

blackbaud®

# END-OF-YEAR FUNDRAISING TOOLKIT

A Step-by-Step Guide to Planning Your  
End-of-Year Giving Campaign Today

## In this ebook, you will learn:



Why end-of-year giving is so critical to your organization's fundraising success



What needs to happen right now to ensure your most successful year-end campaign



Fundraising trends you can capitalize on to make the most of this critical time of year

*Ready to get started?*

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# Introduction



In 2015, the percentage of giving that happened in December held steady for the second straight year at 17.4%, by far the largest month in terms of distribution of giving. Online giving in December increased from 17.8% in 2014 to 19% in 2015, potentially showing the influence of online giving days like #GivingTuesday. Is your organization positioned to make the most of that month and the feelings of generosity that the holiday season brings?

If you haven't yet begun, now is the time to start planning a holiday campaign that engages and delights all of your supporters—not just the existing donors, but also new prospects and lapsed donors. This creates a complex web of channels and messages that can quickly become overwhelming if it isn't managed appropriately. But the good news is that there's a wealth of existing information and tools to help you connect with your supporters according to their preferences.

In this toolkit, we bring together insight, tips, and strategies to help you build a comprehensive end-of-year giving program. From testing and segmentation to organizational alignment and donation form optimization, the topics covered here will paint a comprehensive picture of the steps you need to take to connect with your donors and achieve your fundraising goals.

As you read on, keep one thing at the front of your mind: this time of year needs to be all about your donors. Use the steps within this toolkit to help you position your donors as the heroes of your mission, and you'll be sure to find success this holiday season.

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*“There’s a scene in Jurassic Park III during which one of the characters takes two dinosaur eggs, and after discovering this, one of his colleagues asks, ‘Can you imagine what the dinosaurs will do to us once they realize we have those?’ And the response is, ‘Can you imagine what they would do to us if we didn’t?’ End-of-year fundraising is still a mystery and can be improved upon...but can you imagine where nonprofits would be without it?” —Scott Gilman, Senior Consultant, Blackbaud*

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# CHAPTER 1

## ORGANIZATIONAL ALIGNMENT

Any successful fundraising strategy is rooted in organizational alignment, and the same is true of end-of-year fundraising. In order to truly put your donors first and allow them to be the champions of your campaign, you have to start by aligning everyone in your organization around the same goal. For many nonprofits, this alignment can start at the leadership level. Early on, focus on building a coalition across leadership that understands the benefits of an end-of-year giving campaign and is committed to supporting the process. Show them evidence, like the [2015 Charitable Giving Report](#) and your own financials, to demonstrate just how big the end-of-year giving opportunity is.

## GIVING TRENDS BY MONTH

2015 Overall Giving Distribution by Month by Sector												
Sector	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Arts and Culture	7.0%	6.8%	10.1%	7.5%	6.9%	9.2%	7.6%	6.6%	6.1%	7.7%	7.1%	17.6%
Environment and Animal Welfare	6.7%	6.5%	9.7%	6.5%	6.6%	11.2%	7.6%	7.0%	6.5%	6.8%	7.4%	17.6%
Faith-Based	6.3%	6.6%	8.5%	7.5%	8.8%	9.1%	7.9%	7.3%	6.6%	7.3%	7.0%	17.1%
Healthcare	7.2%	5.2%	8.4%	7.3%	6.4%	8.4%	5.7%	7.8%	8.6%	8.9%	7.5%	18.5%
Higher Education	5.9%	6.2%	7.1%	7.3%	6.9%	11.2%	6.4%	6.9%	7.9%	8.7%	7.9%	17.7%
Human Services	6.4%	6.2%	7.9%	7.7%	7.7%	10.7%	7.2%	6.2%	6.7%	7.5%	7.8%	17.9%
International Affairs	6.0%	7.5%	5.1%	6.1%	14.1%	10.3%	5.4%	4.8%	5.6%	10.8%	10.0%	14.4%
K-12 Education	5.7%	5.5%	7.0%	5.8%	7.6%	10.5%	4.7%	18.0%	4.9%	6.3%	7.0%	17.0%
Medical Research	6.2%	7.5%	6.9%	7.2%	8.0%	12.7%	6.3%	4.7%	7.6%	7.7%	7.2%	18.0%
Public and Society Benefit	7.4%	6.9%	8.0%	7.8%	6.9%	8.0%	7.0%	6.0%	7.2%	9.7%	8.6%	16.7%
All Sectors	6.4%	6.3%	7.7%	7.1%	8.0%	10.2%	6.5%	7.6%	6.9%	8.2%	7.8%	17.4%

Blackbaud's "2015 Charitable Giving Report"

*"Every year, development directors ask me about why their end-of-year appeals aren't getting the results they want. It really takes strong leadership to have successful fundraising. You need to go beyond what seems 'logical' and lead into what works for fundraising."*  
 —Marc Pitman, Founder, Concord Leadership Group

[Share this toolkit](#) so leaders at your organization can see how the most successful appeals make the donor the hero of your story. Once they understand the significance, they'll be able to help you create a sense of excitement and urgency around the campaign process across the organization. And don't forget your board in this early stage; educate them on the opportunities that exist in December giving, and clearly paint the picture of how fundraising success ties to financial and programmatic success. Make a note of who is most interested and dedicated early on—these people can be your champions throughout the process. By first educating your own organization on how end-of-year giving fits into the full picture of mission impact, you'll set the stage for crucial unified efforts further into the campaign.

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*“If we want to fire up our board members for fundraising, we first need to fire them up about our organization and the good work we are doing in the world. As we know, a board that is not engaged and excited about the work at hand is not going to put itself out for fundraising.”*  
—Gail Perry, Fundraising Consultant, Fired-Up Fundraising

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# **CHAPTER 2**

## **DATABASE & TESTING**

Once you've set the foundation for organizational buy-in, where should you start? The answer is your database—the most important tool for an effective end-of-year campaign. Now is the time to ensure that you're using best practices to allow this powerful tool to work for you. Successful year-end campaigns involve engagement through personalized donor communications, nurturing supporter relationships to encourage them to give. To engage donors in this way, we have to know them, and in fact, we do know a lot about them. But the reality is that we sometimes have so much data to analyze and interpret that it can be hard to know where to start.

Before you become overwhelmed and tempted to take shortcuts, take a step back and think about what you really need. To ensure that your database is ready for analytics, the first step is to optimize the information you already have: your donor contact information. You should consider it a hard-and-fast rule that if you don't have a high-quality name and address for a donor, it will be nearly impossible to derive any kind of insight about that person.

There are a series of best practice techniques which are essentially considered “table stakes” for nonprofits; in other words, these are the processes you need to have in place to take advantage of analytics and testing:

- **Address Standardization:** This process validates addresses against United States Postal Service standards in real time as the data is being keyed in to the database, guaranteeing the quality of the data being added. *(In a 2013 analysis, we determined that 18% of all records in nonprofit CRM systems were “un-mailable,” so this isn’t happening nearly often enough.)*
- **National Change of Address (NCOA®):** About 11% of the US population moves every year and reports it to the United States Postal Service, which requires that mailers process their data through NCOA® at least once every 95 days to keep mail files current. *(In the analysis mentioned above, we found that nearly 6% of all nonprofit donor records were out of date, and since out-of-date records can’t be matched to data sources, they are unusable in analytics.)*
- **Proprietary Change of Address (PCOA®):** Another 5% of the US population moves every year but doesn't report address changes to anyone other than banks, credit card companies, and utilities. The PCOA® process takes data gathered from those types of organizations and applies it back to the house file, allowing organizations to keep those donor records current. Typically, this process should be run once per year. Unfortunately, many nonprofits use NCOA® but don't realize PCOA® is an additional option, so the bad data builds up over time, leading to duplicate data for the same donor, disconnected records, and campaign delivery issues.



- **Apartment Append:** Often, a donor will provide an address that isn't 100% complete. It will be missing an apartment or suite number—or perhaps that data simply isn't keyed into the database. This is problematic when trying to match those donors to analytics sources or when trying to mail into any type of dense urban area. Apartment append adds or corrects the secondary address on a donor's record, significantly increasing its potential use for analytics and campaigns.
- **Deceased Suppression:** An organization will lose 2–3% of its house file each calendar year on average due to constituent deaths. Yearly deceased suppression identifies and flags any supporters who have passed away, which keeps the database updated, and removes them from inclusion in analytics.
- **Duplicate Removal:** Recent data shows that the average nonprofit will have 10–12% duplicates, largely because of all the issues listed above. Once the data has been standardized and updated, though, most CRM systems can identify these duplicates and consolidate them, removing duplicate versions of “James Smith” or “Amanda Williams” that are in the database with multiple addresses.

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► [Download a checklist of these database best practices »](#)



**RFM**—(recency, frequency, monetary) analysis is a technique used to determine the best prospects by examining how recently they have given (recency), how often they give (frequency), and how much they give (monetary).

Check out the [Analytics-Driven Fundraising Guide](#) for even more helpful tips on making the most of your data. Using these best practices, you can ground every communications decision you make in facts about your constituents, ultimately increasing your success rate.

If you're looking to get even more advanced with your database usage, consider testing RFM calculations that span the entire organization to find your top donors and prospects across all programs, not just those that support a single area or campaign. Predictive models can help you pinpoint which prospects are most likely to engage in your campaign, allowing you to put your marketing dollars toward the most viable audiences. To test those results, make sure that you're set up to analyze ROI or net revenue by donor characteristics. Some characteristics to consider tracking include cross-program donors, disaster/news event responsive donors, and demographics—like gender, education, and income.

With 17.4% of overall giving happening in December, there's no higher-stakes season for fundraising than end-of-year. Don't leave your results up to chance; your database includes all the tools you need to test in advance and find proven strategies that can help you meet or exceed your fundraising goals. Start mapping out the key steps for making the most of your database several months in advance to ensure that you can enter the holiday giving season with a strong foundation.



# CHAPTER 3

MAP OUT YOUR ENGAGEMENT  
STRATEGIES

After organizational buy-in, segmentation, and testing, it's time to map out your engagement strategy. The truth of the matter is your organization isn't the only one that's realized December is such a valuable time for fundraising, so you need a thoughtful approach to help your messaging stand out from the deluge of asks your donor is no doubt receiving. In the next few sections, we'll cover the best ways to craft smart appeals and engage your supporters. Here is a basic framework to keep in mind as you read on and build your plan:

- **Mine the Data:** Following the steps we reviewed in the chapter on database and testing, take a look at your donor breakdown. Who has usually given by this time of year but hasn't yet? Include all donors from the past three years. Add dates so you can see the donor's preferred giving timeframe. Exclude the obvious: deceased, memorials, capital campaign payment, etc. Sort the list in reverse order of gift size so it's easy to spot the big donors.
- **Review Your Case:** Building a case statement for why donors should support your end-of-year campaign is essential. It should be clear and specific, answering the question, "What are you going to do with this money if I donate to you?" The more tangible you can be, the easier it will be for the donor to see the value of your support. Once you have this statement nailed down, it's time to re-engage those internal champions we talked about in the first chapter. Everyone in your organization should be armed with this case statement so they can effectively engage supporters at every organizational touchpoint.
- **Target the Best Donors:** Select your biggest donors for personal contact. Set the goal of having each staff member in your organization contact five top donors by the end of the first week of December to share a meaningful message of gratitude. This can be a face-to-face meeting or a phone call; the goal is to lead with heartfelt thanks and remind donors how valuable their gifts were last year. This is a perfect time to share any exciting news about mission impact or big upcoming plans before inviting them to once again partner with you by renewing their support.

**Consider adding additional incentives on top of your regular messaging.** While these tactics require additional set-up time, they can be valuable motivators for donors.

A few effective examples include:

- Matching gift challenge
- Gift premiums
- Honor and memorial gifts
- Gift memberships

- **Contact the Next Tier of Donors:** Take another look at your list and focus on the next larger tier of donors. The strategy for this group can be a personal letter or handwritten note—depending on your staff and donor pool size—requesting their support. Manageability is key. Don't worry about layering this on top of your standard year-end mailing; this letter should be much more personal (consider hand-addressing) and shouldn't resemble a direct mail piece. This is your opportunity to invite these prospects to renew their support; remember to tie the request to your case statement.



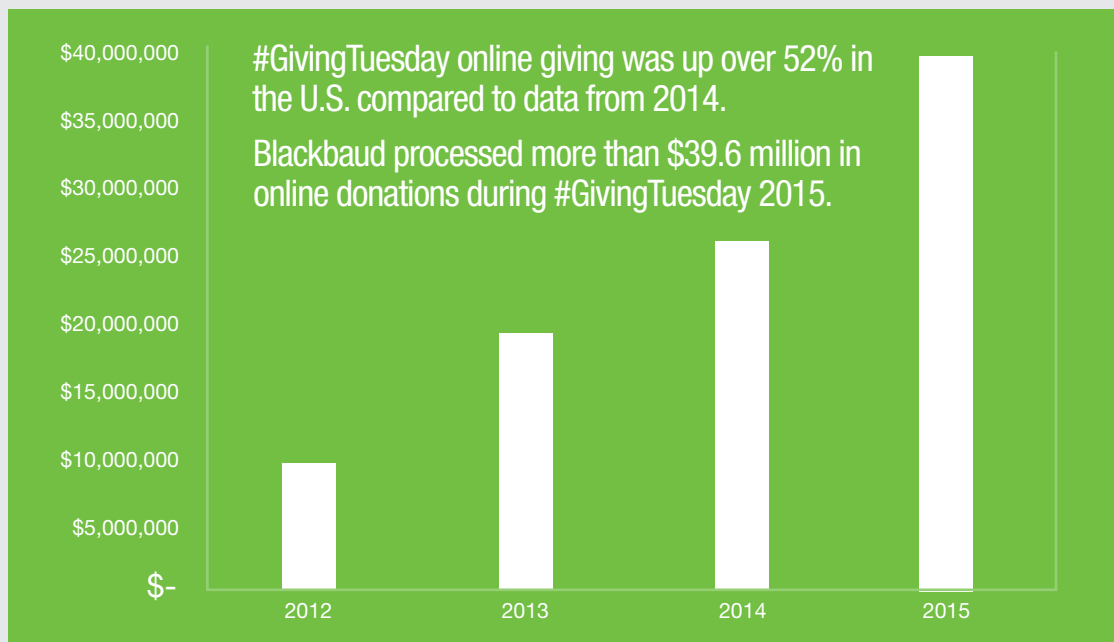
- **Extend Your Thanks:** This is the best time of year to steward your donors, so don't forget to thank them! Spend as much time as possible calling those that respond to your requests and wishing them a happy holiday season. Be sure to note upgrades and loyalty. We'll also cover engagement strategies for new and re-engaged donors in chapter 6.

With this basic engagement framework in mind, let's move on to specifics for crafting your appeal.

## SPECIAL HIGHLIGHT: #GIVINGTUESDAY

### #GIVINGTUESDAY™

#GivingTuesday was founded in 2012 by New York's 92nd Street Y in partnership with the United Nations Foundation. This global day of giving has followed Black Friday and Cyber Monday on the Tuesday after Thanksgiving in the United States. The #GivingTuesday movement has now engaged more than 10,000 organizations worldwide. With the proper planning and attention, #GivingTuesday can be a focal element in kicking off the giving season for your organization.



The attention around #GivingTuesday 2015 reached record levels, and online giving grew 52% compared to 2014. Blackbaud processed more than \$39.6 million in online donations on #GivingTuesday 2015, surpassing all prior years since the movement began.

The growth in #GivingTuesday not only shows the momentum of the movement, but also the key role digital plays in helping donors contribute to the causes that matter most to them. #GivingTuesday 2015 certainly

reinforced the power of engaging donors across traditional, online, and mobile channels. Online giving can be attributed to very strong numbers throughout #GivingTuesday. There was a 15% increase in the number of nonprofits that received an online donation that day. This helped drive a 42% increase in the volume of online gifts compared to 2014.

It is also worth noting that the average online gift amount increased by 6% to \$137 per online donation. Online donations tend to be larger than traditional direct mail gifts and #GivingTuesday donors also show this behavior. Blackbaud also tracked a significant number of online donations over \$1,000 on #GivingTuesday 2015. This includes several \$50,000 online donations during the day. This continues a trend that Blackbaud has seen for years as affluent donors choose to give online in great numbers.

We know that consumer adoption of mobile devices has skyrocketed in recent years. Consumer behavior is changing donor behavior, and #GivingTuesday is just one more example of this trend. Last year, about 13% of #GivingTuesday donations were made on a mobile device. In 2015, the percentage digital donations coming from mobile donors jumped to 17.

In just a few short years, #GivingTuesday has become a global movement. It has also meant that nonprofits of all sizes have been able to increase their year-end fundraising results. The data from 2015 is still new and there's no doubt that additional insight will be gained from analyzing it more in the future.

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Originally posted by Steve MacLaughlin on [Huffington Post Impact](#).

For more details, check out the [#GivingTuesday Trends report](#), which includes giving data from more than 4,300 organizations representing \$55.6 million in online fundraising between 2012 and 2014 that took place on #GivingTuesday. Consider making this important giving day a part of your overall end-of-year engagement strategy.

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*“When it comes to giving days, the big theme to watch is people’s increasing ability and desire to participate. Social media gives individuals a sense that they’re part of the action—that events unfold with them as key characters. Every day we tell stories about ourselves online: we share information on things we care about, and we strive to influence narratives with our own opinions. These behaviors are on the rise, and a generation of philanthropists now expects that they can shape every aspect of their lives in more meaningful ways.”*  
 —Henry Timms, Executive Director, 92nd Street Y

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# **CHAPTER 4**

## **DETERMINE YOUR MESSAGING**

In the last chapter, we discussed building a case statement for why donors should support your end-of-year campaign. This specific, tangible statement should be the building block for your end-of-year appeal. Now is the time to take donor-centrism to the next level; everything about your appeal should frame your donor as the hero of the story. Think about your audience and what motivates them to give. Instead of saying, “Our organization is accomplishing X,” say “Donors like you are accomplishing X.” Focus on the most compelling need your supporters can help solve and incorporate stories that will move the readers to give. Tangible examples of impact are critical to convince the readers that their support will make a difference.

A first impression can make or break the success of these pieces. Along with [crafting a compelling subject line](#), your first paragraph should include motivational language as well as one key thing you want your reader to remember. Writers call this the “one-sentence takeaway,” or the single most important thing that needs to be communicated. Make sure to avoid using passive voice and write to your supporters as if you are having a one-on-one conversation. Use action verbs, avoid lengthy words and sentences, and use the words “I” and “you.” These are easy ways to help readers see themselves as the critical puzzle piece to impact the mission.

Don’t be afraid to be explicit in your ask. Make it clear and repeat it as often as you can; many experts recommend including at least three explicit asks in every mailing. Tangible examples of impact tied to particular giving levels can also be an effective strategy. Providing explanations alongside each gift amount will help your audience make the connection between their support and the mission. And always mention that there is a tax benefit to donating to your organization. For many donors, this is one of the top motivating factors for giving at the end of the year.

For email campaigns, keep the message succinct and impactful; try for 250 words or less. Weekly or biweekly updates on a shorter message can keep the momentum more effectively than a single lengthy mailing.

And most importantly, *make it easy to give*. Bold and hyperlink key phrases and sentences to the donation form, and of course, include a donation button too. It’s crucial to have a seamless donation process in place—don’t make your willing donors work hard just to give you money. This process needs to be mobile friendly too, or you’re sure to be leaving money on the table.

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➤ [Download a worksheet to help you build your campaign messaging »](#)

## Sample Appeals From *How To Create Fundraising Appeals That Work:*

### EXAMPLE 1

#### Trinity Health Foundation's End of Year Campaign



#### Why It Works:

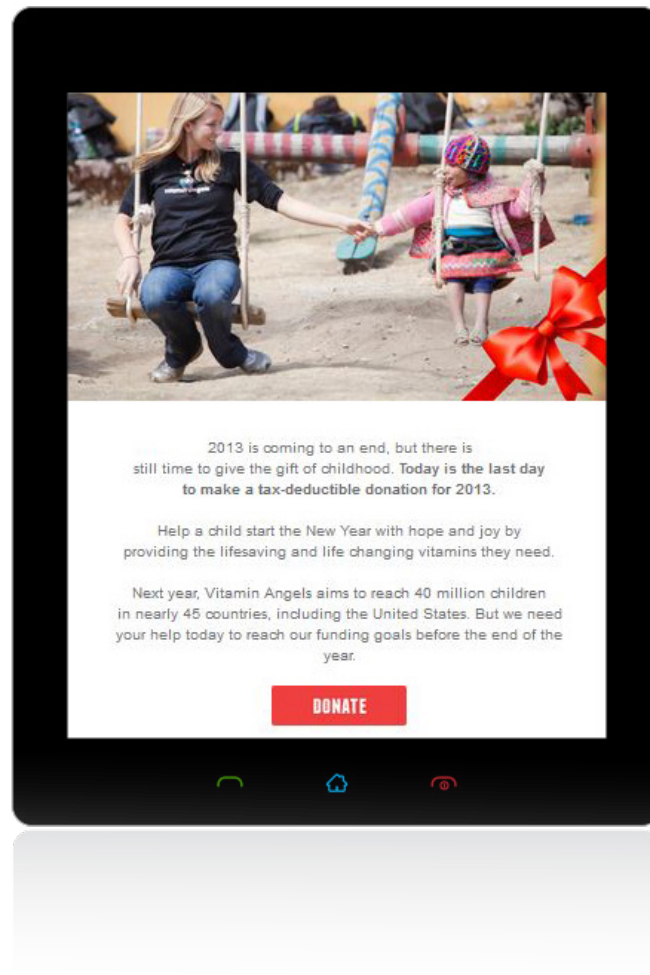
- Beautiful, poignant images helped convey the story, even though the organization couldn't use photos of actual supporters
- It displays good use of tangible examples for the giving levels
- The campaign staff took the extra step to segment the audience by donors and non-donors for the holiday greeting
- They included a campaign close and thank-you that was sent in early January to donors (a best practice around donor stewardship)

#### Campaign Elements:

Kickoff letter, holiday ePostcard to non-donors and donors (segmented lists and targeted messaging), last chance to give message, campaign close/stewardship appeal



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**EXAMPLE 2****Vitamin Angels' End-of-Year Last Chance Email****Why it Works:**

- The email includes a clear theme that sets the tone and includes the call to action: “This Holiday Season, Give the Gift of Childhood”
- It includes a terrific example of a touching and emotional image that conveys the theme immediately
- The narrative ties the donation to impact (i.e., donations will provide children lifesaving vitamins)

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➤ **For more step-by-step advice on creating successful appeals, check out [How to Create Fundraising Appeals that Work](#).**



*In thinking about the ways in which nonprofits can really stand out this December, I'm inspired by the work of Brandon Stanton. If you're not familiar with Brandon, he's the blogger/photographer behind Humans of New York (HONY). Unlike most others who've built a massive following on social media, his following of over nine million people grew by doing things differently. He's not taking selfies or blogging about his adventures in the kitchen. He's telling other people's stories. In doing so, he forces us to consider lives and circumstances other than our own. Maybe we've walked in this person's shoes, dreamed of walking in their shoes, or our biggest fear would be to wear their shoes for even five minutes. The point is that we're left with an impression.*

*Madeline Turner, Online and Social Marketing Manager, Blackbaud*

## ***What does Humans of New York have to do with your nonprofit's end-of-year fundraising campaign?***

For starters, everything. As you're (hopefully) working to integrate a content and digital strategy into your end-of-year fundraising and marketing efforts, it's of utmost importance to show and tell a story that inspires:

Show me the woman who's getting back on her feet after a tragedy.

Show me the child who's no longer hungry or scared or worried about clean water.

Show me the man who's found comfort in a hospital bed thanks to a service dog.

Show me the family who is running a race in memory of a loved one.

### ***You are who you serve.***

People want to give, but what they want more than that is to contribute—to have impact. They don't want to give cash. They want to give meals. They want to grant wishes.

### ***They want to foster change.***

Your numbers are important, yes, as is the building renovation project your campaign will be funding and the event you hosted last week. But those things alone won't foster a network of connected supporters. Alone, those will not tell the story of your organization's work. Tell them instead about lives that are impacted daily through service.

Your volunteers and your frontline fundraisers have stories. Their lives have been impacted by your organization's mission, so give them the opportunity to talk about what they've seen, who they've met, and why they're committed to supporting your cause. Take pictures. Conduct a video interview. Put a face to the story.

### ***Tell their stories, and subsequently, you tell the story of your organization.***

That's what people want to be a part of during the biggest giving season of the year, and that's how a groundswell of support for your mission begins.

Your ask is important. Your last chance email is important. Your Donate Now button is important. Your thank-you is important. But the most important piece of your entire end-of-year fundraising appeal is the story of your people—the story that directly connects your supporters to your cause and reminds them that you're in this together.

*Originally posted by Madeline Turner on [npENGAGE](#).*



# CHAPTER 5

## GO MULTICHANNEL

The year-end giving season is the best time to hit all of your fundraising bases. That means you should never limit yourself to just one fundraising solicitation method. Letters, emails, phone calls, social media posts, coffee meetings—no method should go untouched during this crucial time of year. And think beyond just the development team. Remember our first step of building organizational alignment? Take advantage of every touchpoint your organization has, from the development team to the volunteer coordinator to the front desk manager and everyone in between. Every team member should be armed with the right messaging and information to facilitate engagement and donations at every turn.

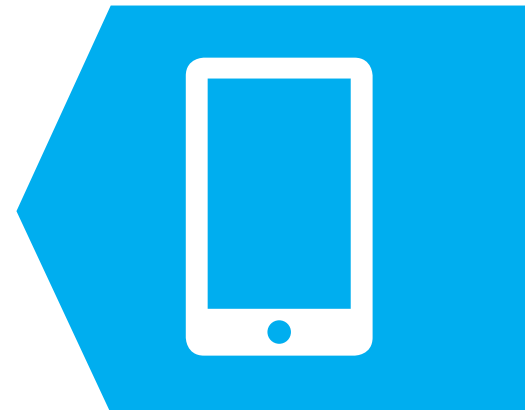
**Here are some steps to keep in mind to ensure that you're setting yourself up for multichannel success:**

**1**

**Get your website in tip-top shape.** With online giving increasing every year, your website will be the place many donors seek out to make their gifts. Consider these steps to make the most of that increased traffic:

**Optimize your homepage.**

- Your website must be responsive. If it can't be easily read on a mobile device, donors will leave. As more and more Internet traffic shifts to mobile, your organization must move to a responsive site to stay relevant. If you haven't yet made this important investment, consider setting it up before the giving season.
- Since your website often gives people their first real impression of your organization, think of it as your front porch. Make sure people feel welcome and invite them in.
  - Give development prime real estate on the home page. Fundraising should be the number one objective for every part of the organization at this time of year, and your homepage needs to reflect that. A prominently placed Donate Now button should immediately catch the eye. Support it with compelling copy about how a donation can make a meaningful impact.
  - Showcase your fundraising goal and progress. If you are sharing a dollar goal with your prospective donors, publicize it on your homepage. Your visitors might feel compelled to give a little bit extra when they see you are so close to your goal. Or maybe they'll return to your website more than once to see how close you are to reaching that magic number. They might even decide to donate a second time to push you past your target.





### Enhance your donation forms.

- An impressive 14% of donations are now made on a mobile device, so your donation pages must be mobile compatible. Test your donation form on a smartphone to ensure that it's a seamless process and it won't turn donors away.
- As we mentioned before, make your gift levels as tangible as possible. For example, a \$10 donation might "buy" a seedling; a \$25 donation might "buy" a mature tree; and a \$75 donation might "buy" a forested acre. Supply enough information with each example to clearly state the need and showcase how donors can meet that need by supporting your cause.
- Appeal to the emotions of website visitors with photos on donation forms. Use images to communicate your mission and show how your efforts are making the world a better place. A visual example of where the donation goes may inspire visitors to give more.
- Use your auto-responders more effectively. After your website visitors make online donations to your organization, they likely receive automatically generated emails, or auto-responders, to thank them for their donations. When was the last time you looked at the content of that email? Chances are it's been awhile. Take this unique opportunity to present copy that encourages donors to take another action, such as join your sustained giving program or tell a friend about your organization.

### Consider search engine optimization and search engine marketing.

- Before you can get people to make a donation via your website, you need to get them there first. Conduct a quick search engine audit to ensure that you are maximizing your placement in organic search. If your organization's website doesn't land on the first page of results, then it's time to make some changes. Work with your marketing department to tweak website content and meta tags. If you have extra budget, consider search engine marketing, also known as paid search, to secure a prominent spot for your year-end giving campaign on search engine results pages.

2

**Make every email count.** Email is one of the best channels during this crucial time of year. Keep these tips in mind when setting up your holiday email campaign:

### Run multi-part appeals.

- Everyone's guilty of forgetting to respond to emails that are buried at the bottom of inboxes. This year, stay top of mind with a multi-part email appeal. A series of three emails could consist of a main ask, a stewardship or season's greeting piece (e.g., an eCard), and a last chance to give email).



### Segment your list.

- You can make your messaging more compelling if you segment your list and customize email content based on your target audience. Recent donors? Thank them for their donations, and then tell them how your organization is rallying to meet its year-end giving goal. Last year's donors? Thank them again for last year's donation, and ask if they could give again this year. Lapsed donors? Get back on their radar with a brief summary of your progress this year, and explain how you still need their support. By taking the time to segment and target, you should boost overall response rates.

### Schedule an email for December 31.

- Yes, it might seem last minute to send an email on December 31, but there are plenty of people who are motivated by tax benefits. Give these generous procrastinators a nudge with a reminder that this is their last chance to give this year. You might be surprised by how many dollars come through before the clock strikes midnight. (For best results, incorporate this tip with a multi-part appeal.)



### Always share outcomes.

- People are interested in knowing that their donations are put to good use. So ask yourself, "What good did our organization do this year?" and then share the answer with supporters. Not every email you send should be an appeal. Take time to share success stories and results to reconnect people to your mission.

3

**Tap into your supporters' networks.** Many people's decisions to support charities are influenced by what family and friends say on social media, in personal emails, and through other word-of-mouth "marketing." Make the most of this fact with these tips.



### Send eCards.

- A holiday message or thank-you eCard is an effective way to connect with supporters without making a hard ask. You can even consider giving supporters the option of sending eCards from your website. You can reinforce your brand and messaging in the template, but give senders the option to customize their messages.

### Encourage family giving.

- Many people are torn between gifts for loved ones and gifts to charity. Why not marry the two with an appealing ecommerce offering, membership, or other holiday giving idea? By getting creative, a donation to your organization could make the perfect present.

### Use social media.

- Chances are that most of your supporters are using social media in their daily lives. Don't be shy about asking them to Tweet or to update their Facebook® status about your organization. They could mention that they are making a donation to support your cause or even ask family members to make a donation to your charity on their behalf rather than buying a present.

### Ask constituents to forward emails or links to their friends.

- When an email is passed along from an individual they trust, recipients are more likely to respond or take action. With this in mind, you should ask your constituents to forward your year-end giving campaign emails and links to their family members and friends. Take the networking effect one step further by asking supporters to ask their friends and family to make a donation, no matter how small. Again, when such requests come from a trusted source, it can be extremely influential in a person's decision to give. And with the help of an effective welcome series, those new donors may bring much more value than just their first gift.

---

## 4

**Don't forget about offline channels.** Even in this digital age, offline channels still produce significant results. In addition to any direct mail appeals you have planned, consider offline channels one of the most effective for thank-yous and stewardship. Donors love thank-you cards, handwritten notes, and phone calls. In the increasingly digital world of fundraising, these "human" touches can put you far ahead of the pack.

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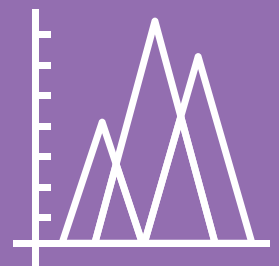
➤ [Download a checklist to keep handy as you build your multichannel strategy »](#)



Now that we've covered some of the best tactics you can employ in a multichannel campaign, let's not forget to track and measure. Remember back in chapter 2 when we talked about reflecting on last year's successes and misses? Now's the time to put the infrastructure in place to report on your multichannel performance. Keep these tips from Nick Barbieri of Charity Dynamics in mind as you begin implementing your multichannel strategy:

## 1 Google® Analytics Audit

- A sweep of your current Google Analytics tracking may show that you need to tweak your code or funnel setup for accurate campaign reporting. As always, the best way to ensure correct tracking is to test it.
- If you're not already doing it, considering adding Google Analytics tracking to your emails by tagging links with specific campaign parameters. This will give you an extra layer of insight beyond standard email reporting to see your end-of-year email audience's website interactions.



## 2 Reporting and KPIs

- You'll want to track the obvious: donation amount, number of donations, and average gift per channel. For email, stay on top of performance by variant/group, A/B testing, open rates, click-through rates, and unsubscribes.
- I also recommend keeping an eye on how many donations per channel are from first-time donors versus returning donors. This is a great way to see if you are battling end-of-year list fatigue and need to pivot engagement strategies for these audiences to deepen their involvement with the organization. Also, are different acquisition sources performing better on different channels, for example, emails acquired through social convert better on phones?

## How National Center for Lesbian Rights (NCLR) Amplified Its December Fundraising by Going Multichannel

1

### Plan early and often.

**Reflect now.** You know that time in the summer when you have a break between projects and can sit back and make plans for the year ahead? Yeah, me neither. But it's only going to get busier, so take some time now to look back at last year and see what worked well, and what didn't. There's no need to reinvent the wheel; if it worked well last year, do it again this year.

**Analyze and measure.** Look at open rates, click-through rates, unsubscribes, and spam reports to assess performance. I use the [M+R benchmarks](#) as a starting point. Whatever wasn't successful, bring these to step 2.

2

### Repeat as needed.

**Brainstorm past wins and misses.** Admit it: you don't know everything. Doesn't it feel good to let that out? But you and your team are the experts on your constituents. My team meets weekly from now until year-end to brainstorm, strategize, and come up with new things to test.

**Learn from your past.** Take your successes and failures from last year's campaign and use them as learning opportunities. Ask the team to brainstorm: Why didn't this work? Why was this other email so successful? You may never know exactly, but the list of possible whys is gold. This is your new testing list. Was the subject line boring and nobody opened it? Was the donate button too small? Did you send it to the full list, including recent donors, and anger people? Use these nuggets to inform the look and feel of this year's campaign, and add some testing items from step 3.

**Set yourself apart.** There is a lot of competition at year-end. How will you stand out from the crowd? Will you send more emails? Will they be designed better? Will you be the first people to send, or look for less crowded days and times?

#### 4 Segment and test.

**Know** before you send the email who it should go to. Look at your calendar of emails and plan which donor groups should get which emails. Which ones will go to your major donors? Your current donors? Your lapsed donors? Will you change content for any of these groups?

**Test** subject lines, images, button colors, text, and anything else that came out of your brainstorming session in step 2. But test now or very early in your campaign. Testing can lower your response rates, so don't wait to do it until your most important email of the campaign. Do it when stakes are lower, so you can implement those results throughout the campaign.

#### 5 Monitor and tweak.

**Never assume**, because...you know the old adage. Even though you have a great plan, the work isn't over. Don't assume your brilliant campaign plan is working until you can verify it. Run reports. Benchmark yourselves. Repeat step 2, and bring your findings to your team. Why did you get a huge uptick in spam reports? Why is your last email bringing in twice the donations as the prior? Brainstorm. And don't be afraid to change your plan. It's okay to make a course correction to address a success or an issue.

#### 6 Hit pause and engage.

**Stop asking.** Well, not really. But don't forget the cultivation and stewardship. Send some emails that aren't asking for a donation to balance out the flood of asks. Thank-yous, holiday cards, newsletters, and success stories are so important to keep your constituents engaged.

#### 7 Send multichannel thank-yous.

**Take it offline and old school.** Donors still love thank-you cards, holiday cards, handwritten notes, and thank-you calls. As an added bonus, offline gratitude helps you stand out from the crowd.

#### 8 Don't make major holiday plans.

I'm only half joking. But someone has to watch all the donations flow in! Fifteen percent of all my December donations come in on December 31. I know that my donors want to give, but I have to work hard until the very end to make sure I connect with them using the right messaging at the right time so they don't forget about us. And then, I plan a spa day.

Originally posted by Autumn Woish on [npENGAGE](#).



# CHAPTER 6

STEWARD NEW &  
RE-ENGAGED DONORS

It's one of the unspoken rules of end-of-year fundraising, but it's still one of the most critical. In order to find success at end-of-year, you need to be cultivating your donors all year long in every channel. With the proper planning and year-round strategy, your end-of-year fundraising campaign can be the “cherry on top” of fortified supporter relationships.

What steps can you be taking now to set that foundation? Start working cultivation and stewardship into *everything* you do. Send some emails that aren't asking for a donation, and instead share a success story or two—with no request included. Mail a handwritten thank-you card to a select group of lapsed donors. Create and send a quick video of staff or clients thanking the donors for their support. Feel free to get creative here. Your goal should just be to engage your supporters in a non-transactional way, allowing them to feel the pure connection to your organization and its cause.

Once you have a plan in place to engage your current supporters, it's time to turn your attention to building a strategy for stewarding the new and re-engaged donors who come in through your end-of-year campaign. The easiest and most effective way to do this is to build a welcome series for new supporters. An automated series of emails sent to new supporters over a set period of time can educate and inspire new supporters without making them feel like you're only reaching out to them for money—a real risk if you plop new supporters right into your regular email flow. A welcome series gives you the opportunity to introduce your organization and mission, learn more about these valuable new supporters, and ease them into the regular flow of asks and stewardship.

## Three Key Steps to Building Your Welcome Series

**1** **Decide the key messages for new subscribers.** Start with what you need to say, and then determine how many emails it will take to say it. If someone is new to your email list, what do they need to know about you? Here are some ideas to get you started:

- Thank them for their interest.
- Tell them what they can expect from your communications.
- Give them whitelist instructions for increased deliverability of future emails.
- Help them get to know the organization or cause more deeply.
- Share stories of impact that your organization has made.
- Tell them how to connect with you on Facebook®, Twitter®, Instagram®, and YouTube®.



2

**Begin with the end in mind. Try mapping a six-month email series.** You read that right—six months. Don't panic! A three-message series is a great place to start. This is an opportunity to repackage existing content and save some time. Ideas include:

- Make it friendly; make it personal (always include their name); and make it exciting!
- Include a thank-you from your executive director. This should be sent within 48 hours of a new supporter donating or subscribing.
- Use pictures to show your mission in action. Pictures speak a thousand words, so share them!
- Educate supporters on low- or no-cost opportunities to engage, such as attending a free event, following your organization on social media, and volunteering.
- Do you have content that got a great response in the past? Maybe a blog post of last year's end-of-year campaign letter? Don't be afraid to repurpose that proven successful content here.

3

**Automate it.** Once the content is built, it's time to set the series and let it work its magic. But do experiment with the right timing for your audience; there's no one-size-fits-all answer for the best message frequency. Go back to our tactics from chapter 2 and test, test, test. Most email automation systems can be set up using groups, segmentation, and filters to automatically send emails to any new people who join your email list at designated times.

- Remember to regularly check in on the series' performance. Adjust content as needed to keep it fresh and relevant, especially the information about your organization and its programs.

► [Download a worksheet that takes you through the steps of building a welcome series »](#)



With your automated welcome series in place, you can focus your time and energy on more personalized stewardship. Remember when we mapped out an engagement strategy in chapter 3? Turn back to that plan and enlist your full staff and board to send handwritten notes and make thank-you phone calls. Gratitude is all around during the holiday season, so take advantage of the warm fuzzies to strengthen your connection with donors new and old!

## EIGHT WAYS YOU'RE PROBABLY NOT THANKING YOUR DONORS

**1. Send a donor welcome series.** Send first-time donors a welcome email series that thanks them, introduces your organization, and provides other ways to be involved. This type of automated series is the top way to improve the relevancy of your emails according to Marketing Sherpa's 2011 Email Marketing Benchmark Report. Vary the messaging for repeat donors.

**2. Credit your donors, instead of your organization.** When you say what's been accomplished in the past year, give your donors the credit. Instead of saying "Our organization was able to...", say "Donors like you were able to..." Help them feel connected directly to those in need and eliminate the middleman (you).

**3. Send a donation update email.** If you struggle to send relevant email content, here's an easy one. Once or twice a year, report back to your donors on the impact of their gifts. It's so simple but so seldom used. Doing this conveys transparency, responsibility, and gratitude.

**4. Make giving an experience.** Donate to Stand Up To Cancer and you can launch a virtual star in honor of someone who's had cancer. The organization thanks its donors by giving them an experience. The donations fund cancer research, but this experience also helps donors feel closer to those they've lost.

**5. Say thanks in regular emails.** Within your email newsletter, event invitations, or news alerts, include an occasional thank-you note to donors. Besides showing appreciation, you may engage them enough to keep reading. Some tools will let you insert hidden messages to donors within these emails.

**6. Make a thank-you video.** Somebody in your office has a smartphone. Make a short video from your nonprofit's executive director or those you serve saying why they're thankful and why the gift is important. Include the video on the donation confirmation page.

**7. Include a thank-you photo.** In your confirmation email or page, include a photo of those you serve waving or holding up a thank-you sign. It'll help your donors feel great about the gift they just made.

**8. Send a happy Thanksgiving email.** As you map out your year-end campaign, consider including an email to let donors know you're thankful for them. It's also a good way stagger hard asks throughout your year-end campaign.

Originally posted on by Mike Snusz on [npENGAGE](#).



# **CONCLUSION:**

## **REVIEW & CHECKLIST**

Remember those numbers we reviewed in the introduction? More than 17% of total giving happens in December. If your organization isn't poised to take advantage of this year's charitable season, you could be losing out on serious funding. The good news is that by reading this toolkit, you've already taken a key step in positioning your organization for success!

Take some time now to print off the checklists and worksheets throughout the toolkit and write down your key thoughts. If you can map out your goals and strategy in advance, you'll be able to take things one step at a time to achieve end-of-year success.

**To review, here's the big-picture view of the steps you need to take to make the most of this holiday season:**

### END-OF-YEAR PLANNING CHECKLIST

- ☐ **Get organizational buy-in.** Build a coalition across leadership and your board that is committed to supporting the process. Educate them on the importance of end-of-year giving and the connection between this time of year and your organization's financial success.
- ☐ **Clean up your database and test your messaging.** Ensure that your database is ready for analytics by cleaning up your records and updating contact information. Consider testing out more advanced analytics to help you pinpoint the best prospects to target at year-end.
- ☐ **Map out your engagement strategy.** Create your approach for segmenting contacts and the best timeframes to contact different groups. Build a case statement for why donors should support your organization, and plan out the groundwork for additional incentives like matching gift challenges.
- ☐ **Consider your plan for #GivingTuesday.** Online giving on #GivingTuesday grew 52% year over year in 2015. If you have the capacity to give this day proper planning and attention, it can be a focal element in kicking off the giving season for your organization.
- ☐ **Determine your messaging.** Building on the case statement you created earlier, craft messaging that frames your supporters as the heroes of your organization's story. Focus on the most compelling need that donors can help solve, and incorporate success stories that will move them to give.

- ☐ **Go multichannel.** With your messaging in place, it's time to spread it like wildfire through every channel you can. Set a strong foundation by optimizing your website, donation forms, and emails. Tap into your supporters' networks by arming them with shareable content. And don't forget about offline channels like snail mail and phone calls.
  - ☐ **Steward your donors.** Set up an automated welcome series to educate and inspire new supporters, drawing them into the fold of your organization. Enlist your full staff and board to participate in personalized stewardship, like handwritten notes and phone calls.
- By following these steps, creating a smart strategy, and positioning your donors as the heroes of your mission, you'll be the one making a serious impact for your organization. Here's to you—the fundraisers who make it all happen—and here's to the most incredible end-of-year giving season yet!

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