A YEAR-END FUNDRAISING GUIDE

50 TIPS to Elevate Your Year-End Giving

A practical planning guide for nonprofit organizations

DOUGLAS SHAW & Associates
FUNDRAISING COUNSEL

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Introduction

Year-end fundraising success rarely comes together on its own in the final week of December. It is built months earlier, one decision at a time, through thoughtful planning, useful donor insight, compelling creative, coordinated channels, reliable systems, and stewardship that continues after the gift arrives.

The good news is that generosity remains strong. Giving USA reported that U.S. charitable giving reached an estimated $617.20 billion in 2025, a 5.7 percent increase in current dollars.

The challenge is that fewer people are giving. The Fundraising Effectiveness Project estimated that the number of donors declined by 3.6 percent in 2025.

That means your year-end campaign has two jobs:

1

Make the most of the generosity already present.

2

Give donors a reason to stay connected long after December.

This guide brings together practical advice from departments across Douglas Shaw & Associates, including our Client Services, Creative, Data and Analytics, Digital, and Production teams.

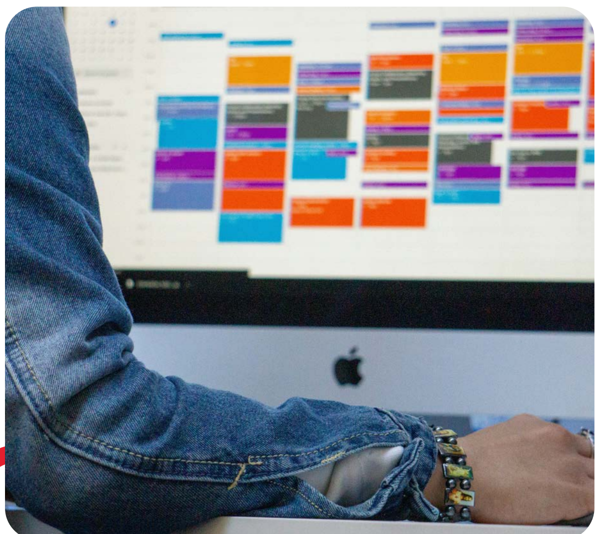
We encourage you to use it as a working roadmap: start with the ideas that fit your team, then build from there.

SECTION 1

Build the Foundation

Strong year-end results begin well before the first appeal reaches a donor. This section turns goals, calendars, approvals, staffing, and internal coordination into an operating plan your whole organization can follow.

1. Give yourself a head start before fall gets busy



Don't wait until November to begin. Work backward from December 31 and give your team enough time to do their best work, not just finish on time. Starting early also gives you room to test subject lines, offers, landing pages, and audience segments before December traffic gets more expensive and mistakes get harder to fix.

2. Set a goal people (donors and staff) can rally around

Choose a primary revenue goal, then name the audiences and channels expected to help reach it. Keep the team updated with a few simple metrics throughout the month. Use the numbers to make decisions while there is still time: add media spend, adjust cadence, or shift staff attention toward what is working.

Alongside a year-end revenue goal, consider setting a goal for new monthly partners. For many organizations, December is one of the strongest months to acquire recurring donors who will provide stable support throughout the coming year.

Sharing progress with donors can also build momentum when the goal is tied to something real—meals served, families housed, research funded, Bibles distributed. Avoid giving progress through a thermometer that has no clear relationship to impact.

IMPORTANT
Pair every financial goal with an impact goal donors can see themselves part of.

3. Create one integrated calendar

Give everyone a shared view of the season: direct mail drops and in-home dates, email sends, social posts, paid media, GivingTuesday and Christmas appeals, texts, calls, donor meetings, and stewardship touches. That simple step prevents awkward collisions, such as a mid-level donor receiving a text, phone call, and handwritten note all on the same day, or an email referring to a letter that has not arrived. A well thought through calendar makes what donors experience feel natural and relational.

4. Lock in deadlines before the crunch

Late approvals can undo months of good work. Decide now who approves strategy, copy, design, budgets, and legal or tax language, and name a backup for each person. Ask stakeholders to block out approval time during the busiest weeks, especially for direct mail, where it is hard to recover from a missed production window. A clear path keeps a small edit from turning into a missed date and helps every channel stay aligned.

5. Plan for the December rush—and the holidays

The year-end busy season extends well beyond the fundraising team. Estimate the workload for gift entry, donor calls, data corrections, mail handling, social monitoring, photography, thank-you letters, and final week questions. Then decide what staff can cover and where temporary help or trained volunteers make sense. Take lower-priority work off Donor Services' plate so they can focus on accurate processing and prompt response to donors. Build a realistic holiday coverage plan with clear handoffs and backup contacts.

IMPORTANT

Estimate daily gift volume now and make sure staffing can support a 24-48-hour receipt turnaround expectation.

6. Give Donor Services the answers before the questions arrive

Create a one-page year-end FAQ that staff, receptionists, volunteers, and call-center partners can use without having to hunt for answers. Include the campaign goal, match terms, giving deadlines, website and donation page links, mailing instructions, stock and donor-advised fund contacts, employer-matching steps, tribute-gift information, and who to call when something unusual comes up. Add plain-language responses to common donor questions but encourage staff to sound like themselves rather than read a script. Review the sheet together before the rush and keep one digital version current so everyone is working from the same information.

7. Don't forget your internal team

Year-end asks a lot from your internal team. Use short weekly check-ins to surface bottlenecks, reset priorities, and give staff permission to pause work that does not support the campaign or donor care. Recognize extra effort while it is happening, not only at the annual review, and treat coffee breaks, lunches,

flexible schedules, and backup coverage as part of the plan, not perks. When the campaign ends, make room for a full debrief and some recovery time. Caring for the team is not separate from fundraising performance; it helps them do their best work when the pressure is highest.

SECTION 2

Know Who You Are Asking

Even the best message can miss when it reaches the wrong person or treats every donor the same. The information already in your file can help you choose a more relevant message, a better channel, and a more human-centric way to reach out.

8. Clean up the data so donors feel known

Data cleanup may not feel glamorous, but donors notice when you get the details right. Deduplicate records, flag deceased donors, correct bad addresses, review salutations, combine or link related donor records appropriately, and honor suppression and communication preferences before you build final lists. Clean data saves on print and postage costs, improves response, and, most importantly, helps the right person receive the right message.

IMPORTANT

Review duplicates, deceased records, undeliverables, salutations, and communication preferences.

9. Choose prospects who need a more personal plan

Build a manageable list of your highest-value year-end prospects and decide what thoughtful outreach looks like for each person. For a small team, that may be 25 names or fewer. The right number is the number you can genuinely steward. Review each prospect's interests, relationships, giving capacity, and preferred way to connect, then start early in the fourth quarter before calendars fill up. Offer a tour, short program video, conversation with leadership, or a concise update tied to the prospect's priorities. These kinds of meaningful touches, when paired with the broader campaign appeal, will help a potential donor see the impact their gift can make.

10. Let past giving patterns guide reactivation

Look back three to five years and identify the people who consistently give in November or December, as well as donors whose behavior changed after a shift in cadence, creative, or messaging. Then match the outreach to the relationship.

A recent, generous supporter may respond to a personal call or handwritten note. A long-lapsed major donor may need to hear what has changed and why renewed partnership matters now. Some lapsed donors may respond better to an invitation to renew their support with a modest monthly commitment. The goal is not simply to flag people who have not given; it is to reach them in a way that feels informed, respectful, and worth answering.

Also, run pledge-balance and fulfillment reports to help identify commitments that may need a courteous reminder or a quick conversation.

11. Refresh portfolios

Before year-end outreach begins, review major donor portfolios and assign a relationship officer to donors giving at the major donor level so no relationship falls through the cracks. Check soft credits, too, so spouses, family foundations, businesses, and donor-advised fund gifts receive the recognition they deserve. These details may live in the CRM, but they are felt personally. A recognition error can make a donor feel unseen and lead your team toward the wrong follow-up.

SECTION 3

Strengthen the Offer and Expand Giving Paths

A strong year-end campaign gives donors a reason to care now, a believable way to increase their impact, and clear options for giving in the way that works best for them.

12. Secure a matching challenge

A matching challenge can create real momentum! When donors know their donation can have twice (or more) the impact, they are more likely to give. Ask a recent five- or six-figure donor, board member, corporate partner, or previous year-end donor whether their gift can be announced as a matching challenge. Even a matching challenge secured late can boost results to final week of the year digital messages.

13. Give donors a real reason to act NOW

December 31 is a deadline, but it is not a story. Explain what needs to happen by that date, what a donor's gift will make possible, and what is at stake if the goal is not met. A mission deadline—meals needed during winter, a January new program launch, a funding gap that affects services and the people helped—feels more meaningful than the calendar alone. Connect the financial goal to the deadline to a concrete outcome in people's lives, then carry that same explanation through mail, email, website, and donor conversations.

IMPORTANT

After only a quick scan of any communication, donors should be able to answer two questions: Why now? And what will my gift do?

14. Remind DAF donors their charitable dollars are ready to work

Many donor-advised fund holders do not need another definition of a DAF. They need a timely, direct invitation to recommend a grant. Remind them that the charitable dollars they have already set aside can go to work now, then make the next step easy: provide your legal name, tax identification number, mailing address, and a person to contact with questions. A practical message can turn good intentions into a completed recommendation.

15. Make complex gifts feel simple

Stock, qualified charitable distributions, grants, and other non-cash gifts can be valuable at year-end, but they often take more time and coordination than a cash gift. Publish clear instructions on your website well before the final week of December. Confirm gift acceptance policies, wire and transfer details, contact names, and internal routing procedures. Make sure someone knowledgeable is available for the donor or their advisor to reach.

16. Make employer matching easy to find

An employer match can increase the impact of a year-end gift without asking the donor to give more out of pocket. Add a simple search tool or prompt on the donation confirmation page, in the receipt, or in a follow-up message.

SECTION 4

Create Communications That Feel Personal

Good creative does more than look polished. It helps donors recognize their role, feel the human stakes of the mission, and move easily from attention to action. Consistency matters, but so do authenticity and emotional clarity.

17. Say thank you before you ask

Thank donors for sustaining the mission—particularly those who already give monthly. Before the first year-end ask lands, send a thank-you with no ask attached. It can be an email, postcard, short video, or phone message. Show a specific outcome donors helped make possible and use language that gives them a place in the story. That small moment changes the tone of what comes next: the donor receives the appeal as a valued partner, not as someone remembered only when money is needed.

18. Make the donor's role unmistakable

The campaign should quickly answer three questions: What problem must be solved, why it matters now, and how a donor's gift will help. Balance emotional connection with tangible impact, helping a donor quickly understand both the urgency of the need and the significance of their role.

19. Make the campaign feel like one connected story

A strong campaign feels like one continuous conversation, from outer envelope to letter, reply card, landing page, email, social post, and ad. Use a common headline idea, primary image, color palette, offer, and impact promise, then adapt the execution to each channel.

20. Let another voice into the campaign

Add a short lift note in a different voice than the main letter—a board member, volunteer, or the person with lived experience—so a reader who skims past the letter still gets a fresh reason to say "yes!"

21. Help donors choose a gift amount

Gift amounts should make the decision easier, not look like a complex math problem. Use recent giving history and capacity to build a clear hierarchy with a suggested amount, an upgrade path, and an open field. In print, a circle, check mark, or subtle highlight can guide the eye. Online, prefilled amounts should be easy to change and should never hide the option to enter another gift amount. When you tie a specific ask amount to tangible impact, make sure the connection is accurate and supports the same campaign outcome.

If recurring giving is part of your strategy (and it should be), thoughtfully present monthly giving as an equal option rather than hiding it behind another click.

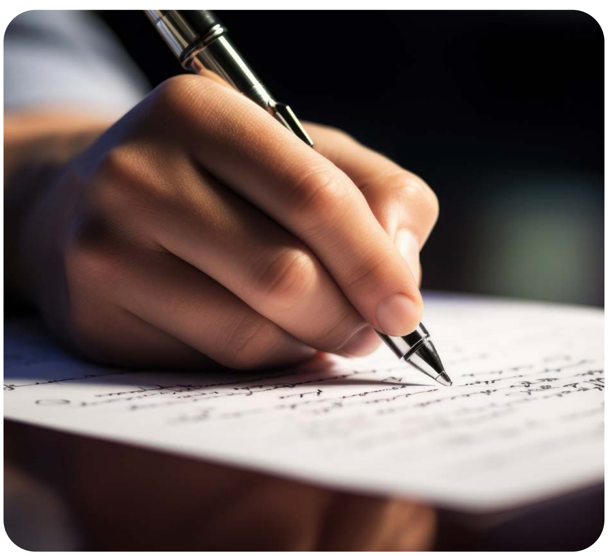
IMPORTANT

Every ask amount should point back to the same clear campaign promise.

22. Give the P.S. a job

Many donors scan a letter before they decide to read it, so the P.S. has work to do. Use it to restate the ask, match, deadline, or impact in a concise, specific thought. Give the P.S. visual separation through spacing, a rule, a box, or a handwritten treatment so it reads as the second most important thing in the letter, not as an afterthought.

23. Make the mail feel touched by a person



A small tactile detail can change the way a package feels before the donor reads a word. Consider a handwritten note or P.S., a real or simulated sticky note, a paper-clipped business card, a handwritten-style address, or bracket marks around one key sentence. These touches feel like something a friend would do.

24. Make the deadline easy to see

Make December 31 easy to spot in the letter, reply card, email, social ad, and landing page. Use a clear date, countdown, clock icon, or highlighted deadline near the call to action, but pair the visual cue with an honest explanation of what the deadline means. Build urgency gradually: introduce the need, show progress toward the goal, explain what is still needed to meet the goal, and increase frequency as the real deadline approaches. (Don't forget the deadline creates urgency, but it's not the story!)

SECTION 5

Orchestrate a True Omnichannel Campaign

Communication channels should reinforce one another rather than compete. Give each medium a clear job, coordinate timing around the donor's actual experience, and use frequency intentionally during the final weeks.

25. Give every channel a job

Do not add a channel just to make the plan look "omnichannel." Decide what each channel contributes to the campaign. Direct mail can carry a deeper story and a reply device. Email can deliver timely updates, reinforce urgency, and introduce both one-time and monthly giving opportunities. Social media can build awareness and help donors see your mission in action. Paid media can reach new audiences and retarget people who have shown interest. Phone calls can create a personal connection, while text messages deliver concise, time-sensitive reminders. When every channel has a job, the campaign feels fuller—not noisier—and donors encounter consistent opportunities to support the organization in the way that works best for them.

26. Deliver a consistent experience across channels

A donor may read a letter, search for your organization, see a retargeting ad, open an email, and finish the gift on a phone. At every step, they should feel confident they are still in the same story. Align the headline, imagery, colors, offer, gift amounts, deadline, and impact language across the journey. Consistency reduces doubt and lets each touch build on the last one.

27. Meet donors when the mail actually arrives

A mail date is not the day a donor experiences the appeal. Use estimated in-home windows, then time email, paid media, and social reinforcement around delivery. The first digital touch can echo the story as the letter arrives; a later one can share progress, remind donors about the deadline, or offer another way to give. Watch postal tracking when it is available and be ready to adjust if delivery slips.

28. Plan a second touch in the mail

Follow your first year-end package with a shorter, less expensive letter and reply device about the same still-active matching challenge a week or two later, so the offer gets a second read without the cost of a second full package.

29. Don't be afraid to increase email cadence

The final week of the year should feel different from a normal communications week. Increase email frequency gradually as December 31 approaches. One message may highlight campaign progress, another may feature a powerful story, while a third may introduce monthly giving as a way to extend the impact of year-end generosity throughout the coming year. Variety keeps the campaign fresh while giving donors multiple ways to respond. A higher cadence works best when each message adds value and the entire sequence has been planned, reviewed, and tested before the final week.

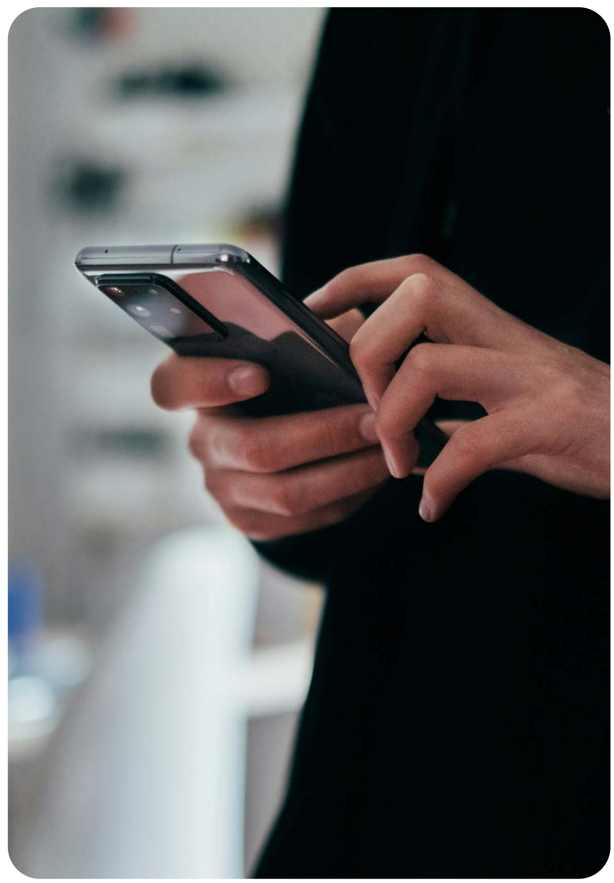
IMPORTANT

A higher cadence works best when each message adds value and the entire sequence has been planned, reviewed, and tested before the final week.

- Check formatting on desktop and mobile
- Review every link
- Review personalization fields

30. Use the phone

Text messages and phone calls can reach donors whose inboxes and mailboxes may be full. Use text to share a short video, match update, deadline reminder, or direct link to a mobile-friendly giving page. Use live or prerecorded calls for gratitude, high-priority outreach, and carefully targeted year-end asks. Keep both channels concise, respectful, and easy to opt out of, and make sure the message sounds like it came from your organization, not a script generator.



SECTION 6

Remove Digital Friction and Use Media Wisely

Online giving works best when the path is fast, familiar, and trustworthy. A clear website, an optimized donation form, and a thoughtful media plan help preserve the emotion that brought a donor there in the first place.

31. Freeze technology changes before peak season

Fall is not the time for a surprise website rebuild or platform migration. Avoid major changes to your site, donation platform, email system, CRM integrations, themes, plugins, or payment tools right before peak giving. Finish necessary work early enough to test it under real conditions, train the people who use it, watch for problems, and roll back the changes if needed.

IMPORTANT

Finish major technology changes before fall campaigns begin and keep a tested plan to revert to your original systems ready.

32. Make the homepage earn its keep

In December, your homepage should make the most important action easy to find: giving. Remove outdated promotions and visual clutter that compete with your year-end offer. Lead with a clear headline, a compelling image, a short value proposition, and a prominent donation button above the fold. A pop-up or banner can support giving in the final weeks. Be sure it has an easy close option and frequency controls. The homepage should still represent the whole organization, but its priorities should align with the season.

33. Improve speed and mobile performance

A slow website load time can weaken trust and cause donors to close the page before the message has a chance to work. Test the homepage, campaign landing page, and donation form with a tool such as Google PageSpeed Insights, paying particular attention to mobile. Optimize oversized images, reduce unnecessary scripts, delay nonessential media, and work with the giving platform provider when the platform is the bottleneck. Treat speed as a conversion and accessibility issue, not just a technical score, and retest after new campaign copy or images are added or changed.

IMPORTANT

Record baseline load times on common phones and connections, make the changes, then test again.

34. Make a gift yourself before donors do

Click the donate button and make a gift—from start to finish—on your donation page. Complete both a one-time and recurring gift on desktop and mobile devices to experience exactly what your donors will see. Test credit cards and available digital wallets, tribute gifts, employer-match prompts, suggested and custom amounts, fee coverage, error messages, confirmation pages, recurring gift enrollment, and tax receipts. Ask someone outside the fundraising team to test it, too; fresh eyes often catch the friction the rest of us have learned to work around.

35. Offer fast, familiar payment options

If your technology stack allows, diversify payment options on your donation form. Quick mobile payment options like PayPal, Apple Pay, Google Wallet, or Venmo can help a donor complete a gift in seconds, especially on a phone. Make it just as simple for donors to set up a recurring gift as it is to make a one-time donation. The easier the payment experience feels—and the fewer decisions donors must navigate—the more likely they are to complete the response they intended.

IMPORTANT

Review every field on your donation form and remove any that are not necessary at the moment of giving.

36. Let the donation page finish the story

A donation page should do more than process payment. Restate the need, the donor's role, the reason to act now, and the impact of the gift in concise language that can be understood without returning to the appeal. If recurring giving is part of your strategy, present it as an equally meaningful way to respond—not as a secondary option hidden later in the process. The page should reassure the donor, keep the emotion alive, and fulfill the promise made by the email, letter, ad, or post that brought them there.

37. Review automations

Automated messages may be the first response a donor receives, so they deserve the same care as the appeal. Test the email signup form, confirm that new subscribers enter the correct welcome journey, and make sure donation confirmations show accurate gift details. Verify that thank-yous, receipts, and welcome automations start and stop when they should. Then read them like a donor: check the sender name, reply address, personalization, links, formatting, tone, and suppression rules.

If you welcome recurring donors differently, verify that those automations are working as intended. If you have only one automated thank-you email, start there. Make sure it is warm, accurate, and timely before worrying about more sophisticated journeys.

38. Use paid media intentionally

Year-end is one of the best times to use paid media to extend the reach of your fundraising campaign. Build a budget before the season begins, and plan to increase it in December if advertising is already part of your strategy. New to paid media? Start small by putting a modest budget behind an organic Facebook or Instagram post so that more people will see it and then learn from the response before you increase your paid media spend.

- Before you launch, check every advertising pixel and conversion event so you can measure results and build useful retargeting audiences.
- Use a mix of formats. Formats such as short video can stop the scroll, introduce your mission to people who do not know you yet, and reinforce the appeal for people who do. Using a variety of formats also helps prevent creative fatigue and gives your campaign more opportunities to connect with both new and returning supporters.
- Watch performance while the campaign is live. Compare networks, audiences, and creative versions; pause what is not gaining traction and move budget toward the ads delivering the strongest engagement, gifts, and return. Real-time optimization helps every dollar work harder.

SECTION 7

Execute Print and Production Flawlessly

Direct mail can be especially valuable at year-end, but the heavy volume of mail moving through printers, mail shops, and the post office leaves little room for mistakes or delays. Starting early, respecting postal realities, and checking every detail protects both revenue and trust.

39. Get in the production queue early

Printers, mail shops, paper suppliers, freight carriers, and the postal network all get crowded at year-end. Start production planning early, confirm vendor schedules, reserve specialty paper, and leave room for proofs, corrections, holidays, shipping delays, and the occasional surprise. This is not just operational caution. It ensures the opportunity you have for your donors to respond with their financial support arrives on time.

40. Design something the post office can deliver

A beautiful package still has to be folded, sealed, automated, and delivered. Talk with your printer or mail shop before you finalize dimensions, paper, tabs, windows, aspect ratios, and address placement. Keep postal clear zones open, verify reply envelopes, permits, and indicia, and fund business-reply or postage accounts well before the drop. Build a physical mockup to see how the inserts sit and whether the envelope behaves as expected. This conversation matters even more when the creative includes an unusual format or tactile element.

41. Proof every detail

Proof what every donor sees and what changes from donor to donor. Check copy, design, color, phone numbers, dates, URLs, QR codes, reply devices, and consistency across components. Then test names, salutations, ask amounts, gift history, source codes, householding, and segment-specific copy across a set of representative records, including the odd cases. Scan QR codes from a printed proof, not just a screen, and complete the action on the landing page. A donor should never be the person who finds the mistake.

42. Personalize with a purpose

Production technology can do much more than insert a first name. You may be able to use recent giving, a suggested amount, program interest, lapsed status, or a tailored message. Use the details that help the donor feel known and make the next step easier. Personalization should help build a relationship and support the offer; not call attention to how much data you have.

43. Save on postage without losing the moment

Postal savings can improve net revenue, but the cheapest route is not a bargain if the appeal arrives too late. Work with mail partners on presorting, address hygiene and NCOA processing, commingling, destination entry, and drop shipping. Weigh the savings against added handling time and delivery risk and protect the in-home window that supports the rest of the campaign.

SECTION 8

Close the Loop with Service and Stewardship

Thoughtful new donor communications and a disciplined January follow-up turn seasonal generosity into stronger long-term relationships.

44. Set a 24-48-hour gift-processing promise

Agree on a clear standard for entering gifts, resolving exceptions, and sending acknowledgments during peak volume. Online confirmation should be immediate. Mailed and more complex gifts should be processed as quickly as staffing and controls allow, with a 24-48-hour goal for routine items. Prompt, accurate processing and acknowledgment give donors confidence that their gift arrived and mattered.

IMPORTANT

Preapprove receipt templates for cash, noncash, tribute, and in-kind gifts so staff are not writing them under pressure.

45. Train the extra hands before you need them

Temporary staff and volunteers can be a tremendous help when they know what to do and how to do it. Train them on the systems, naming conventions, scripts, how to escalate critical issues to appropriate staff, and quality checks they will use. Give them appropriate tasks, clear supervision, and a place to ask questions. Cross train backups on the most critical work so one absence does not stop gift processing.

46. Give callers a framework, not a script

Prepare a short, natural framework for board members, staff, and volunteers so thank-you calls can begin as soon as gifts are processed. The purpose is simple: thank the donor, connect the gift to impact, and listen, not make another ask. Provide the donor's name, gift context, preferred number, pronunciation notes, a few approved impact statements, and a voicemail option. Ask callers to use their own words.

When thanking new recurring donors, acknowledge the significance of their ongoing commitment. A monthly gift is more than a transaction—it represents a decision to partner with your mission throughout the year.

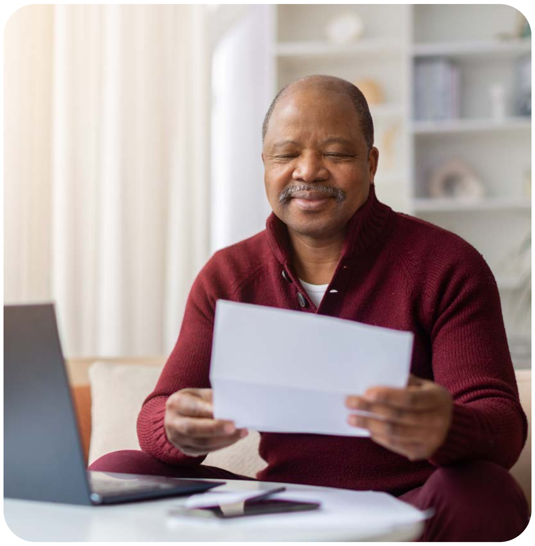
IMPORTANT

Prioritize first-time, one-time, and monthly donors, as well as major, upgraded, and reactivated donors. A thoughtful three-minute call can feel more personal than any automated receipt.

47. Prepare small surprises before the rush

Build new one-time donor and new recurring donor welcome kits before October so they can go out quickly when gifts arrive. Think about simple surprise-and-delight moments that feel true to your mission: a short video from a staff member or someone whose life was changed, a handwritten note, or a postcard with an image that tells a story.

48. Pair fast digital thanks with something tangible



An immediate digital confirmation answers the donor's first question: Did my gift go through? A mailed receipt letter, postcard, or handwritten note answers another: Did anyone notice? Use both. The digital touch provides speed; the physical touch gives gratitude a longer life and creates another meaningful moment with the donor.

IMPORTANT

Use the printed thank-you letter to deepen gratitude. Douglas Shaw & Associates client data suggests that approximately 7% of annual revenue comes from gifts made in response to printed thank-you letters.

49. Carry the relationship into January

Do not let January be the month new donors disappear into the general file. Schedule an impact update, Donor Services follow-up, and one carefully timed next invitation. Make sure the sequence feels like a welcome, not a barrage of asks. Then hold a candid debrief: What worked? What slowed the team down? What did donors say? Capture the answers in a short campaign report so next year's team can build on what you learned.

50. Your Turn: What Would You Add?

We've shared 49 ideas from fundraisers, strategists, creatives, analysts, digital specialists, client-service professionals, and production pros from Douglas Shaw & Associates departments. But no year-end campaign ever goes exactly by the book.

Maybe your best lesson came from a successful test, a last-minute save, or the December 31 surprise that now lives forever in your team's group chat. So, what would you add as tip #50?

Send it our way at **info@douglasshaw.com.**

The best year-end strategies get stronger when fundraisers compare notes—and sometimes the most useful advice begins with, "Well, here's what happened to us last year..."

Conclusion

We hope this 360-degree look at year-end fundraising gives you clarity and confidence before the season gets busy, so the work you do now has room to pay off in December.

You do not need to use every tactic at the same scale. Start with the essentials, choose what your team can execute well, and add complexity when it serves donors and can be measured. The goal is not to make year-end busier, but to make it more intentional—creating a campaign that touches donors' hearts, helps your organization finish strong, and inspires donors to stay connected with your mission in the year ahead.

For more than three decades, Douglas Shaw & Associates has helped nonprofits like yours turn ideas like these into billions of dollars to positively change people's lives for the better. When you need a partner who brings experience, collaboration, and a deep understanding of donors, we would be glad to work alongside you.

Interested in discovering where exactly to start your year-end plans? Contact us today at **info@douglasshaw.com**.

Let us know
if we can help!

DOUGLAS SHAW
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FUNDRAISING COUNSEL

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Year-End Success Quick Tips

12 essentials for a stronger year-end fundraising campaign

1. **Start early—not in November.** Build your strategy, calendar, and marketing timeline months before year-end arrives.

2. **Know who you're talking to.** Review giving history, identify lapsed and high-value donors, and tailor communications accordingly.

3. **Lead with gratitude.** Thank donors before asking again—and be ready to thank them immediately after every gift.

4. **Give donors a compelling reason to act now.** Use matching gifts, deadlines, and timely messaging to create urgency.

5. **Make every message feel personal.** Segment audiences, personalize your asks, and include handwritten or human touches whenever possible.

6. **Create one consistent campaign.** Ensure your mail, email, website, social media, and advertising all reinforce the same story and offer.

7. **Remove any and every barrier to giving.** Test your donation form, optimize for mobile, simplify your website, and offer multiple payment options.

8. **Don't rely on one appeal—or one channel.** Reinforce your campaign with follow-ups, increased email frequency, text, phone, and coordinated digital touchpoints.

9. **Measure—and adjust in real time.** Monitor campaign performance throughout December and shift resources toward what's working best.

10. **Prepare your team for success.** Ensure staffing, gift processing, approvals, and donor service plans are ready before the busiest weeks arrive.

11. **Proof everything before it launches.** Check every link, personalization field, QR code, reply device, and production detail before it reaches donors.

12. **Remember: Stewardship doesn't end on December 31.** A great donor experience today lays the foundation for next year's success.