

RAISE MORE:

Your essential
playbook for
year-end
fundraising



12 Proven Checklists
to boost response and
ensure success at the
most critical time
of the year

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Introduction

November and December are going to be a whirlwind, so planning ahead is your secret weapon for sanity! Nearly 30% of nonprofits raise 26-50% of their annual fundraising from their year-end ask. We're talking calendar year here, not fiscal. Sure, you could kid yourself that missing your annual fundraising goal by December 31st isn't a big deal because you still have months to go. But let's be real—most people aren't feeling the giving spirit in June.

Nearly a third of all annual giving happens in December, and 12% of all giving occurs in just the last three days of that month. That's why most nonprofits aim to raise 70% of their budget during the last six weeks of the year.

You need to be running on all cylinders to capture every opportunity during this most generous time of year.

Give yourself plenty of runway to plan every detail of your year-end campaign. Craft your strategy, gather those compelling visuals, rally your most enthusiastic fundraisers, and map out your multi-channel deployment timeline. Writing, editing, approvals, printing, collating, and adding those personal notes—it all takes time. Skip the early planning, and those crucial details will fall by the wayside. And you know what they say: the devil's in the details.

Dive deeper into what this means with our year-end fundraising “to-do’s”. These 12 checklists are your go-to for planning and follow-through, ensuring your annual year-end fundraising campaign is a smashing success.

Let's get started!

01

IMPACT REPORT

- We've prepared and delivered a compelling, emotion-packed year-end [impact report](#) that truly celebrates our donors as heroes. This report shines a light on their incredible impact, not ours.
 - Major donors receive
 - Mid-level donors receive
 - Other donors receive
- We're thinking about folding a 'thankathon' into our plan.

PRO TIP: If your monthly donors haven't heard a genuine thank you in a while, this is a fantastic way to reconnect and remind them of their powerful impact. Enlist board members, development committee members, and/or other volunteers to help. If you're a school, get those students involved. This sets the stage for inviting them to increase their monthly commitment this year.

02

YEAR-END GOALS BASED ON LAST YEAR'S RESULTS

- We know our [retention rates](#) like the back of our hand and have set an exciting goal for boosting these metrics this year.
- We've identified donors who downgraded their gifts last year and have a clear plan to invite them to increase their support.
- We know which donors made multiple gifts last year and have a strategy to encourage them to upgrade.

PRO TIP: Consider inviting them to join your recurring giving program.

- We've segmented our mailing lists for (a) non-donor volunteers and (b) non-donor clients, and we have a targeted plan to engage them with a specific ask this year.

03

CONTACT PRIORITIES



- We evaluated our wonderful supporters based on cumulative giving because we know a \$100/month donor is actually a fabulous \$1,200 donor. We also understand that a recent \$100 memorial gift from someone who usually gives \$1,000 annually shouldn't be overlooked in this year's annual appeal. Sorting by only the most recent gift means missing these important, loyal supporters.
- We've generated a list of LYBNTs (gave last year but not this) and sorted them by dollar range to prioritize connecting with our most loyal and largest donors. We have a heartfelt plan to remind them of their past generosity (and thank them), letting them know there's still time to renew and make a difference this year. Strategies include face-to-face meetings, phone calls, and personal, hand-written notes added to appeal letters.
- We ran a list of all first-time donors and have a plan to create a separate campaign segment to give them some extra TLC. We know that first-time donor retention is typically 23%, but for repeat donors, it jumps to 60% ([Fundraising Effectiveness Project](#)). So, renewing them once means much higher retention rates moving forward. It's absolutely worth the effort.
- We ran a list of our amazing monthly donors and plan to make them a separate campaign segment.
- We ran a list of last year's peer-to-peer fundraisers because we recognize their significant gift totals. We know these folks can be just as impactful as major donors, and we have strategies in place to celebrate them, reward them, and encourage their continued engagement and investment.
- We ran a list of our dedicated volunteers because we know they are twice as likely to donate as non-volunteers if asked effectively. We have a plan to make them a separate campaign segment and send them a tailored appeal that acknowledges their already generous contribution to our cause.

04

ANNUAL APPEAL CASE FOR SUPPORT



- We've taken a moment to step into our donors' shoes to [craft an appeal](#) that truly resonates with them. We've considered the problems they care about, the issues they've shown passion for, and how they can join us as heroes in finding solutions.
- Our year-end appeal will feature an [emotional story](#) that beautifully illustrates a relevant problem and a timely, believable solution.
- Our year-end appeal will invite the donor to step into our story as the ultimate hero.
- Our year-end appeal will have a vibrant sense of urgency.
- Our year-end appeal will include a specific ask for a specific purpose and amount—ideally tailored to different donor segments for maximum impact.
- Our year-end appeal will draw information from our database to make the offer as personal as possible. Think: first name salutation, their gift amount from last year, or other engagement touchpoints like event attendance, volunteer service, committee involvement, program attendance, or being a parent/alumnae.

05

WEBSITE CLEAN-UP



- We've cleared out outdated information, like past events, old contact details, and broken links.
- Our contact information is super easy to find and up-to-date.
- We've added fresh, captivating stories and visuals to our most-visited pages, with clear links to our [donation landing pages](#) where appropriate.
- Our “donate” button is proudly displayed. Hot tip: the ideal spot is at the top of your home page, in a color that pops against your brand palette. It's not about blending in; it's about getting noticed.
- Donating is a breeze from almost every page. And yes, we've included clear instructions for giving by mail or phone too.
- Our share buttons are in perfect working order. If folks are inspired, we definitely want them to share the love with their networks.

05

WEBSITE CLEAN-UP

- Our website is [mobile-optimized](#) and ready to roll. Seriously, open it on both an Android and iPhone to see how beautifully it displays and how easy it is to navigate. If your email looks messy or the donate button is hidden on their phone, they're probably not going to bother opening it again on their computer.
- We've got third-party endorsements, heartwarming testimonials, and/or stellar charity ratings proudly featured on our website and donation page. We know these endorsements act as powerful "social proof" (one of Robert Cialdini's Six Principles of Influence and Persuasion), assuring visitors that we are absolutely worth their investment. Showing a vibrant community of support short-cuts the decision-making process for prospective new donors.
- We have an exciting plan to spruce up our home page. Heads up: develop a plan to shine a spotlight on fundraising during the last 4-6 weeks of the year. It's a brilliant idea to put your year-end appeal front and center, perhaps as a featured story at the top. Be sure your design and messaging are consistent with your mailed and emailed appeals. Some organizations even totally rebrand their home page during this peak giving period.

Example:

Save the Children
Rebranded Home Page



Example:

Prominently
Placed Story/Appeal



05

WEBSITE CLEAN-UP

- We're considering adding a "pop-up" or "lightbox" during the last three to six weeks of the year. **Fun fact:** There are YouTube tutorials on how to code lightboxes, and you might even find a coding wizard on "Fiverr" to create a custom one for you. You can set it to appear at intervals, like once a day or week, or even better, disappear forever once someone has donated. This can significantly boost traffic to your donation page. Be sure to track your results to see how much online giving increases this year.

Other lightbox tips:

- Use an image that perfectly matches your year-end campaign's heartwarming vibe.
- Craft your call-to-action with a high-value, inspiring result, like "feed a family this Christmas," "your gift will be doubled," or "your gift is 100% tax deductible."
- Make that "X" or "Close Window" button impossible to miss for folks who want to skip past it.

Example:

CARE lightbox



06

DONATION LANDING PAGE(S)

- We've created custom, beautifully [branded donation landing page\(s\)](#) that perfectly mirror our appeal. Nobody wants to feel like they've been whisked off your website. So, if you're using an outside provider or service like PayPal, make sure it's adorned with images and messaging consistent with your appeal and brand.
- Our top header is streamlined, free of navigation links, so supporters are only tempted to click that brilliant "donate" button or share buttons.

Example:

Childrens Rights



- Our pages feature powerful, engaging headlines that beautifully complement the anchor text donors clicked to arrive on the page.
- Our pages include an emotional image or video that perfectly reflects our appeal, grabs attention, and draws people in. We know visuals are processed 60,000 times faster than text by the brain, and today's attention spans are super short (just 8 seconds).
- Our pages include a clear, descriptive subheading that quickly highlights the amazing benefits of taking action.
- Our pages make smart use of bullet points to clearly state benefits and create a sense of urgency.

06 DONATION LANDING PAGE(S)

- Every donation landing page features a specific, compelling call to action. Try "Support [name of your organization]" or "Give Now." Or, get creative and A/B test two different buttons—let's see what inspires.

Example:

Donation landing page mimics appeal; Merchant's Quay



- We've given suggested donation amounts and a thoughtful, limited range of appealing choices for restricted programs and unrestricted gifts. We understand that too many choices can actually depress response, but offering choices often inspires people to give more. We've also included a helpful "other" blank for donors who wish to choose their own gift amount.
- We've made recurring giving options super easy to find and select on our landing page(s).



06 DONATION LANDING PAGE(S)

- We've minimized the amount of information donors are required to provide, understanding that people aren't keen on revealing too much or spending ages filling out forms. We only ask for the essential information to complete the online transaction, knowing we can gather more delightful details later.

Step 1:

Project C.U.R.E.

The screenshot shows the first step of a donation form. It features a 'Gift Amount' section with six buttons: \$25, \$100, \$200 (highlighted in red), \$500, \$1000, and OTHER. Below this are two sections: 'Gift Frequency' with radio buttons for 'One-time gift' (selected) and 'Recurring monthly gift (less available)'; and 'Gift Designation' with a dropdown menu showing 'Where the need is greatest'. At the bottom, there is a section 'Would you like to make this a tribute gift?' with a checkbox 'Yes, make this gift' and a dropdown 'in honor of' followed by a 'Name of Honoree' input field.

Step 2:

Project C.U.R.E.

The screenshot shows the second step of the donation form, titled 'Billing Information'. It contains several input fields: 'First Name', 'Last Name', 'Address 1', 'Address 2', 'City', 'State / Province' (dropdown menu with 'Please Select'), 'Zip / Postal Code', 'Country' (dropdown menu with 'United States'), 'Phone', and 'Email'. At the bottom, there are two checkboxes: 'Remember my contact information on this browser. (Credit card information is not stored)' (checked) and 'Yes, I would like to receive email updates from Project C.U.R.E.' (unchecked).

06

DONATION LANDING PAGE(S)



- We've thoroughly tested our donation landing pages on various mobile devices to ensure a seamless, user-friendly experience. We verified that it leads directly to:
 - An easy-to-use, perfectly branded donation page.
 - Or*, a donation page that displayed well on our phone, but might have lacked:
 - Urgency
 - Suggested donation amounts
 - Suggested giving categories or purposes
 - Emotional appeal/inspiration through photos or action words:
 - Or*, there were other delightful opportunities for improvement that we're eager to address.
- There were other challenges last year that need to be avoided:

07

YEAR-END E-APPEAL SERIES

- We've decided who the email sender will be.

PRO-TIP: This is arguably the most important part of your email. A Constant Contact study revealed that 64% of people open emails based on the sender, compared to 47% for the subject line. Generally, an email from a person is more personal than one from your organization—because people give to people.

- We've crafted succinct, captivating subject lines and run them through our email marketing software's spam checker to catch any hiccups.

PRO-TIP: Convince and Convert reports that 33% of email recipients open emails based solely on the subject line. Constant Contact also finds that subject lines under 50 characters boast 12.5% higher open rates and 75% higher click-through rates. Find fantastic subject line inspiration at [8 Ways to Find Your Nonprofit's Perfect Holiday Email Subject Line](#).

- We'll be personalizing our emails to make every recipient feel special.

PRO-TIP: The Aberdeen Group found that personalization can boost click-through rates by 14% and conversion rates by 10%—wow.

- We'll keep our call to action proudly "above the scroll" because we know busy people won't read a super long email.
- We've picked a [compelling image and caption](#) because a picture is worth a thousand words and research shows that a powerful image telling a story encourages more giving. Plus, our image will perfectly match the imagery on the landing page where donors arrive after clicking "donate."
- We've included a big, bold "donate" button at the top of our appeal in a color that brilliantly contrasts with the rest of our design. And it won't just say "donate."

PRO-TIP: Research reveals that using "support" followed by your cause's name can actually boost your donation rate by 16% per page view.

07

YEAR-END E-APPEAL SERIES



- Our call-to-action joyfully emphasizes why it's so important to give NOW.
- We've meticulously checked how our e-appeal looks on various devices (desktop, laptop, tablet, Android, iPhone) by sending test emails to each. We've also sent test emails to common addresses like Outlook and Gmail to ensure everything displays perfectly.
- We've connected with our email provider to ensure they have a plan for handling the holiday email rush. No time for servers to be down now.
- We've double-checked to confirm all emails direct donors to a simple, beautifully branded donation page that echoes the appeal's message. No generic pages or unexpected detours here—just a seamless experience that builds trust and increases the likelihood of completed donations.
- For our grand finale year-end online blitz (a series of inspiring emails building up to the last few days of the year), we've assigned tasks to ensure:
 - Content is created, perfectly tailored to our audiences, and approved by December 18.
 - Emails are queued and ready for sending by December 20.
 - The first email brings joy on December 26.
 - We'll check email responses and pull clean lists on December 29.
 - The second email spreads cheer on December 30.
 - We'll check email responses and pull fresh, clean lists on December 30.
 - The final, impactful email goes out on December 31.
 - You send prompt and warm thank yous via email, mail, and/or phone call no later than January.

08

PEER-TO-PEER (P2P) FUNDRAISING

- We're ready to develop and launch a [P2P campaign](#) this year that will beautifully complement our other year-end fundraising strategies.
- We've carefully chosen a vendor and are confident that the expenses are justified, as this will yield a positive return on investment by harnessing the passion of our current supporters to attract new donors and boost donations.
- We don't quite have the capacity this year, but we've happily calendared time to explore this exciting possibility for next year.

09

SOCIAL MEDIA

- We have a dazzling plan for a year-end 'Let Your Friends Be Our Friends' campaign, encouraging our fans to jump into peer-to-peer fundraising by sharing our appeal across their favorite [social networks](#).
- We have a plan to connect with our influencers, empowering them with specific calls to share our appeals far and wide.
- We've scheduled blog posts brimming with highlights and cherished memories from the year's accomplishments—all made possible by our incredible donors.
- We've pre-written engaging social media updates, perfectly tailored for each platform we use, for our community to share as the year-end approaches.
- We've selected captivating photos and/or videos to accompany our social media calls to action, adding that extra sparkle.
- We'll ensure that when folks click our social media links, they land on a specific page that provides more inspiring information and a clear call for a donation, rather than just our homepage or a generic landing page.

09

SOCIAL MEDIA

Here's a delightful example of how one charity masterfully used multiple social media channels to get you started. This is the brilliant work of One Justice (@OneJusticeOrg), dedicated to bringing life-changing legal help to Californians in need. They cleverly used Twitter, Facebook, Pinterest, and simple photos to maximize their written and email appeals. They even used Vimeo and iMovie to create simple, inexpensive thank you videos, embedded on their website and sent to their supporters via email. It's worth noting: (1) they achieved all this with a very small staff (meaning, you can do this too) and (2) they clearly had fun, and it totally shows. In other words, it's appealing—just as good fundraising should be.

They used a hashtag, #IGive4, hoping people would search for and use it. No doubt you can dream up even more perfect hashtags for your own campaign.



Twitter

Who gives for justice? We all give for justice! #IGive4 legal services to <http://www.one-justice.org/Donate> Onlinepic. twitter.com/N2Rvgy5ICL



Twitter + Facebook

#IGive4 justice - OneJustice! You can donate online today & bring life-changing legal help to Californians in need. www.one-justice.org/DonateOnline

Sometimes, you'll even be able to enlist other amazing funders—businesses, foundations, or influential donors—to amplify your messages. Here are some examples that all share the #donate hashtag:

FedEx Office @FedExOffice

Make #education your gift this year. Every RT we see \$1 will be donated to @TeachForAmerica. #OneRate #CountlessPossibilities

Kimmie Rose @kimsterling26

@SheistT Provide \$50 grocery gift cards for needy families RT/#donate #thanksgiving

ISF Paw Support @ISF_PawSA

#Donate \$35 to help build the ISF Animal Sanctuary. That's all Ian asks for.

10

LAPSED DONOR RENEWAL

- We've run a database report to identify all those wonderful donors on the [verge of lapsing](#).
- We've happily tiered these donors from highest to lowest.
- We have a delightful plan to call as many of these folks as possible, starting with those who've (1) given the most, (2) those we believe have the greatest potential to become major donors, and (3) those who've given consistently for years.
- We plan to leave warm messages if we don't reach them, thanking them for last year's incredible support, leaving our contact information if they have questions or wish to give over the phone or website, and dropping a "sorry I missed you/thank you" letter in the mail—complete with a remit envelope.
- We have a schedule to keep this list wonderfully updated right up until year-end, so we don't accidentally solicit someone whose generous gift just arrived.
- We plan to organize a lapsed donor year-end phonathon and enlist our incredible board members and other volunteers to help. We'll assume in our tone and language that our donor simply forgot or just hasn't gotten around to giving yet due to life's beautiful busyness. Often, this is true; many folks think they already gave and just need a gentle reminder.
- For donors we can't reach by phone, we've prepared a heartfelt "We Miss You" letter.

PRO-TIP: Keep it brief, direct, personal, and as noticeable as you can manage. For example, if you left a phone message, reference it. If you mailed a long letter in a standard envelope, send a short note in a vibrant, invitation-sized, colored envelope they're sure to notice. Stay upbeat and positive. Celebrate their past giving and praise their ongoing generosity and good intentions. Remember Cialdini's 6 Principles of Influence. People are inclined to keep doing what they've already done to appear consistent.

11

ACKNOWLEDGMENTS

- Ensure your snail mail [thank you](#) letter is beautifully written and input into your database. If you'll have different letters for various donor segments (new, ongoing, increasing, and lapsed donors) or affiliations (board donor, volunteer donor, client donor), enter all these wonderful variations now so you're perfectly ready when gifts start pouring in.
- Ensure your email thank you letter is crafted with care and set to automatically launch the moment someone makes a donation.
- Ensure your thank you template is visually stunning, emotionally compelling, and beautifully ties back to the purpose of your appeal.
- Have a plan in place for making those donor thank you calls. Penelope Burk's research revealed that among donors who received thank you calls from board members within 48 hours of their gift, a remarkable 39% more renewed the next time they were asked, and 42% made larger gifts than donors who weren't called.
- Prepare a heartwarming new donor welcome kit in advance. Plan to send this along with your thank you letter or a few weeks later to reinforce the blossoming of this new relationship with your supporter. It doesn't need to be fancy; just make sure you let your new donors know all the exciting ways they can get involved beyond financial support, and make it super easy for them to connect with you. Show them they're embarking on a wonderful journey with you in the coming year. Being your donor should be fun and fulfilling—not just once, but all year long.

12

YEAR-END DONOR SERVICE

- Prep your amazing staff, including reception and program teams, to confidently share year-end messages with joy.
- Make sure everyone knows how to gracefully handle last-minute requests for help, inquiries about stock gifts, and any other questions that pop up.
- If staff will be away on December 31st, ensure your voicemail has a clear, friendly message guiding folks on how they can still give before the year ends. And don't forget to wish them a very Happy New Year.

Summary

First and foremost, ensure you've had recent, meaningful contact with your donors, showering them with gratitude and showcasing the incredible impact of their gifts. Remind them they are truly your heroes.

- Review last year's annual campaign results with fresh eyes and pinpoint areas where you can shine even brighter. Set goals that invigorate and inspire.
- Craft this year's compelling case for support, choose a captivating theme, and find that perfect, emotional story and image to anchor your appeal. Develop your messaging with heart and a vibrant graphic look, clearly outlining your irresistible call to action (your fundraising offer).
- Then, plaster this same theme, story, image, message, and call to action across every touchpoint: your refreshed website, branded donation landing pages, e-appeals, direct mail letters, appeal envelopes, remit cards, e-newsletters, blog, and all your social media channels.
- Make it impossible for your prospective donors to miss your message by consistently placing compelling offers in front of them across multiple channels, making it incredibly easy for them to respond. Use diverse techniques, knowing that different people have different communication preferences. Many genuinely intend to give; they just need that perfect nudge, perhaps not on the first, second, or even third time they see your offer.
- If staff will be away on December 31st, ensure your voicemail has a clear, friendly message guiding folks on how they can still give before the year ends. And don't forget to wish them a very Happy New Year.

To your success!

Fundraising and donor management software **BUILT** for **PURPOSE.**



TOUR BLOOMERANG TODAY