

EOY FUNDRAISING SEPTEMBER QUICK REFERENCE CHECKLIST



Review last year's EOY campaign

Pull reports from last year that track data like dollars raised, number of donors, number of donations, number of new donors, number of repeat donors, and average gift size. This will drive your goal setting for this year.

Also, look for successes and failures, so you can do more of what worked, and discontinue what didn't. And, consider what has changed at your organization this year, and adapt accordingly.



Establish your goals

Your review of last year's EOY campaign will be your starting point. Set new stretch goals based on last year's numbers.



Develop your key personas

Donor personas are central to successful fundraising, because they can help you understand who your donors are, what they expect and value, and what ties them to your mission. Once you've developed your personas, you can segment your database and target appeals that are meaningful and relevant.



Brainstorm campaign concepts

What is your campaign theme, title, overall story? What current events can you include in the story to show the timeliness of your need? Are there individuals whose stories you can share with potential donors to more clearly illustrate the need?



Conduct a website audit

You'll want to work with your communications/marketing department to accomplish this. Also, ask for honest feedback on your website from volunteers, board members, family members, etc., then implement the suggestions with the most merit. You can then run these same audits again once you have your campaign set up and ready.

Ask your auditors/testers to:

- Donate
- Sign up for your email list
- Describe what you do
- Take other actions relevant to your site or campaign



Test your technology

Review your entire donor giving flow from email/mail, to landing page, to donation form, to thank you message, to follow-up. Be sure all the necessary information is recorded in the appropriate locations. Make any necessary changes/tweaks now.



Get your creative concept(s) reviewed and approved

Does your executive director and/or your board need to sign off? If so, complete that process now, before you get too far down the development road.



Begin collecting stories

You'll want to tell compelling stories during your fundraising campaign(s) about individuals your organization has served. Stories can inspire your supporters, help communicate exactly where donations are going, and show your passion for the cause. Identify those in your community to spotlight in these stories. Collect more than you think you need – you can always use them in social media, update emails, and other communications. And, don't forget to get photos to accompany your stories.



Build an integrated editorial calendar

Your end-of-year campaign is anything but a one-and-done undertaking. Diversifying your appeals can help maximize revenue, and this requires a coordinated campaign with multiple touch points via various channels.

For example, in November:

- Thank you for your continued support and update on the year email or direct mail (no ask)
- Several #GivingTuesday emails
- EOY campaign theme introduction email or direct mail (with a story)

Then in December:

- Five to seven emails over the course of the last month (with more stories, of course)
- Three emails in the final three days of the year
- Consider making personal phone calls to your loyal donors
- Work in as much social media as possible to extend the buzz
- Don't forget to reinforce your message on your website
- Follow up with #GivingTuesday donors

This is more communications than you're probably comfortable with, but there's a lot of noise and distraction this time of year, so you need to remind and motivate your donors.



Recruit board members to help with your EOY efforts

Help your board members be better fundraisers. This doesn't mean they have to do the asking. Instead, they can identify potential donors, make introductions, tell the story about why they're on the board, and share campaign stories with others.

For more end-of-year fundraising resources, including the full **EOY Fundraising Plan**, visit Abila.com/EOY.

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