

6 Steps to Success

End-of-Year Campaign Strategy for Nonprofits



CREATE TIMELINE

01

Plan all the steps you need to take to develop a successful campaign, set fundraising goals and outline your overall theme.



SEGMENT AUDIENCE

02

Segmenting your audience will help you tailor your message to specific giving levels, donor types, and donation history.

Group by average gift size, donor type and/or date of last gift.



CRAFT MESSAGING

03

Include a recap of the organization's year, a personal story of beneficiary success, and – most importantly – the ask.

Tailor the message each donor segment, and gather visual elements to support your narrative (photography, video and graphic design).



BUILD DONOR FORMS

04

Build branded, mobile-responsive donor forms online. If possible, integrate the forms with your donor relations software.

Create unique forms for each audience segment with suggested giving amounts and specifics about how the funds will help.



MULTI-CHANNEL DISTRIBUTION

05

Personalized letters, postcards and emails are common distribution methods for end-of-year appeals.

Remember to include your social media platforms, website and public relations outreach in your distribution plan.



FOLLOW UP

06

Acknowledge gifts immediately with an emailed confirmation that includes a tax receipt. Then, send a handwritten, personalized thank you note.

A few weeks after distribution, follow up via phone with large gift and frequent donors who haven't responded.