INTRODUCTION

December continues to be the biggest month for giving—the latest Blackbaud Charitable Giving Report found that 20% of all giving in 2020 occurred in the final month of the year. So, what are you waiting for?

Now is the time to make sure your organization is correctly positioned to make the most of December and the feelings of generosity that the holiday season brings!

If you haven’t yet started, you should now begin to plan an end-of-year campaign that engages and delights all of your supporters—not just the existing donors, but also new prospects and lapsed donors.

This will create a complex web of channels and messages that can quickly become overwhelming if it hasn’t been managed appropriately—but the good news is that we’re here to help!

We have a wealth of information and tools to help you connect with your supporters according to their preferences. In this toolkit, we bring together insight, tips and strategies to help you build a comprehensive end-of-year giving program.

The topics covered here will paint a comprehensive picture of the steps you need to take to connect with your donors and achieve your fundraising goals. As you read on, keep one thing at the front of your mind: this time of year needs to be all about your donors. Use the steps within this toolkit to help you position your donors as the heroes of your mission, and you’ll be sure to find success this December.
## Section One: Setting Goals and Building Your Strategy

So, where to start? Most of the success of your year-end campaign relies on what you do in the run up to your fundraising push, and your organization’s annual fundraising strategy is a guiding force.

Here are six ways to start building your best campaign yet:

1. **Identify key stakeholders and target audiences.**
   - Who from your organization will be working on your end-of-year strategy?
   - Make sure you can create different segments and target groups for segmentation and personalization in your end-of-year strategy.

2. **Determine your fundraising goals and the pathways to achieve them.**
   - What dollar amount will your organization strive to raise this year?
   - What percentage are you trying to increase by: average gift size, new donors, total year-end gifts, current donor donations?

3. **Create a story to drive your campaign.**
   - What are your strategic campaign objectives? Do you have a compelling story to give throughout the campaign? How can you make your story more meaningful?

4. **Clearly communicate your campaign’s purpose.**
   - What is your mission? Can it be easily shared and understood? Is the donor the hero for your cause?

5. **Complete your prep work and planning.**
   - What are your fundraising methods? What channels will you use? What’s your budget? Have you listed your resources? Have you mapped your EOY donor journey? Please go download Blackbaud and HJC’s new CX Journey Mapping Whitepapers.

6. **Set deadlines for your fundraising goals.**
   - What is your campaign timeline? Have you made a monthly check list to prepare staff for end-of-year success?

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**Myth Buster #1:**

Holiday Giving is only October to December. Many retailers start holiday promotions in August or September and you should too.
Beginning Your Campaign Strategy with a SWOT Analysis

A SWOT analysis is an effective tool for evaluating the starting point of your end-of-year campaign. Use it to help you break down the strengths, weaknesses, opportunities, and threats for your organization’s fundraising efforts.

Before getting started, it’s important to understand the key aspects of a SWOT analysis:

- **Strengths and weaknesses** are INTERNAL—areas your organization excels or where it could improve in its fundraising efforts.

- **Opportunities and threats** are EXTERNAL—where you evaluate available resources or possible obstacles that may affect your organization’s success.

**STRENGTHS**

**WEAKNESSES**

**OPPORTUNITIES**

**THREATS**

If you need help getting your year end SWOT analysis done, reach out to the contributor of this workbook, Michael Johnston, at mjohnston@hjcnewmedia.com
The matrix below can help guide your SWOT analysis:

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<tr>
<th>Goal</th>
<th>Audience</th>
<th>Messaging</th>
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**Goal**
- Do we have a goal? Is it aligned with organizational needs?
- Is our fundraising strategy diversified? How has our goal impacted the strength of our multichannel communication efforts?
- Where have we been focused for the last one to two years? Have our fundraising efforts grown?

**Audience**
- Have we identified a target audience? Do we have a large, reliable pool of donors? How do we know?
  - Do we get feedback? When? When do we not?
    - It's important to understand that some donors only give at the end of the year, which makes it a great time for acquisition. You should have a strategy for an acquisition audience.
  - With which target audience are we most and least effective? How do we know?
  - If we don't know, what do we need to examine, ask, or research to give us more confidence about our assumptions?

**Messaging**
- Are our messages developed with key internal stakeholders?
- Where do our messages resonate the most and the least? How do we know?
- Are there resources or tools within our organization that we haven't capitalized on? Are there tools that we are missing to maximize success?
DATABASE AND TESTING

Now that you have your goals and strategy in place, the next step is to make sure everything is in place for the campaign’s success. To do this, you need to look at your database—the most important tool for an effective campaign. Now is the time to ensure that you’re using best practices to allow this powerful tool to work for you.

Successful year-end campaigns involve engagement through personalized donor communications, nurturing supporter relationships to encourage them to give. To engage donors in this way, we have to know them—and in fact, we know lots about them. But the reality is that we sometimes have so much data to analyze and interpret that it can be hard to know where to start.

Before you become overwhelmed and tempted to take shortcuts, take a step back and think about what you really need. To ensure that your database is ready for analytics, the first step is to optimize the information you already have: your donor contact information. You should consider it a hard-and-fast rule that if you don’t have a high-quality name, email and postal address for a donor, it will be nearly impossible to derive any kind of insight about that person.
The following are the processes you need to have in place to ensure your data is in great shape:

<table>
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<tr>
<th>Process</th>
<th>Description</th>
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<tbody>
<tr>
<td>Address Standardization:</td>
<td>This process validates addresses against United States Postal Service standards in real time as the data is being keyed in to the database, guaranteeing the quality of data being added.</td>
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<tr>
<td>National Change of Address (NCOA®):</td>
<td>About 11% of the US population moves every year and reports it to the United States Postal Service, which requires that mailers process their data through NCOA® at least once every 95 days to keep mail files current.</td>
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<tr>
<td>Proprietary Change of Address (PCOA®):</td>
<td>Another 5% of the US population moves every year but doesn’t report address changes to anyone other than banks, credit card companies, and utilities. The PCOA® process takes data gathered from those types of organizations and applies it back to the house file, allowing organizations to keep those donor records current. Typically, this process should be run once per year.</td>
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<tr>
<td>Deceased Suppression:</td>
<td>An organization will lose 2–3% of its house file each calendar year on average due to constituent deaths. Deceased suppression identifies and flags any supporters who have passed away, which keeps the database updated and avoids potentially insensitive communications. This should be a priority out of respect but if that’s not enough incentive, it will also safeguard your brand.</td>
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<tr>
<td>Apartment Append:</td>
<td>Often, a donor will provide an address that isn’t 100% complete. It will be missing an apartment or suite number—or perhaps that data simply isn’t keyed into the database. This is problematic when trying to match those donors to analytics sources or when trying to mail into any type of dense urban area.</td>
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<tr>
<td>Duplicate Removal:</td>
<td>Recent data shows that the average non-profit will have 10–12% duplicates, largely because of all the issues listed above. Once the data has been standardised and updated, though, most CRM systems can identify these duplicates and consolidate them, removing duplicate versions of “James Smith” or “Amanda Williams” that are in the database with multiple addresses.</td>
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Don’t leave your results up to chance; your database includes all the tools you need to test in advance and find proven strategies that can help you meet or exceed your fundraising goals. Start mapping out the key steps for making the most of your database several months in advance to ensure that you can enter the holiday giving season with a strong foundation.
DETERMINE YOUR MESSAGING

Now is the time to take donor-centrism to the next level; everything about your appeal should frame your donor as the hero of the story. Think about your audience and what motivates them to give. Instead of saying, “Our organization is accomplishing X,” say “Donors like you are accomplishing X.” Focus on the most compelling need your supporters can help solve and incorporate stories that will move the readers to give. Tangible examples of impact are critical to convince the readers that their support will make a difference. You can read more about demonstrating impact in our eBook Supporters in Sight: An Introduction to Personas.

Why Supporters Give During the Year-End Giving Season

As you plan your message, it is important to understand why so many supporters give to non-profit organizations during the year-end giving season:

1. **The holiday season inspires people to give.**
   This time of year inspires people to help those less fortunate than themselves. This naturally motivates supporters to give to local community programs, their favorite charities, and your organization.

2. **Some donors seek last-minute tax deductions.**
   If you have donors in the US or in countries where people can claim tax deductions for their charitable gifts, it’s worth remembering that those supporters might want to make year-end donations to get immediate tax benefits without having to wait until the next year. Similarly, many high-net worth individuals employ tax advisors to help them minimize their tax burden, and charitable giving is often a key part of that strategy. The final four to six weeks of the year is a natural time for supporters to make gifts in accordance with their financial planning strategies.

3. **Supporters have money left in their philanthropic budget.**
   Another important reason why most supporters give at the end of the year is because they have money left over in their charitable giving budget. This is certainly true for businesses—many of which have “use it or lose it” budgetary rules—but it is also true for individuals and families who reset their budgets on January first. Similarly, some donors will have money left over at the end of the year. They’ve paid their self-employment taxes, bought their holiday presents, spent 5% less than planned on the home renovation they did over the summer, and the family holiday was cheaper than expected. So, they have some money left over—and charities often get a piece of that cash.
How to Construct Your Year-End Giving Message

As you design your year-end giving campaigns, what should you be saying to your supporters?

The best year-end asks include three main components:

1. **Looking Back**
   The first part of your year-end message should look back on the year. Talk to your community about all the great things that your organization accomplished this year and the people you helped. Better yet, frame it in terms of all the people that the members of your community have helped because of their support for your mission. You can do this by telling stories, giving statistics, and showing outcomes.

   **An alternative but proven approach:** You might try treating end of year giving like an emergency campaign. You could create six weeks of news stories and ask people to help RIGHT AWAY. This sense of immediacy rather than more big picture overviews is what helps to attract new donors.

2. **Looking Forward**
   After you look back at the previous year, look ahead for the year to come. Tell your audience about all the amazing things that your organization has planned for the following year. Cast a big vision for your work, programs, and team for the next 12 months, and invite your community to get involved in helping you make that vision a reality.

3. **Making an Ask**
   Finally, make an ask. You told your supporters about what they accomplished this past year by helping your mission. You told them about your vision for the coming year—a vision that is bigger than ever before. Now, invite your community to make an investment (or to continue its investment) in your organization, so together you can make the coming year the biggest and best year in the history of your mission.
When creating the messaging for your year end campaign, storytelling can be used to support your organization’s fundraising efforts by helping you build stronger connections with your audience. To ensure that the stories you tell support these activities—and your calls to action are answered—you must do some strategizing and planning. Below, you’ll find step-by-step guidance for how your organization can strategically curate stories throughout the year.

1. **Start with important dates.**
   As you build out your year-end campaign, begin by designating the most important dates for your organization. This could include:
   - Special events
   - Fundraising appeals
   - GivingTuesday (November 30, 2021)
   These are all potential opportunities for your organization to tell stories that showcase how it has created impact and benefited from donor support.

2. **Choose your key message.**
   A key message is the main point you want your audience to take away from your story. For instance, if your organization runs a special fundraising campaign in the spring for a kids summer camp, an example of a key message might be:
   “Summer camp provides kids with opportunities to gain confidence and skills that will last a lifetime.”
   Once you have decided upon your key message, you’ll be able to structure your story in a way that ensures that it’s central message you send. An easy way to identify your key message is to think about the theory of change (really just a comprehensive review on why and how a desired change will happen) that you are proposing in your appeal. This will almost always be your key message.

3. **Find your stories**
   There is important groundwork to do before identifying and planning your stories. Brainstorm anecdotes that will complement your campaign and key message.

3. (cont’d) Using the summer camp example, the organization could tell stories about campers, parents of campers, or even donors who financially supported the camp. The point is to find the story that helps you best demonstrate how your organization creates change and opportunity. What story best shines light on the importance of this program? As a part of the planning process, it can be helpful to brainstorm a list of all possible stories you could tell for each storytelling opportunity you have. This helps avoid a common mistake of committing to a single story without considering all the other possibilities.

4. **Create your plan.**
   At a very basic level, your storytelling plan needs to give you a high-level view of what stories you are telling and when. That’s it. Of course, there may be other details you want included, depending on your team structure and project management system.

5. **Implement and Assess.**
   Many organizations find that EOY is different every year. Things that worked last year can fall flat this year. If you set it and forget it, one repeated mistake can inhibit success. If you’re having weekly check ins then you can catch what’s not working, adjust and amplify what is working! And ever changing philanthropic landscape might make this point more important than ever.

**MYTH BUSTER #4:**

Symbolic gifts don’t work. Over 30% of North American donors say they made a gift to a charity in lieu of a gift for a friend or family member. It works and you should test symbolic giving.
GO

MULTICHANNEL

The year-end giving season is the best time to hit all of your fundraising bases. That means never limit yourself to just one fundraising solicitation method. Letters, emails, phone calls, social media posts, coffee meetings—no method should go untouched during this crucial time. And think beyond just the development team. Use every touchpoint your organization has, from the development team to the volunteer coordinator and everyone in between. Every team member should be armed with the right messaging to facilitate engagement and donations at every turn. One of the best ways to make sure there’s cross-functional cooperation is to journey map a donor’s year-end experience. You can read more about CX Journey Mapping here and download Blackbaud and hjc’s White Papers.

MYTH BUSTER #5:
People only do last-minute shopping, not last-minute giving. People do the same with charitable giving as they do with gift giving—they wait until the last minute. The highest revenue generating days during holiday giving are the 29th, 30th, and 31st of December.
### Check off these steps as you build your multichannel campaign

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<tr>
<th>Website</th>
<th>Social Media</th>
<th>Email</th>
<th>Word of Mouth</th>
<th>Offline</th>
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<tr>
<td><img src="image" alt="Website" /></td>
<td><img src="image" alt="Social Media" /></td>
<td><img src="image" alt="Email" /></td>
<td><img src="image" alt="Word of Mouth" /></td>
<td><img src="image" alt="Offline" /></td>
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<td>- Place a prominent “Donate/Give Now” button on your homepage with compelling copy about how donations make a meaningful impact.</td>
<td>- Chances are that most of your supporters are using social media in their daily lives. Don’t be shy about asking them to Tweet or to update their Facebook® status about your organization. They could mention that they’re making a donation to support your cause or even ask family members to make a donation to your charity on their behalf rather than buying a present.</td>
<td>- Segment your contacts and target your messaging to key groups, like recent donors, lapsed donors, and prospects.</td>
<td>- Highlight ecommerce offerings, memberships, or honor donations as holiday gift options.</td>
<td>- Consider using a straight to voicemail phone service to leave recorded thank you messages. They deliver the same impact but allow for volume. (Note: for some organizations, these have been tested vs. live calls and the voicemail actually outperformed the live person.)</td>
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<tr>
<td>- Showcase your fundraising goals and progress, especially if you’re using challenge or matching gifts.</td>
<td>- You should be advertising and boosting your own asks to lookalike and remarketing audiences. And you should be pushing Facebook Fundraising. Asking people to share is good for goodwill, but far less effective than lookalikes and remarketing on Facebook for fundraising at end of year.</td>
<td>- Build a multi-part email series covering a main ask, stewardship, and a last-change-to-give message.</td>
<td>- Arm your supporters with messaging and graphics to share on social media.</td>
<td>- Enlist your whole staff and board to participate in offline stewardship like handwritten thank-you notes and phone calls, as communication from frontline professionals, like programs staff, can be even more impactful for donors.</td>
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<td>- Test your donation form on a mobile device to ensure that it’s a seamless experience.</td>
<td>- Schedule a last-minute email for December 31 highlighting the tax benefits of donating.</td>
<td>- Sprinkle in a few outcomes-focused emails sharing the impact your organization had over the past year.</td>
<td>- Ask loyal constituents to forward prebuilt emails to their networks to ask them for support of your mission.</td>
<td>- Consider using a straight to voicemail phone service to leave recorded thank you messages. They deliver the same impact but allow for volume. (Note: for some organizations, these have been tested vs. live calls and the voicemail actually outperformed the live person.)</td>
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<td>- Incorporate impactful photos into your donation form.</td>
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<td>- If you have the capacity, then really go for it by asking weekly by email throughout the holiday period and a minimum of three-part email series on GivingTuesday.</td>
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<td>- Update your auto-responder email to encourage donors to take further action.</td>
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<td>- Conduct a quick search engine audit to see how your organization shows up in organic search.</td>
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<tr>
<td>- Make sure there are consistent messaging and branding across all channels.</td>
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SECTION 6

STEWARc NEW AND RE-ENGAGED DONORS

It’s one of the unspoken rules of end-of-year fundraising, but it’s still one of the most critical. In order to find success at end-of-year, you need to be cultivating your donors all year long in every channel. With the proper planning and year-round strategy, your end-of-year fundraising campaign can be the “cherry on top” of fortified supporter relationships. What steps can you be taking now to set that foundation?

Start working cultivation and stewardship into everything you do. Send some emails that aren’t asking for a donation, and instead share a success story or two—with no request included. In October, before the clutter of the end of year fundraising appeals, make sure you mail (and email) a handwritten thank-you card or e-card to a select group of lapsed donors. Make the donors feel very appreciated before the intense November and December fundraising period rolls around. Create and send a quick video of staff or clients thanking the donors for their support. Feel free to get creative here. Your goal should just be to engage your supporters in a non-transactional way, allowing them to feel the pure connection to your organization and its cause.

Once you have a plan in place to engage your current supporters, it’s time to turn your attention to building a strategy for stewarding the new and re-engaged donors who come in through your end-of-year campaign. The easiest and most effective way to do this is to build a welcome series for new supporters. An automated series of emails sent to new supporters over a set period of time can educate and inspire new supporters without making them feel like you’re only reaching out to them for money—a real risk if you plop new supporters right into your regular email flow. A welcome series gives you the opportunity to introduce your organization and mission, learn more about these valuable new supporters, and ease them into the regular flow of asks and stewardship.
Below, you’ll find eight great stewardship strategies. Choose three to four of them to comprise your organization’s stewardship program.

1. **Handwritten Notes.**
   While nearly every organization sends thank you letters to donors, very few send handwritten notes. These convey a level of care and attention that supporters appreciate, so plan to send at least one personalized note to each of your major donors at least once a year.

2. **Thank You Calls.**
   Try calling donors to say thank you and update them on upcoming events. The call doesn’t have to be long - research shows that donors who receive a short call within two days of giving will donate an average of 30% more to your organization over their life.

3. **E-Newsletters.**
   E-newsletters have become the backbone of most stewardship programs for a good reason: they are easy to create and affordable to send. Many organizations have found that sending monthly e-newsletters increases donor retention, volunteerism, and member involvement.

4. **Virtual Events.**
   Non-ask stewardship events (where there is no cost to attend and no fundraising occurs) are a great way for your donors to meet your team and stay connected to your mission. These events do not be expensive and can be held virtually anywhere.

5. **Branded Giveaways.**
   Consider offering a small thank-you gift to donors, emblazoned with the name or logo of your organization. Again, the item can be as simple as a coffee mug or car magnet.

6. **Donor Visits.**
   Most organizations should consider adding in-person visits to the stewardship mix. These visits are opportunities to meet and thank your major donors, and to give them a brief update on your programs and activities.

7. **Committee Membership.**
   For many donors, being asked to serve on a committee is a huge honor. It shows, above financial support, how much your staff values a donor’s advice and leadership. I have found that mid-level donors particularly enjoy being asked to serve on committees and in advisory roles.

8. **Donor Clubs and Giving Societies.**
   Donor clubs and giving societies aren’t right for every organization, but they can be a great way to create a streamlined, scalable donor stewardship system. These clubs simply offer certain benefits to supporters based on their giving levels.
Remember those numbers we reviewed in the introduction? 20% of total giving happens in December. If your organization isn’t poised to take advantage of this year’s charitable season, you could be losing out on serious funding. The good news is that by reading this toolkit, you’ve already taken a key step in positioning your organization for success!

If you can map out your goals and strategy in advance, you’ll be able to take things one step at a time to achieve end-of-year success.

To review, here’s the big-picture view of the steps you need to take to make the most of this holiday season:
END-OF-YEAR PLANNING CHECKLIST

Clean up your database and test your messaging
Ensure that your database is ready for analytics by cleaning up your records and updating contact information. Consider testing out more advanced analytics to help you pinpoint the best prospects to target at year-end.

Build an effective stewardship and fundraising campaign
Create a SWOT analysis to help identify your goal, audience and messaging. Then make sure that you are stewarding donors before and after the end of the year fundraising appeals. Stewarding is the important work in September and October—and post December.

Determine your messaging
Craft messaging that frames your supporters as the heroes of your organisation’s story. Focus on the most compelling need that donors can help solve and incorporate success stories that will move them to give.

Tell Your Story
Strategically curate stories throughout the year and share the key message of your organization through the stories you have to tell.

Go Multichannel
With your messaging in place, it’s time to spread it like wildfire through every channel you can. Set a strong foundation by optimizing your website, donation forms and emails. Tap into your supporters’ networks by arming them with shareable content. And don’t forget about offline channels like snail mail and phone calls.

Steward your donors
Set up an automated welcome series to educate and inspire new supporters, drawing them into the fold of your organization. Enlist your full staff and board to participate in personalized stewardship, like handwritten notes and phone calls.

By following these steps, creating a smart strategy, and positioning your donors as the heroes of your mission, you’ll be the one making a serious impact for your organization.
Contact us
If you have any questions about our solutions or would like to find out more about Blackbaud, please contact us at solutions@blackbaud.com