



# Sage Nonprofit Solutions

eBook: Year-End Campaign Planning Guide

New for 2012!

sage

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## Summary

This eBook is intended to share best practices, resources, and strategies to improve your End of Year fundraising results. Along with our webcast, we provide everything you need to build a successful End of Year fundraising campaign launch it quickly.

You can find out more about the webcasts and the additional information they reference at the following links:

<http://www.slideshare.net/sagenonprofit>

<http://community.sagenonprofit.com/category/article-category/webcasts/recorded-webcasts>

This document is divided into four sections to match your steps in the planning process.

### Introduction

We start by providing some background on End of Year campaigns. We begin with a brief discussion of exactly what an End of Year campaign entails and continue with why you need to launch your campaign today. This section concludes by highlighting some of the best practices we have seen used by successful organizations.

### End of Year Campaign Planning

The Campaign Planning section lays out a timeline and schedule of tasks to launch your campaign. This timeline is only a suggested plan to help you see how the various parts fit together. You should modify the timeline to fit your organization's calendar and needs. With focused effort, many groups are able to launch their campaign in less time than we have outlined here.

### Email Templates

The Email Templates included in this section are designed to give you ideas of how to structure your emails and help get you off the dreaded blank page. Again, these are only suggestions of what you can include in your campaign emails. It is much more important to have the communications utilizing your organization's voice than trying to hit all of the points listed in the samples.

### Sample Campaign

The Sample Campaign section includes a completed Campaign Planning Worksheet as well as written examples of each email in the series. Most are written using a fictional organization focused on childhood literacy. The sample Thank You is from a real organization and is included because it is such a great example of the practices we are discussing that we had to share it with you.

It is our hope that these examples will spark ideas for your own appeals. Again, see them only as a model and create campaign pieces in the voice you know will best speak to and connect with your donors.

# Introduction

## What is an End of Year Campaign?

An End of Year campaign may have many names, such as Year End Campaign or Holiday Campaign, but in the end they are all really the same thing. In its most basic form, they are simply campaigns run at the end of the year. For our purposes we will define an End of Year campaign as:

*A coordinated multi-appeal fundraising campaign that capitalizes on the end of year giving cycles that are part of a larger donor cultivation system.*

Let's look at some of the key ideas from this definition.

### **Coordinated**

An End of Year campaign, just like any successful fundraising campaign, must have a plan and that plan cannot be created in isolation. It should instead be coordinated across groups and departments in your organization as well as across your other campaigns, marketing channels, and obligations. An End of Year campaign should not be seen as a single fundraising event, but instead as a part of your larger effort to attract and cultivate your donor base.

### **Multi-appeal**

You can't expect to send out a single email and have donations come flooding into your organization. A successful campaign must have multiple touch points across a set series of time in order to interest and fully engage your supporters. This can be done through email alone, but ideally it should be coordinated into your overall marketing efforts, including direct mail, event fundraising, and personal contacts.

### **Giving Cycles**

For many individuals, the end of the calendar year is one of the most likely times for them to donate to and support the causes they respect as they close out their donations for that tax year. Simultaneously, the winter holidays often trigger thoughts of giving and altruism. Whatever the reason, the end of the year is a great time to reach out to your community and encourage those donations.

### **Part of Larger Donor Cultivation System**

Securing an end of year donation should not be the ultimate goal. The initial donation that a supporter makes should instead be viewed as the start of long and fruitful relationship for both parties. Since it is much easier to get a supporter to donate a second or third time, it is very important to build a strong follow-up and cultivation system for the individuals who give an End of Year donation.

*Best of luck  
in your  
End of Year  
campaigns!*



## Why You Need to Launch an End of Year Campaign

While the actual numbers may vary from organization to organization, nonprofits can raise from 40% to 70% of their total donations during the end of year cycle. Even more striking is that up to 22% of total donations can come in the last couple of days of the year.

These numbers emphasize what was discussed above — people are more likely to give during the end of year cycle. Whether their reasons for giving are due to the warmth of the holiday season or the desire to secure a tax break, it's vital for your organization to fully capitalize on the opportunity.

Many organizations struggle with what to say to their supporters and constituents in emails or marketing messages and are uncomfortable asking for money. The end of year gives you a great reason for reaching out and has a built in “ask.” Let them know what you did over the last year — both successes and challenges — as well as what you plan to do in the upcoming year or years. It's then very easy to add in the “ask” or request for support and an explanation that your organization will not be able to meet the goals you just discussed without their support!

Finally, an End of Year campaign is also a great opportunity to find and cultivate new donors. During the end-of-year giving cycle, many individuals are looking for new causes or organizations to support, or are more likely to be open to giving requests. You can also ask your current supporters to pass along your emails or messages to friends and family who might be interested in your cause as a holiday gift to your organization. This both taps into the spirit of giving that is alive during the winter holidays and gives people who are financially tight a way to keep supporting your organization.

## Tools of the Trade

While it's very easy to get caught up in the latest and greatest online tools and new social media platforms that seem to be coming out every month, you really only need four tools to run a solid and successful End of Year campaign online.

### **Place to Make Your Case – Website**

The first tool you need is a place to make your case; a website is the easiest, most flexible, and most cost efficient way to build this location. Your website does not need to be the most advanced or flashiest website around, but it does need to make a strong case for why folks should donate to your organization. The Best Practices section below, as well as the included email templates, give great ideas and tips on how to create this compelling message and case for giving.

### **Way to Take Money – Donation Form**

What's the point of reaching out to your supporters and driving them to your website if you don't have an easy way for them to support your cause once they are there? When creating your donation process it is vital to make the system as simple and easy to use as possible. A great way to do this is by using Sage Fundraising Online to build your donation and registration forms. Sage Fundraising Online has many features and benefits to help you raise more money online. You can find out more by visiting [www.sagefundraisingonline.com](http://www.sagefundraisingonline.com).

### **Way to Connect with Potential Donors – Email Marketing**

"If you build it, they will come" worked well in the movies but is not a good tactic in the real world. You can have the best website with the easiest donation process in the world; but if no one knows about it, you will not raise any money. While there are many ways to market and spread the word about your organization, including the shiny tools of social media and online video, basic email marketing is still the most successful method for most organizations when used well. This means, as we mentioned in the definition of an End of Year campaign, that you must utilize email as a "coordinated" and "multi-appeal" tool. The sections below, including Campaign Planning and the Email Templates, will help you build functional, effective emails.

### **Way to Track Results – Online Analytics**

Many organizations feel that they do not have the time or the resources needed to track, test, and measure their fundraising campaigns. However, if you want to see year-over-year increases in your fundraising campaign results, you have to know what works, and what does not work, with your supporters.

It is not enough to see the results for other organizations as each set of donors and situation is different. You don't want to know what works for the nonprofit across town – you want to know what works for your organization. To find this out, you need to test and measure how your supporters react and interact with your campaign messages. Luckily, this is now much easier to do with the help of online tools such as Google Analytics and your email marketing program.

Sage Fundraising Online has many features and benefits to help you raise more money online. You can find out more by visiting [www.sagefundraisingonline.com](http://www.sagefundraisingonline.com).



## Best Practices and Tips for End of Year Campaigns

We've been working with nonprofit organizations for years and during that time have seen some issues come up again and again. To keep you from having to reinvent the wheel, below are some tips and tricks that will help you create an effective End of Year campaign.

### **Prepare and Plan**

The old cliché “Fail to plan, plan to fail” is a cliché for a reason – it's true! It is vital to the success of your End of Year campaign that you take the time to properly plan. And this eBook will help you do exactly that. Using the included planning tools and email templates will put you well on your way to a more successful and profitable End of Year campaign.

However, it's also important to not over plan. A common mistake is to spend so much time planning, discussing, and getting ready to launch your campaign that it never actually gets launched. To avoid that trap, we suggest keeping the planning simple for now. That is why we have made the included tools and resources simple and straight forward and enough to get you off the blank page and moving in the right direction.

It is much more important to start where you are and launch your campaign, than it is to try and make everything perfect. Once you launch the campaign you will be able to try new ideas, test different aspects, and find out what really worked (as opposed to what you thought would work) to improve your future campaigns.

### **Easy Donation Process**

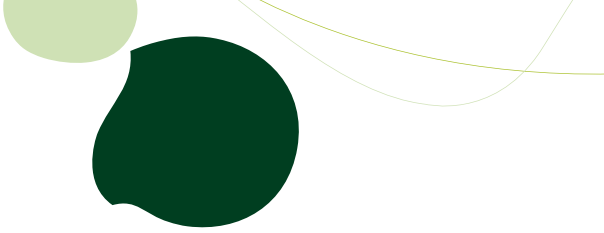
We've already covered the importance of having an easy and simple donation process, but this is so important that it cannot be stressed enough. If you make the donation process difficult on your supporters, they will give up and abandon the process, leaving you with nothing to show for your efforts. No one wants that!

Make the process as easy as possible. Don't make prospective donors hunt to find your donation form. They should be able to find it easily from any page on your website and; of course, every email from the campaign should link to it. Furthermore, don't create a lengthy donation process. You can always gather more information from your donors as part of the follow-up and donor cultivation process but you want to turn individuals into donors first.

If you're looking for an easy way to simplify your donation process, we encourage you to check out Sage Fundraising Online at [www.sagefundraisingonline.com](http://www.sagefundraisingonline.com). It efficiently takes care of the basics and also allows you to add a ton of advanced features, like peer-to-peer fundraising, to your fundraising campaigns,

### **Multiple Touch Points**

One of the biggest keys to a successful campaign is having multiple contacts with each prospective donor. You need to create multiple touch points for your supporters to they can get to know you, learn about the need your organization fills, and become more comfortable with you and your organization.



A common marketing principle is that it can take up to 7 “touches,” or points of contact, before a prospect will feel comfortable purchasing a product or service. The same rule of thumb applies to fundraising and soliciting donations. It is very unlikely that an individual will donate to your organization the first time they come across it. It takes time to develop a sense of trust and create a relationship. Give them that time so they can feel comfortable making a donation.

With this principle in mind, you want to make sure your campaigns include multiple touch points. This can be done by sending a series of emails but you should also be thinking about multiple “channels” of communication. This means thinking of all the ways you can reach your potential supporters – such as direct mail, email, events, advertisements, or press releases – and integrating those into your End of Year campaigns. You never know where you might find a new supporter or reengage with a lapsed donor.

### **Tell a Great Story**

Built into the worksheets and email templates, we have included the suggestion of telling a compelling story throughout your campaign. Humans are built to respond to stories, especially stories of individuals. Think of the most memorable movies and books you have enjoyed and you’ll feel the power of stories about individuals and their struggles. You want to harness that power to help prospective donors engage with your organization

Tell compelling stories during your fundraising campaign about individuals your organization has served and invite your potential supporters to follow along. They are a great way to inspire your supporters, show your passion for the cause, and increase the open rates on your emails. If the story is compelling, then folks will want to read your next email to find out what happens next!

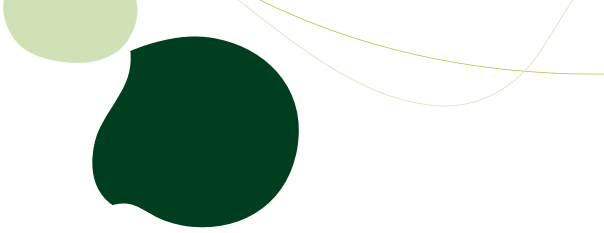
Finally, you can also increase the interest in your story, and your campaign, by making it timely. If you are able to tie the story to current events or related issues in your community or cause, it will resonate even more with your supporters.

### **Vivid Examples of How Donations Will be Used**

Your supporters want to know that the money they donate will make a difference and they want to know what that improvement will be. You can help them see exactly how their donations will help by letting them know, in as clear a manner as possible, what their dollars will purchase.

One way to do this is to have a clear goal for your campaign that directly relates to your cause and the End of Year campaign. Do not raise money to “support XYZ organization,” raise money to purchase new books, provide housing for low-income families, or provide free spay/neuter procedures to control feral cat populations. The more specific you can be about the goal and how this goal will benefit those affected, the more likely you are to get donations.





You can even take this a step further by letting donors know how much of a difference their donations will make. For example, a donation of \$50 will purchase 10 new books for the library, \$10,000 will renovate a home for a family of four, or \$200 will provide 4 spay/neuter procedures. Paint a vivid picture for prospective donors; this has been shown to increase average donations as folks want to provide as much help as possible. We have included some examples of this kind of language in the email templates as a reminder.

### **Follow Up**

Related to the notion of multiple touch points, following up goes further, moving your efforts into donor engagement and donor cultivation. As mentioned in the End of Year campaign definition, donor cultivation and follow-up are one of the main keys to a successful campaign. The first donation is just the beginning of a relationship and should be seen as triggering a formal follow-up campaign. The worst thing you can do is get a donation and then not contact the individual until the next year, when you ask them for money once again. Would you like it if someone did that to you? Of course not. Build a real relationship with your donors rather than only asking them for money.

There are many ways you can develop this relationship without taking each donor out to coffee. One way is to create a “Welcome Series” – a series of emails sent over time to new donors when they donate or simply sign up for your email list. This series of emails can be used to educate your supporters about what you do, how you do it, why it’s important, and so on. These can be emails that share stories about your staff or client success stories. Remember, the goal is to increase the number of touch points and to build trust among your supporters. These emails are an easy way to do both.

Another great way to follow up with your supporters is to use the power of “thank you.” Most folks are not thanked enough, so they will be very receptive to your messages of thanks. Most organizations already have a standard “thank you” letter that is sent to all donors, but why stop there? Consider sending them short thank you emails throughout the year. Explore both common and funky holidays, like Valentine’s Day or Pie Day, for excuses to say thanks. A comprehensive list is available at [http://www.statesymbolsusa.org/National\\_Symbols/American\\_Holidays.html](http://www.statesymbolsusa.org/National_Symbols/American_Holidays.html). Make sure to consider any holidays related to your organization’s mission.

You can also send donors updates on how the money raised during the End of Year campaign is being used, what successes are occurring, and how those successes would not be occurring without their support. You can also point out some of the challenges and the work that remains. Create a short video or handwritten note from staff, clients, or constituents to thank them for their support. These thank-you messages will keep donors connected to your organization as well as help them feel appreciated, which will make your job that much easier the next time you do ask for their support.



## End of Year Campaign Planning

### Campaign Overview

September	Brainstorm, research, and schedule your campaign
October	Design, write, and prepare communications
November	Finalize all communications and test the campaign
December	Launch

#### September – Brainstorm, research, and schedule your campaign

- Review last year's campaign
  - What worked? What did not work?
  - What do the stats tell you?
  - What has changed for your organization in the past year?
- What are your organization's goals this year?
- Complete End of Year Campaign Planning Sheet

## October – Design, write, and prepare communications

- Draft the email series
  - Utilize the timeline and templates/ideas below
- Design the look and feel of your campaign
  - Create email templates
  - Load content and graphics into your email system

## November – Finalize all communications and test your campaign

- Have multiple staff members review all campaign content
  - Ask them to double-check emails, landing pages, donation forms, etc.
- Have the campaign approved by appropriate staff members
- Run multiple tests of the entire campaign
  - Run a few tests yourself pretending to be a donor
  - Ask volunteers or others less familiar with the campaign to walk through the campaign: Email >> Landing page >> Donation >> Thank You email
  - Edit or fix any issues
- Send warm-up appeal email/letter. Possible materials include updates on the year or that month's newsletter. (optional)
  - Send out at least one week before the first appeal

## December – Launch Campaign

- Appeal 1 – Campaign Kickoff – 1st week in December
  - Sets up campaign and tone
- eCard – For acknowledgement of support – 3rd week in December
  - If including a holiday greeting, send before the period most applicable to your donors

### Schedule for 2012 Winter Holidays

Hanukkah	Saturday, Dec. 8 – Sunday, Dec. 16
Winter Solstice	Friday, Dec. 21
Christmas	Tuesday, Dec. 25
Kwanzaa	Wednesday, Dec. 26 – Tuesday, Jan. 1

- This eCard is a gentle reminder about the campaign and helps keep your organization “top of mind”
- Can send separate cards for donors and non-donors
- Appeal 2 – Follow Up/Reminder – Dec. 29 or 30
  - Last chance to give in 2012



# End of Year Campaign Planning Sheet

1) What is the most serious issue/need your organization is currently addressing?

2) How will the money raised during the End of Year Campaign be used to tackle that issue/need?

*The answers to these first two questions should guide your answers to the questions below.*

3) What is the overall story of your campaign?

a) What current events can you include in the story to show that your issue/need is timely?

b) Is there an individual whose story you can share with potential donors to illustrate the issue/need?

4) What is your campaign theme?

a) What are related subject lines you can use for campaign emails?

5) What is your campaign title?

# Email Templates

## Appeal 1 - Campaign Kickoff

*(Sent 1st week of December)*

Subject: \_\_\_\_\_

Dear [Prospect's First Name],

[Short description of the issue/need your organization is currently working to address. This is the issue identified in the Campaign Planning Sheet. Make sure to make a compelling case for need and include the story you will be using throughout the campaign.]

[Simple Call-to-Action: Include a link to the donation form on your organization's website.]

[Short paragraph describing the history and/or background of the issue your organization is addressing. Make sure to add a few sentences to make the issue timely and relevant. This paragraph should continue the story and engage the reader with further details.]

[Provide a description of how donations will be used to address the issue raised above. The more detailed and specific you can be, the better story you will be able to create. Remember to continue the story and focus on examples of individuals and how donations will help those individuals and others like them.]

[Description of what your organization can accomplish with specific dollar amounts.]

- [have amounts increase over the bullets] \$X will
- \$XX pays for
- \$XXX supplies 3 children with

Thank you in advance for your support!

[Signature]



eCard - For Acknowledgement of Support  
*(Sent around 3<sup>rd</sup> week of December, depending on your needs)*

**For holiday greetings, send during the period most applicable to your donors.**

**Schedule for 2012 Winter Holidays**

Hanukkah	Saturday, Dec. 8 – Sunday, Dec. 16
Winter Solstice	Friday, Dec. 21
Christmas	Tuesday, Dec. 25
Kwanzaa	Wednesday, Dec. 26 – Tuesday, Jan. 1

[General thank you for support during the year and/or holiday greetings.]

[Inserting applicable images are a great idea for an eCard. You may choose a holiday image or something more relevant to the campaign or story.]

[Short message reflecting on the year, thanking them for their support, and your hopes for them over the New Year.]

[Link to Donate]

## Appeal 2 - Follow Up/Reminder

*(Sent on December 29<sup>th</sup> or 30<sup>th</sup>)*

Subject: \_\_\_\_\_

Dear [Prospect's First Name],

Today is your last opportunity to [brief description of the campaign and impact those donations will have on those effected]. Remember, any gift you give today is still tax-deductible for 2012.

[Continue the campaign story. If this is the final email of the campaign, then you may want to wrap up the story and talk about others who could benefit from the same assistance, or leave the story open ended and discuss how their donations can help create a happy ending.]

[Call to action – Asking them to give one last gift this year. Link to donation page]

[Brief paragraph discussing your organizations accomplishments during the year. A bulleted list of some of those accomplishments works well and provides another example of what the donors' support can help achieve.]

[Brief paragraph discussing the plans for the New Year and how their support will help make that happen.]

[Call to action – Asking them to give one last gift this year.]

[Closing sentence about the New Year.]

[Signature Name]

[Link to Donate]



## Sample Campaign

### Example - End of Year Campaign Planning Sheet

*(Fictional Organization - Books Change Lives)*

1) What is the most serious issue/need your organization is currently addressing?

Low literacy rates in area children.

2) How will the money raised during the End of Year Campaign be used to tackle that issue/need?

Funds will be used to buy engaging books for young children, which will be given to low income families.

*The answers to these first two questions should guide your answers to the questions below.*

3) What is the overall story of your campaign?

Children who have easy access to books, especially in their homes, are much more likely to become strong readers.

a) What current events can you include in the story to show that your issue/need is timely?

Test scores from area schools were recently released.

b) Is there an individual whose story you can share with potential donors to illustrate the issue/need?

Zachary and his family received several books last year. Both Zachary and his younger brother are now doing better in school, according to Mom. Mom also sought out programs at public library after seeing her sons' enjoyment of books.

4) What is your campaign theme?

Books give children keys to a positive future.

a) What are related subject lines you can use for campaign emails?

Change the Future—Help Kids Turn the Page on Illiteracy

5) What is your campaign title?

Giving Books, Growing Readers, Guiding the Future



## Example Appeal 1 - Campaign Kickoff

*(Fictional Organization - Books Change Lives)*

Subject: Giving Books, Growing Readers

Dear [Prospect's First Name],

Opportunities for low-income children to gain access to books have dwindled over the past few years. Continued tough economic times have led to reduced hours or closure of many public and school libraries. Due to limited funds, 80 percent of preschool and after school programs serving low-income children do not have any children's books. And 61 percent of low-income families do not have any books for children in their homes. For many children, books are simply not part of their daily lives.

To ensure that every child has the chance to read, Books Change Lives (BCL) is launching a Holiday Book Drive to help place books in the hands of low-income children. The availability of reading materials in the home is a strong predictor of academic achievement in children—stronger even than socioeconomic status. However, with 42 percent of children growing up in families that lack the income to cover basic needs, such as rent, food, child care, and transportation, purchasing books is beyond the reach of many families.

As you might guess from our name, Books Change Lives believes that books have the ability to transform the lives of children for the better and that all children, regardless of their family's income level, should have access to books.

And you can help. The BCL Holiday Book Drive will be collecting both book and monetary donations, which will then be used to purchase books through special low-cost publisher programs. You can help by donating books or money. You can also help by spreading the word and telling your friends and co-workers about the BCL Holiday Book Drive.

A little can go a long way—a donation of just \$3 will provide a child a classic book such as *Where the Wild Things Are* while a donation of \$75 will provide an entire classroom of children with a book of their own.

Imagine children at home for the holidays curled up with their very first book. Think about where a love for reading can take them. Can you think of a better holiday present?

Thank you for your time and your support.

[Signature]

## Example eCard - Acknowledgement

(Fictional Organization - Books Change Lives)

***“I can no other answer make, but, thanks, and thanks.”*** - William Shakespeare

As 2012 draws to a close, we have been reflecting on the impact you and other Books Change Lives donors have made this year. Thanks to your generosity, children across Central Texas now have books of their very own and families have been connected with literacy programs in their neighborhoods. The delighted smiles shown below happened because of your thoughtfulness. Thank you!

[Include photos from book donation with captions identifying donation location.]

[Link to Donate]

## Example Appeal 2 - Follow Up/Reminder

*(Fictional Organization - Books Change Lives)*

Subject: Please support Giving Books, Growing Readers

Dear [Prospect's First Name],

Today is your last opportunity to provide books to low-income children through the Books Change Lives' (BCL) Holiday Book Drive. Remember, any gift you give today is still tax deductible in 2012.

This year Books Change Lives distributed books to over 300 low-income children, none of whom had ever owned a book before. At the distribution events, BCL partnered with literacy groups and connected families to neighborhood programs and services to help the children's love for reading grow even stronger.

In the upcoming year, Books Change Lives has already planned to increase the number of distribution events by 20 percent. With our current partners, BCL will also host two Family Festivals to help caregivers learn how to weave reading into their lives and to expose children to new books. In addition, we have high hopes for a fledgling partnership with the local jail, where incarcerated parents have already begun reading to their children during visits.

We're very excited about our plans for 2013 but first want to make sure that 2012 has a happy ending. Please take a moment to support the BCL Holiday Book Drive in whatever way is best for you. Gifts of books or money are greatly appreciated, as are efforts to spread the word.

Thank you for your support and all the best to you and yours in the New Year,

[Signature]

[Link to Donate]

[Link to Tell a Friend]

## Example Thank You/Follow Up Card

While this example was not an email, it is a great example of a thank you/follow up communication and could easily be turned into an email. The card does a great job of thanking the donor for their support as well as tying their donation back to actual individuals who benefited from the gift.

You can view the pdf version of the card at this link, or see screenshots of the card below:

[http://supportingadvancement.com/samples/thank\\_you/mauer\\_thank\\_you\\_card.pdf](http://supportingadvancement.com/samples/thank_you/mauer_thank_you_card.pdf)

### Front of Card:



### Back of Card:





## **Sage Nonprofit Solutions**

10800 Pecan Park Blvd.

Suite 400

Austin, TX 78750

[www.Na.sage.com/sage-nonprofit-solutions](http://www.Na.sage.com/sage-nonprofit-solutions)