



YOUR CHECKLIST FOR YEAR-END FUNDRAISING

August 29, 2024

About the Speaker and Cathexis Partners



**Mark Becker, Founding Partner
Cathexis Partners**

- Founded Cathexis Partners in 2008
- Worked with hundreds of nonprofits on thousands of projects
- Frequently contributes articles, papers, and presentations for industry blogs and events

We help nonprofits
use technology to raise funds
and engage supporters
effectively and affordably.

virtual team = low overhead = affordable prices!

16
years

1000+
nonprofits served

2500+
projects completed

20+
team members

A reminder to use AI, but always with a human eye...

Dall-E image created upon me uploading my profile pic:



New prompt: I wish. Make it more realistic, less polished...

A reminder to use AI, but always with a human eye...



Dall-E response:



New prompt: less good looking and more realistic....

A reminder to use AI, but always with a human eye...



Dall-E response:



New prompt: can you combine the face with a potato....

Dall-E Response: Creating an image that combines a human face with a potato might produce something surreal or humorous. I'll give it a try!

A reminder to use AI, but always with a human eye...



Dall-E Response: Creating an image that combines a human face with a potato might produce something surreal or humorous. I'll give it a try!

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End Of Year giving stats

- [GivingTuesday:](#)
Around **\$3.1 billion** was raised in the U.S. in 2023.
- [NPSource:](#)
30% of all annual giving occurs in **December**;
10% happens on **December 29, 30, and 31**.
- [Double The Donation:](#)
Almost 30% of nonprofits raise **up to half of their annual fundraising** during year-end campaigns.



Your checklist for EOY fundraising

- Start early.
- Take a look back.
- Map out a plan.
- Get tech-ready.
- Create unique content.
- Get personal.
- Remember the recurring gifts factor.
- Incorporate GivingTuesday.
- Keep up the momentum.
- Remain calm.



□ Start early

- Prep as early as possible.
- Allow time for planning, creative, production, testing.
- Start communications as early as October.

Example

October: Engagement campaign that make constituents feel connected with your org but doesn't ask for money.

November: Let constituents know you're thankful for them.

December: GivingTuesday on December 3, and the remainder of your end-of-year giving campaign.

❑ Take a look back

- **Run reports** to analyze actions taken, donations made and unsubscribes
- **Identify strengths and weaknesses** from last year's campaign

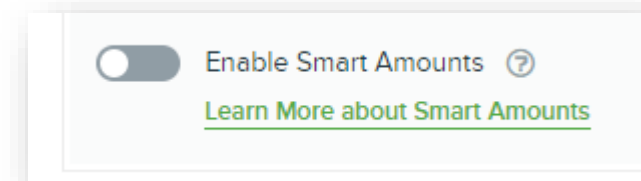


□ Map out a plan

- **Create an outline of a communications plan and calendar** for the last quarter of the year.
- **List your end-of-year fundraising emails** and make note of the purpose of each.
- **Record what other components you'll need to create.**
- **Share your plan** with stakeholders in your organization, get feedback, and start building your campaign.

□ Get tech-ready

- Put your **data segmentation tools** to work.
- Use **dynamic asks**.
- Optimize your **donation form**.
 - Ask donors to cover the transaction fee
 - Add a monthly giving pop-up
 - Offer a range of payment options
 - Embed a matching gift tool



Qgiv's "Smart Amount"

Smart Amounts will intelligently determine the most likely donation amount for each potential donor based on a variety of factor

❑ Create unique content

- EOY season is busy; **your messages will need to stand out.**
- Being unique doesn't necessarily mean you have to come up with an elaborate campaign.
Focus on (and clearly explain) **why your organization is special.**
- **Make your audience's online experience easy, quick, and seamless** no matter what device they're using.

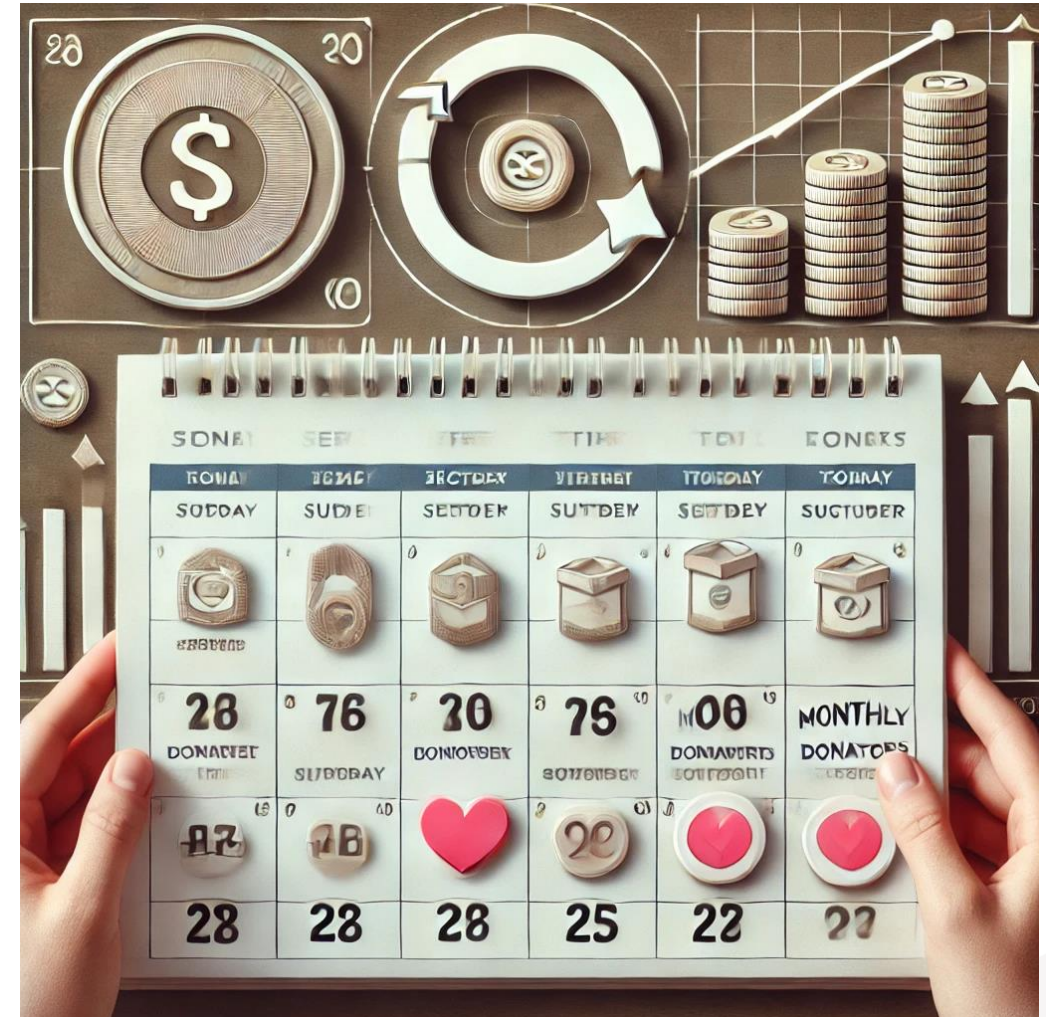
□ Get personal

- **Segment and target:**
Don't blanket everyone with the same message.
- **Example:** If you're looking to convert supporters to first-time donors, send them a different message than people who are already giving to your organization.
- **Let them know how their gift helps** make a difference for your mission.

□ Remember the recurring gifts factor

- Research has shown* that monthly donors give more than one-time donors.
- EOY is great opportunity to increase number of donors who give monthly
 - Give donors an option to make their donation a recurring gift.
 - Offer a special gift for monthly donors only as an incentive.

* <https://www.nonprofitpro.com/post/monthly-donors-give-more-than-one-time-donors/>



❑ Incorporate GivingTuesday

- Give constituents a **heads up**.
- Build a unique GivingTuesday **donation form**.
- Mobilize your **peer-to-peer fundraising supporters**.

**GIVING
TUESDAY**

□ Keep up the momentum

Once the ball drops at midnight on New Year's, your end of year strategy isn't over.

- Follow up with supporters to thank them.
- Let them know how they are helping to shape the next year for your organization and your mission.
- Follow up with updates.



☐ Remain calm

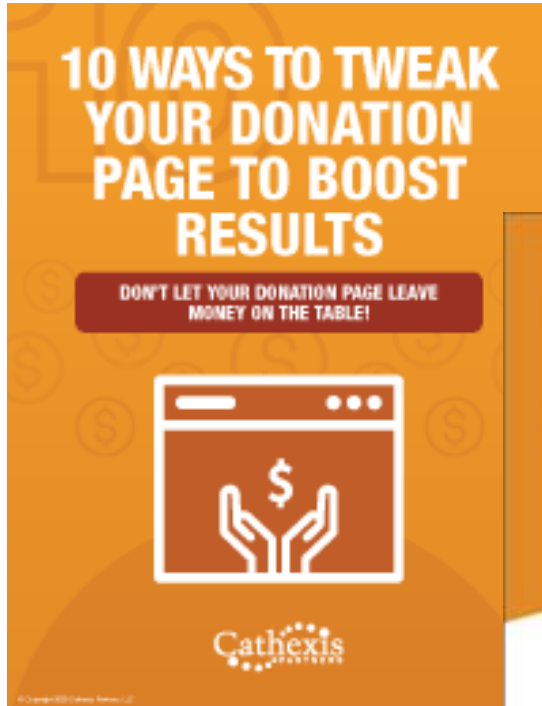
If you get a late start, don't panic!

- Create an EOY campaign theme.
- Use a multi-channel approach.
- Build a dedicated donation form/landing page.
- Thank your donors.
- Find your mission ambassadors.
- Join the Giving Tuesday movement.
- Don't be afraid to ask on December 31.

❑ BONUS - Thank your staff and volunteers!



Thoughts?



cathexispartners.com/resources

Thank you!

contact: mark@cathexispartners.com