

EGUIDE

Year-end fundraising campaign guide and timeline



Did you know that nearly a third 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, we are passionate about helping you make the most of this opportunity to raise funds and awareness about your mission. Bonterra Donor Engagement's Guided Fundraising solution (formerly Network for Good) allows you to segment, communicate, fundraise, and analyze the activities that will make your year-end fundraising campaign successful. This guide, written by our experienced [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

HOW HAS FUNDRAISING CHANGED?

Check out some of the statistics from the M+R 2024 Benchmark Study:¹

- Average online revenue declined by 1% in 2023.
- Revenue from monthly giving increased by 6%, and accounted for 31% of all online revenue in 2023.
- Mobile devices (including cell phones and tablets), accounted for most (52%) of nonprofit website traffic in 2023, but 78% of revenue was contributed by desktop users.
- Organizations sent 59 emails to each subscriber, 27 of which were fundraising appeals, and email made up 16% of online revenue.

We believe that 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, video, 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.

1. <https://mrbenchmarks.com/journeys#fundraising>



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.
- ✓ 1-2 group video messages to 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.

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.**

As you can see, there are many messaging elements to a year-end campaign. As you plan your cadence, consider who you want to contact and when. 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.). Your coach can help guide you. Here are some considerations:



DIRECT MAIL—this is the most costly element of a 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—you will be sending several email messages during the campaign. Bonterra fundraising coaches have designed a robust series of year-end email templates called the [Year-End Engagement Plan](#). These templates are built into your fundraising software and segmented into donor and non-donor email groups. You can use these "drip" email templates or send your own email appeals during the eight-week period. If you use the engagement plan, the mailing segments (donors and non-donors) are created for you and can be edited before you launch the plan. **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.



PEER-TO-PEER—identify loyal donors and influencers who are willing to act as fundraisers to multiply your fundraising appeals. You can use Guided Fundraising's [peer-to-peer](#) fundraising pages to leverage these loyal supporter's networks as part of your year-end fundraising efforts



TEXT MESSAGING—Text messaging is one of the most commonly used forms of modern communication, with a 97-98% open rate. If you have a mobile phone number for your donors but haven't yet sent a text appeal, consider sending a personal video message and/or a group text holiday greeting during this season.

QUICK TIP



Bonterra 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

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 a degree of credibility to the ask. Studies have found that 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 gave 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.

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. Using personal video messaging can be a great alternative to leaving a voicemail. It will be well-received and could yield a (surprise) year-end gift if the donor has the ability and interest to do so. 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 (at no additional cost) that have limited viewing access. For example, a board member or staff person can view contact information and record call notes, but will not see the sensitive donation information.

Matched gifts

A highly effective motivator for a year-end campaign is a matched or challenge gift. According to Double the Donation, an estimated \$2-\$3 billion is donated through matching gift programs annually. Additionally, according to The Big Give Research Initiative, 84% of people they surveyed said they are more likely to donate when a match is offered, and one in three donors would give a larger gift if they know it will be matched.²

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.

For our customers working with a fundraising coach, your coach will encourage you to:

- 1. Have a carefully planned campaign ready to execute in early November.**
- 2. Set a realistic, yet aggressive campaign goal.**
- 3. Be ready to fundraise with vigor across all of your communication channels.**

2. <https://doublethedonation.com/matching-gift-statistics/>

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 personal video messages 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 in the Contacts section. 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!

QUICK TIP



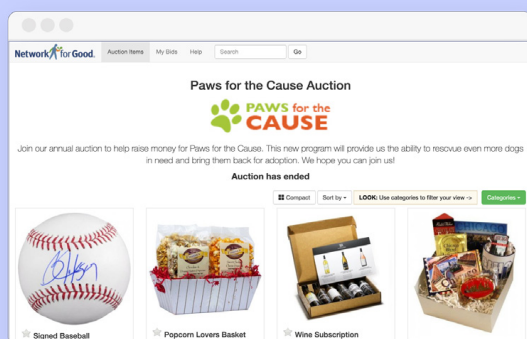
Bonterra Fundraising Coach

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

**Tom Giddens,
Massachusetts**

Fall events

Over the past several years, the event landscape has shifted dramatically. While in-person events are back in action, you may also still consider a hybrid or virtual option for one of your organization's upcoming events. Incorporating a virtual event—even a short live-streaming activity—on #GivingTuesday or any other day during this giving season, will engage current prospective donors and encourage donations to your mission. Learn more about hosting high-ROI events—download our [Guide to Diversifying Your Nonprofit Event Strategy](#).



Learn more about Guided Fundraising's in-person, virtual, and hybrid events and auctions solutions.

LEARN MORE HERE

Typical year-end communications schedule

It's wise to 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.
- Has ample 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.

Below are 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 are 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



Bonterra 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**

QUICK TIP



Bonterra Fundraising Coach

"People tend to be especially generous in December. Plan early for how you will reach out to those who care about your cause in a way they will hear you and respond."

Janet Cobb, CFRE, CNP
Chicago, IL

QUICK TIP



Bonterra 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

Preparing your direct mailing

- Identify staff who will cover phones/inbound requests during the last week/days of the year so no opportunity is missed.
- Draft the appeal using best practices—a double-sided letter with 14-point font, pictures, strong call to action, using a "P.S.," etc. Your coach can tell you more about these if you aren't clear.
- Consider all 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, data shows that giving is concentrated between 12-7 p.m. on Dec. 31. 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 predominately personal email addresses). Your best bet is to test email dates and times to see what works best for your constituency.











Here is a timeline you can use to schedule your campaign. Tasks with a  can easily be performed in the Guided Fundraising solution.

DATE	FORMAT	TASK
By Thursday, 10/24	website social media	Create an fundraising page in your solution software for your year-end campaign. Design a banner or pop up/light box 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.
Friday, 10/25	website	Launch the banner ad on your website's homepage to promote your year-end campaign. It's go time!
Friday, 10/25	social media	Begin ramping up your social presence (25-50% more activity). Post regularly for the next two months so you are at the top of news-feeds during giving season. Spotlight key volunteers and service recipients, share exciting happenings and impact from the year, and begin sharing goals for the coming year. Where appropriate (but not on every post) link to the donate page.
Friday, 10/25	 email	If you haven't recently, email to re-introduce 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 with your mission before you share personal stories and ask for contributions.

DATE	FORMAT	TASK
Thursday, 11/7	 email	Tell a story in the third person that highlights the tangible impact of your work.
Week of November 11	phone script	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. Collect and leverage their stories.
Wednesday, 11/13	 direct mail	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 matches your year-end theme and the graphics used 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 .rst week of December. The additional touch can be a useful reminder for well-meaning procrastinators.
Monday, 11/18 and Tuesday, 11/19	phone call  video message	Board makes thank-you phone calls or send personal video messages to the top donors of the year. There is no direct appeal for funds in this communication. Record any relevant contact feedback/notes in your fundraising solution.
Monday, 11/18	 direct mail	Send hand written thank-you notes to top 10-20 donors to arrive before Thanksgiving.
Wednesday, 11/27	 email  text message  video message	Thank-you emails can go out 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.
Wednesday, 11/27	social media	Thank-you post on social media. This can include a nice harvest picture or one that shows the joys of volunteering/contributing. There is no ask for a donation, instead focus on gratitude for the support you have received from so many volunteers and donors over the year(s).
Friday, 11/28	website social media	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. You can find a handy #GivingTuesday toolkit (with logos) by clicking here .
Sunday, 12/1	 email	Email blast to promote the power of numbers on #GivingTuesday— consider announcing a matching gift to encourage contributions.
Sunday, 12/1	social media	Post on social "Are you ready to make a difference for #GivingTuesday?" to create excitement.
Monday, 12/2	 text message	Send a "get ready to make an impact on #GivingTuesday" text message. Repeat again on #GivingTuesday.

DATE	FORMAT	TASK
Tuesday, 12/3	 email  text message	<p>Send up to three emails and text messages promoting day-of giving on #GivingTuesday. Use #GivingTuesday logos/hashtags where appropriate.</p> <ul style="list-style-type: none"> • Early morning (around 5 a.m.): Please join our national day of giving. • Noon: Update your contacts on your progress against your goal and encourage prospects to give by the end of the day. • Early evening (around 7 p.m.): Announce that time is running out and you are sooo close to your goal (or that there is still time to give)—please help us! Show a progress thermometer or another graphic that highlights your goal.
Tuesday, 12/3	social media	Post throughout the day to encourage giving, share gift results/momentum, and highlight impact. Use logos/hashtags for #GivingTuesday where appropriate.
Wednesday, 12/4	website	Post a thank-you banner for gifts received on #GivingTuesday and remove #GivingTuesday logos and wording from website banner and campaign donation page. You will want to officially remove any reference to #GivingTuesday in your banners and on your donation pages by Thursday, 11/30, so there is complete focus on your year-end campaign.
Wednesday, 12/4	 direct mail phone call	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 relevant call notes/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.
Throughout December	social media	Increase your posting cadence to at least two to three times per week. Spotlight your programs, incredible volunteers, profile a major donor. Slip in an ask (modeled after your campaign theme) every three posts.
Tuesday, 12/10	 email	Email blast to encourage giving during the year-end campaign (suppress anyone who has given so far). Tell a story, use a testimonial. Use some of your communication language in a social media post the next day.
Second week of December	phone call	Board members call lapsed major gift donors (or those who gave early in the year and you'd like to request 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."
Tuesday, 12/17	 email  text message	Optional reminder email blast and text message to encourage giving during the year-end campaign (suppress anyone who has given so far). It's important to talk about the spirit of generosity and gratitude that comes with the holiday season. Express gratitude for what has been accomplished. Appeal to donors/non-donors to show their support. This email should come from yourself, your board president, or someone of influence (from their business email) rather than from your standard organization email address (i.e. JaneDoe@xcharity.org vs. xcharity@xcharity.org). Use some of your communication language in a social media post the next day.
Thursday, 12/26	social media	Ramp up asks for giving through the rest of the year. A short pitch can be made at the end of a content related post.



DATE	FORMAT	TASK
Thursday, 12/26	 email  text message	Reminder email mentioning that there are only a few days left to give as a donor. If possible, announce a matching gift to propel additional gifts.
Monday, 12/31	 email  text message	Email blast with “Please make a difference today” (use more specific mission related language if possible) promotion. If you are close to your goal, mention where you are against your campaign goal.
Friday, 12/31	 email  text message	Final email of the campaign to encourage gifts by midnight on December 31. Send a broad thank-you email to all who contributed to the campaign (donors, volunteers, board members, staff, etc.). Include an update on dollars raised and good tidings for the New Year.
First two weeks of January	 email  direct mail	Send direct mail thank-you letters to major donors. Prepare annual donation summaries to be direct mailed or emailed.
Last two weeks of January	 email  direct mail	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 are tagged in your fundraising software) and put them into your distribution list to receive newsletters and other general communications. Consider asking a board member 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 new year.



#GivingTuesday

The GivingTuesday Data Commons estimates that 34 million adults participated in GivingTuesday 2023 in the U.S., a slight decrease from 2022. Giving in the U.S. alone totaled \$3.1 billion, representing a 15% increase over GivingTuesday 2021, and a 25% increase since 2020.³

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, such as the Saturday before, 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 copy the logo for your marketing outreach.
- Seek a matched gift to further motivate your donors. If you have a matched gift that you launched for your broader year-end campaign that has not 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.
- #GivingTuesday fundraising can occur via email, text-to-donate, 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. 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 spotlight on the total raised.



**GivingTuesday 2023
saw a 34% increase in
monthly giving**

3. <https://www.givingtuesday.org/blog/millions-worldwide-celebrate-givingtuesday-2022-with-acts-of-generosity-giving/>

QUICK TIP



Bonterra Fundraising Coaches

"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 and Mel Shaw,
Tennessee**

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. Your fundraising coach can guide you on how to launch and manage these campaigns. 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 (work, social, etc.).
- Promote sustaining/recurring giving by including monthly/recurring donation language in your solicitations and double check to ensure that it is an option on your Everyday Giving Page. We recommend setting "monthly" as your default frequency.
- Leverage your year-end fundraising page as a campaign landing page that features images from your campaign, brief testimonials (a video or links to testimonials), and highlights ways to give and volunteer.

"To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter."

– MAYA ANGELOU

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 these goals. And after a well-deserved snooze on Jan. 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:

- In the first week of January, thank your entire donor base via social media and group video message. It is also nice to send hand written thank-you letters to major donors, and mid-level donors who have the potential to upgrade.
- Thank you phone calls also 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 the previous year.
- Keep your board well-informed and attuned to your fundraising via email—use the email blast or video messaging feature in your fundraising solution to share some statistics, pictures, and highlights from the previous year's fundraising.
- If you don't already produce an annual report, use the email blast feature in your fundraising software to compile a simple report that can be shared with your entire contact base. Or upload a PDF of your annual report to your website and link to it in an email blast.
- Create a welcome kit for new donors—an overview of your programs, newsletter, pledge form, calendar of upcoming events—let this package serve as a friendly informational tool rather than a hard fundraising appeal.

From all of us at Bonterra, best wishes for a smooth and successful giving season!

QUICK TIP



Bonterra 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 Guided Fundraising's simple, smart
solution can power your nonprofit this giving season
and throughout the year.**

[Schedule a demo](#)

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