



12 Year-End Fundraising Checklists

How to Boost Response and Ensure Success at the Most Critical Time of the Year



Intro

It's going to be busy in November and December. So plan ahead to keep yourself sane. **Nearly 30% of nonprofits raise 26-50% of their annual fundraising from their year-end ask.** That's the end of the calendar year, not your fiscal year.

Sure, technically when December 31st rolls around and you've not come near to meeting your annual fundraising goal, you still have many months to get there. But you're kidding yourself.

Most people don't give in June.

Nearly a third of all annual giving happens in December, and 12% of all giving happens in the last three days of that month!

And that's why most nonprofits aim to raise 70% of their budget during the last six weeks of the year.

You need to be running on all cylinders so you don't miss a trick during this most giving time of year!

Learn more about what this means in [13 Year-End Nonprofit Fundraising 'To-Do's](#).

Here are some of your most important tasks to assure the overall success of your annual year-end fundraising campaign. Use these checklists as both your planning and follow-through guide.

Let's get started!





Give yourself ample time to plan all the elements of your year-end campaign. Create your strategy, collect visuals to support your most compelling stories, recruit your most effective fundraisers, and build a time-line for deploying your campaign offer across multiple channels. Writing, editing, getting approvals, printing, collating, and affixing personal notes it all takes time! If you don't get control of the details through early planning, you'll omit the details down the line. And you know what they say, right? The devil is in the details!

Make sure to get all your ducks in a row with these 13 lucky tips.

REMEMBER: You do have to make your own luck. As management guru Peter Drucker says: "The best plans are only good intentions, unless they degenerate into work."



12 Year-End Fundraising Checklists

I. PREDISPOSE DONORS TO GIVE

1. Impact Reports Checklist

- We've prepared/delivered some type of compelling, emotion-packed year-end [impact report](#) that shows donors how they're our heroes. This report talks about what they did, not what we did.
 - Major donors receive _____
 - Mid-level donors receive _____
 - Other donors receive _____

- We're considering folding a 'thankathon' into our plan. (Note: if it's been awhile since your monthly donors got a real thank you, this is a great way to reach out and remind them of the impact of their giving. Recruit board members, development committee members and/or other volunteers to help. If you're a school, ask students to help. This sets you up to ask for an increased monthly commitment this year.)

II. ESTABLISH PRIORITY YEAR-END FUNDRAISING GOALS

2. Goals Based on Last Year's Results Checklist

- We know our [retention rates](#) and have a goal for improving these metrics this year.
- We know which donors downgraded their gifts last year, and have a plan to ask them to increase.
- We know which donors made multiple gifts last year, and have a plan to ask them to upgrade (Note: you may wish to consider asking them to join your recurring giving program).
- We've created mailing segments for (a) non-donor volunteers, and (b) non-donor clients, and have a plan to target them with a specific ask this year.



3. Contact Priorities Checklist

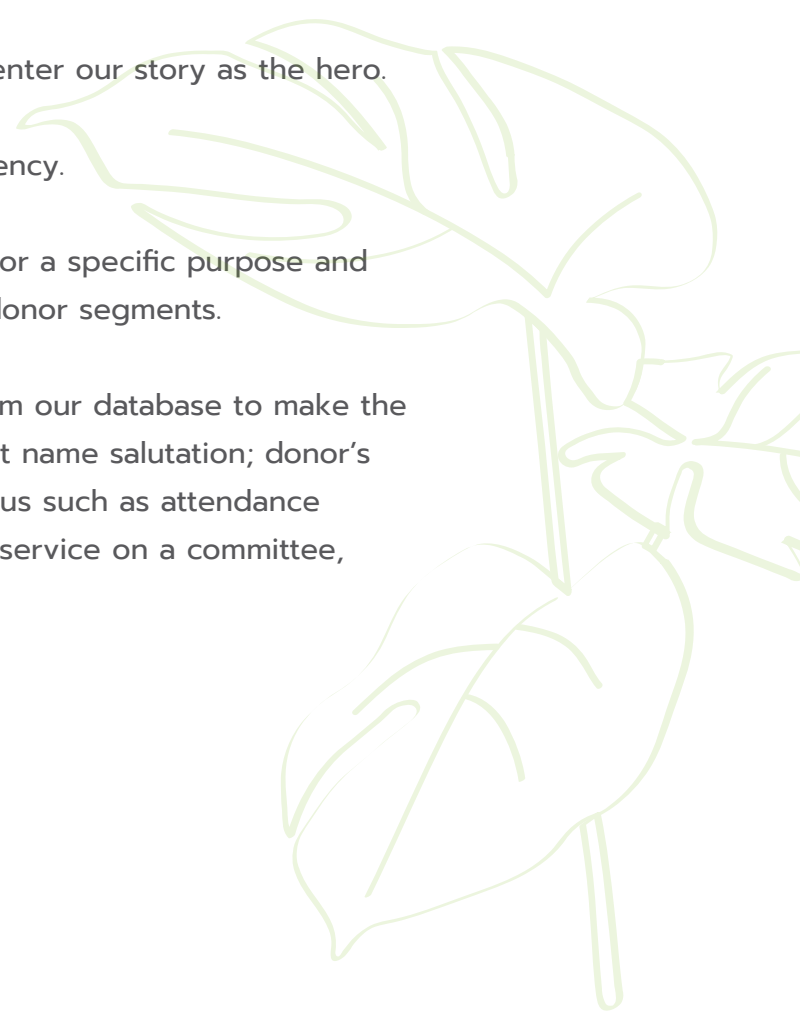
- We evaluate folks based on [cumulative giving](#) because we understand a \$100/month donor is not a \$100 donor, but a \$1,200 donor. We also know that someone who made a recent \$100 memorial gift, but who generally makes a \$1,000 annual gift, is not someone we want to overlook with this year's annual appeal. We understand that when we sort based on most recent gift alone, we'll miss these important loyal supporters.
- We created a list of LYBNTs (gave last year but not this) and have sorted them according to dollar range, so we can prioritize contacts with our [largest and most loyal donors](#). We have a plan to remind these folks of their generous past support (thank them!) and let them know they've still got time to renew and make a difference this year. Strategies to consider include face-to-face meetings; phone calls and personal hand-written notes added to the appeal letter.
- We ran a list of all first-time donors and plan to make these a separate campaign segment so we can give them a little extra TLC. We understand that donor retention, on average, is just 23% for first-time donors. But for repeat donors it's 60%! (Fundraising Effectiveness Project). So if we can renew folks once, we can likely renew them at much higher rates thereafter. It's well worth the effort.
- We ran a list of monthly donors and plan to make these a separate campaign segment.
- We ran a list of last year's [peer-to-peer fundraisers](#) because we understand they bring in significant gift totals. We know these folks can be the functional equivalent of major donors, and we plan to put in place strategies to recognize them, reward them, and encourage their continued engagement and investment.
- We ran a list of volunteers because we know volunteers are twice as likely as non-volunteers to donate if they are asked well. We have a plan to make them a separate campaign segment, and will send them a tailored appeal that recognizes their already generous contribution to our cause.



III. ASSURE PRE-CONDITIONS ARE IN PLACE

4. Annual Appeal Case for Support Checklist

- We've taken the time to put ourselves in our donor's shoes so we can [craft an appeal](#) that will resonate with them. We've thought about the problems they see, the issues they've demonstrated they care about and the ways they can join us in being part of the solution.
- Our year-end appeal will feature an [emotional story](#) that both demonstrates a relevant problem and a timely, believable solution.
- Our year-end appeal will invite the donor to enter our story as the hero.
- Our year-end appeal will have a sense of urgency.
- Our year-end appeal will have a specific ask for a specific purpose and specific amount—ideally tailored to different donor segments.
- Our year-end appeal will draw information from our database to make the offer as personal as possible, for example, first name salutation; donor's gift last year; other type of engagement with us such as attendance at fundraising event, direct service volunteer, service on a committee, attendance at a program, parent or alumnae.





5. Website Clean-Up Checklist

- We've eliminated outdated information like events that already happened; outdated contact information; links that no longer work.
- Our contact information is easy to find and up to date.
- We've added some new, compelling stories/visuals on most-visited pages, and have included links, as appropriate, to [donation landing pages](#).
- Our donate button is prominently displayed. (Note: The ideal location is at the top of your home page, in a color that contrasts with your corporate colors and design. It's not about looking pretty; it's about getting noticed).
- It's easy to donate from just about every page (make sure you also have clear instructions for donating via mail or by phone).
- Our share buttons are operational. If folks are inspired by what they see, you certainly want them to share with their networks.
- Our website is [optimized for mobile](#). Make sure this is true, before it's too late. Open your website on both an Android and iPhone and see what it looks like and how easy it is to navigate. If folks open your email on their phone, and it displays poorly or the donate button is hard to find, it's unlikely they'll open it again when they get back to their computer.



- We have third-party endorsements, testimonials, and/or charity ratings on our website and donation page. We know such endorsements serve as “social proof” (another of Robert Cialdini’s Six Principles of Influence and Persuasion), assuring visitors we’re worth their investment. We know if we can show we’ve got a large community behind us, this short-cuts the decision-making process for prospective new supporters.
- We have a plan to spruce up our home page. (Note: Develop a plan to focus on fundraising during the last 4-6 weeks of the year. It’s a good idea to put your year-end appeal front and center. You can add it at the top as a featured story. Be sure to use design and messaging that’s consistent with your mailed and emailed appeals. Some organizations even rebrand their entire home page during the last four to six weeks of the year).

EXAMPLE: Save the Children Rebranded Home Page



EXAMPLE: Prominently Placed Story/Appeal



- We will consider adding a “pop-up” or “lightbox” during the last three to six weeks of the year. (Note: There are tutorials on how to code light boxes on YouTube. You might even be able to find someone on “Fiverr” to custom code a light box for you. You can program this so it doesn’t show up every time a guest visits. You set the intervals, once/day or once/week, or so that once they’ve donated they never receive this again. The increased traffic to your donation page can be quite significant. Track results, so you know how much online giving increases this year over last year as a result).

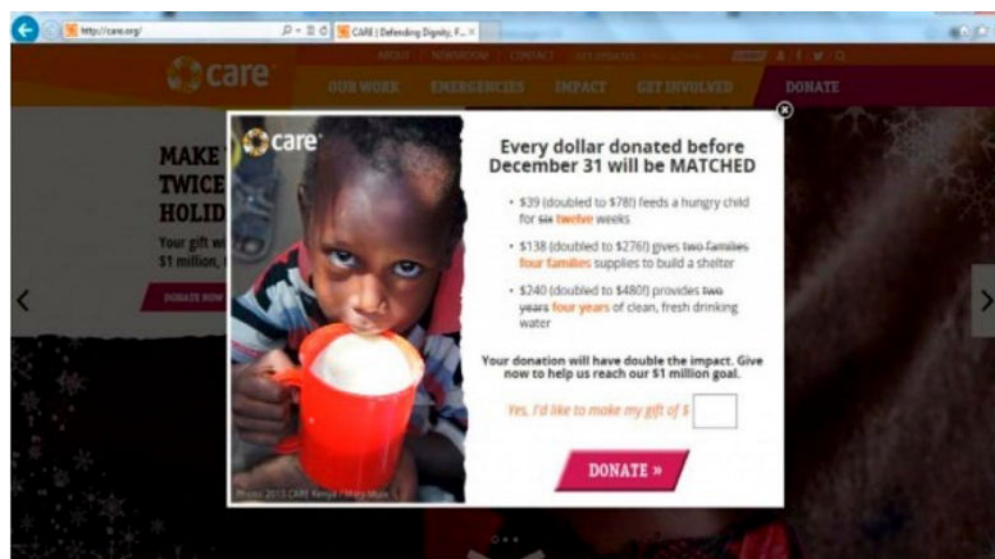
Other lightbox tips:

Use an image consistent with your year-end campaign.

Phrase your call-to-action with a high value result, for example, feed a family this Christmas; your gift will be doubled; your gift is 100% tax deductible.

Make the “X” or “Close Window” option easy to see for people who want to skip past the light box.

EXAMPLE:
CARE Lightbox



6. Donation Landing Page(s) Checklist

- We created custom, [branded donation landing page\(s\)](#) that match the appeal. (Note: You don't want folks to think they've been taken off your website. So if you use an outside provider, or a service like PayPal, make sure you add images and messaging consistent with your appeal and brand).
- Our top header is stripped of navigation links so folks are not tempted to click on anything other than the donate action button or share buttons.

EXAMPLE:

Children's
Rights

CHILDREN'S RIGHTS
Defending America's Abused and Neglected Kids

f t d

HOME

Give kids hope.
Help Children's Rights ensure that thousands in U.S. foster care are safe, supported and living with loving families.

Please select an amount:

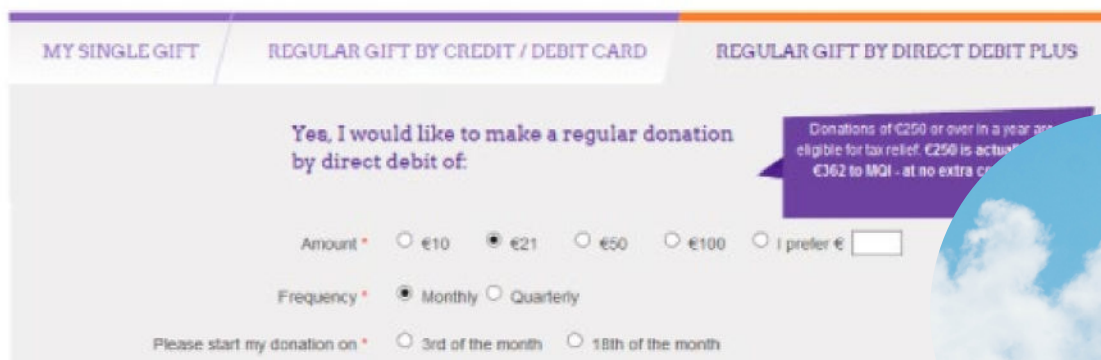
\$50 \$100 \$250 \$500 \$1000 Other Amount

Check here to make this a recurring monthly payment. Don't worry – you can cancel the monthly payment anytime.

- Our pages include a powerful engaging headline that complements the anchor text the donor clicked on to bring them to this page.
- Our pages include an emotional image or video that mirrors our appeal, grabs attention and draws people in. We understand visuals are processed 60,000 times faster by the brain than text—and people today have very short attention spans (8 seconds!).

- Our pages include a descriptive subheading that clearly and quickly describes what the benefits are of acting.
- Our pages make judicious use of bullet points to state benefits and create urgency.
- Every donation landing page has a specific call to action. Try “Support [name of your organization]” or “Give Now.” Or get creative and try an A/B test of two different buttons.

EXAMPLE: Donation Landing Page Mimics Appeal; Merchant’s Quay





- We've given suggested donation amounts and a limited range of appealing choices among restricted programs and unrestricted gifts. We understand that offering too many choices depresses response, but that people often give more when they can choose their gift designation. We've left a blank ("other") for donors who wish to choose their own gift amount.
- We've enabled recurring giving options on our landing page(s).
- We've reduced the amount of information donors are required to provide, understanding that people don't like to reveal too much information or spend a lot of time filling out forms. We ask only for the information needed to complete the online transaction, knowing we can ask for additional details later.



Step 1: Project C.U.R.E.

Gift Amount *

\$25 \$100 **\$200** \$500 \$1000

Gift Frequency *

One-time gift

Recurring monthly gift ([how this works](#))

Gift Designation *

Where the need is greatest

Would you like to make this a tribute gift?

Yes, make this gift in honor of

Billing Information

First Name *

Last Name *

Address 1 *

Address 2

City *

State / Province *

Zip / Postal Code *

Country *

Phone

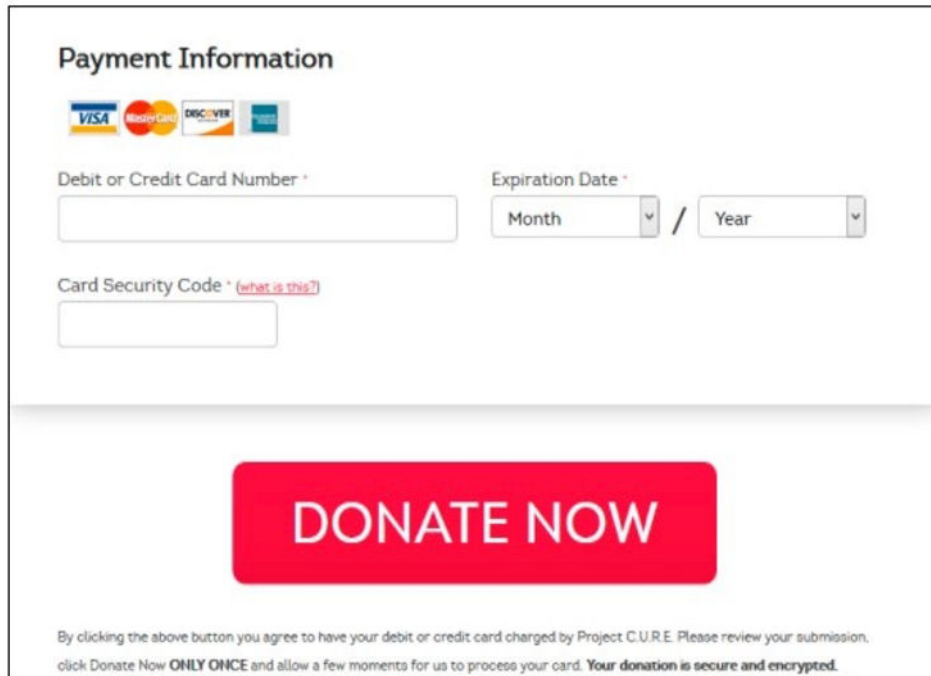
Email *

Remember my contact information on this browser. (Credit card information is **not** stored.)

Yes, I would like to receive email updates from Project C.U.R.E.

Step 2: Project C.U.R.E.

Next time they won't need to re-enter contact info



Payment Information

VISA MasterCard DISCOVER AMEX

Debit or Credit Card Number *

Expiration Date * /

Card Security Code * [\(what is this?\)](#)

DONATE NOW

By clicking the above button you agree to have your debit or credit card charged by Project C.U.R.E. Please review your submission, click Donate Now **ONLY ONCE** and allow a few moments for us to process your card. **Your donation is secure and encrypted.**

- We've tested our donation landing pages on different mobile devices to assess performance and user-friendliness. We found that it went right to:
 - An easy-to-use, clearly branded donation page.
 - The donation page, but it didn't display well on my phone.
 - A well-displayed donation page, but it lacked:
 - Urgency
 - Suggested donation amounts
 - Suggested giving categories or purposes
 - Emotional appeal/inspiration using photos; action words

There were other problems that need to be addressed, like:

7. Year-End E-Appeal Series Checklist

- We've determined who the email sender will be. (Note: This is arguably the most important part of your email. According to a Constant Contact study, 64% of people open emails because of the organization it is from compared with 47% of people opening emails because of what is in the subject line. An email from a person is generally preferable than an email from your organization. People give to people).
- We've developed succinct, compelling subject lines and run them through our email marketing software's spam checker to identify any problems (Note: Convince and Convert reports 33% of email recipients open emails based on the subject line alone. Constant Contact reports subject lines with less than 50 characters have open rates 12.5% higher than those with 50 or more, and click through rates are 75% higher. Grab subject line ideas at [8 Ways to Find Your Nonprofit's Perfect Holiday Email Subject Line](#)).
- We'll be personalizing our emails (Note: Aberdeen Group found personalization improved click-through rates by 14% and conversion rates by 10%).
- We'll keep our call to action above the scroll because we understand busy people will not read a long email.
- We've picked a [compelling image and caption](#) because we know a picture is worth 1,000 words, emails should be brief, and research shows people give more when you add a compelling image that tells a story. Our image matches the imagery on the landing page to which donors are taken when they click "donate."
- We've included a big, bold donate button at the top of our appeal in a color that contrasts with the rest of our design. And it doesn't simply use the word "donate." (Note: Research shows the word "support" followed by the name of your cause can increase your donation rate by 16% per page view).

- Our call-to-action highlights why it's so important to give NOW.
- We've checked to see what the e-appeal looks like on different devices (desktop, laptop, tablet, Android, iPhone) by sending a test to each type to see how readable it is when it displays. We've also sent a test email to the most common addresses used by our constituents (Outlook and Gmail), to assure it's displaying as intended.
- We've contacted our email provider to assure they have a plan for dealing with the glut of email at this time of year. Now is no time for servers to be down!
- We've double-checked to assure all emails send donors to a simple branded donation page that reflects the same message featured in the appeal. They are not taken to a generic donation page, or a page that takes them off our website, but a page that reflects back to them their intentions when they clicked on our "donate" button. We understand this helps potential donors feel secure and builds trust. This increases the likelihood they will complete their donation.
- For our final year-end online blitz (series of emails that build over the last several days of the year) we've assigned tasks to make sure: Content is created, tailored to audiences and approved no later than December 20.



- Emails are queued for sending by December 20.
- First email is sent on December 26.
- We check email responses and pull clean lists on December 29.
- Second email is sent on December 30.
- We check email responses and pull clean lists December 30.
- Final email is sent on December 31.
- You thank promptly and warmly via email, mail and/or phone call no later than January 5.



8. Peer-to-Peer (P2P) Fundraising Checklist

- We plan to develop and launch a [P2P campaign](#) this year that will complement our other year-end fundraising strategies.
- We've selected a vendor to work with and believe the expenses are justified as this will yield a positive return on investment by leveraging the passion of current supporters to attract new donors and increased donations.
- We don't have the capacity this year, but will calendar time to consider this for next year.



9. Social Media Checklist

- We have a plan for a year-end ‘Let Your Friends Be Our Friends’ campaign to get fans to engage in peer-to-peer fundraising initiatives by sharing our appeal on their [social networks](#) of preference.
- We have a plan to reach out to our influencers with specific calls to share our appeals.
- We’ve scheduled blog posts with highlights and memories from the year’s accomplishments—all made possible by our donors.
- We’ve pre-written social media updates tailored for the platforms we use for folks to share as it gets closer to the end of the year.
- We’ve selected compelling photos and/or video to append to our social media calls to action.
- We will make sure that if folks click social media links they’ll go to a specific place that provides more information and calls for a donation, rather than simply to our home page or a generic landing page.

Here is an example of use of multiple social media channels by one charity to get you started. This is the nifty work of One Justice (@OneJusticeOrg), which brings life-changing legal help to Californians in need. They made judicious use of Twitter, Facebook, Pinterest, and some simple photos to make the most of their written and email appeals. They also used Vimeo and iMovie to make simple, inexpensive thank you videos they embedded in their website and sent to their supporters via email. It should be noted (1) they accomplished all this with a very small staff; in other words, you can do this too! (2) they had a lot of fun with this, and it shows! In other words, it's appealing—the way good fundraising should be.

TWITTER



Who gives for justice? We all give for justice!
#IGive4 legal services to <http://www.one-justice.org/DonateOnlinepic>. twitter.com/N2Rvgy5ICL

TWITTER + FACEBOOK

#IGive4 justice - OneJustice! You can donate online today & bring life-changing legal help to Californians in... <http://fb.me/2iWtCR7wW>



They used a hashtag, #IGive4, they thought people would search for and use. No doubt you can think of other appropriate hashtags, or can create your own for your campaign.



PINTEREST

Sometimes you'll be able to get other funders—businesses, foundations or even key influential donors—to chaperone your tweets. Here are some examples that all share the hashtag #donate:

FedEx Office @FedExOffice

Make #education your gift this year! Every RT we see \$1 will be donated to @TeachForAmerica. #OneRate #CountlessPossibilities

Kimmie Rose @kimsterling26

@SheistT Provide \$50 grocery gift cards for needy families
RT/#donate

#thanksgiving <http://scarymommy.com> pic.twitter.com/naNZe89487

ISF Paw Support @ISF_PawSA

#Donate \$35 to help build the ISF Animal Sanctuary! That's all Ian asks for <http://www.isfoundation.com/campaign/ians-35th-birthday> ... #ISFCommCrew pic.twitter.com/nZUIdqR0eZ



10. Lapsed Donor Renewal Checklist

- We've run a database report of donors on the [verge of lapsing](#).
- We've tiered these donors from highest to lowest.
- We have a plan to call as many of these folks as possible, beginning with those who've (1) given the most, (2) those we believe have the greatest potential to become more major donors, and (3) those who've given consistently over a period of years. We plan to leave messages if we don't reach them, thank them for last year's support, leave our contact information if they have questions or would like to give over the phone or website, and drop a "sorry I missed you/thank you" letter into the mail—complete with a remit envelope.
- We have a schedule to update this list regularly up until the end of the year, so we don't end up soliciting anyone whose gift recently arrived.
- We plan to organize lapsed donor year-end phonathon and enlist our board and other volunteers to help. We will assume in our tone and language that our donor simply has forgotten/just not got around to giving yet due to the busyness of daily life. (Note: This is often true; many folks think they already gave and just need a reminder).
- For donors we do not reach by phone, we've prepared a "We Miss You" letter. (Note: Make it brief, direct, personal and as noticeable as you can manage, for example, (1) if you previously called and left a message, reference the fact you're sorry you missed them; (2) if you previously mailed a long letter in a standard carrier envelope, mail a short note in an invitation-sized, colored envelope they're sure to notice. Stay upbeat and positive in your message. Reward your donor for their past giving and praise them for their ongoing generosity and good intentions. Remember Cialdini's 6 Principles of Influence. People are inclined to keep doing what they've already done in an effort to appear consistent).

IV. SET UP YOUR 'NEXT GIFT' STRATEGY

Use great year-end donor service and 'ready-to-go' compelling thank you's.

11. Acknowledgment Checklist

- Assure your snail mail [thank you](#) letter is written and input into your database. If you will have different letters for different donor segments (new, ongoing, increasing and lapsed donors) or affiliations (board donor, volunteer donor, client donor), enter all these different variations now so you're ready when the gifts start coming in.
- Assure your email thank you letter is written and set up to automatically launch when someone makes a donation.
- Assure your thank you template is visually and emotionally compelling and ties back to the purpose of your appeal.
- Have a plan in place for making donor thank you calls. Penelope Burk's research revealed that among donors who got thank you calls from board members within 48 hours of the gift's receipt, 39% more renewed the next time they were asked and 42% made larger gifts than donors who did not get called.
- Prepare a new donor welcome kit in advance. Plan to send this together with your thank you letter or to send it several weeks later to reinforce the building of this new relationship with your supporter. It needn't be fancy; just be sure you let your new donors know the ways they can become involved with you other than through financial support, and make it easy for them to be in contact with you. Show them you'll be taking them on a wonderful journey in the coming year. Being your donor should be fun and fulfilling—not just once, but all year long!



12. Year-End Donor Service Checklist

- Prep your staff, including reception and program staff, to be confident sharing year-end messages.
- Make sure everyone knows how to handle last-minute requests for help, information about giving stocks and other questions.
- If staff is away on December 31st, make sure you have a message on your voicemail that tells folks how they can give before the end of the year. And wish them a happy new year while you're at it!



Summary

First make sure you've had recent contact with your donors where you informed them of the impact of their gift and thanked them for being your hero.

Review last year's annual campaign results and determine areas for improvement.
Set realistic goals.

Create this year's case for support (select a theme), find a compelling story and image to anchor your appeal, develop your messaging and graphic look, and spell out your clear call to action (fundraising offer)

Plaster this same theme, story, image, message, and call to action consistently across your spruced up website, branded donation landing pages, e-appeals, direct mail letter, appeal envelope, remit card, e-newsletter, blog, and all your social media.

Make it virtually impossible for your prospective donors to miss you by constantly putting compelling offers in front of them across multiple channels and making it easy for them to respond. Use different techniques, knowing that different people have different communication preferences. Many intend to give, they just don't get around to it the first, second or third time they receive your offer.

Be patient. Persist, remembering that folks who care about what you do will ultimately give. If you make it compelling and easy.

To your success!



About the author



Claire Axelrad, J.D., CFRE, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support.

Her award-winning blog showcases her practical approach, which earned her the AFP “Outstanding Fundraising Professional of the Year” award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.

Claire also serves as [Bloomerang’s](#) Fundraising Coach. In that role, she provides regular advice and guidance exclusively to the Bloomerang [blog](#) and [webinar](#) series.

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