

# The Ultimate Year-End Fundraising Survival Guide

A handbook to help you survive (and thrive!)  
this December.

# Want a year-end fundraising boost?

The end of the year is like the Super Bowl for nonprofits. Without the hot wings and ridiculous commercials, that is.

All kidding aside, December is the culmination of the hard work you've done to attract supporters and communicate your impact. Year-end fundraising gets some help from a few other built-in bonuses that prime people to give. The holiday season puts people in a more generous mood, and there's a sense of urgency as the year winds down. These are powerful motivators that inspire action.

With such a big portion of online gifts happening in this sprint to the end of the year, it's critical that nonprofits have a game plan to be ready for this opportunity.

Luckily, there are a few key steps that fundraisers can take to make the most of these generous procrastinators. (Even if you're a procrastinator yourself!)

This guide will help you communicate more effectively and optimize your online fundraising strategy to convert more donors, receive larger gifts, and set the stage for long-term donor retention.

## This survival guide includes:

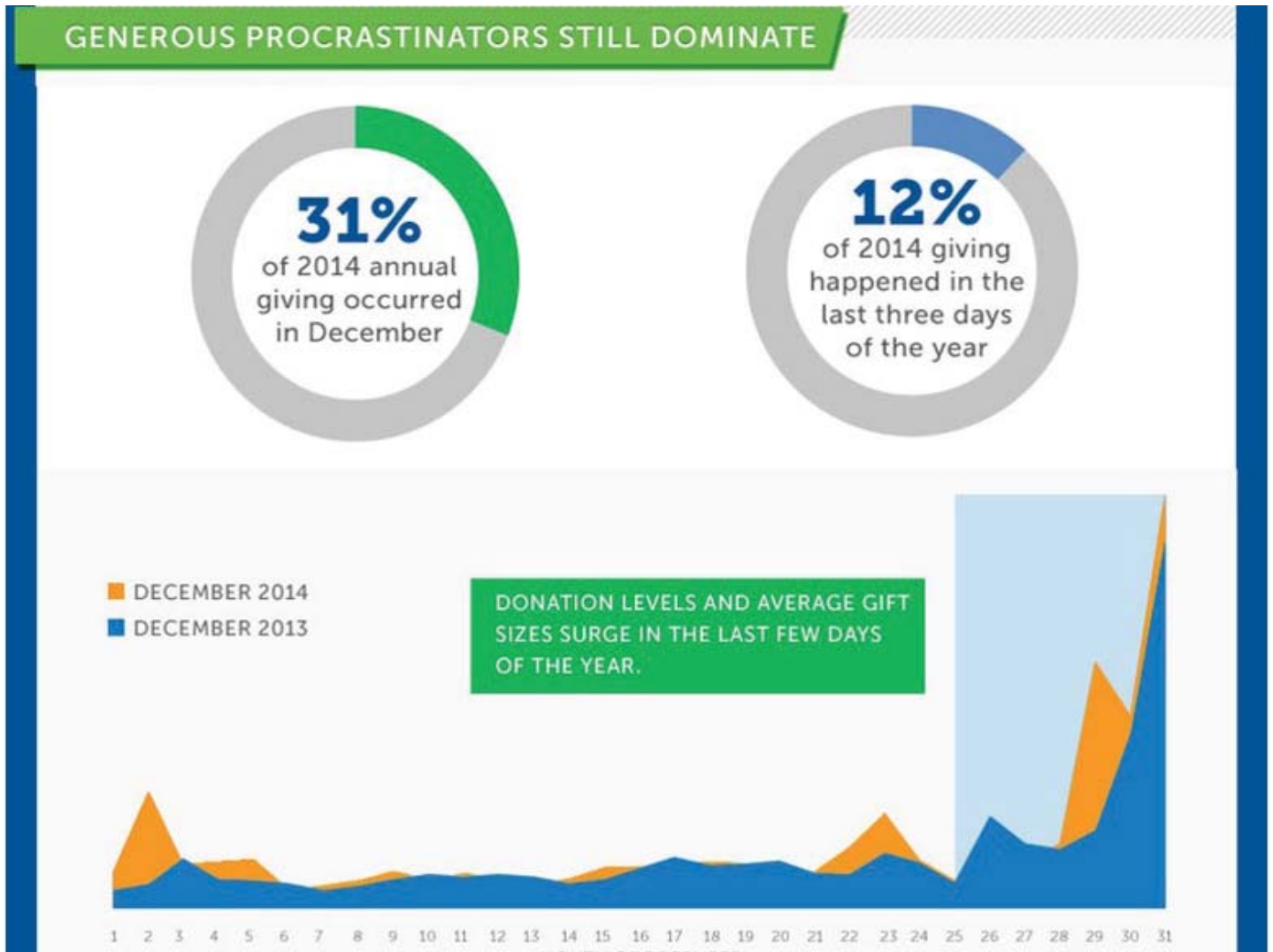
- Year-end housekeeping musts that help donors give more
- A fundraising appeal framework that will inspire donors to act
- The steps you must take after a gift is made
- Insider secrets (and a dash of humor) that will make the process less stressful for you and your staff
- A simple year-end campaign checklist to help you attract more donors and get larger gifts

# Why Year-End Fundraising Matters

Let's cut to the chase: Year-end giving is BIG.

Here at Network for Good, roughly one-third of annual giving through our online giving system occurs in the month of December alone; and in 2014, 12% of all donation dollars came in on the last three days of the year. The vast majority of those donations were contributed directly through charity websites.

We even have a graph to prove it:



Source: Network for Good [Digital Giving Index](#), 2014

So, we've established that people are in a giving mood and they wait until the last minute to make donations. Does this really add up to anything?

Sure does.

We know that year-end gifts tend to be larger than gifts made during other times of the year, including in times of disaster or crisis response.



Source: Network for Good [Digital Giving Index](#), 2014

And, since people tend to wait until the last minute, online giving is a perfect venue for those donations.

With so many people giving—and giving big—at the end of the year, you'll want to maximize your efforts to ride this wave of generosity.

Let's get started!

# Set a Clear Target

Is your year-end fundraising campaign focused on getting results?

It may sound like a silly question but many organizations don't approach fundraising campaigns with clear, concrete goals. And without clearly-defined goals, it's pretty tough to know if you're actually succeeding.

Setting a fundraising goal helps to ensure that you and your colleagues are on the same page with the desired results of a fundraising campaign. Keeping track of where you are in terms of meeting your goal can give you the information you need to adjust your fundraising strategy or improve your outreach.

Now is the time to define what results you and your organization want to achieve. Keep these key pointers in mind:

**Set a specific goal for your fundraising campaign.**


Before you finalize your plans, know whether your overall goal is to add a specific number of new donors or to reach a certain donation level. Have a clear and measurable end result in mind. Decide how you will define success, such as "Raise \$20,000" or "Add 200 new members."

**Check that your goals pass the SMART test.**

You're one smart cookie, but do your goals follow suit? Remember: Your goals should be specific, measurable, achievable, realistic, and time-bound. For a year-end fundraising campaign, the last one is already covered—typically the year-end campaign window is from Thanksgiving through December 31.

**Segmentation is the key to engagement.**

Some audiences are likely more important than others within the context of your campaign. Do you need your current supporters to mobilize and become fundraisers for you? Think about your goals and who holds the key to your success. Lack of participation from primary groups can cause your campaign to falter or fail.



If you're having trouble clearly defining your goal, ask yourself these four questions:

- What are you trying to accomplish? Picture what your ideal end result will be.
- Who are you trying to reach? Decide on your key audiences before planning your campaign.
- What do I want them to do? Have a clear call to action for your supporters. Will they be asked to donate a specific amount or pledge a recurring gift? Make sure this is baked into your planning and communications.
- What is the best way to reach my audience? Once you've identified your audience and calls to action, think about the best way to reach and activate your supporters.

Once you've established a clear goal and you have your team on board, you're on a course for fundraising success!

# Craft a Strong Appeal

As the year winds down, now is the time to remind your supporters of the great work you do and how they make that possible. Personal connections and stories have a big effect on giving—so if you've got them, use them.

An effective appeal is equal parts emotion and urgency. You want to pull people into your message with a compelling story, and then push them to act with a specific, clear, and urgent call to action. Here are some things to keep in mind as you craft your year-end ask:

**Show how donations will be used.** If your audience has given before, tell them all the great things they've done, and all the wonderful things that more support will bring.

**Be specific.** Don't assume your donors know what you want them to do. Ask for one concrete action. Asking people to click on a button to donate now is better than asking them to support your campaign. Specific actions are easier to do and harder to decline.

**Keep it simple.** December is a busy month for everyone. Don't be longwinded or beat around the bush. Make an incredibly compelling yet concise case for why people should give.

**It's not all about you.** Instead of talking only about how great \*you\* are, share amazing stories about your donors, volunteers, and beneficiaries. Inspire your supporters to want to be a part of the action.

**Share a photo.** One powerful photo can go a long way in stirring emotion. Pick a clear photo of one person or animal looking straight at the camera.

**Make it personal.** People give more when they feel they're helping another person to whom they can relate. Don't talk about the masses who need help. Focus on one person's story.

## A Few Words on Framing Restricted vs. Unrestricted Gifts

It's tricky for fundraisers to grapple with restricted versus unrestricted giving. How can we tell an individual's story and connect our donors to that individual while still raising money for a larger cause?

This isn't easy, but organizations must work hard to transform their fundraising model to meet donors' emotional needs.

- Tell stories that exemplify the work of your organization, without using statistics.
- Incorporate these stories into your fundraising and marketing channels.
- Be clear that these stories are emblematic of your work, but don't create the impression that a donor's contribution is specifically earmarked for an individual (unless it is).

## Timing Your Appeals

Although your donors may procrastinate on making their gift, you shouldn't wait until the last minute to reach out to supporters! Clean up your mailing lists and begin emailing people now. Make it part of every conversation you have—whether it be through email, print, or social media.

Warm up your donors now, then send a series of appeals starting the week of Thanksgiving and continue until December 31.

Plan to send a few final emails the last few weeks of the year. Send an appeal on December 23 one on December 29 or 30, and then a final one on December 31. As you get closer to the end of the year, your appeals should become more concise and emphasize the deadline. You want to increase visibility and reach donors when they are most inclined to give.



## Answer These Key Questions

Along with a compelling story, it's critical that you take the guesswork out of giving for your donors. That begins with understanding the questions your donors are asking themselves before they give.

### “Why me?”

Your donors need to know why your cause is relevant to them and why they should care. They need to connect with you on a human level. Use pictures, tell stories, and do anything that can help your audience relate to your organization and its mission.

### “Why now?”

Is there urgency in your appeal? Create a sense of immediacy. Explain why a donation is needed right now. (At the end of the year, donors will generally answer this themselves knowing that tax deadlines are approaching.)

### “What for?”

Describe what their gift can accomplish and the impact it will have. Share how other donors have helped individuals in need. Important: Avoid talking about massive numbers, mind-numbing statistics, or intangible outcomes. This makes it harder for donors to relate to your cause!

### “Who says?”

People are increasingly skeptical and will trust what their friends, family, and even acquaintances say over all of your marketing efforts. Ask existing supporters to share why they give to you and what it means to them. Use these testimonials in your outreach. Also consider who signs your appeal. It may be more effective for your message to come from a volunteer, beneficiary, or a front-line staff member instead of your executive director.

# Make it Easy to Give

Once you've made the ask, don't put roadblocks in a donor's way by creating a confusing or complex donation experience. From your first appeal to your thank you page, make it easy for your supporters to give to your cause.

There are three basic requirements any online donation experience should satisfy:

## 1. It should make giving easy.

This can't be stressed enough, so we'll say it again and again: Don't make your donors think too hard about giving to your organization. This includes enabling your supporters to quickly interact via mobile and social: can your donors easily give and share on the go?

## 2. It should keep donors in the moment of giving.

When a prospective donor lands on your donation page, each component should reinforce their decision to give while making it quick and easy to complete their donation. This means it should closely match your nonprofit's branding, campaign materials, and message. Make your donation page an extension of the conversation you're having with your potential donors so there's no disconnect.

## 3. It should help start your donor relationship off right.

Donor retention really begins before a donation is made. If it's confusing, difficult, or frustrating to give to your cause, you're not starting your donor's experience with your organization on a positive note. Your donation page should also help you quickly thank donors with a powerful post-donation experience and email acknowledgement, plus give you the information you need to cultivate these supporters over time.

## Optimizing Your Donation Page

To make the most of your year-end efforts, you absolutely must have an easy, intuitive way for donors to give online.

E-commerce or shopping cart-style experiences aren't optimized for charitable giving, so to raise more money online, you need a donation page that allows donors to give quickly and offers essential tools for fundraisers, like the ability to track gifts and send thank you messages.

Think of it this way: You're going to be putting a lot of time, effort, and money into communicating to potential donors. Don't lose them in the final stretch to a confusing or inefficient donation experience.

Take some time to review your donation page now to ensure that it's in shape for eager donors this holiday season.

### Beware of these common pitfalls:

- No easy way to give online.
- Microscopic or missing donate links on your nonprofit website.
- Conflicting calls to action.
- Too many distractions on your nonprofit website or giving page.
- Lack of urgency. (Donors might think "I'll do this later ..." and then never come back!)
- Overwhelming donors with statistics instead of appealing to their emotions.

## Your online donation page should:

- Be as short as possible. Ideally your form should be one page and include a minimum number of fields.
- Be branded to look like your organization's website. Your page will perform better if it carries your nonprofit's design; worse if it does not.
- Have one clear call to action: Donate!
- Be concise. If you have copy on why to give/where the money goes, keep it very short.
- Be easy to read. Go easy on the eyes and avoid offbeat fonts, clashing colors or unconventional design choices.
- Offer well-positioned recurring gifts.
- Provide a warm online thank you after the donation. (And send an email receipt automatically.)
- Be easy to share. Empower your supporters to easily tell someone else about your organization after they donate.

Once you have covered these best practices, you should know what happens on the page once people land on it. Be sure you can track your donate page activity through web analytics so you know what people do when they're there. Seeing a lot of traffic to your page but not many donations? This may mean your messaging is confusing or that your donation page needs some work.

Don't be afraid to test different calls to action or set different donation amounts to see what works best. After each test, compare your results so you can make the best decisions for making the most of your campaign.

**Bonus:** When you're making it easier for donors to give, make it easier for them to give *\*more\**. Ask them for a monthly gift. On average, recurring donors give 42% more per year than one-time givers. Plus, these donors are more likely to become long-time supporters. Everybody wins!

# Tidy Up Your Website

While there are now many ways for potential donors to find and interact with your organization online, your nonprofit's website is still home base for everything there is to know about who you are, what you do, and how supporters can get involved.

Not convinced your donors are going online to do their homework?

Whether they give online or offline, 65% of all supporters will still check out your website prior to making a donation. This means that your website is your opportunity to make a good impression on potential supporters.

If it's not in the cards to completely overhaul your site, there are still some key things you can do to make your online experience more donor friendly for year-end. Focus on your home page, your donation page (which we already covered), and your About Us page.

**Make it easy to give from your website.** Donors expect to find a way to donate from your site—if you don't have this option prominently featured, they may assume you don't need their help. This is especially important at year-end, when you're sending out a series of appeals. For the month of December, make your home page and other key landing pages focused on fundraising.

**Show where the money goes.** Create a simple "Why Donate" page and provide links to this page from your "About Us" section, home page, and donation form. On this page, include easy-to-understand pie charts and clear descriptions of where your money comes from and where it goes.

**Highlight your endorsements.** Testimonials, ratings, and seals of approval are all powerful cues that tell potential donors that yours is an organization that they can trust, because others are willing to speak on your behalf.

**Test it.** Ask a few objective testers to help you identify any issues with your site. Give them a hypothetical situation: they have heard of your organization and are considering donating to your cause, but first they need to get on the website and do some research. Have them talk through the process, what they like and what they don't, could they find everything easily and what, if any, information is missing that they were expecting.

# Focus on the Follow Up

According to the Association of Fundraising Professionals' [Fundraising Effectiveness Survey Report](#), 103% of donors gained by nonprofits were offset by lapsed donors.

Let that sink in for a minute: for every 100 new donors that came through the door, 103 walked out.

Not exactly the growth most nonprofits are looking for.

Now is your opportunity to begin turning year-end donors into your long-term partners in good. To do so, you need a solid plan to welcome these donors, keep them informed, and build relationships with them throughout the year. The first step is to keep the magic alive with a well-planned donor gratitude strategy. Here are some things to keep in mind:

**Thank your donors as soon as possible.** Ideally, your online donors have already received an automatic thank you and receipt, and offline donors are receiving their thank yous in the mail shortly. Thanking donors promptly is not just common courtesy, it's positive reinforcement of their decision to support and trust your organization.

**One thank you is not enough.** You've acknowledged all of your year-end donations with a proper thank you. You're done, right? Not so fast. One great thank you is a good start, but don't forgo regularly thanking donors to keep them up to date on the impact of their gifts. Don't leave donors wondering, "Whatever happened to that person/animal/cause in need?"

**Don't forget other donation sources.** Acknowledge every donation your organization receives, whether they come from your direct mail campaign, your online donation page, or from third-party sources such as employee giving programs, peer-to-peer fundraisers, or online giving portals. Understand all of your donation sources and tailor your notes of appreciation where necessary. New donors coming in from a peer-to-peer campaign, for example, may need a more formal introduction to your organization than donors you've directly solicited.

**Make sure your thank you is sincere and memorable.** You may have a template for your donor thank yous, but if your thank you feels like a form letter, it needs more work. Express authentic gratitude for your donors' generosity and put them in the middle of the work you do. Use photos, quotes, and even video to help bring these stories to life for your supporters. Give donors a thank you so amazing that they can't wait to show it off to their friends and family.

## **Beyond the Thank You Letter**

Crafting an amazing donor acknowledgement is critical, but it's just the beginning. Consider how you will build the relationship with your supporters for years to come.

**Celebrate Your Donors.** Find ways to recognize and celebrate your donors on your website, in your newsletter, and in your future outreach.

**Extend an Invitation.** Keep the door open for your donors to do more—such as volunteer, attend an event, or help you spread the word about your cause. Make them feel like they're part of the team.

**Make them Feel Special.** Personalize your acknowledgements to include relevant details to each donor, like additional information on the specific programs they support.

**Keep in Touch.** Reach out regularly to update your donors on your progress and how their donations are making a difference.

**Ask for Feedback.** Your donors are a valuable source of insight and inspiration. Make it easy for them to share their comments and suggestions, and take note of indirect feedback, such as unsubscribe requests. Track your results. After you have created and shared a few videos, start tracking audience interaction. What do people like to watch? What are they sharing often? These metrics will give you indicators about what is resonating with your audience.

# Look Ahead to Next Year

Breathe a big sigh of relief as the clock strikes midnight on New Year's Eve. You won't have to think about year-end giving for a nice long while.

Wrong.

(You knew that was coming, didn't you?)

Reality: the best way to get the most out of December giving is to track, plan, and adjust all year long.

**Understand what's working.**

As you congratulate yourself on your hard work this year, be sure to review your efforts and the results you saw to learn which messages and channels work best for your nonprofit.

**Tighten your strategy.**

As you think of your 2016 strategy, revisit your your goals and your audience. What are your organization's top targets? How can you optimize your communications to focus on the key groups and desired actions? If you align fundraising strategy with your organization's priorities, next year's campaigns will be even more successful.

**Invest in growth.**

Balance your budget to include a healthy dose of the tactics and tools that produced the best results, as well as some new tests to find out the other methods and messages. Don't forget to count staff time and non-monetary resources in your review. The right tools and training are wise investments if they can help your organization become more efficient and effective.

**Continue to build your list.**

Map out your donor acquisition plan for 2016. Leverage your best bets for building your prospect file and consider new ways to grow your list. Make an effort to recruit most of your new leads by mid-fall. This will give you time to build a relationship with them in hopes of converting them into new donors at year-end. Create a communication plan that tells a consistent story throughout the year to deepen your relationship with your prospects so that they are inspired to become donors when it's time to make the ask.