

# EOY FUNDRAISING PLAN

## QUICK REFERENCE CHECKLIST



## EOY Fundraising Plan

Ahhh. Fall. As temperatures outside start to cool, your end-of-year (EOY) fundraising efforts should be heating up. Because before you know it, the Season of Giving will be upon us, and it's widely known and continually validated that people donate generously to charities between Thanksgiving and New Year's.

Perhaps it's because they're feeling particularly thankful, and consequently charitable this time of year. Or, maybe they need to spend the remainder of their allotted charitable dollars to make up for lost time or prepare for tax filing.

Whatever the motivation, charities receive more than one-third of overall giving during the end of the year, with some bringing in between 40 and 70

percent. Consequently, you absolutely must be poised and ready if you want your mission's voice to be heard above the proverbial clanking bells. And, this means you need to start your EOY campaign planning and prepping well in advance.

So, where to start? You could conduct an online search of "year end fundraising," but it would probably take you far past Giving Season to slog through all the research, ideas, opinions, and advice. That's why our fundraising experts at Abila have put together this quick reference checklist that will guide your planning, month-by-month, all the way to year's end.

**It's time to get started ...**



## SEPTEMBER



### Review last year's EOY campaign

Pull reports from last year that track data like dollars raised, number of donors, number of donations, number of new donors, number of repeat donors, and average gift size. This will drive your goal setting for this year.

Also, look for successes and failures, so you can do more of what worked, and discontinue what didn't. And, consider what has changed at your organization this year, and adapt accordingly.



### Establish your goals

Your review of last year's EOY campaign will be your starting point. Set new stretch goals based on last year's numbers.



### Develop your key personas

Donor personas are central to successful fundraising, because they can help you understand who your donors are, what they expect and value, and what ties them to your mission. Once you've developed your personas, you can segment your database and target appeals that are meaningful and relevant.



### Brainstorm campaign concepts

What is your campaign theme, title, overall story? What current events can you include in the story to show the timeliness of your need? Are there individuals whose stories you can share with potential donors to more clearly illustrate the need?

## SEPTEMBER



### Conduct a website audit

You'll want to work with your communications/marketing department to accomplish this. Also, ask for honest feedback on your website from volunteers, board members, family members, etc., then implement the suggestions with the most merit. You can then run these same audits again once you have your campaign set up and ready.

Ask your auditors/testers to:

- Donate
- Sign up for your email list
- Describe what you do
- Take other actions relevant to your site or campaign



### Test your technology

Review your entire donor giving flow from email/mail, to landing page, to donation form, to thank you message, to follow-up. Be sure all the necessary information is recorded in the appropriate locations. Make any necessary changes/tweaks now.



### Get your creative concept(s) reviewed and approved

Does your executive director and/or your board need to sign off? If so, complete that process now, before you get too far down the development road.



### Begin collecting stories

You'll want to tell compelling stories during your fundraising campaign(s) about individuals your organization has served. Stories can inspire your supporters, help communicate exactly where donations are going, and show your passion for the cause. Identify those in your community to spotlight in these stories. Collect more than you think you need – you can always use them in social media, update emails, and other communications. And, don't forget to get photos to accompany your stories.

# SEPTEMBER



## Build an integrated editorial calendar

Your end-of-year campaign is anything but a one-and-done undertaking. Diversifying your appeals can help maximize revenue, and this requires a coordinated campaign with multiple touch points via various channels.

For example, in November:

- Thank you for your continued support and update on the year email or direct mail (no ask)
- Several #GivingTuesday emails
- EOY campaign theme introduction email or direct mail (with a story)

Then in December:

- Five to seven emails over the course of the last month (with more stories, of course)
- Three emails in the final three days of the year
- Consider making personal phone calls to your loyal donors
- Work in as much social media as possible to extend the buzz
- Don't forget to reinforce your message on your website
- Follow up with #GivingTuesday donors

This is more communications than you're probably comfortable with, but there's a lot of noise and distraction this time of year, so you need to remind and motivate your donors.



## Recruit board members to help with your EOY efforts

Help your board members be better fundraisers. This doesn't mean they have to do the asking. Instead, they can identify potential donors, make introductions, tell the story about why they're on the board, and share campaign stories with others.

### PRODUCT SPOTLIGHT

With Abila Elevate's Circles™ feature, fundraisers have at-a-glance visibility into a donor's relationships and communities. From book clubs to board membership to alumni organizations, and everything in between, Circles helps fundraisers make important connections.

**Austin Spay and Neuter Volunteers**  
 A small group of volunteers who help to schedule spay and neuter clinics for mobile VEC program in Austin.

Primary Contact Info:  
 Brandy Denise Keller  
 1234 Main Street  
 Williamsburg, VA 51234  
 UNITED STATES  
 Billing Address

Business Info:  
 Email: brandy@brandybrandy  
 Phone:  
 Fax:

Circle Created: 11/12/2014

Gifts This Year	Number of Gifts	Lifetime Giving	Outstanding Pledges
\$6,585.00	28	\$6,585.00	\$820.00

**Members**

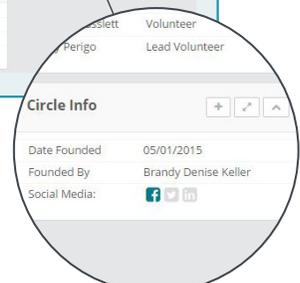
Constituent	Role
Ariane Carlson	Volunteer
Brandy Keller	Volunteer
Penelope Lasslett	Volunteer
Penny Perigo	Lead Volunteer

**Circle Info**

Date Founded: 05/01/2015  
 Founded By: Brandy Denise Keller  
 Social Media: [Facebook] [Twitter] [LinkedIn]

**Giving History**

Member	Date	Amount	Gift Type	Campaign	Balance
Penny Perigo	2/19/2015	\$50.00	Gift	Capital Campaign	---
Penny Perigo	2/19/2015	\$50.00	Gift	Capital Campaign	---
			12		





## OCTOBER



### Conduct data appends

The time is now to scrub your data to make sure you're entering Giving Season with all the latest information on your donors.



### Build donor journeys based on personas

Each donor's experience should feel personal, depending on his or her persona. For example, the giving process for a major donor who has a passion for red-eyed tree frogs should look and feel different than the process for your \$50 donor who likes polar bears.



### Create Web content

To create these various donor journeys, based on personas, you'll need targeted landing pages, stories, blog posts, donation forms, etc.



### Create campaign specific donation forms

You'll want to continue the campaign theme all the way through the giving process, including your forms. This keeps the conversation going in the donor's head ... a much better scenario than sending him or her to a generic donation form right after reading an amazing, relevant story.



### Write email and direct mail appeals

Refer to the editorial calendar you created last month that details all communications needed, and craft them now. If all planned content is ready to go, then you'll have more time to react to current events, updates, or inevitable challenges that arise during the campaign.

## OCTOBER



### Seek asset/appeal approval

Does your executive director need to sign off? Do you need board approval? What about the subjects of your stories? Even if it's just a courtesy review, circulate your content and get necessary approvals now.



### Review appeals and donation forms with accounting

It's always wise to circle up with your finance team to ensure funds are restricted or unrestricted as you both expect.



### Write super awesome EOY thank you letters

Make sure your thank you messages match your personas and continue your stories. After all, it was your meaningful, relevant stories that peaked donors' interests to begin with, so keep it going through the thank you and even the follow-up next year.



### Identify corporate partners/sponsors

Corporate sponsorships offer infinite opportunities to extend your campaign. Secure their support now.



### Make sure #GivingTuesday is part of your overall plan

#GivingTuesday is no flash-in-the-pan. Last year, charities raised more than \$45 million, up from \$28 million the year prior. You should absolutely take advantage of the widespread – and growing – awareness and observance of this special day.

**PRO  
TIP**!

#GivingTuesday is the Tuesday after Thanksgiving each year. For the next three years, the exact dates are:

December 1, 2015 | November 29, 2016 | November 28, 2017



## NOVEMBER



### Final campaign approvals

It's almost Go Time, so campaign approvals should be signed, sealed, delivered.



### Finalize all communication assets

Make sure you have everyone's approval, and give materials one final once-over.



### Send your warm-up communication

NO "ask" here! Just review your year's successes and spread the warm fuzzies about your organization and all the good you're doing with your donors' help.



### Conduct telephone thank-a-thon

This is another opportunity to warm up your major donors. Again, your hands should be clapping together in praise, not extended out in need!



### Test, Test, Test

Get your staff and volunteers involved in campaign testing. Use as many variables as you can.

## NOVEMBER



### Send pre-#GivingTuesday email notices

#GivingTuesday is always the Tuesday after Thanksgiving, so consider sending out a note the week before and the week of Thanksgiving.



### Send your first EOY appeal

Your first appeal should go out around mid-month.



### Recruit volunteers

Ask either staff members or folks from your volunteer rolls (or both) to make thank you calls. You might even tap board members to call your high-dollar, loyal donors.



### Block time on your ED's calendar to personally sign thank you notes

Just schedule about 15 minutes each week this month and next. You might also ask board members and those you've served to sign (and maybe even create) your thank you messages.

## PRO TIP !

When testing campaigns, be sure to test the entire user flow from initial contact through thank you and follow-up, with special emphasis on these five components:

1. List segments (suppression and inclusions from email marketing/direct mail)
2. Links to your landing pages (from email, social, or direct mail)
3. Donation form submission/Credit card processing
4. Donation tracking in your database
5. Personalized thank you letter generation



## DECEMBER



**Send a #GivingTuesday email solicitation on the Tuesday following Thanksgiving**



**Post #GivingTuesday appeals on social media**

Facebook, Twitter, LinkedIn, Instagram, or whatever other social media channels you use should come alive on #GivingTuesday. Be sure to include the hashtag and a link to your donation page.



**Execute to editorial calendar**

Time for the RUSH! Provide EOY campaign updates, thank donors who have given to your year-end efforts, and interact on social media early and often throughout the month. This is where you separate yourself from the herd and really focus on your donors and their impact. If you've followed this monthly plan so far, December won't be the fire drill that it's felt like in years past.



**Prepare your accounting counterparts**

Make sure your finance team is adequately staffed, ready, and waiting for the rush in donations during the last couple days of the year, and that the process to accrue is known by all.



**Hijack your website homepage**

Make your website homepage ALL ABOUT your EOY campaign.

## DECEMBER



### **Post social media thank yous and updates**

This should be, at best, a daily task; at least, weekly, throughout the entire month of December.



### **Continue making thank you phone calls**



### **Get your last direct mail solicitation to the USPS by December 15**

December 15 is a good target for a direct mail drop deadline. Based on your audience and the distance your appeals have to travel – within the state versus international, for example – you may consider a shift in either direction.



### **Review your initial campaign emails and adapt**

Based on their performance, make adjustments to upcoming solicitations, such as swapping out subject lines, changing images, and/or rewriting headlines.



### **Schedule an email solicitation for the holiday week**

With the right online fundraising and email marketing tools, you can set-it-and-forget-it 24/7/365. Enjoy the holidays with your family, and let your system temporarily take over.



### **Set your out of office messages**

Instead of the same-old, same-old, “I’m out, blank, returning, blank,” message, ask all employees to reinforce your EOY campaign in their out of office messages. You might even consider providing them with a script to cut and paste.

## DECEMBER



### Send your final “last chance” email solicitation on December 31

Your message should grab donors’ attention and convey a sense of urgency. The clock is TICKING!

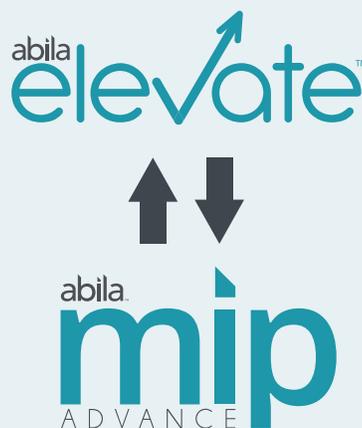


### Start building new donor welcome series (There’s no rest for the weary!)

In the heat of the EOY moment, you may feel like securing these hard-fought, year-end dollars is your ultimate goal. But really, this is just the beginning. Each donation should be viewed as the start (or continuation) of a wonderful, long-lasting, meaningful relationship. And, since it’s much easier to get a supporter to donate a second and even third time, it’s critical that you start building a solid connection immediately. Your welcome series should convey your heart-felt appreciation; illustrate the impact made with the donor’s contribution; incorporate real stories of success; and include continual touch points/updates throughout the coming year.

## PRODUCT SPOTLIGHT

Integration between fundraising and fund accounting solutions improves recordkeeping and reduces errors. [Abila’s Elevate™](#) for fundraising and [MIP Advance™](#) for fund accounting are cloud-based solutions with a tight integration that help your team work collaboratively and be good stewards of funds.



## About Abila

Abila is the leading provider of software and services to nonprofit organizations and associations that help them improve decision making, execute with greater precision, increase engagement, and generate more revenue. Abila combines decades of industry insight with technology know-how to serve more than 8,000 customers across North America. For more information, please visit [www.abila.com](http://www.abila.com).

## About Elevate™

Designed with and for today's fundraisers, [Abila Elevate](#) is smart, intuitive donor management software. Accessible anytime, anywhere, Elevate enables modern fundraisers to build better connections, relate and respond to donors' needs, utilize resources more efficiently, and boost results.

### LEARN MORE

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