Due date: \_\_\_\_\_

No "ask" here! Just review your year's successes impact-style and spread the warm fuzzies about your organization and all the good you're doing with your donors' help.

### ☐ Conduct a telephone thank-a-thon

Due date: \_\_\_\_\_

This is another opportunity to warm up your major donors. Again, your hands should be clapping together in praise, not extended out in need!

### ☐ Test, test, test

Due date: \_\_\_\_\_

Get your staff and volunteers involved in campaign testing. Use as many variables as you can.

### ☐ Send your first EOY appeal

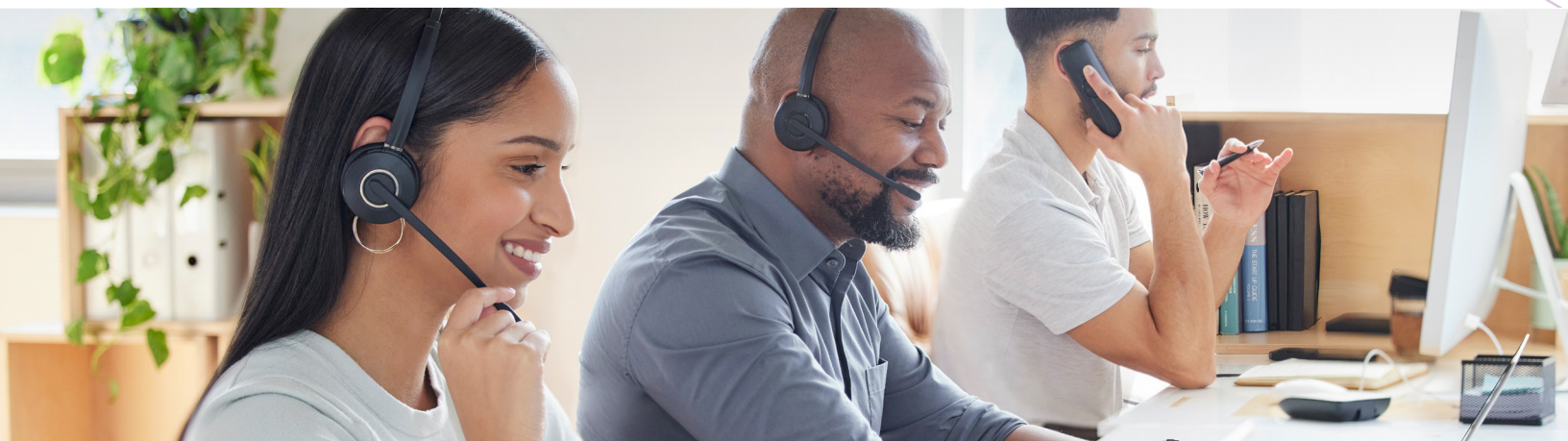
Due date: \_\_\_\_\_

Your first appeal should go out around mid-month.

### ☐ Send pre-#GivingTuesday email notices

Due date: \_\_\_\_\_

#GivingTuesday is always the Tuesday after Thanksgiving, so consider sending out a note the week before and the week of Thanksgiving.



## November

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### ☐ Recruit volunteers

Due date: \_\_\_\_\_

Ask either staff members or folks from your volunteer rolls (or both) to make thank you calls. You might even tap board members to call your high-dollar, loyal donors.

### ☐ Block time on your Executive Director's calendar to personally sign thank you notes

Due date: \_\_\_\_\_

Just schedule about 15 minutes each week this month and next. You might also ask board members and those you've served to sign (and maybe even create) your thank you messages.

### ☐ Send #GivingTuesday email solicitation on the Tuesday following Thanksgiving

Due date: \_\_\_\_\_

#GivingTuesday is a major EOY fundraising campaign for your organization. Use all the tools at your disposal to get your name, mission, and ask on the donor map.

### ☐ Post #GivingTuesday appeals on social media

Due date: \_\_\_\_\_

Facebook, Twitter, LinkedIn, Instagram, or whatever other social media channels you use should come alive on #GivingTuesday. Be sure to include the #GivingTuesday hashtag and a link to your donation page in posts and your profile description.



### **PRO TIP!**

When testing campaigns, be sure to test the entire user flow from initial contact through thank you and follow-up, with special emphasis on these five components:

1. List segments (suppression and inclusions from email marketing/direct mail)
2. Links to your landing pages (from email, social, or direct mail)
3. Donation form submission/credit card processing
4. Donation tracking in your database
5. Personalized thank you letter generation

## December

### ☐ Execute your editorial calendar

Due date: \_\_\_\_\_

Time for the RUSH! Provide EOY campaign updates, thank donors who have given to your year-end efforts, and interact on social media early and often throughout the month. This is where you separate yourself from the herd and really focus on your donors and their impact. If you've followed this monthly plan so far, December won't be the fire drill that it's felt like in years past.

### ☐ Prepare your accounting counterparts

Due date: \_\_\_\_\_

Make sure your finance team is adequately staffed, ready, and waiting for the rush in donations during the last couple of days of the year, and that the process to accrue is known by all.

There's no time like the present to start building a better relationship with finance team members. You're going to need their support during this mad fundraising dash.

### ☐ Takeover your website homepage

Due date: \_\_\_\_\_

Make your website homepage ALL ABOUT your EOY campaign.

### ☐ Post social media thank yous and updates

Due date: \_\_\_\_\_

This should be, at best, a daily task (or at least, weekly) throughout the entire month of December.



### PRO TIP!

Track your donor engagement, donor scores, retention rate, and more using GiveSmart Donor CRM. [Elevate your donor management strategy today.](#)

## December

☐ Continue making thank you phone calls

Due date: \_\_\_\_\_

☐ Get your last direct mail solicitation to USPS by December 15

Due date: \_\_\_\_\_

December 15 is a good target for a direct mail drop deadline. Based on your audience and the distance your appeals have to travel (within the state versus international, for example) you may consider a shift in either direction.

☐ Review your initial campaign emails and adapt

Due date: \_\_\_\_\_

Based on their performance, adjust upcoming solicitations, such as swapping out subject lines, changing images, and/or rewriting headlines.

☐ Schedule an email solicitation for the holiday week

Due date: \_\_\_\_\_

With the right online fundraising management and email marketing tools, you can schedule in advance. Enjoy the holidays with your family, and let your system do the work.

☐ Set your out-of-office messages

Due date: \_\_\_\_\_

Instead of the same-old, same-old, "I'm out, blank, returning, blank," message, ask all employees to reinforce your EOY campaign in their out-of-office messages. You might even consider providing them with a script to cut and paste.



## December

- ☐ Send your final “last chance” email solicitation on December 30

Due date: \_\_\_\_\_

Your message should grab donors’ attention and convey a sense of urgency. The clock is TICKING!

- ☐ Start building a new donor welcome series

Due date: \_\_\_\_\_

In the heat of the EOY moment, you may feel like securing any hard-fought, year-end dollars is your ultimate goal. But really, this is just the beginning. Each donation should be viewed as the start (or continuation) of a wonderful, long-lasting, meaningful relationship. And, since it’s much easier to get a supporter to donate a second or even third time, it’s critical that you start building a solid connection immediately.

Your welcome series should convey your heartfelt appreciation, illustrate the impact made with the donor’s contribution, incorporate real stories of success, and include continual touch points/updates throughout the coming year.

GiveSmart offers end-to-end features that best support your donor and fundraising management plans, no matter the time of year.

GiveSmart is the easy-to-use, innovative, and modern online fundraising and donor management platform that elevates any fundraiser. From mobile-friendly silent auctions to dynamic peer-to-peer events and guest management to donor engagement, we’re the solution to turn your mission into something that moves donors.

9 out of 10

nonprofit professionals would **LOVE** a single solution that meets all their needs.



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