

# Year-end fundraising cheat sheet

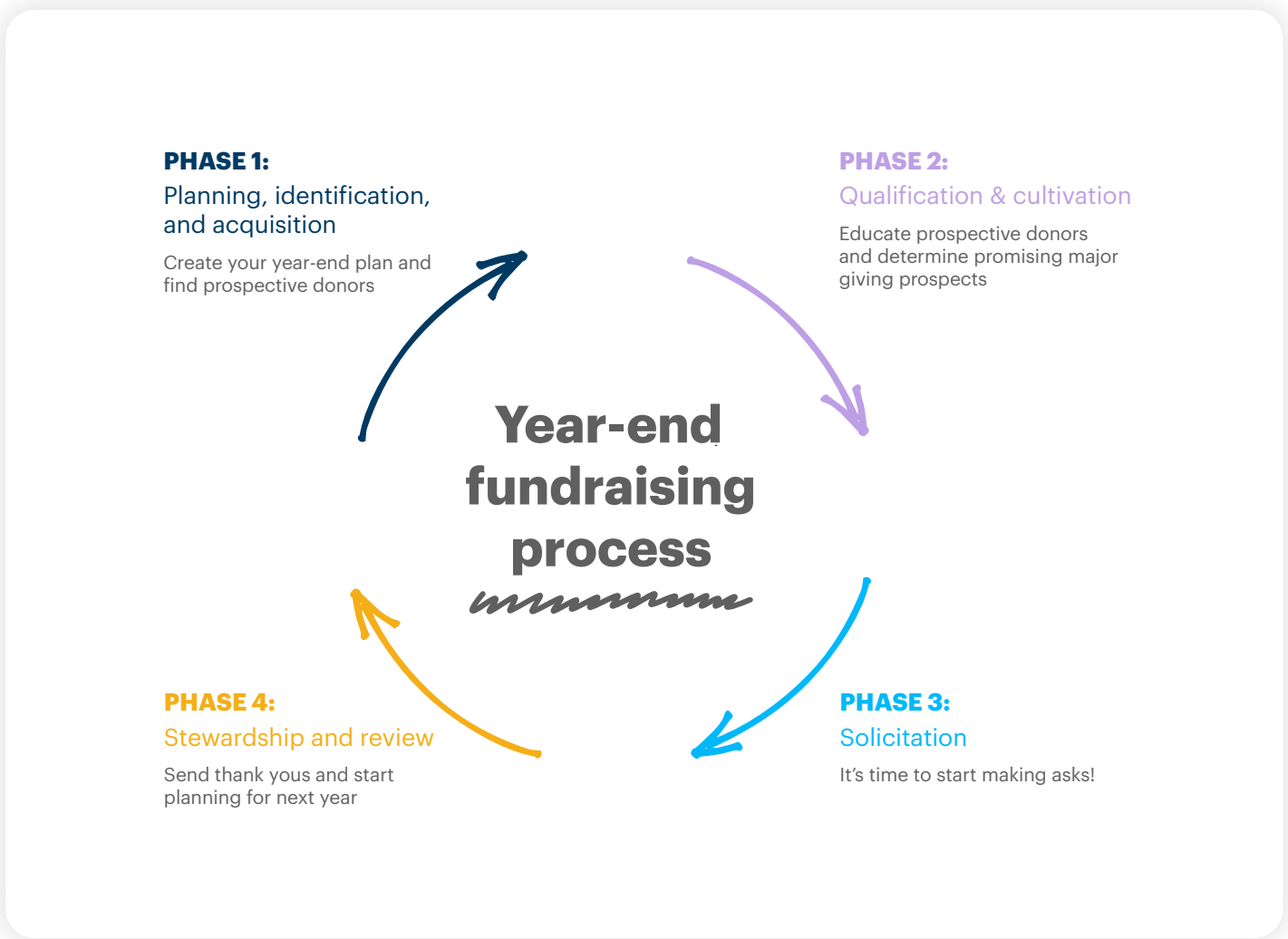


# INTRODUCTION



DonorPerfect is here to help you achieve your year-end fundraising goals! We've taken feedback from clients, nonprofit professionals, and industry thought leaders to create a comprehensive list of tasks. We hope it will help alleviate the stress from your busiest giving season of the year, and spark some ideas that will boost your fundraising results.

We know every nonprofit has different needs, and many fundraisers are a team of one! Don't feel like you must complete every task on the list. We've bolded the most important tasks for each phase. For everything else, consider your team's size, structure, and bandwidth, and celebrate everything and anything you're able to accomplish as "above and beyond."



# PHASE 1: PLANNING, IDENTIFICATION, AND ACQUISITION

In this phase, you'll create your year-end plan and find prospective donors who have both the capacity and inclination needed to support your cause

Task:	Assigned to:	Due date:
<p><b>Set year-end fundraising goals</b> *</p> <ul style="list-style-type: none"> <li>• Run <a href="#">reports</a> to analyze last year's end-of-year giving</li> <li>• Schedule a goal-setting and planning meeting with all staff involved in year-end fundraising</li> <li>• Check out <a href="#">this blog post</a> for more ideas</li> </ul>		
<p><b><u>Prepare your data</u></b> *</p> <ul style="list-style-type: none"> <li>• <a href="#">Get a HealthCheck</a> for your database</li> <li>• Merge <a href="#">duplicates</a></li> <li>• Make sure supporters' <a href="#">contact information is up-to-date</a></li> <li>• Learn how to <a href="#">create mailing lists</a></li> <li>• <a href="#">Create new codes</a> and <a href="#">clean out old codes</a> to track results</li> </ul>		
<p><b>Plan out marketing and communications strategy, using a calendar. Here's some ideas to get you started:</b> *</p> <ul style="list-style-type: none"> <li>• <a href="#">Direct mail</a> and <a href="#">Email</a></li> <li>• <a href="#">Social media</a> (posts and ads)</li> <li>• Phone-a-thons and <a href="#">texting campaigns</a></li> <li>• Local ad buys (radio, TV)</li> <li>• Print, billboards, and banners</li> <li>• <a href="#">Events (including virtual/hybrid)</a></li> <li>• <a href="#">Crowdfunding</a></li> <li>• <a href="#">Video</a></li> </ul>		

Task:	Assigned to:	Due date:
<p><b>Learn from current donors to find new ones</b></p> <ul style="list-style-type: none"> <li>Surveys, virtual town halls, and other communications can help you learn how your donors found out about you and what inspires them to support you</li> </ul>		
<p><b>Use your data to discover strong prospects</b></p> <ul style="list-style-type: none"> <li>Use your community, marketing lists, and <a href="#">wealth screening tools</a> to find new potential donors</li> </ul>		
<p><b>Explore opportunities for matching gifts</b></p> <ul style="list-style-type: none"> <li>Create a list of prospects who would enjoy inspiring others with their generosity - start with your board!</li> </ul>		
<p><b>Reduce, reuse, and recycle</b></p> <ul style="list-style-type: none"> <li>What can you recycle from previous years or other successful solicitations?</li> <li>What didn't work last year so you can avoid repeating any pitfalls?</li> </ul>		



**Major timesaver: Start your content calendar with AI!**




Here are some ideas for how to prompt your generative AI tool...

- Ask your AI tool to generate a sample content calendar for the month of December that includes emails and social media posts leading up to New Year's Eve.
- Provide context about your year-end appeal, and ask your tool to use emotional language to inspire donors to join in on the holiday spirit of giving.
- Tell your tool how many emails you plan to send and how many times you plan to post on social media throughout the month so it can suggest send dates.
- Ask for each content piece to be more urgent than the last in the series, stressing that time is running out to make tax-deductible donations.

**Never used generative AI before?** Learn how with our free guide, [AI for Nonprofits!](#)

# PHASE 2: QUALIFICATION & CULTIVATION

In this phase, you'll educate prospective donors on your mission and get them excited about your cause. You'll also determine who your most promising major giving prospects are, and get a head start on your direct mail appeal.

Task:	Assigned to:	Due date:
<p><b>Execute on your marketing and communications strategy, and pay special attention to donor cultivation activities:</b> </p> <ul style="list-style-type: none"><li>• Newsletters</li><li>• Behind-the-scenes tours</li><li>• 1x1 meetings with major giving prospects</li><li>• Social media</li><li>• Events (including virtual/hybrid)</li></ul>		
<p><b>Select a printing and mail vendor (if using) and create your direct mail appeal</b> </p> <ul style="list-style-type: none"><li>• Draft your letter</li><li>• Create your mailing list</li><li>• If you're working with a vendor, start in September. If you're printing yourself, try to get letters out the door by November 1.</li></ul>		
<p><b>Prepare your <a href="#">online donation forms</a></b> </p> <ul style="list-style-type: none"><li>• Pick an eye-catching banner image</li><li>• Make it user-friendly and quick to complete</li><li>• Add an option for <a href="#">monthly giving</a></li></ul>		



Task:	Assigned to:	Due date:
<p><b>Narrow down your list of major giving prospects</b></p> <ul style="list-style-type: none"> <li>Learn more about your potential donors               <ul style="list-style-type: none"> <li><a href="#">Prospect research tools</a> and general internet searches both work</li> </ul> </li> <li>Create a manageable list of prospects you'll be able to connect with, starting with those who are most passionate about your cause</li> <li>Start setting up 1x1 meetings or small groups with major giving prospects</li> </ul>		
<p><b>Secure matching gifts</b></p>		
<p><b>Plan for <a href="#">Giving Tuesday</a> or other day of giving</b></p>		
<p><b>Create a <a href="#">welcome series</a> for new donors</b></p> <ul style="list-style-type: none"> <li>Emails</li> <li>Sign up links to newsletters</li> <li>Ways to stay in touch</li> </ul>		



### Major timesaver: Create a new donor welcome series with AI!

Here are some ideas for how to prompt your generative AI tool...

- Ask your AI tool to generate an email template series welcoming new donors to your nonprofit community. Tell it how many emails you want to include in the series, and how each one might differ from the others. Maybe Email 1 thanks them for their initial gift and provides more information about your mission; Email 2 tells them about upcoming events; and Email 3 invites them to join your monthly giving program.
- Provide context about your mission, events, and projects for the tool to use.
- Ask it to include placeholders in the template series - for [Donor name] and [Gift amount] - so you can use giving data from your fundraising system to personalize the emails before sending. Be sure to include placeholders for links, too!

**Never used generative AI before?** Learn how with our free guide, [AI for Nonprofits!](#)

# PHASE 3: SOLICITATION

It's time to start making asks! Now that your donors feel involved and connected to your organization, your donors will see your asks as well-timed and expected.

Task:	Assigned to:	Due date:
<p><b>Execute on your marketing and communications strategy, and pay special attention to solicitations:</b> ✓</p> <ul style="list-style-type: none"><li>• Send fundraising letters (try to hit homes by early-to-mid November)</li><li>• Email solicitations</li><li>• Calls to prospects who haven't yet made their annual gift</li><li>• Social media campaigns</li></ul>		
<p><b>Brush up on <a href="#">year-end tax tips</a> and determine what types of gifts you're able and willing to accept. These may include:</b> ✓</p> <ul style="list-style-type: none"><li>• Cash</li><li>• Checks</li><li>• Credit card online or by phone</li><li>• Stock</li><li>• Cryptocurrencies</li><li>• In kind</li><li>• Legacy/planned gifts</li></ul>		
<p><b>Make sure all users are comfortable with <a href="#">processing and entering gifts</a> into DonorPerfect</b> ✓</p>		
<p><b>Secure matching gift pledge(s)</b></p>		





## Major timesaver: Repurpose old appeal content with AI!


Here are some ideas for how to prompt your generative AI tool...

- Ask your AI tool to generate an email template series welcoming new donors to your nonprofit community. Tell it how many emails you want to include in the series, and how each one might differ from the others. Maybe Email 1 thanks them for their initial gift and provides more information about your mission; Email 2 tells them about upcoming events; and Email 3 invites them to join your monthly giving program.
- Provide context about your mission, events, and projects for the tool to use.
- Ask it to include placeholders in the template series - for [Donor name] and [Gift amount] - so you can use giving data from your fundraising system to personalize the emails before sending. Be sure to include placeholders for links, too!


**Never used generative AI before?** Learn how with our free guide, [AI for Nonprofits!](#)

## PHASE 4: STEWARDSHIP AND REVIEW

Thank your donors, staff, and volunteers, and get a head start on planning for next year while this year's results are fresh.

Task:	Assigned to:	Due date:
<p><b>Thank your donors!</b> </p> <ul style="list-style-type: none"><li>• Thank you letters - <a href="#">mail merge instructions can be found here</a></li><li>• Host a call-a-thon where staff and volunteers personally call all year-end donors after the holidays</li><li>• Send out a <a href="#">thank you video</a> from your staff, beneficiaries (if appropriate), or passionate supporters</li><li>• Send handwritten thank you cards or personalized videos to a select group of donors</li><li>• Share how you plan to use the funds you've raised from your year-end campaign</li></ul>		



Task:	Assigned to:	Due date:
<b>Generate and send tax receipts</b>  <ul style="list-style-type: none"> <li>• <a href="#">A step-by-step guide can be found here</a></li> </ul>		
<b>Schedule a debrief to review what went well and what didn't while it's all still fresh</b>		
<b>Celebrate yourself and your team for a job well done!</b>	Your whole team!	Every day



### Major timesaver: Brainstorm thank-you scripts with AI!

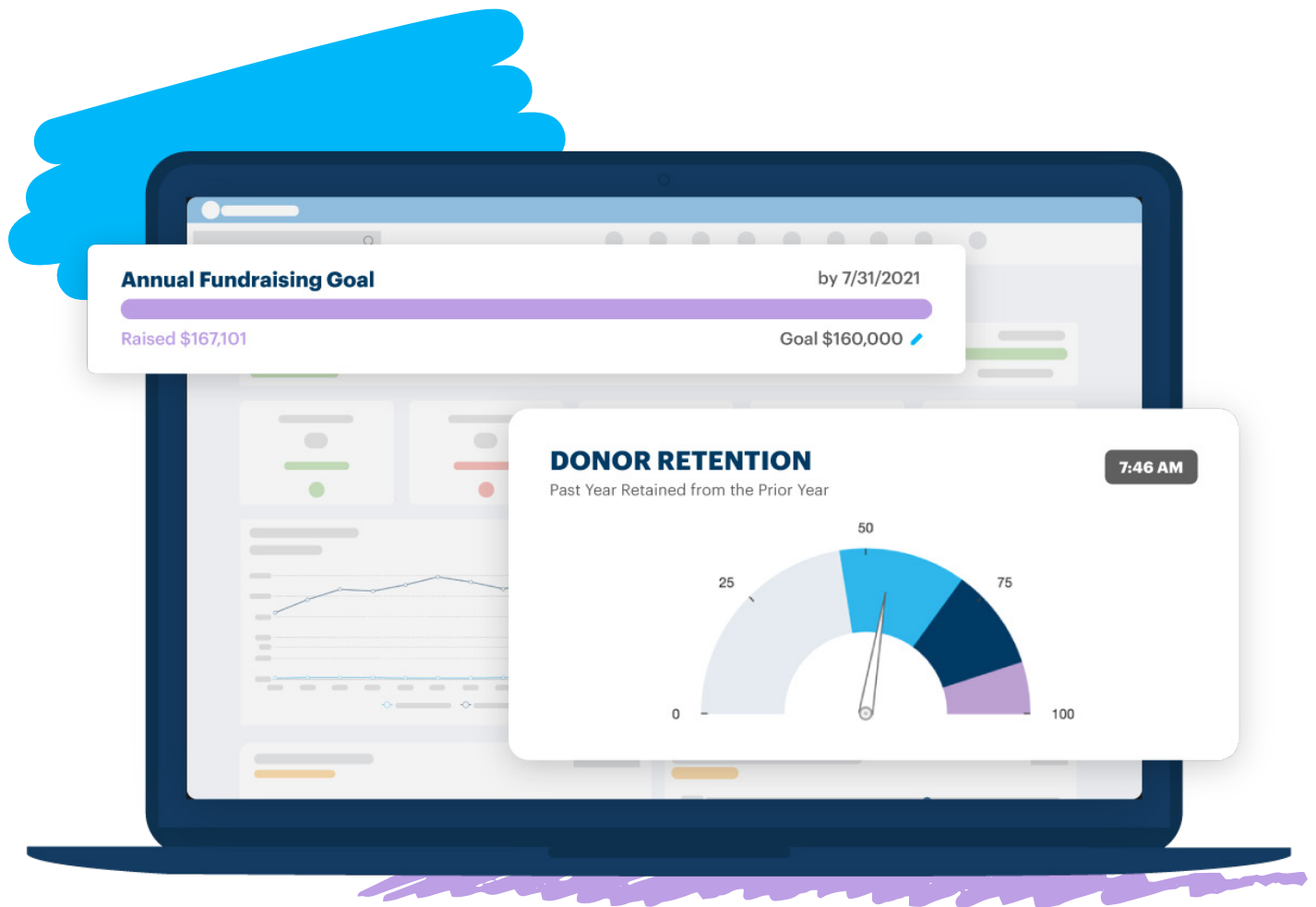
Here are some ideas for how to prompt your generative AI tool...

- Try asking your tool to rewrite last year's appeal to resonate specifically with millennial donors who prefer a quick, digital donation experience so you can reuse that content for a social media post or text message.
- If last year's appeal letter content is too long for an email, ask AI to shorten it to a certain word/character count. If it's too confusing, ask AI to rewrite it for clarity.
- You can even ask your tool to rewrite direct mail pieces to include instructions for scanning a QR code that leads to your online donation page.

**Never used generative AI before?** Learn how with our free guide, [AI for Nonprofits!](#)



# WE'RE ALWAYS HERE TO HELP



DonorPerfect is here to support you through all of your fundraising efforts, through year-end and beyond. For walk-throughs and more specific instructions on how your DonorPerfect system can help you make the most of the year-end giving season, you're always welcome to [call or chat with our support team](#).

**CONTACT DONORPERFECT**

📞 [1 800.220.8111](tel:18002208111)

🌐 [www.donorperfect.com/fundraising-software/demos/](http://www.donorperfect.com/fundraising-software/demos/)