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Year-End Nonprofit Fundraising Checklist

With so many nonprofits competing for attention—and funding—at the end of each year, it's important to make yours stand out. Being prepared and strategic can help ensure success.

For many organizations, year-end fundraising means connecting with individual donors online. We spoke to a number of development and fundraising experts about what it takes to mount a successful year-end direct response campaign, and combined their tips into a printable checklist to get you ready.

You'll need a few things in place before you begin—specifically, a donor database or CRM, a website, analytics tools, the ability to accept donations online, and a broader online engagement strategy.

Think of this list as a set of suggestions. Not all will apply—take action (or ask a volunteer to help) only with the tasks that make the most sense for your organization's limited time, staffing, and resources. Even doing one or two new things can have a transformative impact on your fundraising.

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1. PLAN YOUR CAMPAIGN.

When planning your campaign, use past performance and industry benchmarks to prepare for future results. But don't create the plan alone—include other staff, volunteers, and board members from the start. If possible, survey your donors well in advance of the campaign to gauge interest and engagement.

☐ Run reports that let you review historical year-end campaign results for all prior year-end campaigns.

☐ Set a budget to identify potential campaign revenue, expenses, and net income.

☐ Create a campaign calendar (be sure to keep national and religious holidays in mind).

☐ Add your new campaign to your CRM or donor database for results-tracking.

2. UPDATE PUBLIC INFORMATION ABOUT YOUR ORGANIZATION.

Update information about your organization on your organization's website, social media platforms (including Facebook, LinkedIn, Instagram, Twitter, Pinterest, etc.), and other sites such as GuideStar, your local chamber, and other nonprofit listings.

Be sure to include the following:

- ☐ Program descriptions.
- ☐ Staff and board information.
- ☐ Donor listings.
- ☐ Contact information.
- ☐ Calendar of events.
- ☐ News and/or blog posts.

Where possible, include stories that show how your organization is different from others, why the work you're doing is important, and why it merits support. (Be sure to complete or update any state or local registrations required for solicitation, if necessary.)

3. UPDATE YOUR INTERNAL SYSTEMS.

Review all relevant software platforms your organization uses to make sure staff, partners, and volunteers have appropriate access to databases, donor data, calendars, campaign materials, and related systems and content.

Within your database:

- ☐ Check for duplicate records to reduce mail costs.
- ☐ Make sure deceased people and closed businesses will not be sent communications.
- ☐ Update mailing addresses to improve deliverability.
- ☐ Update employer records, where possible, for potential matching gifts.
- ☐ If appropriate, consider wealth data when seeking support.

4. CREATE CONTENT AND A PLAN FOR ALL OF YOUR COMMUNICATIONS CHANNELS.

To engage your audience and your potential donors, make sure you're putting out content that's compelling—for example, messaging that includes not just text, but images and video.

Don't have access to high-end equipment? Most smartphone cameras can capture high-quality photos and videos.

- ☐ Write meaningful messages, and vary them; different messages might resonate with different people.
- ☐ Segment your list to target relevant requests to different donors.
- ☐ Create or download templates (email and post) for messages, requests, updates, and acknowledgements during the campaign.
- ☐ Create or purchase images in appropriate sizes and resolutions and videos in appropriate sizes (landscape, vertical, square) to use in different places and channels.
- ☐ Obtain proper permissions for any images or video you plan to use.
- ☐ Plan a mix of communications that includes multiple channels. Remember, emails can be effective when used in coordination with print mail—for example, in a pattern such as "email, email with video, direct mail, email reminder."

5. REDUCE BARRIERS TO GIVING.

Want donors to give? Make it easy for them. Eliminate barriers that make it harder to see, hear, or understand your messages. Fewer navigation options, larger fonts, and simpler forms can improve results. (For more information, read "Nonprofit Best Practices: Online Donation Appeals." *https://www.idealware.org/reports/online-donation-appeals/*)

- ☐ Use larger font sizes and images that make items easier for people to see.
- ☐ Add alt-text and captions to images.
- ☐ Add captions to videos and/or provide transcripts.
- ☐ Eliminate as many fields as possible from donation forms.
- ☐ Test your website's donation page in multiple browsers and operating systems—including Chrome (Android, Windows, macOS), Safari (iOS), Internet Explorer (Windows), and Firefox (Windows, macOS)—and make any necessary adjustments.

☐ Test your donation page and process from start to finish to experience what donors will. Make improvements based on what you learn.

☐ Ask someone else to test your donation page and observe their experience and reactions; make any adjustments needed.

☐ Where possible, enable recurring gifts (e.g., monthly donations).

6. ANALYZE, ADAPT, AND ADJUST.

As you plan your year-end campaign calendar, consider testing different messages in different ways (commonly known as A/B testing). For example, you might experiment with different headlines, text, tone, hashtags, images, videos, calls to action, or links. It's best to only test one variable at a time to more accurately gauge its effect on results. Adjust your messaging as you learn which messages best connect with your supporters.

☐ Examine opens, click-throughs, and gifts (conversions) to understand how your audience engages with each email.

☐ Review landing pages, paths, and exit pages to understand website engagement.

☐ Measure link clicks, likes and favorites, and shares to understand social media engagement.

Learn more about fundraising tools and best practices at *www.idealware.org*.

ABOUT THIS ARTICLE

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