



## YEAR-END FUNDRAISING COURSE SYLLABUS

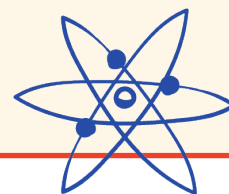
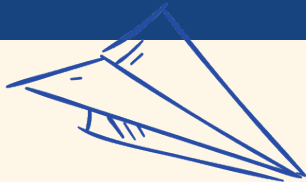
# Your Roadmap to Success

It's wise to develop a multichannel communications plan so that your nonprofit:

- ✓ Schedules each fundraising/marketing piece in union with your marketing calendar, so they don't conflict with any other communications also being sent by the organization.
- ✓ Drafts a budget for all printed materials including quantities, number of direct mail pieces (letter, inserts, response cards, and envelopes), etc.
- ✓ Requests additional contacts from your board and key volunteers to add to the mailing list.
- ✓ Has ample time to design an overall theme for the campaign, requesting photos and testimonials from people connected to the cause, confirming the look and feel of the communications.

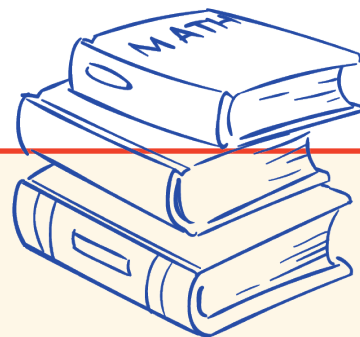
BELOW IS YOUR COURSE SYLLABUS

# for year-end fundraising.



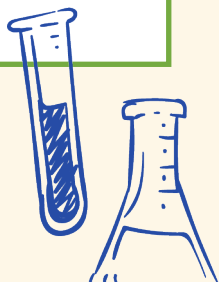
## 1.1 Set Your Pre-Launch Foundation

- Plan your campaign theme.
- Collect testimonials, pictures, etc. that tie to your theme.
- Draft communications materials—direct mail solicitation, emails, social media posts, etc.
- Develop web banners, set up donation page for fundraising campaign, plan where and how it will be highlighted on your website and in your office (if client/donor facing).
- Brief your staff on the theme and timing/calendar for the campaign. Get everyone pumped to be part of this year's campaign!
- Identify staff who will cover phones in case donations are phoned in during the last week/days of the year.



## 1.2 Segment Your Donors

- Group prospects into similar lists to personalize the messaging. You can do this within your Donor Management System.
- Some suggested segments:
  - Highly engaged recurring donors
  - Lapsed Donors (gave last year but not yet this year)
  - Contacts in your database that aren't yet donors
  - Volunteers/Board Members



## 1.3 Thanksgiving Week Activities

- For direct mailings, be sure that it lands in mailboxes the Friday before Thanksgiving.
- Review your list of major donors—you or your board can call a few to "give thanks".
- Identify which board members have not given yet (this is a great segment to have handy!). Give them a call to check in and mention that you hope they will contribute to the campaign.
- Send an email to all constituents thanking them for their involvement in your organization.

## 2.1 Giving Tuesday

Follow a schedule for Giving Tuesday. Here's a sample schedule:

### MONDAY

- ✓ Email and social media promotion.

### TUESDAY

- ✓ 9 a.m. email and social media launch.
- ✓ Lunch time note about progress. Share success stories and/or pictures of participating donors.
- ✓ Early evening "last chance" note.
- ✓ Logos and ideas can be found on the Giving Tuesday website.

### WENESDAY

- ✓ Send out a brief "thank you" to Giving Tuesday donors. You can use Network For Good's newsletter template to create an email with pictures and highlights from the day of giving.

### THURSDAY

- ✓ Ask your most dedicated followers to send a peer-to-peer campaign out during December. NFG has a guide on how to launch and manage these viral campaigns.
- ✓ Use social media to celebrate the success of individual fundraisers.

- Share sample language with your board members and best volunteers to use when sharing your campaign communications.

- #GivingTuesday will likely fall on this week – plan it to complement your EOY plan.

## 2.2 Campaign Ramp

- Send an email with another connection to the campaign. Promote sustaining/recurring giving to keep donors engaged.
- Review your segmented list of donors from 2017—are there any mid/major donors who have not yet given? If so, you may want to send a different communication that notes that there is still time to be listed on the 2018 honor roll.
- Add updates to your donation page to increase traffic. Try testing different headlines, copy, and images.

## 2.3 Highlight Goal Tracking

- Post on social media a positive story tied to campaign and highlight goal tracking (we are halfway to goal or "our generous donors have provided 50 children with new coats—we still have 25 more who need new, warm coats, won't you help?").
- Reach out to your donors via email highlighting those same goals.



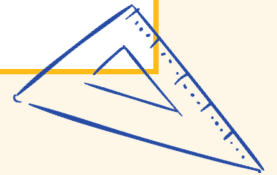
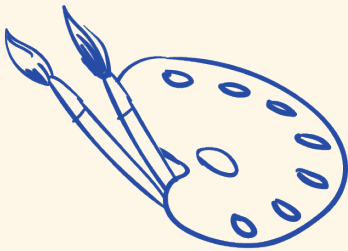
### 3.1 Quiet Week

- Email full audience (less donors who already gave to the campaign) from CEO or ED with direct push for EOY giving. Send “just three days left to be listed on our 2018 honor roll” and “last day—times running out” emails. See if you can leverage a matched gift for the final push.
- Try a text-2-give campaign in the final days.



### 3.2 All Out Push

- First week of January, thank your donors as a group via social. It is also nice to send thank yous with handwritten notes to mid-level and major donors.
- Thank you phone calls also go a long way to building relationships and encouraging repeat donations. You can leverage board members to make these calls. Be sure to provide a script.
- Update the donor honor roll on your website to recognize those who made a gift last year.
- Encourage board members to make thank you calls—especially newly acquired donors.



### 3.3 Count Your \$ and Send Thanks

- Have your thank you notes ready to go in advance so you're not scrambling.
- Have a template for each segment of donors.



# You've graduated!

**NOW GET READY TO BUILD SOME  
EVERGREEN OUTREACH PROGRAMS TO  
RETAIN THE DONORS YOU'VE ACQUIRED!**