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A Nonprofit's Guide to **Year-End Giving**





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Who's ready for the holidays?

Your donors are!

Did you know that [30% of all annual giving occurs in December](#) and that 10% happens on December 29, 30, and 31? That means that now, as the days get a little shorter and the temperatures just start to drop, nonprofits still have plenty of time to reach their fundraising goals. A solid strategy and a well-thought-out calendar form the foundation of a smart year-end giving campaign.

It isn't hard to find advice about nonprofit year-end giving because it's such a big deal in our industry. Since we started this business, we've helped hundreds of clients plan and execute solid year-end fundraising campaigns, and we can confidently say that every nonprofit we've helped has amped up their efforts at this time of year—and seen big revenue gains.

As we head into another busy year-end, it's worth your time to review some best practices and start to think about where you want to allocate your resources. It takes some planning and preparation, but when you're staring down [Giving Tuesday](#) and you know you have a solid plan, you can (somewhat!) relax and enjoy the excitement of the holiday season.

In this guide, we will cover:

- ➔ Importance of Year-End Giving
- ➔ Year-End Giving Planning Processes
- ➔ Marketing for Year-End Giving
- ➔ Best Practices for End-of-Year Giving
- ➔ What To Do After Your Year-End Giving Campaign

Once you've got these basics down, put pen to paper (or fingers to keyboard) and start to sketch out what your year-end giving outreach will look like this year.

Ready to get started?

1 The Importance of Year-End Giving

Turkeys and friends and parties and gifts....that's what the end of the year looks like to many of us. And even the most dedicated nonprofits, the ones most intent on executing a perfect year-end giving campaign, can feel the draw of wanting to just relax and not work so hard.

We get it. But it will reinvigorate you—and your staff—if you remember just how important these next few months are to reaching, even exceeding, your online fundraising goal.

Let us share a few [nonprofit statistics](#) that underline how important year-end giving is to your overall fundraising program:

- ➔ Almost [30% of nonprofits](#) raise up to half of their annual fundraising during year-end campaigns.
- ➔ In 2022, [Giving Tuesday](#) raised about \$3.1 billion in the U.S.
- ➔ More than half of all nonprofits start [planning an end-of-year campaign](#) in October
- ➔ Despite [economic uncertainty](#), charitable giving [continues to rise](#) year over year.

If you're thinking, "Yeah, but those stats don't apply to little old me," then pull your own statistics from last year. A good fundraising CRM will be able to show you how much money you raised each month and how you did it. It's likely your numbers will show that year-end giving puts a nice exclamation point on your annual fundraising, and that alone can motivate your team and remind them the eggnog will taste even better when you've smashed your fundraising goals.

Continue to motivate staff by focusing on your mission and your donors. The rush to raise funds isn't so you can go on a shopping spree; the donations are intended to change something significant in the world. Keep that lofty goal in mind this season.



2 Year-End Giving Planning Process

Many nonprofits start [planning their year-end campaigns](#) early, which helps alleviate the last-minute stress you feel if you wait until November 1. And the caveat remains that the best-laid plans can go seriously awry and you have to remain nimble enough to pivot.

This is why we recommend a [multi-channel campaign](#). Statistics show that **70% of people donate through multiple channels**, meaning that you can send an email and a text and invite them to an event...you won't be driving them crazy; rather, you'll be giving them multiple opportunities to give.

So let's talk about the planning process. How do you go about developing a plan that will fire on all cylinders and get your nonprofit the attention (and donations) it deserves? We'll let you in on the advice we give our clients.



Analyze your Fundraising Metrics and Craft Goals

Whether last year was off-the-charts fantastic or drowning-in-my-eggnog lousy, there's something to be learned. These are the questions to ask yourself:

- ➔ **How did my fundraising in the last three months of last year compare to the first nine months?** What if there was no change? Great! You have amazing, untapped fundraising ready for you.
- ➔ **What was different about my outreach methods those last three months?** If you did something that worked, repeat it. If it didn't work, change it up. And if you didn't do anything differently, see the previous comment about untapped fundraising.
- ➔ **When I look at the past several years, which efforts correlate with spikes in giving?** These will form the basis of your campaign.
- ➔ **On which platforms do I get the best response?** Guess who's going to answer the phone? Boomers. Gen Z will respond to outreach on Twitter, and the Greatest Gen will open their mail. Know your donors, and see what gets them to engage. Then repeat it.
- ➔ **How much did I raise in my last year-end giving campaign?** Use this number to set a goal for this year. Unless there's something crazy, like a worldwide pandemic, you can probably expect to increase your numbers year over year.

Next, you are going to set goals for your year-end campaign. Goals can include:

- ➔ Amount of money you'll raise
- ➔ Number of new donors you acquire
- ➔ Number of existing donors that up their gifts
- ➔ Number of donors that engage on more than one channel
- ➔ Or any other metric that defines success for you

These can be and/or goals: Number of donors who give on Giving Tuesday **and** one more time before the end of the year, or number of donors who increased the amount of their gift **or** the frequency. A robust [nonprofit CRM with advanced query capabilities](#) will make these reports easy to run, and those numbers can be the benchmark you use for your next goal.





Best-practices advice when it comes to formulating your goals is to make sure they're S.M.A.R.T. We know you are, so let's make your goals smart, too.

- ➔ **Specific:** Try narrowing down and creating separate goals through each fundraising channel during your year-end giving campaign. For instance, you might earn more through your online donation page than through direct mail contributions. Creating separate goals ensures you know specifically how much to expect from each revenue stream.
- ➔ **Measurable:** This is an inherently easy guideline when you create your year-end giving goals. For fundraising, it'll simply be the amount that you'd like to raise. However, if you have additional goals in mind, like donor retention, acquisition, or others, be sure to assign a measurable metric that can be applied to the goal. For instance, you may want to "retain 50% of your donors from last year's year-end giving campaign."
- ➔ **Attainable:** This is why it's so important to base your goals on historical metrics. If you set the goal too high, your fundraisers might become discouraged during your year-end giving campaign. However, if you set your goals too low, you'll likely miss out on some potential (and likely sizable) revenue opportunities. In perfect Goldilocks style, you need to make sure your goals are just right.
- ➔ **Relevant:** Make sure you align your goals for your year-end giving campaign to your goals as an organization. This will be important as you communicate the impact to your supporters. You'll want to show them exactly how their contributions impacted your mission. For instance, when someone contributes \$100 to your campaign, you should be able to send an email to that donor saying, "Your gift of \$100 helped to accomplish X, which goes a long way toward our mission, Y."
- ➔ **Timely:** Again, this is a shoo-in for your year-end giving campaign. As a part of your year-end strategy, the timeline for your campaign should end on December 31st. However, keep in mind that this doesn't end all of your efforts. In January, you'll still need to follow up with your supporters and show appreciation for their hard work and contributions.

Creating concrete fundraising goals will help motivate your organization's fundraisers as well as your supporters. They'll feel driven to reach those goals and help you succeed in your mission.



Plan your Appeals

You've set your goals and looked at your metrics to see which engagement efforts are the most effective with your donors. Make a specific list that answers these questions:

- ➔ What channels were the most effective at getting donations?
- ➔ Which group of donors were most likely to give with each channel?
- ➔ Did any donors give in more than one channel, such as email and direct mail outreach?

Get a list of HOW you will reach WHICH donors and WHEN. Base this on data!

Okay, you've got a peer-to-peer campaign that will target all donors and launch November 1. Good! How will you craft your ask?

There are [creative ways to ask for donations](#), and the sky is the limit when it comes to off-the-wall approaches. There are going to be a lot of charities asking a lot of people for support, so how are you going to stand out?

We recommend these [8 steps to crafting the perfect year-end appeal](#):

1. Create an attractive **donation form** and make sure it's integrated with your website.
2. **Test your form** on different screens, like your laptop and your phone.
3. Include **suggested giving levels** tied to your goals. \$15 saves an acre of the rainforest, or \$25 supplies medicine for an abandoned pet.
4. **Quantify** your mission. You want to save 1,000 acres or care for 100 abused animals.
5. Keep the headline **simple and easy to remember**.
6. Tell your [nonprofit's story](#).
7. Make your appeal **specific and manageable**.
8. **Link** to your donation form.

The bottom line? Use data to figure out the how, who, and when, and then craft important elements (headline, graphics, story, and your ask) and use them across channels to blanket your donors.



Create a Fundraising Calendar

We talked about a general fundraising calendar, but let's get specific! Open an Excel sheet or pull a blank calendar from the Internet that covers Giving Tuesday to the last day of the year. And then map out your efforts, noting which ones run concurrently with another.

DECEMBER						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 Giving Tuesday Virtual Event	2 Giving Tuesday Appreciation Follow-Up Phone Calls	3 Continue Giving Tuesday Appreciation Follow-Up Phone Calls	4 Send Direct Mail Postcard	5
6 Send Year-End Giving Emails	7	8	9 Facebook - Year-End Giving Social Push	10 Launch Year-End Giving Peer-to- Peer Fundraiser	11	12
13 Send Year-End Giving Emails	14	15 Instagram - Year-End Giving Social Push	16	17 Social Media Takeover Event	18 Send Direct Mail Postcard	19
20	21 Send Holiday Cards to Major Contributors	22	23 Send Holiday Emails	24 Christmas Eve Organization - Holiday	25 Christmas Day Organization - Holiday	26
27 Holiday Virtual Gala	28	29 Social Media All-Day Marketing Push Email All-Day Marketing Push	30 Continue Social Media All-Day Marketing Push Email All-Day Marketing Push	31 Continue Social Media All-Day Marketing Push Email All-Day Marketing Push Final Day of Year-End Giving Campaign!		

Get specific, and be sure to note:

- ➔ Dates for each of your social media pushes
- ➔ Dates for emails to be sent to groups of clients
- ➔ Direct mail sendoffs
- ➔ Giving-specific holidays like Giving Tuesday or Cyber Monday
- ➔ The holiday vacation days for your staff members
- ➔ Notable campaign events

When you craft your calendar leading up to the end of the year, you should be sure to customize your appeals that you plan to send based on the segments in your donor database. For instance, you may create a donor segment of first-time supporters (who have only given once in the past), another for those who are eligible for matching gifts, and still another for your supporters who have given major or substantial contributions in the past.

Then, you can schedule the appeals for each of these groups of individuals to be sent at specific times on your calendar. Be sure not to send too many emails in a row to overlapping groups to avoid becoming repetitive with certain supporters.



Make sure you've got the right tools in your toolbox.

Now you've got your goals, you've drafted the appeal, and you've planned which messages will be on what channels and when. Remember, this is your last push for the year...you will want to throw everything you've got into these campaigns.

But just like having a great idea to build a tree house and then realizing all you have is one lousy Allen wrench, these great ideas need tools to give them life.

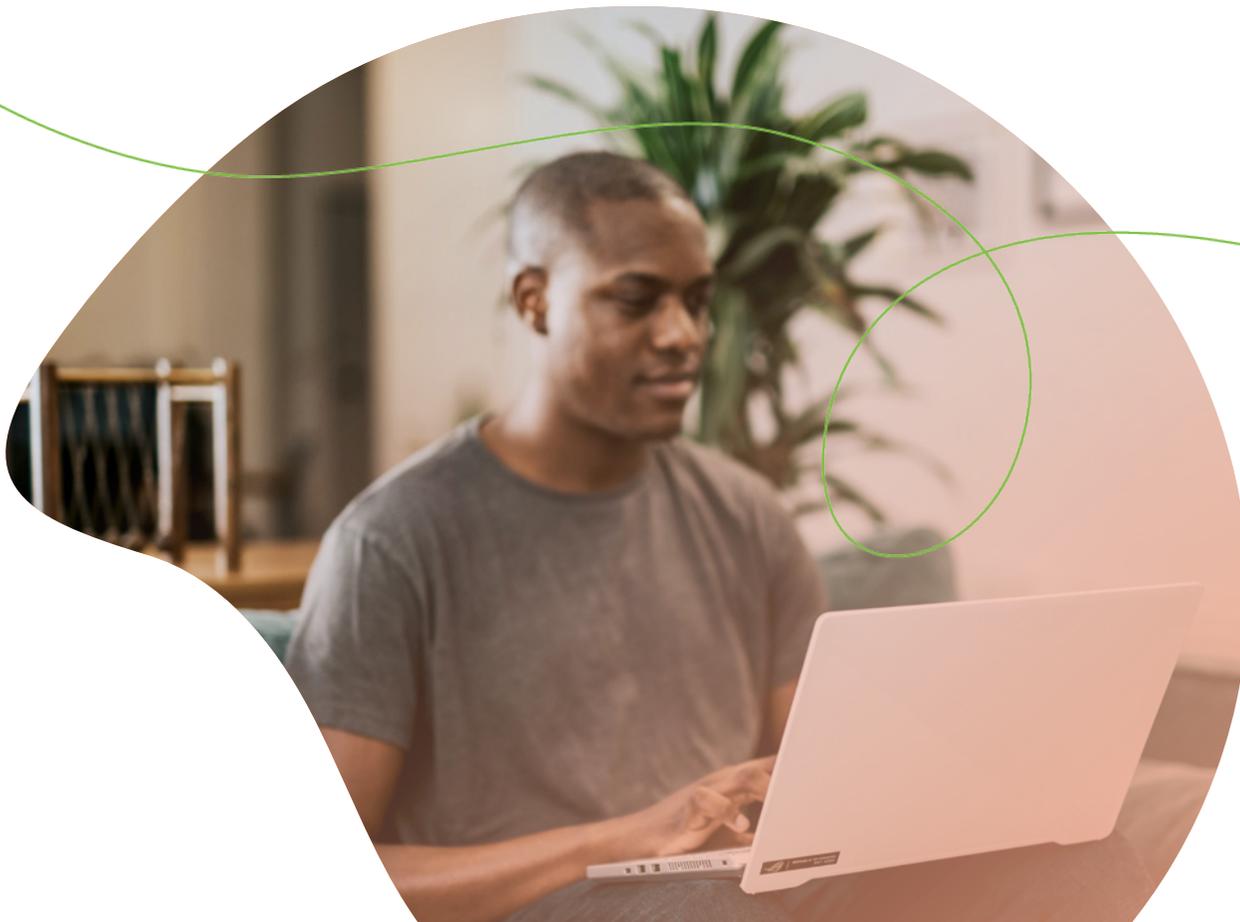
Obviously, we are going to tell you that the very core of your fundraising is an [all-in-one CRM](#). Why? Because you have all the tools you need, right at your fingertips. If you're using different programs, all of this advice still applies, but you might have to cobble together the tools rather than having them in one spot. We think these are the [top 12 fundraising tools](#) for nonprofits:

1. **Email** remains the most cost-effective and efficient way to appeal to your donors. It has the highest ROI of any marketing channel.
2. Identify, nurture, and engage with **major gifts** donors. Use [technology to get insight](#) into your donors so you can find those who might become major donors, and think about a [stewardship campaign](#) to gain their support.
3. If you have **members** who have committed to your organization, tier your memberships to encourage more engagement. Remember the best [tips for strengthening recurring giving](#) which will keep your pipeline healthy.
4. **Customize your [online forms](#)** to maximize giving. You can include a "boost" button that donors can push to up their donation by a dollar, or ask donors to cover processing fees. A [matching gifts](#) button can help your nonprofit find free money!
5. Make sure your [payment processing solution](#) is right for your nonprofit and that you understand industry security terms, such as PCI compliance vs. certification and SOC II compliance.



6. Use **reporting and analytics** to extract the donor data you need, whether it's to determine the effectiveness of past campaigns or leverage AI to plan an appropriate appeal.
7. A [sustained giving program](#) is a critical tool for nonprofits, because that's where your major gift donors are often born!
8. **Advocacy tools** offer an effective way to [amplify your nonprofit's voice](#) to create change.
9. Can you sell anything to raise money? Give a [shopping cart](#) a chance! Sell T-shirts, bricks to pave a walk at your office, or an experience for your biggest donors.
10. Plan an **event** and sell tickets! Auctions work, but so do runs, bingo games, and bake sales.
11. Leverage social media and plan a [peer-to-peer campaign](#). It's low-cost, blankets a broad population, and gets big results.
12. And finally, **text-to-give** campaigns take advantage of all the time we spend staring at our phones! You send a text with a link to the online donation form. That's it!

With these 12 tools and strategies, your toolbox will be able to handle anything from a tree house to a McMansion. (You know what we mean.)



3 Marketing for Year-End Giving

How can you best publicize your campaign? You have a compelling story and you are equipped with the tools we just mentioned. You know you want to personalize your message and you've thought of different channels, but allow us to highlight a few.

We talked about how **email** remains the most effective outreach method. There are some tips that will ensure email marketing will work for you:

- ➔ Segment your audience and appeal to each group.
- ➔ Use donor data to personalize your emails, and always at least include their names.
- ➔ Make sure your email provider has high deliverability rates.

Social media can launch an end-of-year campaign. Beware that many nonprofits will be flooding socials, so you're going to want to put your creative hat on and come up with messaging that will get attention. Pamela Grow, a friend of ours, tells of a [great campaign for adopting adult dogs](#). The Animal Protective Association of St. Louis wanted to encourage people to adopt older dogs, so they launched a social media campaign with the hashtag #GrownAssAdult dogs. Effective? Yes. Memorable? You betcha. Funny? Yup, unless you are a very serious person by nature.

[Research](#) shows that **direct mail** has an average response rate of 4.4%, while email has a response rate of 0.12%. (Now, before you think we are contradicting everything we've said, email has an ROI of \$28.50 and direct mail has an ROI of \$7. So do both!) While we're throwing around figures, 72% of consumers prefer an integrated, multi-channel marketing approach, so marrying direct mail and email is highly effective.

Finally, we say this all the time, but your **website** is your very best marketing tool. From casual supporters visiting to learn more about your cause to regular donors knowing they can give with the touch of a button, having a website that informs and educates—and offers a fantastic [user experience](#)—will go far in making your nonprofit a household name.



4 Best Practices for End-of-Year Giving

If we're being honest, these are best practices for all-year giving. While the end of year is a lucrative time for nonprofits, keeping healthy donor engagement all year 'round makes this busy season that much easier.

- ➔ **Reach out to your volunteers**, even if it's just to tell them how much you appreciate them. Your nonprofit's volunteers are [twice as likely to give](#) to your nonprofit so make sure they feel the love.
- ➔ **Take advantage of free money!** An estimated [\\$4 to \\$7 billion](#) in [matching gifts](#) is unclaimed every year. It's easy to add a button to your website that checks to see if matching gifts exist with an employer. Did you know that people are 84% more likely to donate to your nonprofit if their gift will be matched? Don't drop the ball on free money.
- ➔ **Go nuts for your donors.** Tell them you love them and offer them insights into the cause you all have in common. Use your technology to know when someone is having surgery or a baby. Refer to this [lovely conversation](#) we had with Angel Aloma of Food For the Poor. His stories of donor care will inspire you.
- ➔ **Get up to speed on tax deductions** and use those to appeal to your donors, particularly at the end of the year. These rules change every year, but sometimes newer legislation like the [CARES Act](#) will offer incentives to donate.
- ➔ **Show your donors the impact of their support.** One of our clients, Foodbank For the Heartland, [told us](#) how the nonprofit's president took his phone and walked through the warehouse, livestreaming the event on social media for his donors. Telling supporters they help is one thing, but showing them is much more powerful.

Whether you implement these tips for your end-of-year campaign or use them as general bits of good advice, they will serve you well.



5 After Your Year-End Giving Campaign

Put your feet up. Finally enjoy that glass of champagne or eat that slice of cake. Ahhhh.

And then get back to work.

What?? Yes, now you have to evaluate all the campaigns you just ran. While they're fresh in your mind, document what worked, what didn't, and what you should be sure to do next year to make your jobs easier or your campaigns more effective.

And your donors are hot! You can continue to thank them and share the results of your end-of-year campaigns, but have an eye to the next few outreaches. You don't always have to ask for money. Sometimes it's okay to just say hello. Remember, you're developing relationships, so treat these donors as you would friends.



Document Your Impact

Data doesn't lie, so collect data and share it with your donors. Discuss how their contributions help your mission. **Impact statements** are helpful to persuade donors to contribute and to show your appreciation after the campaign. Tell them exactly what their donation will help you do for the mission. For instance, you might say, "Sally, your donation of \$100 helped purchase backpacks for 20 children to go back to school in the spring."

Provide an **annual giving report** summarizing the year's efforts. This annual report is designed to celebrate the successes and discuss the projects of the entire year. If you have a weird year, which these days doesn't sound so farfetched, document how the pandemic or other event impacted your mission. What did you learn? How will you move forward?

Close Out One Year and Plan for the Next

We know, it seems like your work is never done. It's hard to overestimate the importance of a good fundraising CRM to collect and analyze data for you. When you can run custom reports and have detailed campaign performance numbers in your hand moments later, it's an argument for making sure you have software that meets your needs. Compare what features you need with what are available through your technology to see if you have the right solution, and if not, match those features to what's available on the market and ask to [see their software](#) in action. There are a [lot of options](#) and we're only one of them, so take your time.

And know that every year, your year-end campaign is going to morph and evolve based on your technology, your donor base, world events, and your outreach efforts. Every minute you put into growing your nonprofit will pay dividends and increase your ability to change the world.



A COMPLETE SOLUTION

Built for Nonprofit Success

CharityEngine's all-in-one nonprofit CRM has every tool you need for complete donor management, strategic fundraising, and a 360° view of donor interactions. Book a demo today to learn how CharityEngine can help your mission succeed.

[Request a Demo](#)



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