



THE COMPLETE GUIDE TO YEAR-END FUNDRAISING 2023



HOW TO EFFECTIVELY PLAN & LAUNCH YOUR
NONPROFIT'S YEAR-END CAMPAIGN

Table of Contents

- Introduction
- Individualizing Your Strategy
- Year-End Building Blocks & SMART Goals
- 7 Tips to Surpass Goal and Finish Strong
- Most Impactful Marketing Channels
- Year-End Campaign Timeline
- Wrapping Up

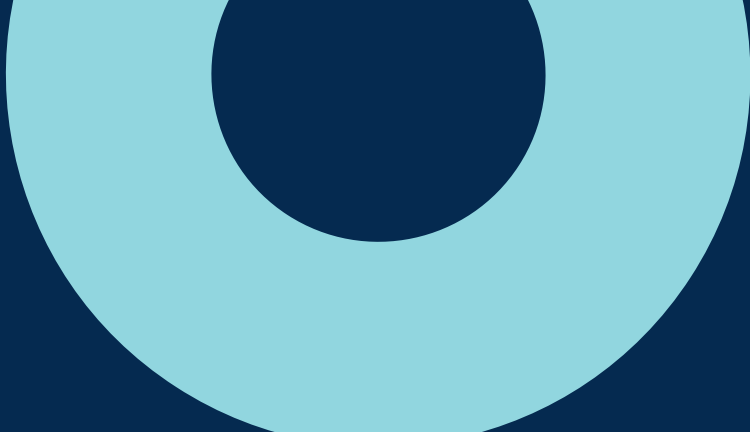


HOW TO USE THIS GUIDE

To use and edit this version of the guide, select File > Make a Copy

Or, do it the good ol fashioned way and print it out to fill in. File > Print





“If you want the end result, focus on the future. If you want to stay stuck where you are, keep focusing on the past.”

- Tim Grover

Introduction

What does your organization struggle with when it comes to year-end fundraising? Is it hard to stand out with quality creative and a [compelling campaign story](#)? Do you have trouble [acquiring new donors](#)? The answers to these questions should influence your strategy for year-end fundraising, help decide which marketing tools would be best for your organization, and provide you with a good start to your year-end launch strategy.

After working with over 1,000 nonprofits directly to date, Community Boost has developed our best tips for developing and maintaining a tailored year-end campaign for your nonprofit in 2023. Let's take what we've learned from this year and end on a positive note!

Here's what we found...



Individualizing Your Strategy

Answer these questions in your notes...

What are 2-3 things that most impacted your 2023 Year End?

ex. Virtual Events / Cancelled Events, Disposable Income, Election Year

What are your nonprofit's fundraising pain points and main challenges when it comes to Year End?

ex. Small existing supporter base, understanding your mission, competing with other nonprofits



Set SMART Goals

Now that we have identified the “problem(s)”, how can you customize your strategy for success? It’s easy, create some smart goals!

Please create a goal or goals for each organic social channel that you plan on using in your strategy.. Remember, choose the channels where your audience is at and that you are already using and can continue to use...realistically.

On the next page, you can make a copy of the slide and add in your smart goals for year-end. Right click or double click on slide 8, and select duplicate slide



Set SMART Goals

S Specific	What specifically are we trying to achieve? Why is this goal important? Who/what is involved?
M Measurable	How will we measure success? What milestones need to be set and met?
A Attainable	What steps do we need to take to attain this goal? Do we have the tools/systems in place to achieve this goal? If so, what will we use?
R Relevant	Is this relevant for our long-term objectives? Is this the right time?
T Time-bound	What is the time frame for this goal?



Year-End Building Blocks



Create an emotive campaign theme

- ✓ Make sure there's a storytelling component
- ✓ Make sure you have a mix of *asks* and *gives*



Consistent messaging across all channels



Multiple channels and formats at play (ads, social, email, etc.)



Multiple email and social touchpoints in the final days of the year



A seamless online giving experience with multiple payment methods



Be ready with an electric “thank you”!



7 Tips to Surpass Goal and Finish Strong

Now that we have identified the goals, let's step into how you can complete them

1. Use Past Wins as a Roadmap to Success **Answer each question and fill in below**

What was your average gift amount last year?

Insert Here

What was the average cost per donor (on the advertising front)?

Insert Here

What campaigns raised the most money?

Insert Here

What were the most popular campaigns with each donor segment?

Insert Here

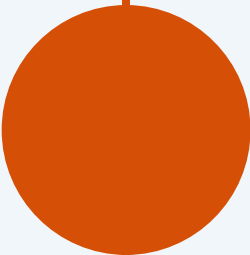
Were the campaigns run through your website or a separate fundraising page? What were the pros and cons of both?

Insert Here

Which channels were the highest converting (email, direct mail, paid social, Google Ad Grant, etc.)?


Insert Here





2. Engage with Donors Well Before Year-End

The earlier the better. Because of Giving Tuesday and YE saturation, it is more important than ever to warm up different audiences to year-end appeals ahead of time. This help keep donors informed, engaged with the mission, and expecting your advertisements.

Having multiple touchpoints to ensure supporters feel involved year-round is  Also, remember that donor stewardship isn't one-size-fits-all. You should consider a personalized approach for your outreach strategy based on each donor segment (top givers, recurring givers, new donor, volunteers). Identify your donor segments and touchpoints below:

Donor Segment	Touchpoint
<u>Fill in the blank</u>	<u>Fill in the blank</u>
<u>Fill in the blank</u>	<u>Fill in the blank</u>
<u>Fill in the blank</u>	<u>Fill in the blank</u>
<u>Fill in the blank</u>	<u>Fill in the blank</u>
<u>Fill in the blank</u>	<u>Fill in the blank</u>

Learn How to Launch and Scale a Recurring Giving Program with our free [webinar](#).

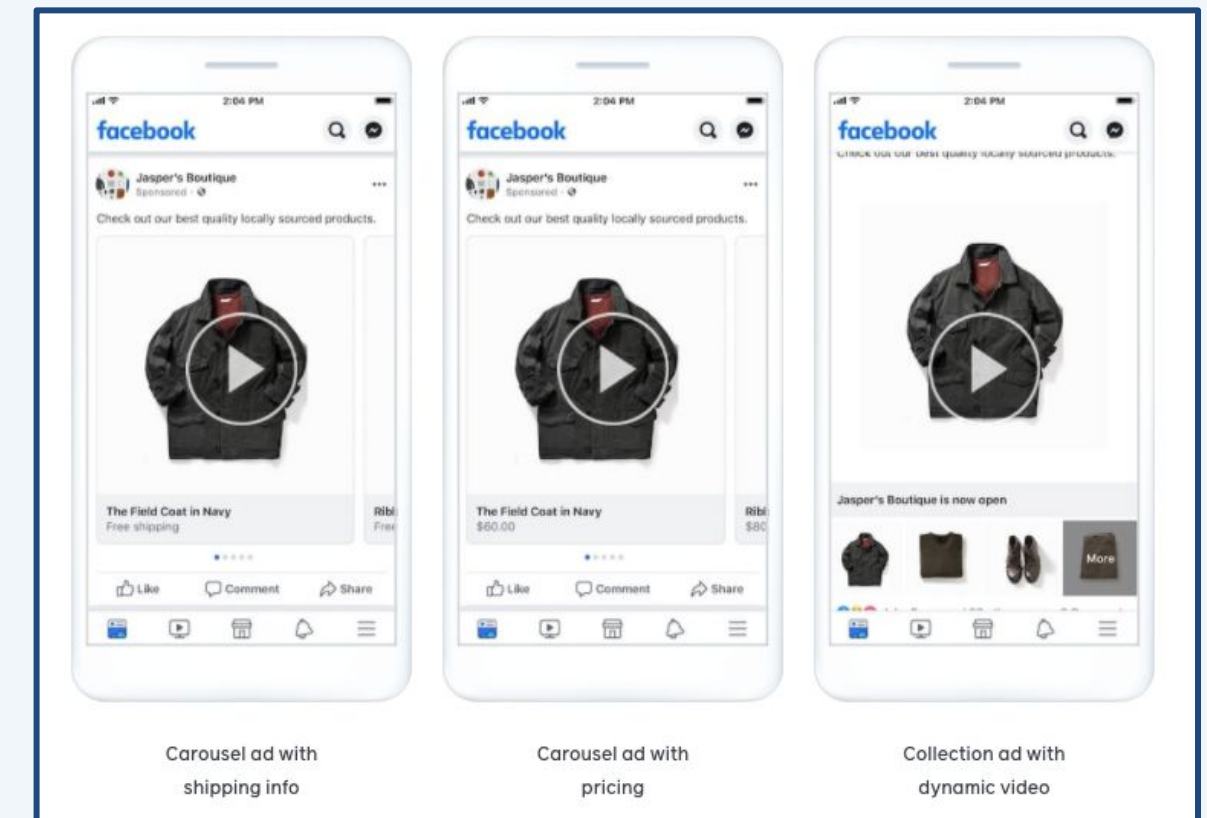


3. Use Segmentation and Personalization

- ❑ **Craft a Good Message:** Your supporters should feel like you're in their shoes . The best performing campaigns stand out by having one message that is concrete and specific. Ensure that your campaign messaging is consistent across channels.

Learn more about how to develop a compelling campaign story [here](#).

Create Your Message Here:



- ❑ **Segment Your Audience:** Divide your donors into groups based on their behaviors or traits. “People don’t ever mind being interrupted if the ad’s message is interesting to them.” Focus on delivering timely and relevant messaging. *Segmenting by visitor traffic is one way to do this.*
- ❑ **Personalize the Appeal:** Use your existing data to make your appeal sound like it was written just for that individual. By leveraging machine learning to dynamically select ad formats, creative, and copy, we can improve user experience by meeting people where they’re at. This is available for Google and Facebook advertising.



4. Measure What Matters: Let Data Be the Center of Your Strategy

Focus on the right metrics: Set yourself up for success by identifying clear metrics that you want to keep an eye on before launching a campaign.

Fundraising: Number of gifts, average donor amount, average cost per donor, donor retention rate, total funds raised. If using advertising tools, add in donor data!

Marketing: Conversion rate, ROAS, ROI, landing page views, bounce-rate, cost per conversion, frequency.

Project or program: Number of beneficiaries served, beneficiary satisfaction rate, number of hours per project.

Key Metric #1: Type Key Metric here

Key Metric #2: Type Key Metric here

Key Metric #3: Type Key Metric here

Value your best supporters: Instead of measuring transactions alone, model the lifetime value you derive from your supporters.

Attribute value across the journey: To find out what's working in your marketing and what's not, identify the role of each touchpoint along the customer's journey through abandonment rates and page drop-off.

Prove marketing impact: Use controlled experimentation to understand what happened only because of a given marketing spend change (and would not have happened without it). Always be testing.



Measuring Checklist:

- ❑ Test your website through Google Tag Manager
- ❑ Test your tracking through Google Tag Manager
- ❑ Test all of your marketing funnels prior to launching your campaigns
- ❑ Put your year-end giving campaign front and center on your website. If you want to test, you can use [Google Optimize](#) to A/B test different versions of your year-end campaign messaging (depending on who is reaching you). For instance, you may want to show one version to cold traffic and another version to returning visitors or past givers.
- ❑ Additional tip: Use [Google PageSpeed insights](#) to see if your site is mobile-optimized (60% of nonprofit site visitors are on mobile). You can also use this tool to check site speed and for diagnostics on how to improve your site.
- ❑ Getting feedback on these things ahead of time is critical!

How will you measure success?

Identify your primary key performance indicators (KPIs) and determine if they can be measured with your current technology stack

By channel and audience track

- ❑ Site visits
- ❑ Number of donations
- ❑ Conversion rate
- ❑ Average gift amount
- ❑ Total revenue
- ❑ Y/Y change



5. Lead with Video

Why?

Video ads visually create an emotional connection. It's not just a trend anymore—it's one of the most successful fundraising tools at your disposal for Giving Tuesday and Year-End Fundraising.

There are tons of easy templates to build video whether it's in Canva or the Facebook and Google video builders. Paid Google Ads also unlock ad formats like Display & Video that offer powerful audience insights that you can apply to other marketing channels.

It's a great way to diversify your marketing mix. Video campaigns are often cheaper and reach a broader audience than others. And no, you don't need a videographer. There are top performing ads shot with just an iPhone as long as the story is there and you're targeting the right audience!

Video helps with iOS 14 tracking. Due to iOS 14 updates, it's gotten harder to track users on-site since users can now opt out of being tracked. [Learn more here](#)



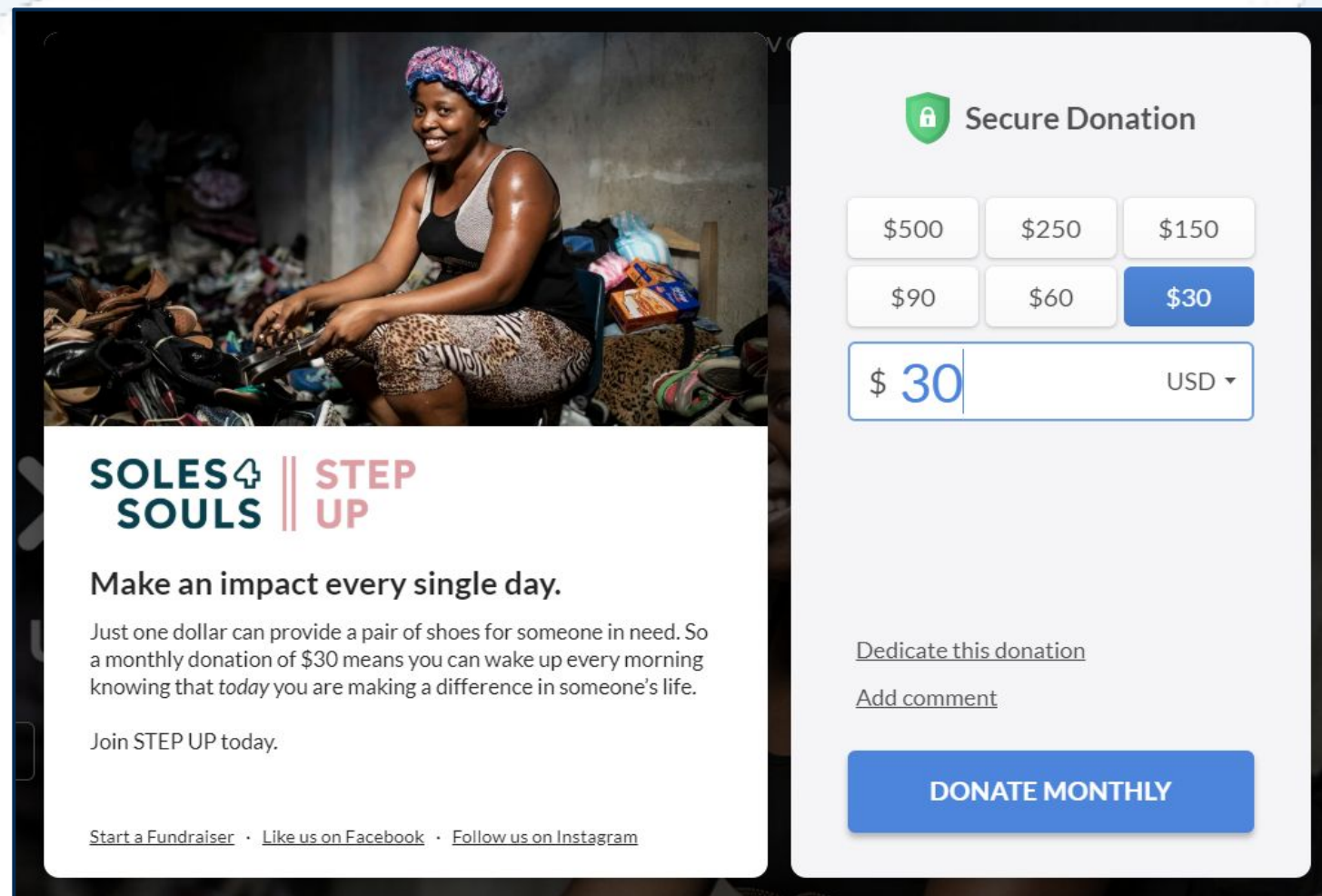
6. Build, Launch, and Sustain A Recurring Giving Program

Why?

It's Affordable: By giving lower monthly options, your donor profile is immediately diversified

It's a Community: Recurring givers are much more likely to share your cause with others.

It's Sustained Support: 13 Months is the average time that a recurring giver stays at their initial gift size.



SOLES4SOULS || STEP UP

Make an impact every single day.

Just one dollar can provide a pair of shoes for someone in need. So a monthly donation of \$30 means you can wake up every morning knowing that today you are making a difference in someone's life.

Join STEP UP today.

[Start a Fundraiser](#) · [Like us on Facebook](#) · [Follow us on Instagram](#)

Secure Donation

\$500 \$250 \$150

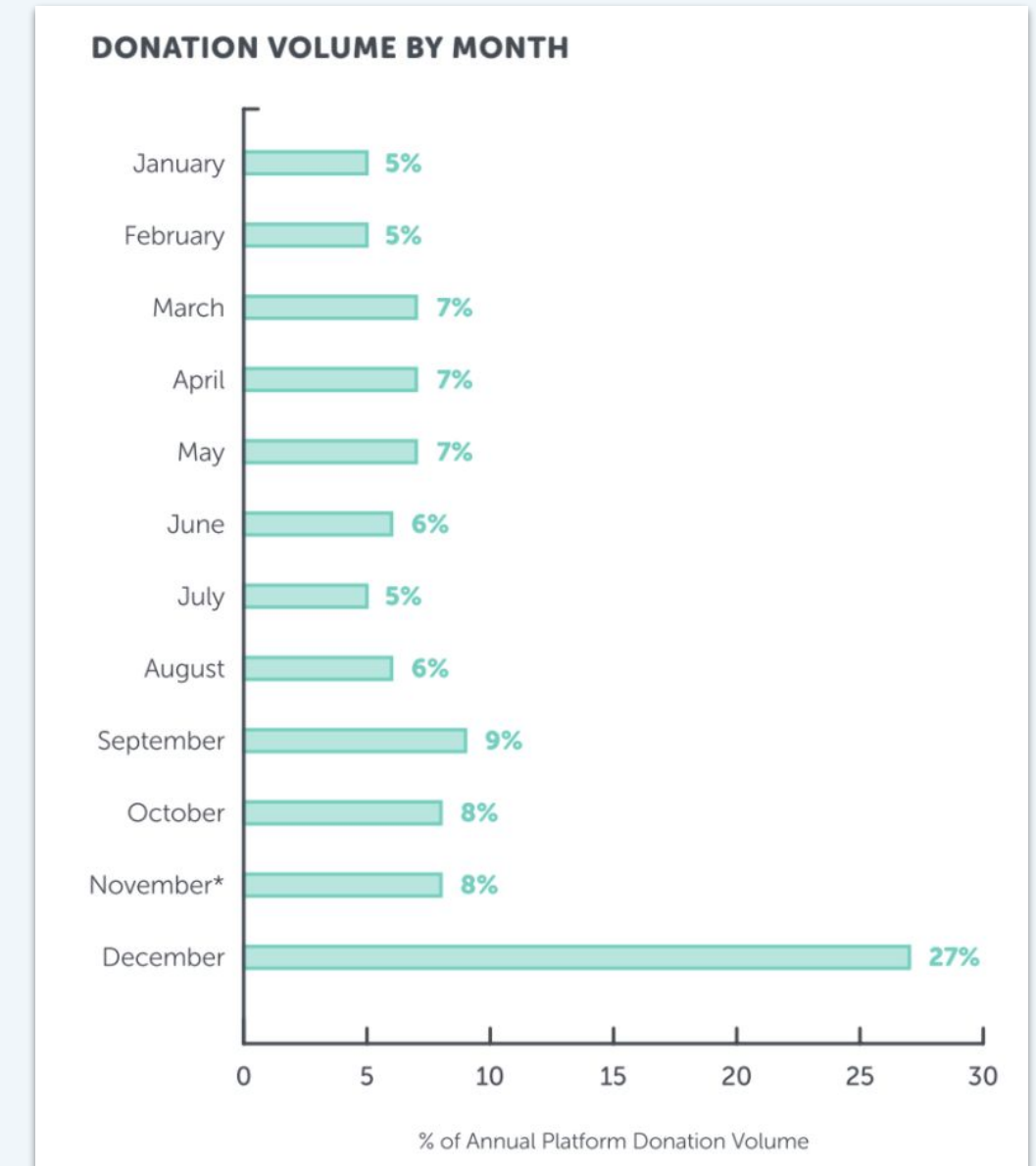
\$90 \$60 **\$30**

\$ **30** USD ▾

[Dedicate this donation](#)

[Add comment](#)

DONATE MONTHLY



Of all one-time donors that return to start a recurring gift subscription:

25% proceeded to make another one-time gift

11% made a donation to a crowdfunding campaign

14% signed up to fundraise or registered to a fundraising campaign

10% participated in a peer-to-peer campaign



How?

❑ Build Your Program

A successful giving program starts with storytelling. Who should give, why should they give, and when should they give. *Think Membership*

❑ Scale Your Program

Using tools like Facebook and Instagram, Conversion Design, Email Automation, etc., we should help take individuals through a journey that leads them to a recurring giving membership

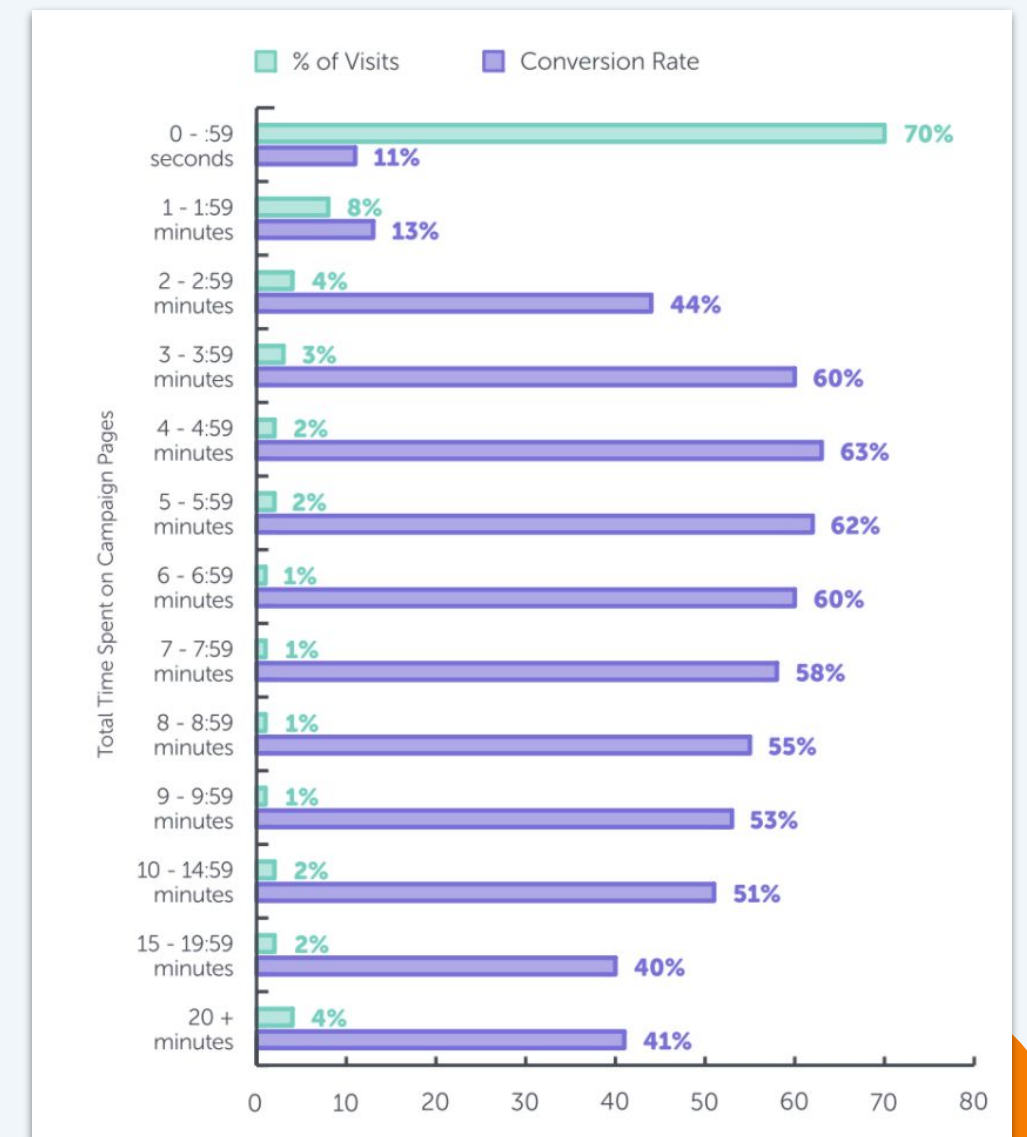
❑ Sustain Your Program

One of the major benefits of recurring giving is increased retention rate. When individuals are giving monthly we have time to build a relationship. We should continue to share a deeper side of our mission to those who invest and make them feel like they are a part of that story.

[The Spring](#) by Charity Water is an excellent example of this.

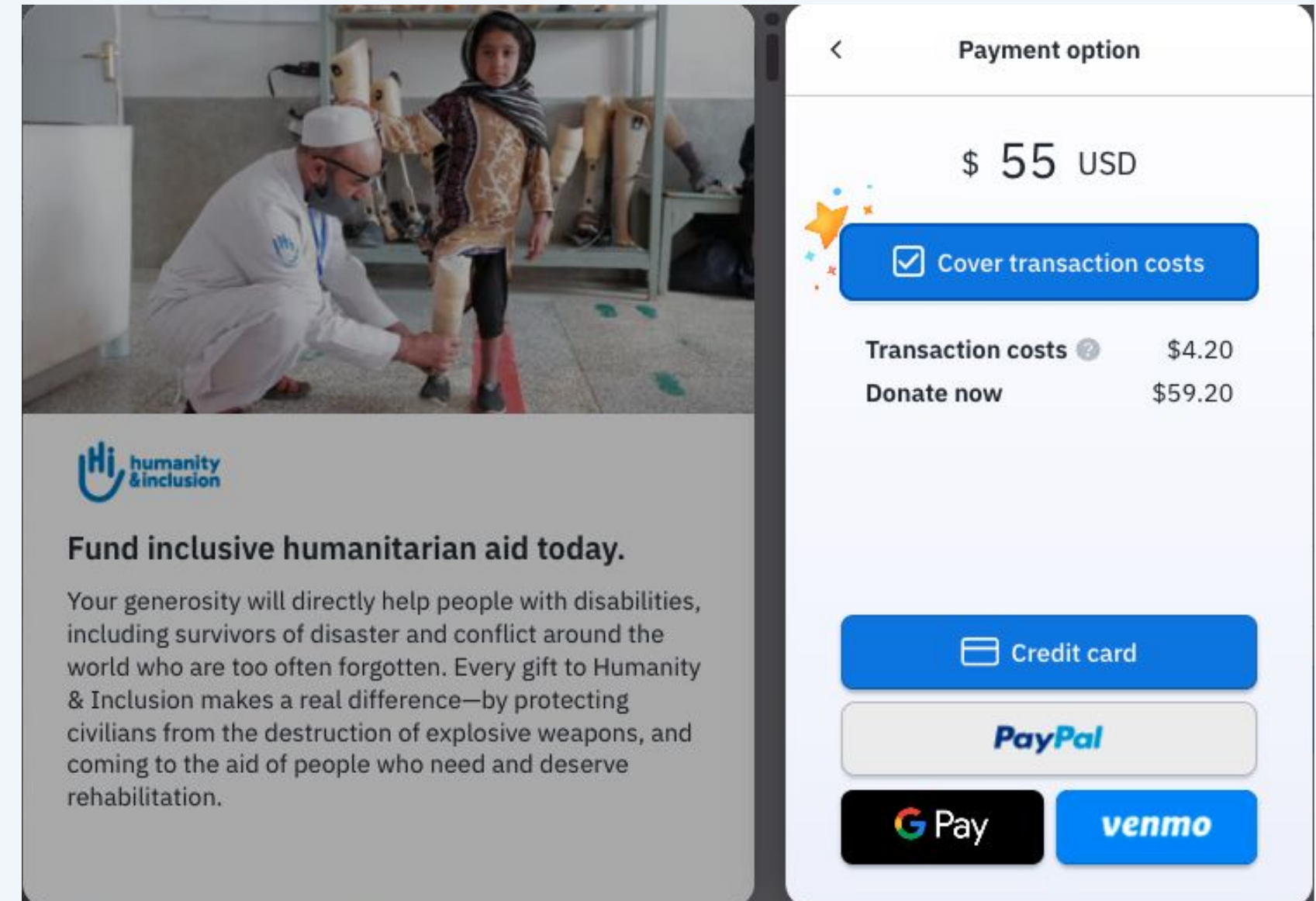
Consider this... If you are in more need of recurring gifts, **be straightforward about it**. It seems simple, but just explaining the difference of a one-time gift from a recurring gift for your organization and why it's important **is enough**. To have it land, **emphasize the benefit for the donor**:

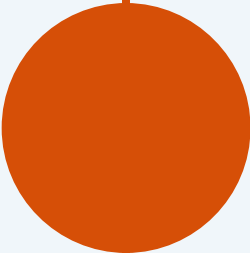
- It's more convenient to donate through an automated recurring program
- It helps them stay connected with the organization and know where their money is going
- They can give small monthly gifts instead of one large gift



7. Landing Page Must Haves

- ❑ Compelling visuals
- ❑ Clear ask(s)
- ❑ Easy donation process
- ❑ Various payment methods
- ❑ Demonstrate detailed impact
- ❑ Dynamic elements: image cards, countdown, goal meter, leaderboard, donor map (examples)





Content Elements Showing Impact and Reach

Image card

Join us in celebrating 40 years of inclusive humanitarian aid!

Our Nobel Prize-winning organization has been hard at work since 1982, helping millions of people through the hardest experiences of their lives and sparking big smiles on the other side. Thank you for celebrating with us. We wouldn't be here without you!

Rehabilitation Care

Ali was injured when he stepped on an explosive device in Afghanistan.

Help people like Ali receive physical therapy and artificial limbs.

Give \$40 today



Disability Inclusion

Give \$140 today



Mine Action

Give \$400 today

Help Stop The Refugee Crisis

More than 150,000 people have been displaced from their homes because of the refugee crisis. They are in desperate need of a place to go and essential care. Donate now to help stop the crisis, provide hope, and ensure care for those in need.

\$23,895 of \$100,000 goal

24%

One Time

Monthly

\$250

\$130

\$55

\$35

\$10

\$5

\$ 25

USD

Donate Now

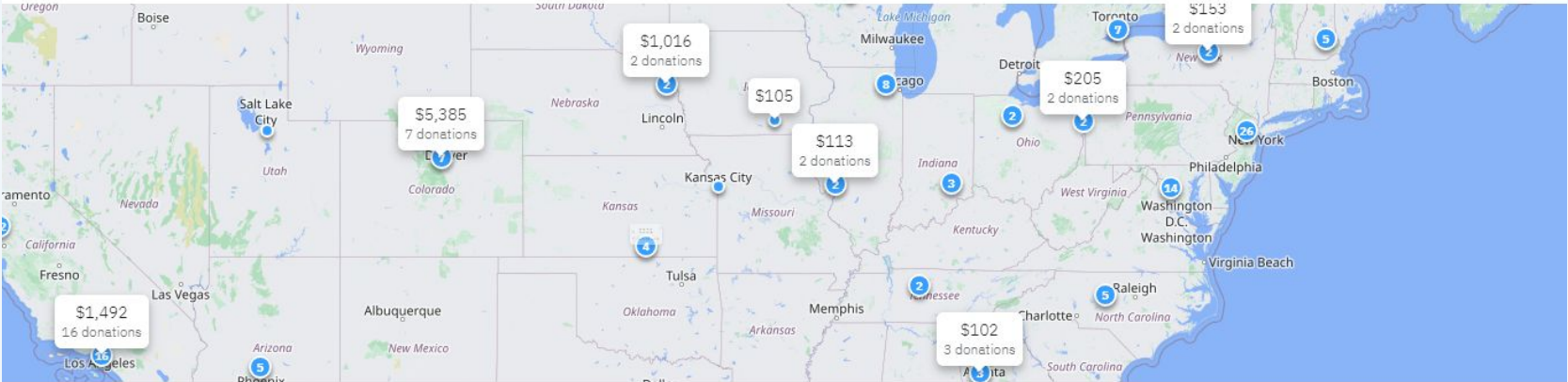
Goal meter + donor map

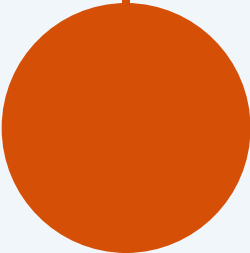
match has been met. **Please don't stop now, you can help us meet our goal of \$75k to protect rainforests, save species and fight climate change!**

\$56,180 of \$75,000 goal

75%

Supporters taking action for Earth Day around the world.





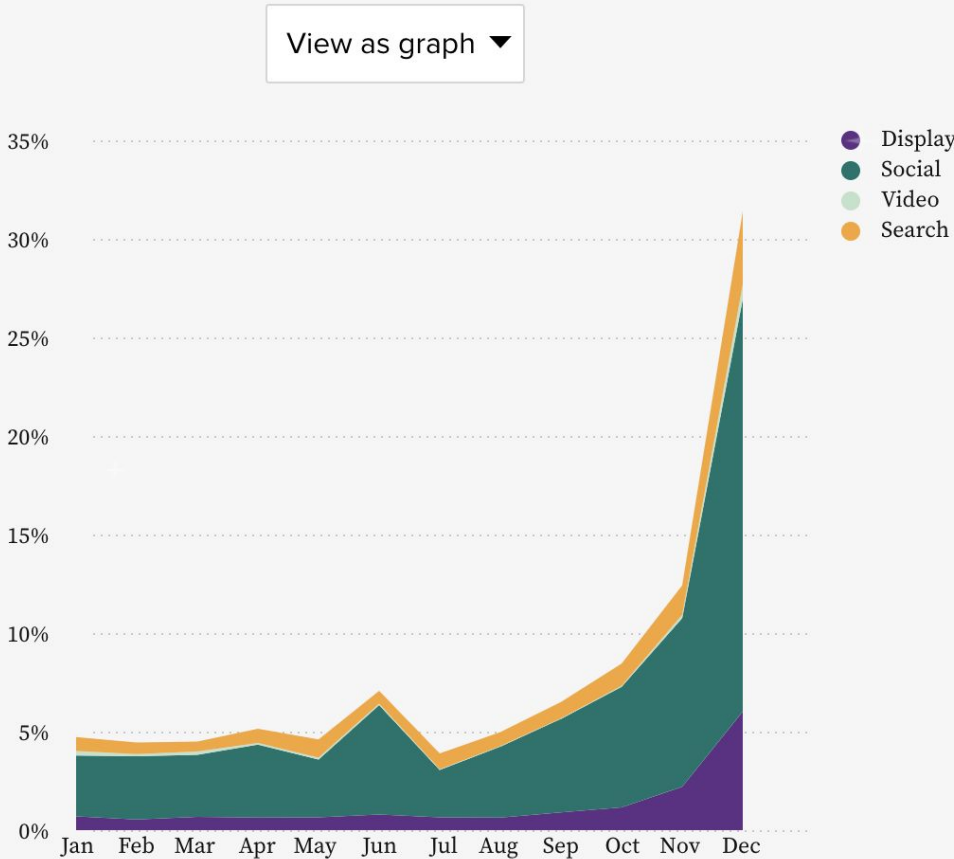
8. Capitalize on the Last Three Days of the Year

This report from M+R Benchmarks shows data on how nonprofits scale their digital channels towards the end of the year and which digital channels they use. Nonprofit organizations receive a whopping 50% of their annual donations during October, November, and December, and 12% of all annual donations occur during the final three days of the year (December 29, 30, and 31). To match this trend of year-end giving, one-third of all nonprofit spending occurs in December.

Share of direct fundraising budget by channel

	All	Large	Medium	Small
Display	32%	35%	23%	2%
Search	1%	1%	1%	0%
Social Media	59%	54%	71%	96%
Video	5%	6%	1%	0%
Other	4%	4%	3%	2%

Percent of budget spent in each month



Share of digital advertising budget by goal

	All	Large	Medium	Small
Branding, Awareness, or Education	24%	25%	13%	46%
Direct Fundraising	44%	44%	51%	21%
Lead Generation	23%	22%	22%	32%
Other	9%	8%	14%	1%

If you are wondering which channels are right for your nonprofit, the most important thing is to look at what's already working. If certain campaigns are doing well then put more time and spend into those channels while pausing those that aren't working and reallocate your budget!

Source: [M+R 2020 Observations](#)



9. Retain and Maximize Momentum into the New Year

67% of One Time Donors never give again.

During year-end Nonprofits typically see a huge influx of one-time donors that leave and never return. To support the donor retention rate it is crucial to keep the momentum going and keep your campaigns alive.

Retention Rates per Donor Pool



If you are wondering how to retain most your donors– the answer is continue your campaigns!

1. Do a gratitude campaign
 - i. Highlight impact of donations and story of impact
2. Promote Recurring Giving & Impact of Recurring Gifts
3. Promote Spring Opportunities



Most Impactful Marketing Channels

Paid Social: Meta

BENEFITS

Ability to build and control the full marketing funnel and associated content through a single platform

BEST USED FOR

Brand & Campaign Awareness throughout all phases of year-end fundraising, Custom storytelling & call to action by audience warmth/demographic, and Competing for the attention of donors with refined audience targeting

CONSIDERATIONS

It can be expensive for smaller nonprofits to compete if you're just starting for year-end in Q4. Think through how to keep people on platform when possible and grow your social following and email lists now to improve Year End targeting.

Youtube & Display

BENEFITS

Cost effective way to connect & STAY connected with **large volumes** of individuals through creative assets. Learn how to use Youtube Giving for fundraising [here](#).

BEST USED FOR

Brand & campaign awareness and facilitating multiple (new) touch points of consideration with remarketing capabilities

CONSIDERATIONS

Can have low conversion rates for direct, last-click data
Can require significant optimizations for relevant placements
High quality creative necessary



Search Advertising: Google Ad Grant & Paid Search

BENEFITS

Both: Increased visibility on front page of search results if your SEO is poor or brand name or mission is common or competitive
Google Ad Grant: Increase new, relevant web traffic for free

BEST USED FOR

Google Ad Grant: Growing your brand awareness and remarketing audiences
Paid Search: Capturing warm, non-branded traffic with actionable search intent (**RLSA**)
Both: Directing traffic already searching for you to specific campaign pages

CONSIDERATIONS

- Typical search volume and search intention can shift as people are on vacation and spending time with family
- Costs for Paid Search can increase as more people focus budget on their advertising efforts

On-Site Conversion Design

BENEFITS

Easily customize your creative and copy to advertise your YE campaign on your website. **Free** platforms available. Being able to streamline people's ability to get back to campaign landing pages.

BEST USED FOR

- Dynamically showcasing your YE Campaign and **call to action** no matter where someone enters the website
- Facilitating a **streamlined path back to your campaign pages** when someone has exited the phase of consideration and is ready to convert
- Creating **urgency** during peak giving moments
- **Prevent people 'abandoning cart'** mid-donation with exit-intent pop up



Which Channels Will You Use?

Check off the channels your nonprofit is already using or is hoping to try with this year-end campaign

- ☐ Paid Social: Meta or Tiktok
- ☐ Search and Display Ads
- ☐ On-site Conversion Design
- ☐ Paid search Advertising: Google Ad Grant & paid Google Ads
- ☐ Website
- ☐ Email
- ☐ Organic Social Media
- ☐ Partnerships
- ☐ Other (list them here): _____



Year-End Campaign Timeline

Prepare & Analyze
September or earlier

- ❑ Analyze data from previous campaigns & years
- ❑ Define the campaign theme
- ❑ Set target fundraising goals
- ❑ Start creating and testing content
- ❑ Segment leads
- ❑ Gather incentives, secure sponsors or matches

Pre-Wire
&
Gratitude
Oct - Nov

- ❑ Pre-wire core constituents with gratitude and ads of impact
- ❑ Pre-wire new and warm, non-donor audiences with ads of impact
- ❑ Grow remarketing audiences
- ❑ Unlock early gifts without the big ask
- ❑ Continue to engage and attract users with regular posts

Full Launch
(#GT)
November

Giving Tuesday serves as the main launchpoint in what is outwardly seen as the start to Year-End fundraising

- ❑ Increase posts and promotion on Facebook
- ❑ Highlight key giving events for the weeks ahead
- ❑ Launch your #GivingTuesday campaign
- ❑ Showcase the impact made, people helped, the volunteers who make it possible
- ❑ Thank you campaign for donors & volunteers



Engage

Early - Mid
December

Big Finish

End of December

Follow-Up & Gratitude

January

Recurring Giving

February

Engage during **Consideration Phase**

Channel Application Examples

- Year-End Facebook Event
- Paid Social/ Display: Fundraising benchmarks - Where are we at?
- Search Ads / Onsite CD: Create streamlined path to campaign pages

31% of all giving occurs in December; 12% of total in the last 3 days

URGENCY: *Compete, Remind, Compete, Make it Easy, Close*

Channel Application Examples

- Budgets should increase, audiences should narrow to highest potential
 - Paid Social: *Conversion campaign*
 - YouTube & Display: *Remarketing only*
 - Search Advertising: *Emphasis on branded keywords*
 - Onsite Conversion Design: *Higher Frequency, Welcome Mat, Exit-Intent Pop-ups*

Show your appreciation! **Donor stewardship** is key to ensure retention

Capture last minute, afterthought donations

Begin to analyze data and segment donors

Channel Application Examples

- Onsite conversion design, Paid Social, YouTube & Display
 - *Gratitude content directing to updated Campaign Landing page with results and an option to still contribute*

Nurture new and existing donors

Ask: Why upgrading their gift to become Recurring will make the most impact in the coming year(s)



Year-End Marketing Calendar Template

Year-End Fundraising Goals - [YOUR ORG NAME]

Resource - ROI Calculator: <https://www.calculator.net/roi-calculator.html?>

The purpose of the Year-End Fundraising Goals Worksheet is to take a look at 1) What your year-end fundraising results were last year and what channels contributed to those results, and 2) Use these insights to set attainable goals and predictable outcomes. For example, you may want to scale back or cut out channels that have a low ROI, and invest more into the channels that were most successful. We also recommend trying 2-3 new channels this year-end. Fill in your results and set your own customized goals here.


Last Year's High Level Results	Goal	Actual
Fundraising Total		
Average Gift Size		
# of Donors (Total)		
# of New Donors		
Retention YE 2020 - 2021		
Raised offline		
Raised online		
[OTHER KPI]		
[OTHER KPI]		
[OTHER KPI]		

Last Year's Results By Channel	Goal	Actual	Spend	ROI	Reflection Notes
Direct Mail					
Board Gifts					
Major Gifts					
Phone Call Campaign					
Email Campaign					
Facebook + Instagram Ads					
Organic Traffic (Donation Page)					


[GET YOUR TEMPLATE]

Check Yourself!

Now to wrap up, let's check in and see if your campaign achieves the three M's!

 **Memorable** - through humor, nostalgia, heart-warming video, and/or giving people a meaningful experience

 **Manageable** - a plan your team can execute in a high-quality way

 **Measurable** - the campaign is designed with proper tracking in place, and success metrics clearly defined

Thank You for Reading!





COMMUNITY BOOST™

Are you interested in a **complimentary** strategy session on how to take your year-end fundraising to the next level?

Book Your Year-End Gameplan Session



Community Boost Impact

1k

nonprofits
directly served

\$100M

online revenue
generated for npo's

12

years
in business

