



HOW TO START THE YEAR STRONG

A Nonprofit Leader's Guide

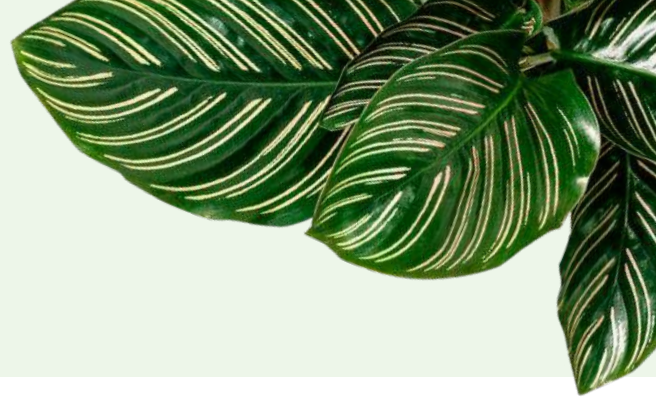
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Introduction



The transition from one year to the next is a natural time to take stock, celebrate wins, and set your sights on what's ahead. But without a clear fundraising plan, fundraising can quickly become reactive—disorganized, inconsistent, and overwhelming. Important donor relationships and even gifts can slip through the cracks. Deadlines get missed. Stewardship falters. And before you know it, your team is feeling stretched and unappreciated.

But it doesn't have to be that way.

A fresh year is your chance to turn last year's results into a focused game plan. This guide will help you look at your past performance, align your team around shared goals, and set a fundraising plan that's ambitious yet achievable. You'll get practical, no-fluff advice to start the year with early wins, a motivated team, and a fundraising strategy built for long-term success. Plus, we'll highlight how a giving platform—an all-in-one solution that includes donor management software, CRMs, and fundraising tools—can help you streamline your efforts and maximize your impact.

Let's get started!

Step 1: Build team buy-in for early wins



Have you ever been handed down a goal you had no role in setting? It's not very motivating. If you want your team to be invested in this year's success, they need a seat at the table. The more they help shape the plan, the more they'll own it.

Start by bringing in key staff—fundraisers, program staff, even a board member or two if it makes sense. Get their input. What worked last year? What felt like a struggle? Where do they see opportunities? This not only strengthens your plan but makes your team more committed to seeing it through.



Step 2: Take stock of last year's performance



Before you set goals, take a hard look at last year. What worked? What flopped? What surprised you?



This handy "[Year In Review](#)" questionnaire can help you think through your performance.

If you only track total dollars raised, you're missing the bigger picture. The single most important metric to measure is [retention](#). Why? Boosting retention is the easiest, fastest, and most affordable way to boost fundraising revenue.

To get the full picture of your fundraising health, here are three ways to [measure your retention](#):



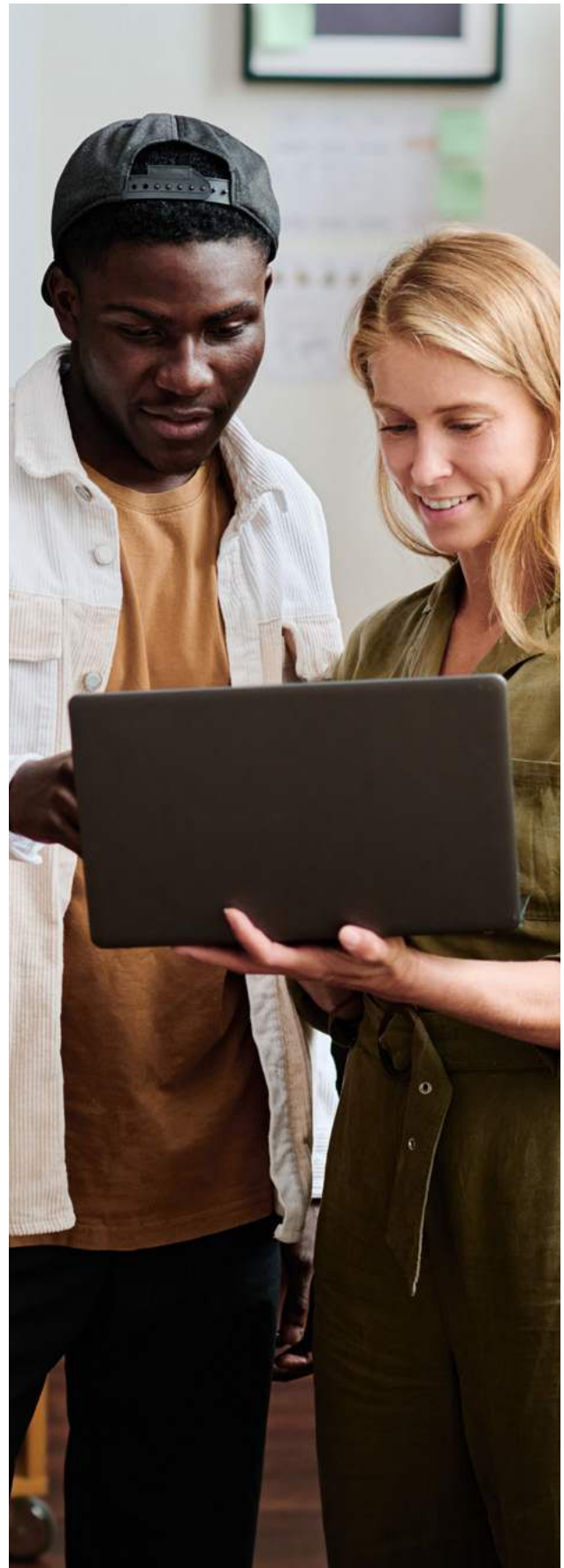
1. First-time donor conversion rate

If a donor gives once, will they give again? First-time donors are fickle—only 19% give again. But once they do, you're on your way to keeping them. Herein lies the magic—[convert them to repeat donors](#), and a whopping 63% stick around. Run a report of first-time donors and see how many made a second donation within the same year.

2. New donor renewal rate

Of the donors who gave for the first time last year, how many renewed this year? Knowing this number helps you set a realistic goal to boost your new donor renewal rate. To find out how many new donors gave again the following year, calculate the number of donors who made their first gift to you in a 12-month period, for example, last year. Then, determine how many also made a gift to you this by dividing the number of last year's donors by the number of this year's donors.

For example, if you had 100 first-time donors in last year and only 10 gave again, that's a 10% renewal rate. This information might lead you to set a goal for 2025 of a 20% new donor renewal rate and add new donor cultivation strategies to your plan, like new donor welcome calls, a one-month update, or a new donor survey.



3. Multi-year retention rates

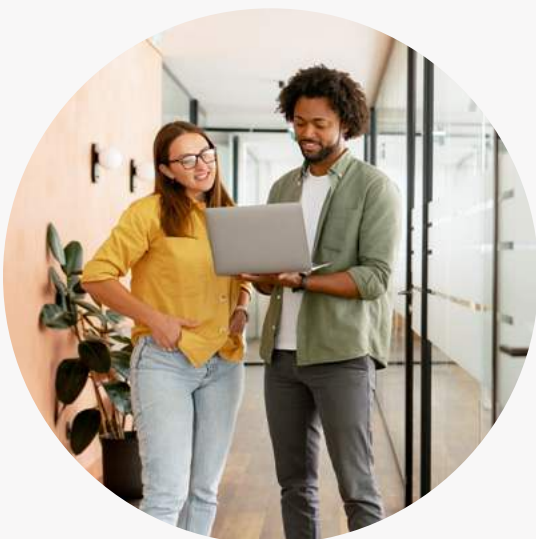


Are your longtime donors sticking with you, or are you losing them over time? Retention over time matters just as much as year-to-year numbers.

You might raise more money one year and see your average gift size increase. But if you look at donor loyalty over time, you'd realize your success was based on your most loyal donors giving you more of their hard-earned cash. Over the years, you've likely lost thousands of dollars from donor attrition. This scenario usually goes hand in hand with poor donor stewardship—a lack of reporting back to donors, poor thank-you processes, and scant or inconsistent stewardship.

Nonprofits that don't consider multi-year retention are blind to this problem because they only look at overall income and average gift size. Get under the hood of your data, look at donors who made their first gift 3 – 5 years ago, and track how each donor class (by year) has stayed loyal or dropped off.

You may find tens—if not hundreds—of thousands of dollars you could have easily recovered with better donor retention measurement and stewardship.



Your numbers tell a story—if you're willing to listen.

Retention metrics show you what's working, where you're losing donors, and how much money you may be leaving on the table.

Step 3: Set data-driven goals



Now that you know where you stand, it's [time to set goals](#). Just like we don't drive blindfolded, we don't want to start the year without a crystal-clear fundraising plan.

Your fundraising success depends on it.

Example: Over a three-month period, add six meaningful, personal touches (thank yous, check-ins, behind-the-scenes invites, and impact stories) to increase donor retention by 5%.

Example: Recruit 25 new monthly donors in Q1 by running a direct mail and email monthly giving campaign targeting new and recent one-time donors.

Example: Upgrade 50 existing monthly donors by June with a targeted phone campaign.



A CRM or donor management system can make tracking and executing these goals much easier. Think of your goals as a roadmap—each should be clear, measurable, and tied to real actions that move the needle.

Step 4: Prioritize for Q1



What are your top priorities for the first three months of the year?

A [strong fundraising plan for Q1](#) starts with a full picture of what's ahead. Consider:

- All events—from galas to peer-to-peer events to 3rd party events.
- Major holidays plus holidays that relate to your mission.
- Milestones for donors, your nonprofit, programs, and staff.
- Community events.
- Board meetings.
- Onboarding events for board or staff.
- Internal deadlines, like grant submission and reporting deadlines.

Once you've got the full picture, decide where to focus your efforts first. Early winds build momentum—and momentum builds success.

Step 5: Align goals with organizational capacity



Do you have the staff, resources, tools, and training to successfully meet your goals?

You won't hit your goals if you don't have the staff, resources, or bandwidth to go after them. Before you commit, ask yourself:

- Do we have the right people in place to make this happen?
- Do we need new tools, training, or systems to support this?
- Are we spreading our team too thin?

A [giving platform](#) can make fundraising easier by helping you automate donor outreach, track engagement, and streamline reporting. A classic mistake? Setting higher fundraising goals after cutting staff. That's wishful thinking, not a strategy. Make sure your plan aligns with what's realistically possible.

Step 6: Create clear roles and accountability



Goals without ownership? Just ideas. Make sure every goal has a clear owner. Who's responsible? What are the milestones? How will you track progress?

Here's the kicker: If the goal's important, tie it your employees' annual performance reviews. If it's not worth tracking at that level, is it really a priority? .



A strong start to the year isn't about making massive changes—it's about taking small, strategic steps that add up. Keep your goals realistic, focus on donor retention, and make sure your team is aligned. With the right plan in place—and the right fundraising tools—you'll build momentum that lasts all year long.

Now, go make it happen!

Need a jumpstart?

Looking for some extra help with your fundraising planning? Check out these free tools:

- [Fundraising plan template](#) - Map out your goals using this step-by-step guide.
- [Donor retention calculator](#) - Easily measure your retention rates.
- [Fundraising ROI calculator](#) - See the real impact of your fundraising efforts.

About the Author



Rachel Muir, CFRE

Rachel has worked every side of the Rubik's cube that is the nonprofit sector. When she was 26 Rachel Muir launched Girlstart, a non-profit empowering girls in math, science, engineering and technology in the living room of her apartment with \$500 and a credit card. Several years later she had raised over \$10 million and was featured on Oprah, CNN, and the Today show. Today Rachel delivers workshops and offers a monthly membership, [League of Extraordinary Fundraisers](#), transforming people into confident, successful fundraisers. Learn more about Rachel at www.rachelmuir.com.

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