

Year-End Fundraising Campaign Guide & Timeline



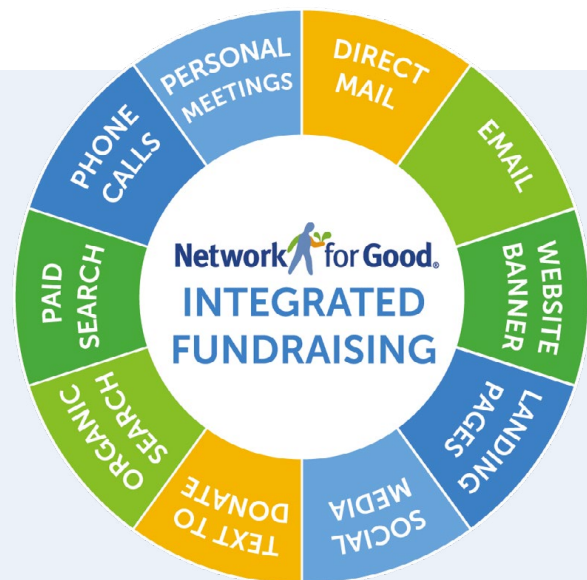
Did you know that nearly **1/3** of all charitable giving occurs in December? And **10%** of all giving is raised in the *last three days* of the year?

Year-end fundraising is the most exciting, demanding, and engaging time of the year for fundraisers. At Network for Good, we are laser focused on helping you hit new milestones in your year-end fundraising. Our donor management system (DMS) allows you to segment, communicate, fundraise, and analyze the activities that make-up your year-end fundraising campaign. This Guide, written by our most experienced Personal Fundraising Coaches, was created exclusively for our DMS clients to help you plan your year-end campaign using best practices within the DMS. Our goal is to help you optimize your time, effort and outcomes.

For our clients using Personal Fundraising Coaches, your coach will be encouraging you to:

- 1** Have a carefully planned campaign ready to execute in early November.
- 2** Set a campaign goal—one that is aggressive and realistic.
- 3** Be ready to fundraise with vigor across all of your communication channels.

Think of a year-end campaign as an integrated fundraising campaign that engages all of the senses of an organization—resulting in both increased giving and brand awareness.



Typically, a year-end campaign will run a minimum of eight weeks (mid-November to early January). Components of the campaign typically contain at least:

- ✓ One direct mail appeal—consider a second reminder direct mail appeal or postcard inviting recipients to make a secure online gift.
- ✓ 10+ emails to your donors and contacts.
- ✓ Lots of social media posts—plan on two to four per week with impact stories, donor profiles, and board member profiles so you can build engagement, sharing, and giving.
- ✓ Phone calls to key donors who you want to invite to participate in the campaign—board members and other volunteers make great, legitimizing callers.
- ✓ Engagement tactics in January to touch and retain donors, including thank yous, and new donor welcome kits.



As you consider how best to plan your year-end campaign, consider proven tactics that can boost dollars raised. This guide provides direction on:

- 1** Selecting your mailing list.
- 2** Whether to include major donors in the mailing(s).
- 3** Suggested year-end communications and solicitation timeline.

Selecting Your Mailing List

You have multiple messages that you will be sending for your year-end campaign. As you plan your cadence, consider who you want to send to and when. It is not recommended that you email your full contact list every time you communicate during your year-end campaign. Segment your existing donor base for customized messages based on their commonalities with your organization (i.e. major donors, donors to a specific program, etc.). Your coach can help guide you. Here are some considerations:



- **Direct mail**—this is the costliest part of the campaign. Depending on the size of your mailing list, you may want to:
 - Suppress any significant donors who have given within the last three months, or who would be better cultivated via personal calls (from yourself or your board).
 - Select donors who have given within the last three to five years, suppressing those who haven't given in many years.
 - Identify a “test” group that has not been routinely solicited—i.e. contacts who attended an event but haven't given, a new mailing list you have received, family members of service recipients, etc.



- **Email**—you will be sending several email messages during the campaign. Network for Good's Personal Fundraising Coaches have designed a robust series of year-end email templates (called the Year-End Engagement Plan) that are built into your DMS and segmented into donor and non-donor email groups. You can use these “drip” email templates or send your own email appeals during the eight-week period.

If you use the Engagement Plan, the mailing segments (donors and non-donors) are created for you and can be edited before you launch the plan. Consider whether you want to include major donors in this group and note that those who donate will be removed from the next email sent automatically but you will not be able to make any other edits to the recipient list once the plan is launched.



- **Social media**—begin to note those that like and/or respond to your posts. You may find that these supporters are active “influencers” who can be asked to repost your fundraising solicitation, or who are loyalists who could be asked for a more significant gift. Consider a small incentive to those who share your post (i.e. a tchotchke or coffee cup). One way to capture these findings in your DMS is to add a note to the contact's record in DMS. Or you can create a custom field named “Social Influencer” with a checkbox to filter this group.



- **Peer-to-peer**—identify loyal donors and influencers who are willing to act as fundraisers to multiply your fundraising appeals. You can use NFG's peer-to-peer fundraising pages to leverage these loyal supporter's networks as part of your year-end fundraising efforts. To get started, log in to your Fundraising Pages and choose the “Peer-to-Peer” option.

Major Donors—Do You Include?

It's helpful to know your major donor's giving habits so you can upgrade them to larger gifts. Personal meetings and calls can be planned in advance of their gift to thank them for their continued support, reaffirm the relationship, learn their specific interests, and request a higher gift. These meetings and/or calls can be done by the executive director, a trained board member or the development officer. Be sure to record the key findings and outcomes from the meeting in the donor's record in your DMS.

A best practice is to have two people from your organization; the executive director or development director and a board member. The board member will add a degree of credibility to the ask. Studies have found that personal meetings with a major gift prospect yield higher returns when a board member participates in the meeting. The prospect/donor tends to study the volunteer while the ask is being made; the board member can respond, *"When Anna and I made our major gift, we, too, carefully considered the contribution. We are happy with the investment in X organization and ask you to join us."*

At year-end, you'll want to consider whether you want to include each major donor in your year-end campaign mailing list. This depends on the timing of their gift and the amount. For example, you may want to omit the donor from your mailing list if they have recently given, or give a substantial amount that is better nurtured through personal contact. Send major donors updates on program accomplishments and personal impact stories. Include a tagline like: made possible through your generosity. Make sure the donor knows he/she made a real difference for someone. Focus on outcomes over statistics—you want to pull heartstrings.

QUICK TIP



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"Partner with your most passionate and connected supporters (donors, volunteers, board members) using social media and peer-to-peer campaigns to harness the spirit of your year-end campaign."

– ANNE MCCARTEN-GIBBS,
CALIFORNIA

Phone Calls

Even if you decide not to include your major donors in the direct mail and email appeals, you may want to have your board members call the donors to thank them. This is best done prior to Thanksgiving so you can tie in the theme of gratitude. Even if a quick, appreciative voice mail is left it will be well-received and could yield a (surprise) year-end gift if the donor has the ability and interest to do so. You can make these calls on any day of the week, but Friday afternoons are better than you might think—people typically answer their phones and are pleasantly surprised by the gesture.

To make the effort easier for you, you can create additional administrators in your DMS (at no additional cost) that have limited views. For example, a board member or staff person can view contact information and record call notes but will not see the sensitive donation information.

Matched Gifts

A highly effective motivator for a year-end campaign is a matched gift. A dollar-for-dollar donation match can boost overall giving and is a great hook to leverage across email and social media channels, especially on #GivingTuesday and in the final days of the year. Do you have a major donor who would be willing to contribute a matched gift? If so, you will want to line up the matched gift(s)—you can have multiple donors contributing towards a bulk matched gift—by the end of October. Consider forming a coalition of board members to pool their normal year-end gift into a more significant challenge to the community. A board member, preferably the chair, is likely to be the best person to lead this initiative.

What About Your Board and Top Volunteers?

Year-end is a great time to motivate your board and key volunteers to participate in your campaign. Ask them to make thank-you calls to donors and top prospects. They can also call LYBUNTS (donors who gave last year but not this year) and SYBUNTS (donors who gave some years but not this year) who you would like to retain before year-end. You can quickly pull LYBUNT and SYBUNT lists from your DMS filters in the Contacts section. Here's a sample script for a voicemail message:

Hi John, I'm a member of the X board of directors and wanted to call to thank you for your support over the years. I noticed that you haven't yet given this year and wanted to reach out. I wanted to be sure that you knew about our latest [milestone, initiative, or news]. Your contribution this year would mean the world to us—we have a goal of raising \$X before the end of the year so we can hit the ground running in 2020. Will you help us? Feel free to visit our website to make a donation, or give me a call to discuss. If you give before December 31st we will include you in our honor roll for the year. Thanks so much and happy holidays to you and your family!

QUICK TIP



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"Try to find a matching gift and definitely have a goal. If you can't find someone or a group or business to match your overall goal number, that's okay. The match (at any \$ level) gets people excited and if you do updates during the day via email #GivingTuesday can be fun, too! If you get your board involved everybody wins."

– FRANK HOFFMAN,
VERMONT

Typical Year-End Communications Schedule:

It's wise to develop a communications plan so that your organization:

- Schedules each fundraising/marketing piece in step with your marketing calendar, so there isn't conflict with other communications also being sent by the organization. Map each move as shown in the flowchart of activities below.
- Drafts a budget for all printed materials including quantities, number of direct mail pieces (letter, inserts, response cards, and envelopes), etc. Record the costs so you can plan for and evaluate future year expenses.
- Tests the materials with a select group of donors, board members, and volunteers for their reaction—are these materials emotionally compelling and motivating? Are they donor-centric enough to put him/her in the story as a participant, not merely as a bystander?
- Requests additional contacts from your board and key volunteers to add to the mailing list.

QUICK TIP



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"Draft and schedule some email blasts early so that as things heat up, you won't have to think about sending them later."

- KATHLEEN KELLEY, CFRE,
NEW HAMPSHIRE

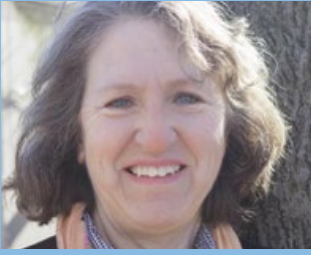
- Has ample time to design an overall theme for the campaign, requesting photos and testimonials from people connected to the cause, confirming the look and feel of the communications.
- Thinks through where and how the campaign will be promoted on your homepage and website.

Below are suggestions/considerations when designing a year-end communications plan.

Pre-launch:

- Plan your theme.
- Collect testimonials, videos, pictures, etc. that tie to your theme. Video will put the donor in the middle of the story.
- Draft communications materials—direct mail solicitation, emails, social media posts, etc.
- Develop web banners, set-up donation page for fundraising campaign, plan where and how it will be highlighted on your website and in your office (if client/donor facing).

QUICK TIP



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PERSONAL FUNDRAISING COACH

"Use the power of the database to segment so donors, lapsed donors, and non-donors get tailored messages, at the right time."

- **JANET COBB, CNP, CFRE,**
ILLINOIS

- Brief your staff on the theme, timing/calendar, and campaign goals. Get everyone pumped to be part of this year's campaign! A simple communicator is posting a thermometer with your goal in a visible spot in the office and raising it throughout the campaign. The lunchroom or near the exit are great spots that can remind all that fundraising is a team sport.
- Identify staff who will cover phones/inbound requests during the last week/days of the year so no opportunity is missed.

Preparing Your Direct Mailing

- Draft the appeal using best practices—a double-sided letter, pictures, strong call to action, using a "P.S.," etc. Your coach can tell you more about these if you are not familiar with them.
 - Consider all elements of a direct mail solicitation—letter, insert/buck slip, response card and/or donation envelop, etc.
 - Organize your board members and volunteers to write handwritten notes on the letters of key prospects.
- If you have secured a matching gift for the campaign, be sure to mention it in the letter.
 - Consider how you will print/mail your direct mail solicitation and the cost. You can print from your DMS or outsource it with a printer/mail house. If you opt to use a printer, you can recreate the letter in your DMS so you can easily retain a copy.
 - Plan the timing of the direct mailing. How many days do you expect it to take before the piece "drops" in mailboxes? If you use a mailing house, they can give you an estimate.
 - Determine whether you will use first class or nonprofit postage. Your decision affects the cost of the mailing and the time that it takes for the mailing to reach mailboxes.

QUICK TIP



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"Predispose your donors to visuals now on what you have done with their philanthropy thus far. Once #Giving Tuesday occurs, donors will know how you deployed their dollars."

- **T.J. MCGOVERN, MPA,**
INDIANA

Scheduling Your Campaign

Your communications schedule is a critical part of your success—leveraging multiple channels and timing the communications for the greatest response. Test and learn from the times that you sent your emails. Note the dates of all communications so you have a starting point for next year. For example, on December 31st, data shows that giving is concentrated between 12-7 p.m. Popular times to send emails during the week are 6 a.m., 10 a.m., 2 p.m., and 8 p.m. Tuesday-Thursday is great for reaching contacts who use their work-related email. Sometimes the weekend is smart for youth-oriented, arts, animal, or other similar missions (or if you have predominantly personal email addresses). Your best bet is to test email dates and times to see what works best for your constituency.

Here is a timeline you can use to schedule your campaign:

DATE	FORMAT	TASK
<ul style="list-style-type: none"> By Thursday, 10/31 		<p>Create an Everyday Giving Page in your DMS for your year-end campaign. Design a banner or pop up/light box for your website’s homepage promoting the fundraising campaign. The banner will run on your website for the next two months. Draft a plan for social media content—pull together core messages and photos so you’ll have a sense of your inventory and they will be available when needed. You can fill in more detail once ramp-up starts.</p>
<ul style="list-style-type: none"> Friday, 11/1 		<p>Launch the banner ad on your website’s homepage to promote your year-end campaign. It’s go time!</p>
<ul style="list-style-type: none"> Friday, 11/1 		<p>Begin ramping up your social presence (25-50 percent more activity). Post regularly for the next two months so you are at the top of newsfeeds during giving season. Spotlight key volunteers and service recipients, share exciting happenings and impact from the year, begin sharing goals for 2020. Where appropriate (but not on every post) link to the donate page.</p> <p><i>Note: Election Day is November 5 and is likely to affect national and local news. Be sure to consider the timing of your campaign against the very crowded political messaging environment.</i></p>
<ul style="list-style-type: none"> Friday, 11/1 		<p>Email to re-introduce donors and non-donors to your organization. Share a few of your organization’s major accomplishments from this year. Highlight how the support of generous donors helped you advance your mission. It’s important to re-introduce your mission before you share personal stories and ask for contributions.</p>





QUICK TIP





















NETWORK FOR GOOD DIRECTOR OF MARKETING OPERATIONS

“Marketing pro’s live and die by communications schedules. A communications timeline for year-end fundraising will help you stay focused, maximize touch points and reduce your stress levels. It’s a constant reminder that ‘you’ve got this!’”

– CHARNELE BAZEMORE, WASHINGTON DC

DATE	FORMAT	TASK
<input type="checkbox"/> Thursday, 11/7	@	Tell a story in the third person that highlights the tangible impact of your work.
<input type="checkbox"/> Week of November 18		Develop the phone script for board members and other volunteers to make their calls. The goal is deepened engagement—ask what inspires your giving, etc. Collect and leverage their stories.
<input type="checkbox"/> Friday, 11/15		Time the arrival of your direct mail letter to land in mailboxes by or around mid-November. This letter matches your year-end theme and the graphics used in your campaign emails and social posts. Optional: send a second letter or postcard to those who haven't responded to arrive by the end of the first week of December. The additional touch can be a useful reminder for well-meaning procrastinators.
<input type="checkbox"/> Tuesday, 11/26 and Wednesday, 11/27		Board makes thank you phone calls to the top donors from 2019 (to date). There is no direct appeal for funds in this communication. Record any relevant contact feedback/notes in your donor management system.
<input type="checkbox"/> Monday, 11/25		Send hand written thank you notes to top 10-20 donors to arrive before Thanksgiving.
<input type="checkbox"/> Wednesday, 11/27	@ 	Thank you emails can go out to volunteers, the board, etc. to express appreciation for all they do and wish them a happy Thanksgiving. Alternatively, you can send a thank you text message.
<input type="checkbox"/> Wednesday, 11/27		Thank you post on social media. This can include a nice harvest picture or one that shows the joys of volunteering/contributing. There is no ask for a donation, instead focus on gratitude for the support you have received from so many volunteers and donors over the year(s).
<input type="checkbox"/> Friday, 11/29	 	Launch a banner on your website's homepage for #GivingTuesday and add the #GivingTuesday logo to your campaign donation page. Post a "save the date" on social media for #GivingTuesday. You can find a handy #GivingTuesday toolkit (with logos) by clicking here .
<input type="checkbox"/> Sunday, 12/1	@	Email blast to promote #GivingTuesday—consider announcing a matching gift to encourage contributions.
<input type="checkbox"/> Sunday, 12/1		Post on social "Are you ready for #GivingTuesday?" to create excitement.
<input type="checkbox"/> Monday, 12/2		Fill out the form within your DMS to begin sending text messages. Send a get ready for #GivingTuesday text message. Repeat again on #GivingTuesday.

DATE	FORMAT	TASK
<p>□ Tuesday, 12/3</p>	<p>@</p> <p></p>	<p>Up to three emails and text messages promoting day-of giving on #GivingTuesday. Use #GivingTuesday logos/hashtags where appropriate.</p> <ul style="list-style-type: none"> • Early morning (around 5 a.m.): Announcing that it's #GivingTuesday—please join our national day of giving. • Noon: Updating your contacts on your progress against your goal and encouraging prospects to give by the end of the day. • Early evening (around 7 p.m.): Announcing that time is running out and you are sooo close to your goal (or that there is still time to give)—please help us! Show a progress thermometer or another graphic that highlights your goal.
<p>□ Tuesday, 12/3</p>	<p></p>	<p>Posting throughout the day to encourage giving, share gift results/momentum, and highlight impact. Use logos/hashtags for #GivingTuesday where appropriate.</p>
<p>□ Wednesday, 12/4</p>	<p></p>	<p>Post a thank you banner for gifts received on #GivingTuesday or remove #GivingTuesday logos and wording from website banner and campaign donation page. You will want to officially remove any reference to #GivingTuesday in your banners and on your donation pages by Thursday, 12/5, so there is complete focus on your year-end campaign.</p>
<p>□ Wednesday, 12/4</p>	<p></p>	<p>If possible, call every new donor from #GivingTuesday to personally thank him/her for choosing your organization. Ask what inspired the gift and their communication preferences for the future. Enter relevant call notes/insights into the contact record in your DMS. Thank-you postcards can be a nice addition, or alternative, to the calls.</p>
<p>□ Rest of December</p>	<p></p>	<p>Increase your posting cadence to at least two to three times per week. Spotlight your programs, incredible volunteers, profile a major donor. Slip in an ask (modeled after your campaign theme) every three posts.</p>
<p>□ Tuesday, 12/10</p>	<p>@</p>	<p>Email blast to encourage giving during the year-end campaign (suppress anyone who has given so far). Tell a story, use a testimonial. Use some of your communication language in a social media post the next day.</p>
<p>□ Second week of December</p>	<p></p>	<p>Board members call lapsed 2019 major gift donors (or those who gave early in the year and you'd like to request another gift) to thank them for their prior giving and to ask them to give before the end of the year. "Your contribution will help XX [service recipients] and enable us to expand our outreach."</p>
<p>□ Tuesday, 12/17</p>	<p>@</p> <p></p>	<p>Optional reminder email blast and text message to encourage giving during the year-end campaign (suppress anyone who has given so far). It's important to talk about the spirit of generosity and gratitude that comes with the holiday season. Express gratitude for what your organization has been able to accomplish. Appeal to donors/non-donors to show their support. This email should come from yourself, your board president, or someone of influence (from their business email) rather than from your standard organization email address (i.e. JaneDoe@xcharity.org vs. xcharity@xcharity.org). Use some of your communication language in a social media post the next day.</p>
<p>□ Thursday, 12/26</p>	<p></p>	<p>Ramp up asks for giving though the rest of the year. A short pitch can be made at the end of a content related post.</p>

DATE	FORMAT	TASK
<ul style="list-style-type: none"> Thursday, 12/26 	 	Reminder email mentioning that there are only a few days left to give and be recognized as a 2019 donor. If possible, announce a matching gift to propel additional gifts.
<ul style="list-style-type: none"> Monday, 12/30 	 	Email blast with "Time is running out! Please help us reach our goal." promotion. Mention where you are against your campaign goal.
<ul style="list-style-type: none"> Tuesday, 12/31 	 	Final email of the campaign to encourage gifts by midnight on December 31. Send a thank you email to all who contributed. Include an update on dollars raised and good tidings for the New Year.
<ul style="list-style-type: none"> First two weeks of January 	 	Send direct mail thank you letters to major donors. Prepare 2019 donation summaries to be direct mailed or emailed.
<ul style="list-style-type: none"> Last two weeks of January 	 	Create an internal campaign report to highlight results and lessons learned. Ensure your data from the year-end campaign is clean and organized in your DMS. Identify any first-time donors (they are tagged in your DMS) and put them into your queue to receive newsletters and other general communications. As an engagement tool, consider sending a donor welcome kit (welcome letter and brochure) by direct mail to new donors. Set yourself up for a smooth and successful 2020.

#GivingTuesday

Last year, #GivingTuesday raised over [\\$380M online in the United States alone](#). The global day of giving continues to grow and, if you haven't participated, you may want to join the movement this year. #GivingTuesday fundraising can occur via email, text-to-donate, and Facebook fundraisers and other social media.

Visit the #GivingTuesday [website](#) to view their free online toolkit, get ideas, and copy the logo for your marketing outreach. Provide an engaging, celebratory conclusion to the day by sending a newsletter and social media posts the following day (Wednesday) with pictures/testimonials, a donor honor roll, and spotlight on the total raised.

Advanced Campaign Ideas

Year-end campaigns are a lot of work, but they can be fun, too! They are a fantastic way to leverage all your possible fans—staff, board members, volunteers, etc. If you want to go the extra mile this year, here are a few ideas:

QUICK TIP



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"Offer a donation match and leverage the energy of #GivingTuesday for your donors to be part of the global wave of generosity."

- LEA ANN SKOGSBERG,
ILLINOIS

QUICK TIP



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PERSONAL FUNDRAISING COACH

"Incorporate #GivingTuesday plans into your current year-end campaign as an integrated, additional touch."

- ROBIN CABRAL, MA, CFRE,
MASSACHUSETTS

- Ask your most dedicated followers to create and start promoting a peer-to-peer campaign just before Thanksgiving. The campaign would run through December. Your Personal Fundraising Coach can guide you on how to launch and manage these campaigns. Use social media to celebrate the success of individual fundraisers and continue to encourage your fundraisers to promote their campaign.
- Share sample language with your board members and best volunteers to use so they, too, can promote your campaign through their channels (work, social, etc.).
- Promote sustaining/recurring giving by including monthly/recurring donation language in your solicitations and double check to ensure that it is an option on your Everyday Giving Page.
- Leverage your year-end Everyday Giving Page as a campaign landing page that features images from your campaign, brief testimonials (a video or links to testimonials), and highlights ways to give and volunteer.

January Follow-Up

Fundraisers often spend the last few days of the year anxiously tracking donation levels against their campaign and annual goals. It's thrilling to watch the dollars tick upward toward these goals. And after a well-deserved snooze on January 1, it's time to move to the next phase and engage your donors so you don't lose them! Sadly, less than 50% of all donors (new and recurring) do not give again after the first donation—the suggestions below can help you beat the odds and retain more donors:

- In the first week of January, thank your donors as a group via social media. It is also nice to send written thank you's with handwritten notes to major donors, as well as mid-level donors who have the potential to upgrade.
- Thank you phone calls also go a long way to building relationships with new and/or promising donors. You can leverage board members to make these calls. Be sure to provide a script.
- Update the donor honor roll on your website to recognize those who made a gift in 2019.
- Keep your board well informed and attuned to your fundraising via email—use the email blast feature in your DMS to share some statistics, pictures, and highlights from your 2019 fundraising.
- If you don't already produce an annual report, use the email blast feature in your DMS to compile a simple report that can be shared with your entire contact base. Or upload a PDF of your annual report to your website and link to it in an email blast.
- Create a welcome kit for new donors—an overview of your programs, newsletter, pledge form, calendar of upcoming events—let this document serve as a friendly information tool rather than a hard fundraising appeal.

QUICK TIP



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PERSONAL FUNDRAISING COACH

"Segment your communication lists to test and learn. It's one of the best ways to see what resonates with your audience. Be sure to record your findings so you can build on them next year."

– **KIMBERLY O'DONNELL, MS,
CFRE, WASHINGTON DC**

QUESTIONS?

Schedule a session with your Personal Fundraising Coach. They are ready to get you on schedule and on target for a successful year-end campaign.

From all of us at Network for Good, best wishes for a smooth and successful giving season!

Acknowledgements

Special thanks to our Personal Fundraising Coaches who contributed to, or were quoted, in this Guide:

Robin Cabral, *MA, CFRE*

Janet Cobb, *CFRE, CNP*

Frank Hoffman

Paige Jarrett, *MA, MSc*

Kathleen Kelley, *CFRE*

Anne McCarten-Gibbs

Kimberly O'Donnell, *MS, CFRE*

Lea Ann Skogsberg

T.J. McGovern, *MPA*

As well as our fantastic Network for Good staff who helped with the production of this Guide:

Charnele Bazemore,
Director of Marketing Operations

Elizabeth Ragland,
Customer Success Marketer