

2022 year-end fundraising campaign guide and timeline





Did you know that nearly 1/3 of all charitable giving occurs in December? And [10% of all giving](#) is raised in the last three days of the year?

Year-end fundraising is the most exciting, demanding, and engaging time of the year for fundraisers. Here at Bonterra (formerly EveryAction), we are passionate about helping you make the most of this opportunity to raise funds and awareness about your mission. Our fundraising software allows you to segment, communicate, fundraise, and analyze the activities that will make your year-end fundraising campaign successful. This guide, written by experienced professional fundraising coaches, was created exclusively to help you plan your year-end campaign using best practices. Our goal is to help you optimize your time, effort, and outcomes.



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How did fundraising change in 2022?

Check out some of the statistics from the [M+R 2022 Benchmark Study](#):

- Total online revenue grew by 3% in 2021.
- Monthly giving increased by 24%, and accounted for 22% of all online revenue in 2021.
- Mobile devices (including cell phones and tablets), accounted for 54% of nonprofit website traffic in 2021, with desktop computers making up the rest.
- The average response rate for fundraising email was 0.08%, an 11% decrease from 2020.
- Facebook fundraisers accounted for 1.1% of all online revenue in 2021.



Organizations on the Bonterra Donor Engagement's Development and Digital solutions broke supporter engagement records in 2021—twice!

The most successful year-end campaigns take advantage of all the communication channels an organization has available, including direct mail, email, social media, text messaging, and more. Think of a year-end campaign as an integrated fundraising campaign that engages all of the senses of an organization—driving increased giving and brand awareness. Include a variety of digital communications in your plan this year while retaining any tried and tested print appeals that continue to motivate more traditional donors

As you consider how best to plan your year-end campaign, consider proven tactics that can boost dollars raised. This guide provides direction on:

1. Selecting your mailing list.
2. Whether to include major donors in the mailing(s).
3. Suggested year-end communications and solicitation timeline.

Typically, a year-end campaign will run a minimum of eight weeks (mid-November to early January), but the earlier you begin to plan the better.

A campaign usually contains the following elements:

- One [direct mail](#) appeal—consider a second reminder direct mail appeal or postcard inviting recipients to make a secure online gift.
- 10+ [emails](#) to your donors and contacts.
- Lots of social media posts—plan two to four per week featuring impact stories, donor and board member profiles, and links to your giving page. This will build engagement and encourage sharing and giving.
- Board member and volunteer-led phone calls and [video](#) messages to key donors inviting them to participate in the campaign.
- Engagement tactics in January to touch and [retain donors](#), including thank yous and new donor welcome kits.



YEAR-END CAMPAIGN MESSAGING

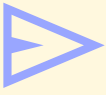
As you can see, there are many messaging elements to a year-end campaign. We do not recommend emailing your full contact list every communication during your year-end campaign. Instead, [segment](#) your existing donors for [targeted messages](#) based on commonalities (i.e., major donors, donors to a specific program, etc.) Here are some considerations:



Direct mail

This is the most costly part of the campaign. Depending on the size of your mailing list, you may want to:

- Suppress any significant donors who have given within the last three months, or who would be better cultivated via personal calls (from yourself or your board.)
- Select donors who have given within the last three to five years, suppressing those who haven't given in many years.
- Include a test group that has not been routinely solicited—i.e., contacts who attended an event but haven't given, a new mailing list you have received, family members of service recipients, etc.



Email

Like with direct mail, draw from both online and offline data points to segment audiences and personalize content.

You will be sending several email messages during the campaign. Like with direct mail, draw from both online and offline data points to segment audiences and personalize content. Remember to utilize the Bonterra Digital solution's easy [drag-and-drop email builder](#) and directly insert a donation form into your different messages to convert more donations. Remember to consider whether you want to include major donors in your email asks, and always set up your series to remove donors who have already given before your next campaign email sends.

Consider whether you want to include major donors in this group, and note that those who donate will be removed from the next email sent automatically.



Social media

Begin to note those who like and/or respond to your posts. You may find that these supporters are active "influencers" who you can ask to repost your fundraising solicitation, or loyalists who you can ask for a more significant gift. One way to capture these findings in your fundraising software is to add a note to the contact's record. Or you can create a custom field named "Social Influencer" with a checkbox to filter this group.



Text messaging

Text messaging is one of the most commonly used forms of modern communication, with a 97-98% open rate. 25% of donors complete their donations on mobile devices. Bonterra Development and [Digital customers sent 270,000 SMS messages on GivingTuesday 2021](#). If you have a mobile phone number for your donors but [haven't yet sent a text appeal](#), consider sending a personal message and/or a group text holiday greeting during this season.



Peer-to-peer

Identify loyal donors and influencers who are willing to [act as fundraisers](#) to multiply your fundraising appeals. You can use fundraising pages to leverage these loyal supporters' networks as part of your year-end fundraising efforts.

MAJOR DONORS—DO YOU INCLUDE?

Knowing your major donors' giving habits is helpful to further engage them in your mission. Personal meetings and calls can be planned in advance of their gift to thank them for their continued support, reaffirm the relationship, learn their specific interests, and request a larger gift. These meetings and/or calls can be done by the executive director, a trained board member, or the development officer.

Be sure to record the key findings and outcomes from the meeting in the donor's record in your fundraising software. A best practice is to have two people from your organization, the executive director or development director and a board member join the conversation. The board member will add credibility to the ask. Personal meetings with a [major gift](#) prospect yield higher returns when a board member participates in the meeting. The prospect/donor tends to study the volunteer while the ask is being made; the board member can respond, *"When Anna and I made our major gift, we, too, carefully considered the contribution. We are happy with the investment in X organization and ask you to join us."*

If in-person meetings are not possible, using [virtual tools](#) like Skype or Zoom can still be effective for creating personal engagement with our highest donors. At year-end, you'll want to consider whether you want to include each major donor in your year-end campaign mailing list. This depends on the timing of their gift and the amount. For example, you may want to omit the donor from your mailing list if they have recently given, or give a substantial amount that is better nurtured through personal contact. Send major donors updates on program accomplishments and personal impact [stories](#). Include a tagline like: "made possible through your generosity." Make sure the donor knows they made a real difference for someone.



Quick tip

from a professional fundraising coach



Be sure to include direct mail in your year-end campaign so you **don't leave out supporters for whom you don't have an email address**. The cost of the mailing should be less important than cost-effectiveness. It costs money to raise money."

— Michele Peters, CFRE Florida

PHONE CALLS

Even if you decide not to include your major donors in the direct mail and email appeals, you may want to have your board members call the donors to thank them. This is best done prior to Thanksgiving so you can tie in the theme of gratitude. You can make these calls on any day of the week, but Friday afternoons are better than you might think—people typically answer their phones and are pleasantly surprised by the gesture. To make the effort easier for you, you can create additional administrators in your fundraising software that have customized viewing access. For example, a board member or staff person can view contact information and record call notes but will not see sensitive donation information.

MATCHED GIFTS

A highly effective motivator for a year-end campaign is a matched or challenge gift. [According to research from The Big Give](#), 84% of respondents felt that they were more likely to give if matching was offered. [Matched funding](#) was rated the most motivating donors to give, even more so than emergency appeals or religious or cultural festivals.

According to another study by Innovations for Poverty Action, announcing that a matching gift was available had a significant impact, increasing the revenue per solicitation by 19%. They also found that the [probability that an individual would choose to donate](#) increased by 22%.

A dollar-for-dollar donation match can boost overall giving and is a great hook to leverage across email and social media channels, especially on GivingTuesday and in the final days of the year.

Do you have a major donor who would be willing to contribute a matched gift? If so, you should secure the matched gift(s)—you can have multiple donors contributing towards a bulk matched gift—by the end of October. **This way, you will be able to include messaging about the matched gift(s) when you draft your communications.**

Tips to find a matching donor:

- If you have worked with a matching donor in the past, consider **asking them first**. This is a great way to keep them engaged with the organization.
- If you have not worked with a matching donor in the past, review your major donors from the past two years. **Is there anyone who has not given yet this year who might be a good fit?** Ask them if they are planning to make a year-end gift this year, and if so, would they consider allowing your organization to use it as a matched gift. This donor could be recognized in your communications or anonymously depending on their personal preference.
- Consider forming a **coalition of board members** to pool their normal year-end gift into a more significant challenge to the community. A board member, preferably the chair, is likely the best person to lead this initiative.



WHAT ABOUT YOUR BOARD AND TOP VOLUNTEERS?

Year-end is a great time to motivate your board and key volunteers to participate in your campaign. Ask them to make thank-you calls or emails to donors and top prospects. They can reach out to [LYBUNTS](#) (donors who gave last year but not this year) and SYBUNTS (donors who gave some year but not this year) who you would like to retain before year-end. You can quickly pull LYBUNT and SYBUNT lists from your fundraising software filters. **Here's a sample script for a voicemail or video message:**

Hi John, I'm a member of the X board of directors and wanted to thank you for your support over the years. I noticed that you haven't yet given this year and wanted to let you know about our latest [milestone, initiative, or news.] Your contribution this year would mean the world to us—we have a goal of raising \$X before the end of the year so we can hit the ground running in 2023. Will you help us? Feel free to visit our website to make a donation, or give me a call to discuss. Thanks so much and happy holidays to you and those you love!



FALL EVENTS

With a reduction of the pandemic lockdown protocols and the increased availability of the vaccine, many organizations have planned for in-person fall events, but for those not hosting an in-person event, other options are available.

[Virtual and hybrid events](#) can be a smart choice to expand your reach. Incorporating a **virtual event**—even a short live-streaming activity—on GivingTuesday or any other day during this giving season, **will engage current and prospective donors and encourage donations to your mission.**



Quick tip

from a professional fundraising coach

“Make certain you have individually and **personally thanked each donor at least six times** throughout the calendar year.”

— Tom Giddens, Massachusetts

TYPICAL YEAR-END COMMUNICATIONS SCHEDULE

Develop a communications plan so that your organization:

- **Schedules** each fundraising/marketing piece in step with your marketing calendar, so there isn't conflict with 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. Record the costs so you can plan for and evaluate future year expenses.
- **Tests** the materials with a select group of donors, board members, and volunteers for their reaction—are these materials emotionally compelling and motivating? Are they donor-centric enough that donors can find themselves as a participant in the story, not merely as a bystander? Are they community-centric enough that program participants and beneficiaries are seen as drivers and partners in their own empowerment?
- **Requests** additional contacts from your board and key volunteers to add to the mailing list.
- **Allots** time to design an overall theme for your campaign, requesting photos and testimonials from people connected to the cause, confirming the look and feel of the communications.
- **Thinks through** where and how the campaign will be promoted on your homepage and website.



Quick tip

from a professional fundraising coach



As the number of donors who no longer own a checkbook grows, **be sure you are including a QR code** (preferably) or your giving page link in your year-end direct mail appeal. This way, your donor can open the letter and immediately give.”

— Chany Ockert, CFRE Montana



Try these suggestions/considerations for designing a year-end communications plan.

Pre-launch

- **Plan** your theme.
- **Collect** testimonials, videos, pictures, etc. that tie to your theme. Video will put the donor in the middle of the story.
- **Draft** communications materials—direct mail solicitation, emails, social media posts, video scripts, etc.
- **Develop** web banners, set up the donation page for your fundraising campaign, plan where and how it will be highlighted on your website and onsite (if client/donor facing). Brief your staff on the theme, timing/calendar, and campaign goals. **Get everyone pumped to be part of this year's campaign!** If you're working onsite, a simple communicator is posting a thermometer with your [goal](#) in a visible spot in the office and raising it throughout the campaign. The lunchroom or near the exit are great spots that can remind all that fundraising is a team sport.



Quick tip

from a professional fundraising coach



Start planning **earlier than you think you should** on how you will reach new and existing donors during a time when they are most generous and when many nonprofits will be making asks.

— Cherian Koshy, IOWA

PREPARING YOUR DIRECT MAILING

- Identify staff who will cover phones/inbound requests during the last week/days of the year so you don't miss a single opportunity.
- Draft the appeal using best practices—a double-sided letter with 14-point font, pictures, strong call to action, using a “P.S.,” etc.
- **Make use of all the elements of a direct mail solicitation**—letter, insert/ buck slip, response card and/or donation envelope, etc.
- Organize your board members and volunteers to write handwritten notes on the letters of key prospects.
- If you have secured a matching gift for the campaign, be sure to mention it in the letter.
- Consider how you will print/mail your direct mail solicitation and the cost. You can print from your [fundraising software](#) or outsource it with a printer/mail house. If you opt to use a printer, you can recreate the letter in your fundraising software so you can easily retain a copy.
- Plan the timing of the direct mailing. How many days do you expect it to take before the piece “drops” in mailboxes? If you use a mailing house, they can give you an estimate.
- Determine whether you will use first-class or nonprofit postage. Your decision affects the cost of the mailing and the time that it takes for the mailing to reach mailboxes.





SCHEDULING YOUR CAMPAIGN

Your communications schedule is a critical part of your success leveraging multiple channels and timing the communications for the greatest response. Test and learn from the times that you send your emails. Note the dates of all communications so you have a starting point for next year.

For example, we’ve seen that for organizations using the Bonterra Development and Digital solutions, [giving is concentrated between 12-7 p.m. on December 31st](#). Popular times to send emails during the week are 6 a.m., 10 a.m., 2 p.m., and 8 p.m. Tuesday-Thursday is great for reaching contacts who use their work-related email. Sometimes the weekend is smart for youth-oriented, arts, animal, or other similar missions (or if you have predominantly personal email addresses.) Your best bet is to test email dates and times to see what works best for your constituency.

Use [workflow automation](#) and conditional content within the Bonterra Development and Digital solutions to send personalized and timely donor communication at scale.

See the next page for a timeline you can use to schedule your campaign.



Quick tip

from a professional fundraising coach



“Year-end is a great time for experimentation. Test what works with your audience every year and within four years you will have an unbeatable year-end fundraising program.”

— Elizabeth Finlayson, Illinois

EXAMPLE SCHEDULE FOR YOUR 2023 END-OF-YEAR CAMPAIGN

Website, social media

📅 Thursday, 10/26

Design a banner, pop-up, or [lightbox](#) for your website's homepage promoting the fundraising campaign. The banner will run on your website for the next two months. Draft a plan for social media content—pull together core messages and photos so you'll have a sense of your inventory and they will be available when needed. You can fill in more detail once ramp-up starts.

Website

📅 Friday, 10/27

Launch the banner ad on your website's homepage to promote your year-end campaign. It's go time!

Social media

📅 Friday, 10/27

Begin ramping up your social presence with about 25-50 percent more activity. If you don't already, post regularly for the next two months so you're at the top of newsfeeds during giving season. Spotlight key volunteers and service recipients, share exciting happenings and impact from the year, begin sharing goals for the coming year. Where appropriate (but not on every post) link to the donate page.

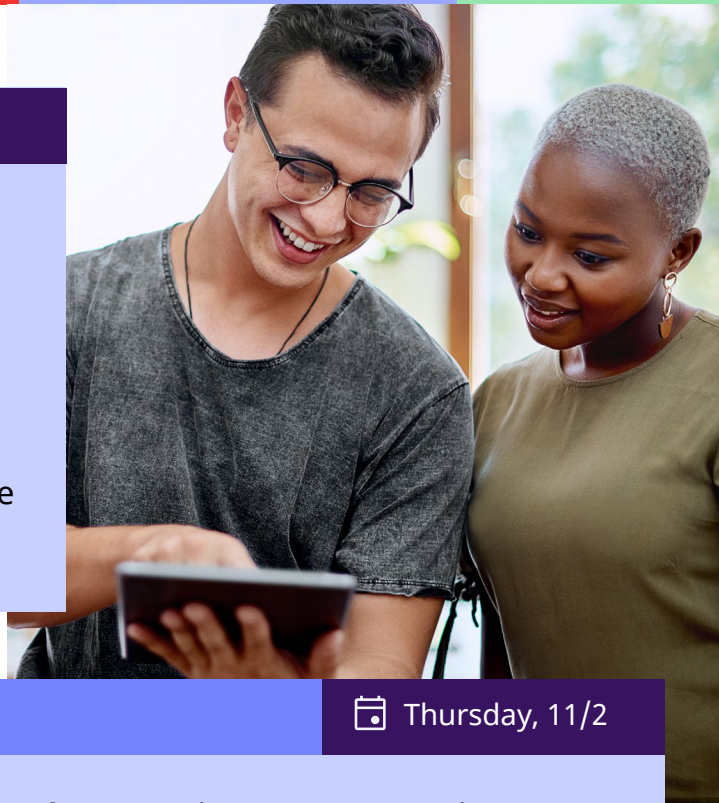
Note: Election Day is November 7, and is likely to affect national and local news. Be sure to consider the timing of your messages against the very crowded political messaging environment—if you don't have a benchmark, consider asking peer organizations how Election Day has traditionally affected their year-end campaigns or messaging.



Email

📅 Friday, 10/27

If you haven't recently, send an email to reintroduce donors and non-donors to your organization. Share a few of your organization's major accomplishments from this year. Highlight how the support of generous donors helped you advance your mission. It's important to re-engage donors around your mission before you share personal stories and ask for contributions.



Email

📅 Thursday, 11/2

Tell a story that highlights the tangible impact of your work. Experiment with perspective, design, and other creative elements—aim to evoke a strong but not overwhelming moral response.

Phone script

📅 Week of 11/13

Develop the phone script for board members and other volunteers to make their calls. The goal is deepened engagement—ask donors what inspires their giving, etc. Collect and leverage their stories.

Direct mail

📅 Wednesday, 11/15

Time the arrival of your direct mail letter to land in mailboxes by or around mid-November or the week after Thanksgiving. Avoid Thanksgiving week. This letter should match your year-end theme and the graphics in your campaign emails and social posts. Optional: send a second letter or postcard to those who haven't responded to arrive by the end of the first week of December. The additional touch can be a useful reminder for well-meaning procrastinators.



Phone call

Monday, 11/20 and Tuesday, 11/21

Ask board members to make thank-you phone calls or send personal video messages to the top donors from 2023 (to date.) Don't include a direct appeal for funds in this communication. Record contact feedback/notes in your [donor management system](#).

Direct mail

Monday, 11/20

Send handwritten thank-you notes to your top 10-20 donors, to arrive before Thanksgiving.

Email, text message

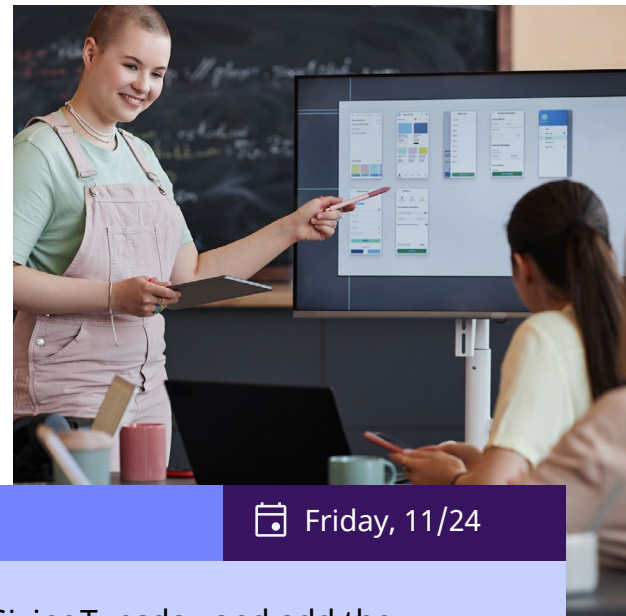
Wednesday, 11/22

Send thank-you emails to volunteers, the board, etc. to express appreciation for all they do and wish them a happy Thanksgiving. Alternatively, you can send a thank-you text or video message.

Social media

Wednesday, 11/22

Post a thank-you on social media. This could include a timely harvest picture or one that shows the joys of volunteering or contributing. Avoid asking for a donation, but do share your gratitude for the support you've received from so many volunteers and donors over the year(s.)



Website, social media

Friday, 11/24

Launch a banner on your website's homepage for GivingTuesday and add the GivingTuesday logo to your campaign donation page. Post a save-the-date on social media for GivingTuesday. If you haven't already, download the official [GivingTuesday toolkit with logos](#).



Email

📅 Sunday, 11/26

Send an email blast to promote the power of numbers on GivingTuesday—consider announcing a matching gift to encourage contributions.

Social media

📅 Sunday, 11/26

Create excitement by posting to your social media audiences, *“are you ready to make a difference for #GivingTuesday?”* Make sure to use the #GivingTuesday hashtag to drive additional traffic to your profiles and make your organization easier to find for people who don’t already follow you.

Text message

📅 Monday, 11/27

Send a “get ready to make an impact on GivingTuesday” text message. Repeat again on GivingTuesday.

Email, text message

📅 Tuesday, 11/28

It’s the big day! Lean on the testing you’ve done to decide how many emails to send, but if you don’t have strong benchmarks, consider sending around three emails and text messages promoting day-of giving on GivingTuesday. Use GivingTuesday logos/hashtags where appropriate. Your goal should be to communicate these messages to your supporters:

- **Early morning (around 5 a.m.):** “Please join our national day of giving.”
- **Noon:** “Here’s an update on our progress—please help us reach our goal by the end of the day.”
- **Early evening (around 7 p.m.):** “Time is running out and we’re so close to our goal (or, if you’re not, there is still time to give)—please help us cross the finish line! Check out our progress thermometer (or other graphic that highlights your goal.)”



Social media

📅 Tuesday, 11/28

Post throughout the day to encourage giving, share gift results/momentum, and highlight impact. Use logos/hashtags for GivingTuesday where appropriate.

Website

📅 Wednesday, 11/29

Post a thank-you banner for the gifts you received on #GivingTuesday, and remove GivingTuesday logos and wording from your website banner and campaign donation page. **Remove any reference to GivingTuesday** in your banners and on your donation pages by Thursday, 11/30, to focus completely on your year-end campaign.

Direct mail, phone call

📅 Wednesday, 11/29

If possible, call every new donor from GivingTuesday to personally thank them for choosing your organization. Ask what inspired the gift and their communication preferences for the future. Enter those call notes and insights into the contact record in your fundraising software. Personal video messages or postcards can be a nice addition or alternative to leaving a voicemail if no one answers the phone.

Social media

📅 Throughout December

Increase (or maintain) your posting cadence—aim for at least two to three times per week. Spotlight your programs, incredible volunteers, or profile a major donor. Experiment with donation ask cadences, but try including an ask (modeled after your campaign theme) every three posts.

Email

📅 Thursday, 12/7

Email your supporters encouraging them to give during the year-end campaign (but suppress anyone who has already given.) [Tell a story](#) or include a testimonial, and use some of your communication language in a social media post the next day.

Phone call

📅 Second week of December

Board members should call lapsed 2022 major gift donors (or those who gave early in the year and you think should be asked for another gift) to thank them for their prior giving and to ask them to give before the end of the year. "Your contribution will help XX [service recipients] and enable us to expand our outreach."

Email, text message

📅 Tuesday, 12/12

Optional reminder email blast and text message to encourage giving during the year-end campaign (suppress anyone who has given so far.) Keep these messages in line with your campaign themes, but consider talking about the spirit of generosity that comes with the holiday season and express gratitude for what they've helped you accomplish. Appeal to donors and non-donors alike to show their support. This email should come from yourself, your board president, or someone of influence rather than from a standard or catch-all organization email address (i.e., JaneDoe@YourNonprofit.org vs. YourNonprofit@YourNonprofit.org.) Use some of your communication language in a social media post the next day.



Social media

📅 Tuesday, 12/26

Ramp up asks for giving through the rest of the year. Make a short pitch at the end of related social media posts.



Email, text message

📅 Tuesday, 12/26

Email supporters to remind them that there are only a few days left to give as a 2023 donor. If possible, announce a matching gift to propel additional donations.

Email, text message

📅 Thursday, 12/28 through Sunday, 12/31

Ramp up your fundraising ask emails to encourage gifts by midnight on December 31. Segment your donors and send thank-you emails to all who have contributed to the campaign (donors, volunteers, board members, staff, etc.) Include an update on dollars raised and good tidings for the new year.

Email, direct mail

📅 First two weeks of January

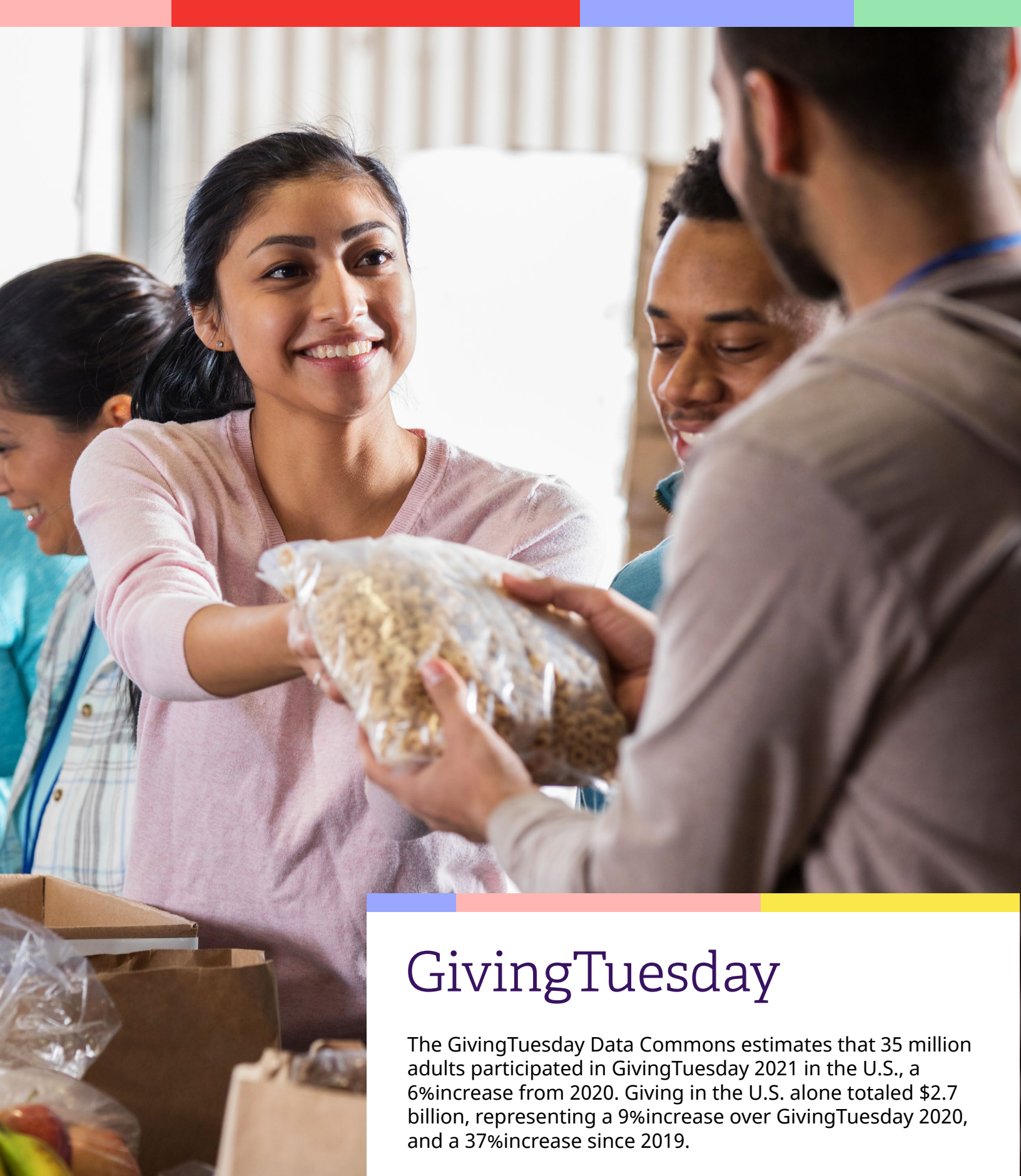
Send direct mail thank-you letters to major donors. Prepare 2023 donation summaries to be direct mailed and/or emailed.

Email, direct mail

📅 Last two weeks of January

Create an internal campaign report to highlight results and lessons learned. Ensure your data from the year-end campaign is clean and organized in your fundraising software. Identify any first-time donors (they should be tagged in your fundraising software) and put them into the appropriate distribution lists to receive newsletters and other general communications if they have opted in. Consider asking a board member to make thank-you calls or send personal video messages to new donors. As an engagement tool, consider sending a donor welcome kit (welcome letter and brochures) by direct mail or email to new donors. Set yourself up for a smooth and successful 2024!





GivingTuesday

The GivingTuesday Data Commons estimates that 35 million adults participated in GivingTuesday 2021 in the U.S., a 6% increase from 2020. Giving in the U.S. alone totaled \$2.7 billion, representing a 9% increase over GivingTuesday 2020, and a 37% increase since 2019.

GIVINGTUESDAY TIPS TO GET STARTED:

- Just as you would for your broader year-end campaign, come up with a **theme**, a **goal**, and a **communications plan** for GivingTuesday. Plan to start sending communications a few days in advance to reach people before they begin receiving asks from other organizations. Allow people to make a gift in honor of GivingTuesday when it's convenient for them rather than requiring them to donate on the day itself.
- Visit the GivingTuesday [website](#) to view their free online toolkit, get ideas, and download the official logo for your marketing outreach.
- Obtain a matched gift to further motivate your donors. If you have a matched gift that you launched for your broader year-end campaign that hasn't been completed yet, you could let people know that their GivingTuesday gifts will be matched. Alternatively, you could seek a matched gift specifically for the day itself.
- You can conduct GivingTuesday fundraising via email, [texting](#), and Facebook fundraisers and other social media. Use testimonials, storytelling, and progress updates to keep your content fresh throughout the day.
- Follow the hashtag #GivingTuesday to see what your fellow nonprofit organizations are doing, and use it to share your GivingTuesday content on social media to give your organization broader reach. Make notes of any ideas and inspiration for the future.
- Provide an engaging, celebratory conclusion to the day by sending a newsletter and social media posts the following day (Wednesday) with pictures/testimonials, a donor honor roll, and a spotlight on the total raised.



Quick tip

from a professional fundraising coach



Connect the dots between a donor's gift and your organization's impact. Your job in a year-end campaign is two-fold: thank donors for support this year and set the stage for what is possible in the next year with donor gifts."

— John Gilchrist, FAHP, CFRE, CNC,
Texas



ADVANCED CAMPAIGN IDEAS

Year-end campaigns are a lot of work, but they can be fun, too! They are a fantastic way to leverage all your possible fans—staff, board members, volunteers, etc. If you want to go the extra mile this year, here are a few ideas:

- **Ask** your most dedicated followers to create and start promoting a peer-to-peer campaign just before Thanksgiving, to run through December. Track the costs so you can plan for and evaluate future year expenses. Use social media to celebrate the success of individual fundraisers, and continue to encourage your fundraisers to promote their campaign.
- **Share** sample language with your board members and best volunteers to use so they, too, can promote your campaign through their channels (email contacts, social media, etc.)
- **Promote** sustaining/recurring giving options by including language about them in your solicitations. Experiment with setting “monthly” as a default frequency—it worked for organizations like the [National Audubon Society](#)!
- **Leverage** your campaign landing page and feature images from your campaign, brief testimonials (a video or links to testimonials,) and ways to give and volunteer.



Quick tip

from a professional fundraising coach



No nonprofit can achieve greatness by stumbling over its board. That includes the all important year-end campaign. Make sure each board member has a role in the year-end giving campaign. AND, make sure each is personally asked for a meaningful gift by the board chair, or chair of the development committee.”

— Pearl + Mel Shaw, Tennessee

January follow-up

Fundraisers often spend the last few days of the year anxiously tracking donation levels against their campaign and annual goals. It's thrilling to watch the dollars tick upward toward your goals! And after a well-deserved snooze on January 1, it's time to move to the next phase and **engage your donors so you don't lose them!** Sadly, [fewer than 50%](#) of all donors give again after the first donation—the suggestions below can help you beat the odds and retain more donors:

- **Thank** your entire donor base via social media and email over the first week of January. It's also nice to send handwritten thank-you letters to major donors and mid-level donors who have the potential to upgrade.
- **Pick up** the phone to share your gratitude—thank-you phone calls can go a long way to building relationships with new and/or promising donors. 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 in 2023.
- **Keep** your board informed about your fundraising via email—use the automated reporting and/or email blast features in your fundraising software to share some statistics, pictures, and highlights from your 2023 fundraising.
- **Compile** an annual report to share with supporters. If you don't already produce an annual report, use the email feature in your fundraising software to share a simple report with your entire contact base.
- **Create** a welcome kit for new donors—an overview of your programs, a newsletter, a pledge form, and a calendar of upcoming events. Let this package serve as a friendly informational engagement tool rather than a hard fundraising appeal.



Quick tip

from a professional fundraising coach



Segment your communication lists to test and learn. It's one of the best ways to see what resonates with your audience. Be sure to record your findings so you can build on them next year."

— Kimberly O'Donnell, CFRE, ACC
Washington, DC



It's not too late to make a difference this year-end. Learn about how the Bonterra Development and Digital solutions can power your nonprofit this giving season and throughout the year.

Get a demo →