

13 Lucky Year-End Fundraising Tips



Intro

The end of the calendar year is fast approaching. This is the time when your annual fundraising goals will likely be met, surpassed or put onto life support. Because even if you operate on a fiscal year, now is the time when people do most of their annual giving.

Don't delay. The end of the calendar year is when most folks engage in philanthropy. You don't want to waste this time when people are feeling their most generous. October or November is too late to begin thinking about your strategy. You must plan ahead, because 50% of nonprofits receive a majority of their annual contributions from October to December. In fact, over 30% of donations are made during the month of December alone.

This time of year also includes the celebrations that inspire the most generosity: Thanksgiving, #GivingTuesday and Christmas, per a Network for Good report. In fact, a whopping 77% donors surveyed noted December 25th was the day that most inspired them to give. And donors who have tax benefits in mind will give last-minute gifts before January 1st.

The important lesson here? It's not too early to start developing a strategy for the end of 2023.



Give yourself ample time to plan all the elements of your year-end campaign. Create your strategy, collect visuals to support your most compelling stories, recruit your most effective fundraisers and build a time-line for deploying your campaign offer across multiple channels. Writing, editing, getting approvals, printing, collating, and affixing personal notes ... it all takes time! If you don't get control of the details through early planning, you'll omit the details down the line. And you know what they say, right? The devil is in the details!

Make sure to get all your ducks in a row with these 13 lucky tips.

REMEMBER: You do have to make your own luck. As management guru Peter Drucker says: "The best plans are only good intentions, unless they degenerate into work." Let's get started!



13 Year-End Tips for Luck

1.) Send Impact Reports to Set the Stage

If you've not done so already, send a brief report to remind donors of their past decision to give to your cause and show how they helped. Humans are inclined to repeat past decisions to show their consistency ([See Robert Cialdini's Six Principles of Influence and Persuasion.](#)) Reports also close the loop for people, assuring them they didn't drop their money into a black hole. It's a not-to-be-missed opportunity to make donors feel good.

Setting the stage in this way also works to 'pre-suade' donors to give in the future. If you thank folks once, and then wait a whole year to communicate with them again, folks are not going to be 'ready' to repeat their giving without going through a whole cycle of hesitations. You don't want that. If you've fallen down on your stewardship this past year, it's not too late. Send a non-solicitation communication now – before you send your appeal.

Ideally, include some sort of [donor-centered content that is experienced by your donor as a 'favor' or 'gift.'](#) If you do your donor a solid, they'll be inclined to do you one back. One of the best gifts, and integral to effective stewardship, is ongoing communication with your donor about why their gift is such a good investment. Because of the impact it creates. Because it makes your donor a hero. Another great gift – more of a favor – is [content that is helpful](#) (e.g., 'how- to' video related to your area of expertise; recommended reading list; white paper; research; a recipe that ties back to your mission/clients you serve, etc.).



Don't forget you can also send impact reports via social media. Send out some posts on Facebook or Twitter (or whatever social platform your constituents use most frequently) to remind folks of your mission and accomplishments. Besides the fact you'll reach folks you'd otherwise not reach, you'll also predispose your current supporters to give to you when asked. Make your posts as 'feel good' as possible. Do this daily if you can. Again, your goal is to 'pre-suade' donors to give by offering up little gifts of meaningful content.





2.) Establish Goals Based on Last Year's Results

Your aim: To set realistic, measurable objectives.

Look at retention, upgrades and downgrades from last year and evaluate your areas for improvement. Otherwise you won't know if you did a poor job, a status quo job or a "hit it out of the ballpark" job.

Your donor database or CRM will facilitate this process. Pull reports based on donor segments (e.g., size of gift, other affiliation and/or area of interest). You'll likely find some groups are more likely to renew or upgrade than others. See if you did something differently with these groups last year. If so, why not try that with your less high-performing segments? If you did nothing different, brainstorm something you might add as a strategy for the groups that are under-performing.

You'll likely want to target different ask amounts for donors who give at different levels. You might also want to change up the story you feature in your appeal based on whatever programs your different donors earmarked their giving to support. For example, a cat story won't float a dog donor's boat.



3. Prioritize Contacts with Your Most Promising Supporters

The point: Pay special attention to your existing supporters; a bird in the hand really is worth two in the bush.


It's sad not to acquire a new donor; it's a tragedy to fail to renew an existing donor. Don't become so focused on acquiring new donors you forget it's much easier and more cost-effective to renew a donor than to acquire one.

Make donor retention and upgrading a priority:

Segment your mailing list and send tweaked versions of your appeal and response device to different segments. There are numerous ways to segment your list (e.g., by amount of donation; first-time vs. renewing vs. lapsed; by donor interest area, etc.). When you segment, you show donors you know them and can more specifically tailor your ask amount.

Recruit active donor volunteers to become peer-to-peer fundraisers. People respond better to people than they do to organizations. Especially when it's people they know and trust. [So this is a great way to amplify your fundraising power.](#)

Hold a special board session to inspire volunteers to be active as ambassadors, advocates and askers during the critical year-end months of October through December. Help them [reframe fundraising](#) as storytelling to make them comfortable taking on this responsibility.



Ask all your board members to give. Passionately. If the board won't lead, why should anyone else follow? I'm sure I'm not the only development practitioner who's been asked "What does your board give?" by a prospective foundation or individual donor. You absolutely must be able to answer: "They all give passionately!"

Set up visits with the Top 10 prospects you absolutely want to connect with personally to ask for gifts before the end of the year.

Approach potential corporate sponsors for your spring special event. Often this is the time of year they still have budget from the previous fiscal year that hasn't yet been allocated. And, if not, they can get you to the top of their list for the new fiscal year. You win either way.





4. Build Your Donor-Centered Case for Support

Your overarching goal: Have a compelling reason for people to support you – right now.

Always ask: What's in this for the donor? How do they benefit by giving here? How can we demonstrate we're relevant to their lives? To what they're thinking about and caring about? How can we connect with their heart, not just their head?

The absolute best way to convey your case for support is to begin with a story.

Here are some specific, timely tips you might not be thinking about:

Select a story, or series of stories, around which to center your campaign. Rather than retreading last year's generic appeal, or sending something letting folks know "It's the end of the year," or "It's the holidays, and it's time to share your blessings," send a story about ONE person, place or thing that needs their help. Only one purposeful story at a time.

Build a story that will break their heart, yet potentially restore their hope.

Describe a protagonist (a person, animal, place or thing) with a problem. Describe the obstacles that must be overcome to reach a solution. Make sure the solution is one your donor can realistically help with. Tell your donor how they can swoop in and become the hero who gives the story a happy ending. That's when hope will be renewed!



Select compelling visuals to support your story. Pictures capture attention, and really are worth 1,000 words. This is important in our digitally revolutionized zeitgeist where folks consume morsels rather than full meals. Visuals whet donor appetites and cause them to pay a bit more attention. If you have several stories, but only one visual, choose the story for which you have the supporting photography or video. Should you use a happy or sad image? [The jury is out](#). I've often used [sad ones](#) for appeals and happy ones for thank you's. But were I to have to choose this year, I might try happy. Why? Because of research from the [Network for Good report](#) showing hopeful donors are happy donors. People are tired of being angry and scared.



Here are the emotions that motivate donors to give:



Anger & Sadness



Empathy &
Altruism



Fear & Anxiety



Hope & Optimism

And ... don't forget to include a clear, persuasive call to action.

Ask donors to fund something specific. Research shows [donors will give more](#) if they can designate their gift. People like to be able to visualize how their money will be used. If you have a multi-program cause, sometimes you can accomplish this by sending a series of appeals. First, pick your top three strategic initiatives. Tell one story about each (September/October, November and December). Use one remit card that gives folks the option to earmark their gift for any of these three programs. Alternatively, highlight different stories in your e-appeal series.

5. Optimize Your Website

This is the foundation of your nonprofit's online presence.

Make sure prospective donors find what they're looking for, and make it easy for them to take action. 82% of donors report visiting a nonprofit website prior to making a gift.

Add a story or stories. Websites that are nothing but text and/or dry facts are boring. The human brain is [wired for storytelling](#), and folks will be more receptive to a story than data. Make sure your story demonstrates how a donor's gift will help, and will give the story a happy ending. [Donors want to be the heroes](#) who save the day!

Include visual elements. They'll capture attention faster and "stick" with the donor longer to support and reinforce the message of your appeal. Images are processed 60,000 times faster in the brain than text. Since people have an [attention span of 8 seconds](#), it just makes sense to use images or videos consistent with your year-end campaign messaging so your home and landing pages are an extension of your direct mail or email.





Verify your trustworthiness. Not seeing trust indicators can deter donors. Add something to show your credibility, such as:

- Donor testimonials
- Community leader testimonials
- Client testimonials
- Charity watchdog rating (e.g., Charity Navigator, give.org, Charity Watch, Guidestar)
- Verified encryption security
- Lockbox icon (NextAfter conducted research showing this one thing increased donations by over 14%)

Take down any outdated information. If your gala happened six months ago, don't keep the option of donating to it on your donation page. If you have contact information for staff who no longer work for you, remove it. Especially on your home page. You want to appear to donors that you're on top of things.





Put up some current information. You don't need a lot. Just three instances of things that are happening soon, new announcements; research; stories, photos, and videos, and recent reports, etc. will persuade visitors you're 'happening,' relevant and efficient.

Assure your website is mobile responsive. Don't just trust what your IT person tells you. Check it out for yourself! Visit your website on a variety of devices (desktop, laptop, tablet, Android, iPhone; try different browsers too). What did you find? Are you happy? Will your donor be happy?

Most important: Assure your donate button stands out and is easy to use. Make sure it works too! Try to make a donation to your nonprofit by clicking your donate button from different devices. See what transpires. I was recently on a charity website, and half of their "donate now" buttons and/or links gave me error messages. Some worked; but too many didn't. On another site, I had to click three times before I was actually able to make a donation. That's two clicks too many.



6. Build Compelling Landing Pages

Your method: Wherever folks come from (email, hard copy appeal, social media, blog post, organic search), you want people to go to a page where they're compelled to take action! Per [Firespring](#), visitors who are directed to a landing page are 10 times more likely to give than visitors who start on a home page. Yet 44% of all clicks are directed at home pages, rather than a relevant landing page.

Create a different landing page for each appeal's case for support. Use the messaging and imagery for distinct stories/campaigns. One generic landing page is just business as usual. Boring. This technique works especially well in upgrading mid-level donors because you're giving them a reason to do something different than just send their habitual unrestricted annual gift.

Consider different landing pages for asks of different amounts. As much as possible, everything on the landing page should match what was in the appeal. If you're making a different string of asks to donors under \$100 than you are to donors giving \$100-\$499, for example, the donors at these different levels should be sent to landing pages that ask for amounts these donors will find reasonable. You don't want to direct a donor from whom you've requested a \$500 gift to a landing page that asks for gifts ranging from \$15-\$250.

Each landing page should adhere to the K.I.S.S. Philosophy. Keep it simple and to the point. If there were ever a case where less is more, this is that case. Beware of including a menu with multiple drop-down options and opportunities to leave the page. Don't include various links and action items. You want them to do just one thing: DONATE!

7. Plan a Multi-Channel Campaign

The point: Make your hard work do double and triple duty. Don't waste all that thought and energy you put into your mail appeal. Reinforce and leverage your efforts by spreading your message through multiple channels. Whoever you are and whatever you do, your constituents are likely to be online. We're all now part of "[Generation Connected](#)" (GenC) – requiring you to develop and master a robust, multi-channel online engagement strategy.

Find the channels that may work best for you. Check out this [short webinar](#) to help you find the best channels for your campaign. And, of course, look at the channels that have been working best for you up to this point.

Find tools to support your efforts. When you can automate some of your work, it becomes more manageable than trying to do everything manually. Plus outsourcing work to experts can free up your time to do what you do best. No one can learn how to do everything well. Consider an email marketing provider, a social media management tool and perhaps a mass text messaging tool. Call other charities you admire and ask them about the most effective tools they use.





8. Plot Your Year-End E-Appeal Series

Your objective: Assure you ‘cash in’ during the final month of the year when such a large percentage of annual giving occurs – with the big spike coming in the final few days.

Most nonprofits don’t send enough email. Plan to send enough online appeals to maximize your chances (three between Dec. 26 and Jan. 31 is recommended, with two to four additional in the weeks between Thanksgiving and Christmas).

If you’ve been focusing on your snail mail appeal and thinking of email as an afterthought, this is the year to re-think your strategy. Per Double the Donation’s Top Nonprofit Fundraising Statistics, 63% of donors in the US and Canada prefer to donate online using a debit or credit card. Twenty-nine percent of Millennials prefer to give via text message or app with an additional 23% preferring to donate directly online. Baby Boomers are most likely to donate by sending a paper check through the mail. However, all generations are becoming more homogenous and tech-based in their giving habits.

Your email appeals should support your mail appeals and vice-versa. It’s ideal to use similar design, graphics and language to maintain consistency. But emails are briefer and require some special touches. [Get tips for success here.](#)



9. Incorporate Peer-to-Peer (P2P) Fundraising

Your consideration: Studies show peer-to-peer fundraising is on the rise, and well worth your serious consideration, ranging from 23% to fully one-third of all online fundraising (see [here](#) and [here](#)).

The size of a person’s network and their propensity to use that network matter.

The concept of “lifetime value” is changing. It’s no longer simply a combination of average gifts, future capacity and attrition rates. Now it must encompass factors like those Malcolm Gladwell wrote about in [The Tipping Point](#). “Connectors”, “Mavens” and “Salesmen” become very desirable constituents. Someone who gives you \$100, and recruits 9 friends to join them, is equivalent in value to a \$1,000 donor.

Peers often make better askers than you do. You’re pretty much a stranger, while a peer is a friend – and harder to ignore or say “No” to. 85% of donors report they prefer to be asked by friends than strangers ([Mason Academic Research System](#)). Relationships and recommendations matter.

You’ll also reach new prospects who are part of your peer fundraisers’ networks.

Their combined mailing lists (email and social media) will be much larger than your organizational mailing list.

You can master an online P2P campaign relatively easily using off-the-shelf software.

Sure, you have to project manage the process; you don’t have to invent everything from whole cloth, however. Numerous companies will build online, customizable P2P fundraising pages for you; integrate these pages with your social media accounts; offer training and support, and even help with coaching, promotion, and reports. They vary in fees and costs. Some are free, some have plans with monthly charges and some get their fees from your donations (much like a credit card company). Fees range between 3% and 8% of the funds raised.

10. Share Your Campaign on Social Media

Your objectives: To (1) Reinforce the message in your appeal letter and e-appeal; (2) Send folks to your website home page and donation landing pages using links; (3) Spread the word to new prospects using advocates and influencers, and (4) Predispose prospects to give by building your brand and sharing your impact.

You've a better chance of winning than losing. 55% of people who engage with nonprofits on social media end up taking some sort of action. Improve your chances by continually testing which channels work best for you, adding new channels as resources allow. You don't need to be everywhere. You do need to be in the right places.

Use the social channels your constituents frequent. For most charities, the big three are Facebook, Twitter and YouTube. You'll want a written plan with assigned deadlines and responsibilities to assure you create maximum leverage by aligning your campaign mailings with your social blasts.





11. Boost response with follow-up calls and notes to lapsed donors.

Your objective: Remind donors of previous giving, thank them for their past support and tell them you miss them!

Call your lapsed donors. Often people simply forget they've not renewed. They need you to nudge them a little. To remind them they've already made the decision to support your cause. (Per Robert Cialdini's 6 Principles of Influence, once we've made commitments, we're naturally inclined to want to keep them). You've already got a foot in the door with these donors; you just need to walk inside! If you don't have time to call everyone, pick those who are most important (e.g., larger donors, first-time \$100+ donors, active volunteers, etc.).

Consider holding a mini-phonathon and asking volunteers to help make these important calls. Send a "sorry we missed you" note with a remit envelope to anyone you don't reach personally (and leave a brief, friendly message letting them know they'll be receiving this mailing – and that they can also give via phone or internet).



These reminders act as a decision-making shortcut for donors. Even though you've messaged multiple times across multiple channels, some busy folks may manage to duck the question up until the last minute. Don't give up! Lapsed donors should be a priority target.

- Remind them they gave before. People are more inclined to repeat past behaviors than begin new ones.
- Thank them warmly for their past giving. Gratitude is always appreciated, and feels rewarding. This will incline your donor to seek this reward again.
- Tell them you miss them. Channel an attitude of gratitude. Think about what your donors make possible, and specifically why you'd miss their support if they don't renew. Tell them!
- Assume they'll give again; tap into their best impulses. "I know how busy you are, and this may have just got lost or buried. You've been so generous in the past, and this means more than you know. Would you take a moment now to send a contribution this year?"



12. Offer Stellar Year-End Donor Service

Your process: Assure prospective donors can make gifts and get questions answered during the last week(s) of the year!

If you're not going to be fully staffed during the last week of the calendar year (say you're a school, and everyone takes vacation), plan ahead for how you'll handle donor inquiries around making donations. Make sure the main number has a great year-end message and you let folks know how to make a gift! Elements to include: Great greeting and/or subject line. Contact info should they really need to reach you. Personal, warm tone. Call to action for end-of-year campaign. Put this on your website as well.

If there's any time your own desk won't be covered during the crucial weeks leading up to Dec. 31, make sure to include a similar voicemail message on your line and a message for your voicemail. Check your voicemail regularly during this period so you don't miss any donor inquiries that require someone's attention before the end of the calendar year.

For donors wanting to make a gift of appreciated assets, be sure to let them know what steps to take. If you'll be out of the office, make sure you've set up at least one brokerage account, and that your broker will be available to accept and process gift transfers. Generally, tell donors to give written instructions to the broker with: (1) name of stock; (2) number of shares to transfer, and (3) specific account to which transfer should be made [provide your legal name, account number, direct transfer number and broker's name, email, FAX and phone number]. Also instruct the donor to provide a copy of these instructions to you (give them a name and contact information).



13. Build Your Acknowledgment Plan

Your goal: Set up the donor's [next gift](#) with a stellar [donor love and loyalty program](#).

Spend as much time on thank you copy as fundraising copy. Plan this out in advance so you're able to send a meaningful acknowledgement within 48 hours of receiving the gift. Don't wait, because if you do you'll likely not get your thank you letter out to your donor in a timely manner. This is imperative, as prompt, personal, meaningful thank you'd make you [stand out from competitors](#). Most important, they establish trust, which is the foundation of all lasting relationships.

Write different thank you's for different appeals, donor segments and dollar amounts. Align the copy with the messaging in your appeal. Connect the dots for donors so they feel: "Yes. I made the gift for a specific reason and I can tell it's going to be put to use exactly for the purpose I intended. That's reassuring. That makes me feel I made a good decision."

Make sure your donor feels like a hero. Think of it this way: If you ask well, you may get one gift. If you thank well, you may get a lifetime of gifts.



Conclusion

Think ahead about which of [these 42 questions](#) you'll ask your donors when you visit with them, and why.

Imagine what might prevent them from saying "yes" when you make your ultimate major gift fundraising offer, and ask questions with the intention of overcoming any hesitations or objections.

With every interaction, you should have an objective in mind.

To paraphrase Lewis Carroll in Alice in Wonderland: "It's only when you know where you're going that you're very likely to get there."

To your success!





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