

The Year-End Fundraising Planner

A Worksheet to help you organize and plan a successful year-end fundraising campaign.





INTRODUCTION

Your year-end campaign is important not only because it takes place when your donors are the most generous, but it also reinforces your organization's commitment to fundraising while recruiting, maintaining, and expanding your donor base.

Your year-end campaign should deliver a consistent, compelling message across multiple channels to support a single fundraising goal. A campaign is a process, not a single appeal. Your campaign should be a well-orchestrated series of activities that happen for a specific amount of time.

Use this planner to help organize your plan and optimize your key components for a more successful December campaign. You'll have a basic action plan that you can share with your team, your boss, and your board.



Part 1: Examine Your Data & Create the Perfect Plan

[Hint: Use your donor management system to aggregate your fundraising data to create a clear picture of your past performance and opportunities

- a. How much money did you raise last December?
- b. How much money do you need to raise this December?
- c. List other fundraising goals you may have, such as number of new donors, new monthly donors, etc.:
- d. Write out no more than 4 sentences that make up your core case for giving. If there are matching gifts involved, make that one sentence. Refer back to the <u>four questions</u>—are they covered here?
- e. Outline your #GivingTuesday plans. How will they complement or stand out from your other December appeals?
 [Hint: Consider differentiating your #GivingTuesday outreach by empowering your board members, volunteers, and supporters to raise funds on your behalf. <u>Network for Good's peer-to-peer fundraising software</u> makes it simple to set up and fun and easy for your fundraisers.]
- f. Set the dates for the beginning and end of your annual campaign.



Part 2: Craft an Irresistible Appeal

[Hint: Grouping donors gives you the power to communicate with each segment more appropriately and effectively. <u>Network for Good's Donor Management System</u> makes it easy to create groups, and then send segmented, customized appeals, all from one tool!]

- **a**. An effective appeal is one that raises the most money. List any appeals (email, mail, etc.) that have been especially successful for your organization (or any other).
- b. List the possible elements of an emotional fundraising appeal, such as your founding story, a moving success story, a powerful photo, etc. Remember: This is not about facts or statistics.

- c. Who are three potential signers for your year-end appeals?
- d. What do you want the recipient of your appeals to do? This will become your <u>call to action</u>. Be as concise as possible.



e. List 2 to 3 photos that would add just the right emotional drama to the story you plan to tell with your appeals.

- f. Write 3 possible <u>subject lines</u> for your first email appeal.
- g. A compelling fundraising appeal answers <u>four key donor questions</u>: Why me? What for? Who says? Why Now? Following the 4 questions, write down a phrase or sentence responding to each.

- h. Do you plan to test your emails? If so, what will you test?
- i. List three specific segments of your list who you plan to target with your December campaign. How will you customize communications for each group?



J. Now, define each segment with your organization's criteria, the target ask, and number of contacts that fall into each group. Your <u>Gift Level-Recency</u> <u>Segmentation</u> overview might look something like this example:

Segment	Attributes	Target Ask Amount	
Renewed Donors	Made a gift in the current fiscal year	Second gift, upgrade/special program appeal	
Event Donors	Attended an event in the current fiscal year, but has not made an annual gift	First gift, flat amount of \$25-\$40 for a special program	
Current Donors	Made a gift in the last fiscal year, but not yet in the current year	Last gift amount + 50% more; or monthly giving program enrollment	
Lapsed Donors	Made a gift two years ago, or prior, but not since or in the current fiscal year	Last gift amount, special program appeal	
Non-Donors	Prospects for contact info, but have never made a gift	First gift, flat amount of \$25-\$40 for a special program	



k. Review your planned send dates and create a communications calendar for the rest of the year. Add a phrase or sentence for each piece of outreach to indicate any testing, segmentation, or versioning you plan to do. Consider copying and pasting this as a separate document, and add as many rows as necessary to create a complete view of your communications plan.

Date	Туре	Message	Call to Action	Audience	Notes

[Hint: Remember to sync your online and offline calendar and be sure to send at least 3 emails between Christmas and New Year's Eve. This is when the majority of year-end giving happens!]



Part 3: Optimize Your Giving Experience

[Hint: <u>Network for Good's smarter donation pages</u> are easy to configure and customize with your message, giving options, and images. Plus, they help you make it easy for donors to give at higher donation amounts.]

a. Review your website, especially the home page and donation page. How can you transform your home page it into a fundraising-only page in December? What calls to action should be removed? Write down the key changes you would like to make.

b. Draw a freehand sketch of what you would like your site to look like during year-end fundraising. Make a copy for your webmaster and post a copy in your workspace.

c. What are the traffic-driving elements you plan to employ this year-end giving season? This could include social media promotion, social media advertising, search marketing, traditional advertising, etc. Who will be responsible for each set of tactics?



d. Carry out a 5-minute audit of your online donation page. List the changes that need to be made before year-end fundraising begins. Make sure the images, messages, giving amounts and calls to action match your brand and your appeals.

e. Review your email plan, and add a note or two about your planned social media posts that will complement each email.

f. Set a timer for 10 minutes. Now write down as many ideas as you can think of for cultivation emails and other communications to reactivate/improve your relationship with donors over the coming weeks. Be creative. Assume the majority of your communications will not include solicitations for additional gifts until later in the season.



Part 4: Thanking Your Donors

[Hint: <u>Network for Good's Donor Management System</u> allows you to easily see your fundraising results, which donors gave which amounts, and enables you to quickly thank donors and follow up with them all from one tool!]

- a. Who will be in charge of thanking supporters?
- b. Do you have an existing process for thanking each type of donor (online, phone, mail, etc.)? If so, give an overview of each process:
- c. Think about your standard thank-you letter. Jot down some ideas for improving and personalizing it:

- d. Review your email plan, and add a note or two about how you will thank online donors.
- e. Review your direct mail plans and add a note or two about how you will thank donors who give via check.
- f. Do you currently thank participants by phone? How could you increase phone acknowledgements and involve your board members?



g. List 3 ideas for updating your donors about their impact:

h. Who will manage the donor experience on an ongoing basis? This person should be able to focus on forging ongoing relationships with those who give.

i. When do you plan to reach out to donors and ask them for feedback about their giving experience and your programs?