



YEAR-END FUNDRAISING WORKSHOP

The DO's and DON'Ts of Year-End Fundraising

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President, Gail Perry Group — how to shoot past your year-end goal



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- Philanthropy expert, speaker, author, consultant, coach
- 35+ years experience in major gift fundraising
- LinkedIn Top Voice in Philanthropy
- Top 10 America's Fundraising Experts



NEW BOOK Coming Soon!

"Easy Fundraising and Friendmaking for Board Members"



WHAT WE'LL COVER

Ten ideas that help you go over goal!

THE DO'S

- 1 Focus on donor renewals
- 2 Focus on leadership donors
- 3 Warm up your donors first
- 4 Send enough appeals
- 5 Plan your thank you process now

THE DON'TS

- 1 Make a weak ask
- 2 Send too few communications
- 3 Let a committee run the show
- 4 Make the ask all about money
- 5 Check out your donation page

WHAT YOU'LL TAKE AWAY

Leave with a plan, not a to-do list

Fast, fun and rapid-fire — everything here is built for the six weeks that decide your year.



Specific steps to raise more at year-end

Not theory. The moves, in order — ready to schedule!



The hidden donors you are missing

Where the untapped money is sitting in your own database right now, and how to find it before December.



Approaches that get renewals

Strategies and tips to nail those last minute appeals!

PART ONE

The five year-end DO's

Where the easiest money at year-end actually comes from.



#1 Focus on donor renewals

This is the easiest money you will raise all year — and it is already sitting in your database.



Work your LYBUNTs

Donors who gave last year but haven't given yet this year are your most promising prospects. This is absolutely your top list.



They are your passionate loyal supporters!

Send them a warm invitation to join the cause again.



Make the renewal personal

A phone call or handwritten note will out-raise another mass email every single time.

#2 Focus on leadership donors

A small group of donors will deliver most of your year-end revenue — so give that group most of your attention.



Name your top annual fund donors

The top tier of your annual fund typically delivers well over half of year-end revenue. Build a list by name.



Don't forget your major donors

Major donors with capacity to give again this year deserve a call, a visit or a note from a board member.



Ask each one for a specific amount

Base the ask on giving history and capacity.

#3 Warm up your donors first

Open the campaign with gratitude, not an ask. Donors who hear from you first give more when you finally do ask.



Start with a Thank-a-thon

Spend the opening week of your campaign calling donors with no ask at all. Board members love this job!



Give each caller a script and ten names

A few minutes on the phone, a short thank-you and one question: what made you give?



Send a warm-up video

It makes your eventual ask feel like a conversation already under way.

#4 Send enough appeals

Repeat yourself without apology. The gift usually comes on the message your donor finally happens to open.



Plan the whole series on the calendar.

Map every letter, email and social post allowing slack time.



Do not let one appeal carry the campaign

A single appeal is a single chance. Use multiple touches.



Send the same message on all channels.

It will finally get your donors' attention.

DO #5

Plan your thank you process now

Your thank you is the first ask for next year's gift.



Decide who does what, in writing

Name the person who signs, the person who calls and the person who mails — and set your turnaround time.



Draft the letter now.

Write it while you have time to make it warm.



Report impact, not receipt

Tell the donor what their gift will do. That single paragraph is what earns you the renewal next year.



PART TWO

The five year-end DON'Ts

The mistakes that quietly cost you gifts every December.

DON'T #1

Don't make a weak ask

A vague ask earns a vague response. The most common reason a donor does not give is that nobody asked them for anything specific.



Don't bury the ask

If the ask arrives in paragraph four, there is no ask.



Never leave the amount blank

"Will you give \$250 to feed ten families this winter?" will always beat "please consider a gift."



Tie the number to one outcome

Tell the donor exactly what their gift accomplishes.

DON'T #2

Don't send too few communications

Most year-end gifts arrive on the second, third or fourth time a donor hears from you.



Plan the follow-up before you launch

A direct follow-up message – we haven't heard from you yet – can nail the ask.



Assume your donors missed the first one

They are not reading everything you send.



Focus big in the last week

A large share of online giving arrives between December 26 and 31.

DON'T #3

Don't let a committee run the show.

Too many cooks in the kitchen. Every extra round of approval pushes your mail date deeper into the busiest giving season of the year.



Who approves what and when?

Iron out your decision process now.



Do not run the appeal by committee

Consensus review is where year-end appeals go to die. Name one decision-maker and give reviewers a 48-hour window.



Protect the December window

An appeal that lands on January 2 raised nothing. At year-end, late and never are the same thing.

DON'T #4

Don't make the ask all about money

Nobody gives to close your budget gap. Donors give because they want to change something in the world.



Ask the donor to make an impact, not make a gift

Open the letter with an impact story.



Turn dollars into impact.

Show the donor exactly what they are accomplishing.



Write “you,” not “we”

Make the donor the hero of the story. Use “you” liberally.



DON'T #5

Don't check your donation page

Every year gifts are lost to a broken form that nobody tested..



Make a gift to your own organization

Complete a real donation on your phone, start to finish. Most year-end traffic arrives on mobile, and that is where forms break.



Count the clicks and the fields

Every extra field costs you gifts. Strip the form back to what you genuinely need, and keep the donate button visible.



Read the automatic receipt

If your confirmation email reads like a bank statement, rewrite it today. It is the first thank you a donor sees.



Now have a great year-end!



YOUR NEXT STEP

Let's raise more money together

WORK WITH THE GAIL PERRY GROUP

We help nonprofits build major gift programs that actually produce — and run capital campaigns that hit their numbers.

- Major gift program design and coaching
- Capital and comprehensive campaign counsel
- Board training that turns members into fundraisers

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GET IN TOUCH

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