

# Year-end Micro Fundraising Plan for Small Nonprofits

Prepared for you by The Good Partnership

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## Plan for year-end Success

Do you have any idea how much your annual fundraising revenue could increase during the last 60 days of the calendar year? Approximately 34.4% of the dollars donated through CanadaHelps are made in December alone, with 11% of annual donations coming in during the last three days of the year!

You could be raising as much as 50% of your annual donations through your year-end campaign.

As a small non-profit, with limited time and resources, we want you to focus your energy on an area of fundraising that will yield the most value. That's why we've created this detailed plan, just for you, specifically focused on year end results!

For many organizations, holiday fundraising is an integral part of their overall fundraising efforts. Donors are exceptionally active during this short time, and nonprofit organizations know it is wise to take full advantage of this opportunity!

The best way to execute a successful holiday fundraising campaign is to start planning early. In this guide, we will walk you through the most important holiday fundraising strategies, so that you can optimize your campaign and maximize results.

# Instructions

## Saving the document

First things first, go ahead and save a copy of this document so you can edit it.

### Google Docs

Click "file" and select "make a copy" to create an editable version of the document. You can re-name and share the new "copy" document in your own Google Drive.

### Word

Click "file" and select "download as" and then select "Microsoft Word".

### How to use this template

This template gives you structure and outline to put your year-end fundraising ideas into a cohesive and actionable plan. Year-over-year you will come back to this template and create a new plan based on previous learnings. Over time, you will start to see trends and opportunities. Don't worry if you're starting out from scratch. Fill in what you can and evaluate as you go along and before you know it, you'll have more information to fill in for next year-end.

Happy fundraising,

Your team at The Good Partnership

# Messaging

I want you to think of your year-end appeals as a mini campaign. What does every great campaign need? A theme, a tagline and a call to action (CTA). Starting from now until the year end, everything should fit together and support each other under this mini-campaign. You're going to repeat messaging several times over. Messaging should be clear, consistent, and cohesive and take on a multi-channel approach. Research shows that people need to see or hear the same message 8 times before it sticks, so don't worry if you feel sick of seeing the same thing. Your donors won't.

## Theme



How do you develop a theme? Consider your fundraising goals and objectives; is there anything that clearly stands out as a theme? For example, if you want this funding to support a specific capital expense or program, like purchasing a new build to support health and wellness classes for seniors, then your theme could focus on health and wellness. You want to choose something creative and unique. After you've spent time brainstorming, write your final thoughts and outcome below.

The example we've provided above is from a leader in email marketing, charity: water<sup>1</sup>. With their simple and creative designs as well as captivating messaging, this organization is one to

<sup>1</sup><https://www.charityemailgallery.com/appeal/charity-water-what-if-your-holiday-gifts-could-change-lives/#.VXCzhFxVhBc>

keep an eye on for inspiration. Their design succinctly incorporates a holiday theme (of unwrapping a present) while still focusing on their organization and cause which is to provide clean water for those in need - specifically using a BioSand filter.

Theme	Tag Line	CTA
Holiday theme <ul style="list-style-type: none"> <li>• Gift wrapping</li> </ul>	“This Holiday season, the best gift you can give is wrapped in concrete, filled with sand, and runs on bacteria”	Give the gift of clean water by donating \$65 to purchase 1 BioSand filter.  Charity: water’s goal is to raise \$975,000 to purchase 15,000 filters for people living in Cambodia this holiday season.

*Your turn...*

Theme	Tag Line	CTA

## Stories

The secret behind almost every successful brand, is a relatable story. The more your audience can relate to what your saying, and insert themselves into the narrative, the more likely they will remember you, feel impacted by your amazing work, and donate to your cause. It’s about knowing what type of stories to tell, who to tell them to, and when. Research proves that listening to stories activates not only the language parts of our brains, but it also stimulates the experiential parts as well (as if you are experiencing the story first-hand.)

There’s also research to show that stories increase generosity. According to Network for Good, a large donor advised fund based in the US, donors tend to give twice as much when presented with a story about an affected individual, as opposed to reading abstract numbers of the overall scope of a problem.

Elements of a success story include:

- a story about one person,
- offers both a problem (beneficiary struggle) and a solution (the organization),
- expresses urgency,
- written in an easy to understand and conversational style, and
- evokes emotion.

Check your files to see if you have any stories that fit with the theme you’ve identified above, if not, you’ll need to collect approximately 1-2 new stories. Consider whose story you can and

should highlight in the theme of your campaign. You can interview clients, program beneficiaries, staff, and volunteers. Consider interviewing different people to get different angles of the same story. Make sure to prepare a loose list of questions before stepping into the interview, but go with the flow and use your curiosity to ask questions based on responses to dive deeper into the topic.

Use the chart below to list and schedule individuals for an interview. Before anything is published, always make sure to get their permission beforehand.

Interviewer	Interviewee	Date	Discussion Topic
Stephanie	Program Beneficiary	October	Food Bank
Stephanie	Program Staff	October	Food Bank

*Your turn...*

Interviewee	Interviewer	Date	Subject

### Example Interview Questions:

1. Tell me about what problem this program/service solves?
2. Can you tell me about a specific person who has used this program?
3. What was their life like before they began working with you?
4. Do you remember the first time you met them? What was their emotional state like?
5. Now that they've gone through this program, what's their life like? What their outlook for the future?
6. With so many great organizations to support, why should others choose to support \_\_\_?
7. What have you learned about \_\_\_?
8. What was most surprising to you about \_\_\_?
9. Is there are particular moment or memory that stands out for you?
10. Is there an achievement or contribution that you are most proud of?

# Funding Priorities and Goals

Before you begin creating content, you want to set goals<sup>2</sup> and objectives<sup>3</sup> for your mini-campaign that supplement or coincide with your previously set, yearly fundraising goals. This mini-campaign will generally take place over the last 3 months of the year.

## Funding Priorities

Use this section to identify 1-3 funding smaller priorities that you feel this mini-campaign could fully support or partially supplement. Why is this funding urgent and what will this funding support early next year? Operating costs are usually top of mind, but also think of special projects, or how to break out operating into donor-friendly funding opportunities.

Goal	\$ needed	Specific ask
Specific Need <i>Example: Toronto Humane Society Kitten Rehabilitation</i>	\$10,000	\$50 will provide 2 life-saving shots for a kitten
General Campaign (unrestricted) <i>Example: SickKids Fund Continue Breakthrough</i>	\$1,000,000	Each \$1 invested in research provides an extra \$3 in external research funding. Please donate \$30 today.

Your turn...

Goal	\$ needed	Specific ask

## Goals

Now it's time to set manageable, SMART goals for this mini undertaking. You should have 1-2 specific objectives tied to each goal. This *is* a fundraising plan, the number one objective should be to raise money, however don't forget about increasing donor engagement, increasing new fundraising prospects, and/or re-engaging lapsed donors.

<sup>2</sup> A goal is broad, intangible, and abstract  
<sup>3</sup> An objective is specific, tangible, and measurable

Goal	Objective
EXAMPLE	
Use year-end appeals to raise \$5,000 to supplement new volunteer program.	<ul style="list-style-type: none"> <li>- To increase # of monthly donors from current, 15, to 25</li> <li>- To increase \$ amount of current monthly donors by 50%</li> </ul>

*Your turn...*

Objective	Goal

# The Thank-Ask-Thank Strategy

## The First Thank

Yes, I know you're sending out an ask, but before you begin to think about asking, I want you to send a special thank you to your donors. It can be a thank-a-thon where you and a couple of members of your board spend a couple of hours on the phone, or a card, or a short report. If you feel overwhelmed by the idea, my favorite thing to do is to print out the donor list with phone numbers, book an hour in your team's calendar (if it's just you, maybe pull in some volunteers), order a pizza and make the calls during a lunch. Or, do it at 3pm on a Friday and then let everyone leave an hour early!

Involving your staff, board and volunteers in a thank a thon is a great way to engage them in fundraising in a way that feels good.

I've seen a growing number of organizations use Giving Tuesday as an opportunity to say thanks, instead of ask, so you can do that too. Many of your donors will be doubly-solicited on Giving Tuesday, so think of how refreshing your simple message of appreciation will be.

Using the chart below, plan out your first few thank you's to all your amazing donors who have supported you in the past.

Activity	When	Cost
Pull lists of 500 individuals you plan to solicit	Early September	\$0
Craft first round of segmented thank you emails with impact story/send out emails	Mid-September	\$0
Donor thank-a-thon - call 100 "major donors"	Early October	\$0
Craft and send giving tuesday email with soft ask	November 27	\$0

*Your turn...*

Activity	When	Cost

## The Ask

Once you feel you have the appropriate stories you need, now comes time to craft the appeals as well as the subsequent communications.

## Direct Mail

Brought back year after year due to consistency of results, end-of-year direct mail appeal letters are relied upon by many nonprofits for a reason: they work!

The major downside of direct mail is that it can be quite costly. For those with a less flexible budget, it's time to get strategic. Do your research to find the most affordable printing company. Instead of splurging on all of the fixings, consider having an intern fold, stuff, and mail the envelopes to cut costs. Don't make it fancy - focus on making it personal. Research suggests that the more informal it looks (handwritten elements, postage stamp, etc.) the better it will perform.. Forget elaborate designs, just keep it simple.

Follow these tips to get more bang for your buck:

- Focus on existing donors, particularly small-to-midsize donors who've previously given through mail.
- Make the donation easy by including a pre-addressed reply envelope and the URL to your online giving form. Don't have a donate button on your website? Find out how [CanadaHelps](#) can help!

When should you send it?

We recommend that you send it earlier rather than later. After all the planning, aim to have it sent out around the beginning of November. Make the direct appeal letter the highlight of the campaign and mirror the following communications after it.

Use this checklist as a guide to ensure that you have included all the elements of a successful year-end direct mail appeal in yours!

✓	Elements of a Compelling Appeal:
	Start with "thank you". <ul style="list-style-type: none"><li>● Does your first paragraph acknowledge your donors previous support?</li></ul>
	Donor as the hero <ul style="list-style-type: none"><li>● Make sure the donor sees themselves in the story. It's not about your work as an organization, it's about their impact through giving.</li></ul>
	Conversational. <ul style="list-style-type: none"><li>● Does your writing fall into a grade 4-6 reading level?</li><li>● Is your writing warm, friendly, and easy to understand?</li></ul>

	<p>Easily Digestible.</p> <ul style="list-style-type: none"> <li>• Can the reader scan your letter and take away all the important points?</li> <li>• Is your letter broken up into short paragraphs?</li> <li>• Have you bold or italics lettering to breakup boring text?</li> <li>• Do you have a p.s. at the end of your letter?</li> </ul>
	<p>Clear and Multiple CTAs<sup>4</sup>.</p> <ul style="list-style-type: none"> <li>• Is your CTA repeated throughout the letter?</li> <li>• Does your CTA close your letter?</li> </ul>
	<p>Keep it Personal</p> <ul style="list-style-type: none"> <li>• Plain outer envelope - handwritten if possible</li> <li>• Proper stamps if possible</li> </ul>
	<p>Size Matters</p> <ul style="list-style-type: none"> <li>• 2-4 pages (for mailed version, despite what everyone on your board will tell you)</li> </ul>

Use this chart to plan out all of the activities associated with getting your appeal created and sent!

Activity	When	Cost
Brainstorm and develop theme and tagline	ASAP (ideally start during "down-time" in the summer months)	\$0
Interview 4 individuals to find story	August-September	\$0
Write/approve appeal	September	\$0 - \$1,000 <i>(depending on whether or not you hire a consultant)</i>
Design appeal	Early-October	\$0 - \$1,000 <i>(depending on whether or not you hire a consultant)</i>
Coordinate with printing company	Mid-October	\$400 - \$5,000 <i>(depending on size of mailing)</i>
Align technology with with appeal (ex. Donation page, web page, database integration)	End-October	\$0
Mail appeal	Early November	\$300 - \$2,000 <i>(depending on size of mailing/ partnership with Canada Post)</i>

<sup>4</sup> A call to action (CTA) is when you ask your audience to do something (usually make a financial donation).

*Your turn...*

Activity	When	Cost

## Email

In this case, you want to use email as a tool for repetition. Reinforce your messaging through consistent communications. Who should you send emails to? **Everyone!**

Don't forget about those who haven't provided their mailing address. We recommend sending emails with the same story and wording as your direct mail appeal to everyone on your list for whom you don't have mailing addresses. Early to mid November, or about 2 weeks after the first appeal gets mailed, I want you to send a follow up email to everyone who hasn't given. This email should repeat what was said in the first mail out. Send another couple of emails after that.

In the last week of December, send another 3-4 emails leading up to year-end.

As mentioned, don't be afraid to recycle the same story used in the direct mail appeal (repetition is good). Following the same theme, introduce new stories in your follow-up (that's where the other interviews come into play). Make sure that you not all of your emails are direct asks. Use the following list as inspiration to craft messages that establish a deep connection with your donors. Don't just ask them for money, share stories and updates. To help you get started, here are a few ideas of what you might include in your email communications strategy:

- Highlight a program's success through a beneficiary's personal story
- A message from the field, so supporters come face-to-face with the work their support is enabling your organization to accomplish
- Send a personal note from a board or staff member about the progress you've made towards your mission this year
- Thank existing donors for being involved throughout the year and demonstrate the impact their support has had on your programs through story

After you've planned out your mailed appeal activities, that's only half of the plan - think about what follows! Use this chart to plan the rest of your email communications this holiday season. After all, the more points of contact you have with your donors the more likely they are to feel connected to your mission which often translates to more gifts!

Activity	When	Cost
Pull donor list of those who only have email addresses - craft/send appeal that emulates mailed appeal	Draft September - October Send November	\$0
Segment donor lists	September - October	\$0
Write follow-up content based on interviews previously conducted as well as the mailed appeal	September - October	\$0
Send first email	Early November (1-2 weeks after initial mailing)	\$0
Send second email	Mid-November	\$0
Giving Tuesday email	November 27	\$0
Send third email	Early-December	\$0
Send forth email	Mid-December	\$0
Send fifth email	End-December	\$0
Send sixth email	Early-January	\$0

*Your turn...*

Activity	When	Cost

## The Second Thank

Check out a recording of our monthly masterclass with ideas on how to blow your donors' minds with amazing stewardship: <https://youtu.be/bOyAgIXfqvk>

Year-End Stewardship Activities			
Action	Date	Donor to Contact Based on Gift Size	Comments

		\$1 - \$249	\$250 - \$999	\$1,000 - \$2,499	\$2,500 +	
Email Thank You	Immediate if online, or within 24 hours off-line	x	x	x	x	
Phone call from fundraising staff	within 48 hours of gift	x	x			5 minute phone call thanking donor for their generous contribution
Phone Call from ED	within 48 hours of gift			x	x	5 minute phone call thanking donor for their generous contribution
Holiday Card	Beginning of December	x	x	x	x	Send to all donors if possible, but due to time and budget constraints, send to those who made the biggest contributions (or those who have given repeatedly year after year)

## Personalization

### Groups

For the most effective fundraising, you can group your audience based on specifications like amount donated, type of gift, how often they give, the last time they gave, etc. (whatever is most valuable to your organization). Use your database or spreadsheets to pull the information you need to properly categorize your donors. Once you have your donors grouped, you will begin to figure out the best communication strategy for each.

Donor Group	Specifications
Major Donors	<ul style="list-style-type: none"> <li>• Gave over \$500</li> <li>• Gave within the past 12 months</li> </ul>
Annual Donors	<ul style="list-style-type: none"> <li>• Gave between \$1-\$499</li> <li>• Gave within the past 12 months</li> </ul>
Monthly Donors	<ul style="list-style-type: none"> <li>• Donates on a monthly</li> <li>• Gave within the past 12 months</li> </ul>
Lapsed Donors	<ul style="list-style-type: none"> <li>• Anyone who gave last year but not this year</li> </ul>

*Your turn...*

Donor Group	Specifications

## Customization

Donors want to feel important to you! One way to do that is to make the letters you send feel extra personal.

Here are some examples of how you can personalize your letters, both with technology (mail merge) and not. Be creative!

Customization	Specifications
Mail merge based	<ul style="list-style-type: none"> <li>• add/repeat the donor's name throughout</li> <li>• Acknowledge their last gift amount</li> <li>• Call out a specific ask based on interest</li> </ul>
Low-tech	<ul style="list-style-type: none"> <li>• Handwritten envelope</li> <li>• Real stamps</li> <li>• Handwritten note on the letter</li> <li>• Email from personal account</li> <li>• Email intro that is personalized</li> </ul>

*Your turn...*

Customization	Specifications
	•
	•
	•
	•

## Social Media

Whatever your social media IQ, you can use social media to reinforce your year-end appeal themes. Keep in mind, it's very hard to get people to convert from social media to donors, but if someone is a donor and getting the same messaging from mail, email and now social media, it can be pretty powerful. Consider budgeting \$75-\$100 for Facebook ads to specifically target people who already like your page, as well as their friends. Check out [this](#) CanadaHelps article to help get you started.

Taking a more passive approach, social media reaches a larger audience as well as new potential prospects. Use social media as a storytelling tool. Balance your solicitations with an equal number, if not more impact stories. Use this chart to schedule your year-end communications and align them with your mailing and email appeals.

Date	Story/Content	Audience	Solicitation (S) or Update (U)
Facebook			
Twitter			
Instagram			

# Calendar

Use this calendar as a final summary of the activities that you will be engaging in over the next 3 months. Good Luck!

Month	Activity
September	Brainstorm year-end appeal messaging, access previous year's year-end giving results  Complete this plan
October	Use database to review donor segments  Draft and revise year end appeals, segment donors  First thank-you
November	Send out direct mail and first batch of email appeals
December	Send out second batch of emails, promote year-end giving on social media  Thank donors for their gifts, generate year-end giving reports
January	Continue with donor stewardship  Follow up communications (email, phone call) of campaign success to all participating donors  Track results in your spreadsheets/database (compare results to your predicted goals)

*Your turn...*

Month	Activity
September	
October	
November	
December	
January	

# Appendices

## Appendix A: Margaret's "Before" Appeal

Landing on my feet...

My name is Lena, I'm 31 years old, and have been diagnosed with schizophrenia. Four years ago, I came to Toronto from Calgary to escape an abusive relationship. I had to leave my home and my job as an executive assistant I had no job, no income, and no support. I had stayed in a shelter for a week but ended up hospitalized for several months.

I was fortunate enough to be discharged into Margaret's high-transitional housing, where I found a safe haven to begin my recovery. The structure of the house helped me boost my sense of stability. I was able to continue my education and develop significant and important social supports in the community. Today, with the help of Margaret's I have moved into my own apartment and work part-time as an administrative assistant.

To continue to provide essential services for women in our community we are reaching out for your support. Any amount of time, donation of items or money given will be used to help our clients recover and rebuild their lives. If you are interested in becoming a member, email [info@margarets.ca](mailto:info@margarets.ca) , volunteering your time email [anna@maergarets.ca](mailto:anna@maergarets.ca), donating an item for our yearly fundraiser email [info@margarets.ca](mailto:info@margarets.ca), and/or make a donation, please call or mail a check to Margaret's Housing and Community Support Services, 301 Broadview Ave, Toronto, ON M4M 2G8, or donate online at [margarets.ca](http://margarets.ca).

Our charitable registration number is 11889 0391 RR0001. A tax receipt will be issued for donations of \$10 or more.

Thank you for your continued support!

## Appendix B: Margaret's "After" Appeal

Dear [FIRSTNAME],

As the season transitions into winter, you welcome many sources of warmth into your life. While you sit on the couch, wrapped in a cozy blanket, it's easy to forget what lies beyond the frost covered glass.

Greg is someone beyond the glass. It's easy to feel disconnected from something as big as homelessness or mental health until there's a name attached to it. But when you support Margaret's, your support goes to individuals just like Greg.

For the better half of his life he didn't know where and how to look for warmth. He didn't know where his next meal was coming from, didn't have a friend in the world to call for some kind words, and had no place to sleep at night other than the streets.

At Margaret's, we see clients everyday who question their worth and struggle to be accepted. With no source of warmth to recharge their spirits, they struggle to make it through the winter.

Your support offers protection from the elements through our drop-in and housing programs. But it's more than that. Your support provides comfort, community and self-worth at a time when it's needed most.

You can celebrate the importance of warmth and love alongside friends and family this holiday season by giving an opportunity to someone who didn't think themselves worthy.

A generous gift of just \$50 is enough to provide five people in need with the basic necessities to start them off on the right foot this holiday season. You will provide a nutritious meal, warm clothes, and a warm, safe place to sleep.

Greg, whose life went through many trials before arriving at Margaret's Drop-In Centre, will be spending his first winter in an apartment of his own thanks to generous supporters like you! Your donation today will help others like Greg escape the cold once and for all.

Approaching 60 years old, he had never had a place to call his own and struggled for years with mental illness. Over the last decade, Greg lived on the streets of Toronto and in tents in Western Canada.

When Greg set foot through our doors in search of warmth and a hot meal, this was his first step towards re-discovering his value. Greg's skin, weathered by the elements, had deep

creasing around his eyes and mouth. His tall frame, once solid and upright, was bent as he hunched towards the floor.

The drop-in staff were able to refer Greg to the services that would lift him off the cold streets. With your support, Margaret's was able to find him permanent, supportive housing.

For individuals like Greg, the sense of relief you feel after finding a place to live is often fleeting. Just because he found housing, it doesn't mean it's secure.

Just as you and I would have an unimaginably hard time adjusting to living on the cold streets, when someone who was formerly homeless transitions into permanent housing, they need to make a lot of adjustments. Your support during this transition is critical.

For Greg, who suffers from mental illness, his new surroundings brought out feelings of hopelessness and isolation. He didn't know how to live in an apartment. He lacked the skills to maintain basic standards of personal hygiene and cleanliness. Utilities and the associated payments went straight over his head. Eventually an eviction notice was slapped on his door and panic set in.

Pacing around his new apartment alone, Greg considered running back to the familiarity of the streets. This is when your generosity and the work of Margaret's staff kicked in.

First, Greg and his caseworker addressed the eviction notice - Greg was connected to legal support, and given a court hearing date. His support worker made sure he attended. He also connected Greg to a local food bank and other supports to offer a sense of stability.

Greg's transition is a work in progress that you are a part of building.

Without you, Greg would likely be back on the cold, lonely streets right now, curling up his fingers in his tattered gloves, waiting for the frost to settle into his bones for a long, cold winter.

Your support helps people like Greg find comfort and refuge at Margaret's. Instead of shivering in a tent or desperately jumping from shelter to shelter, they enjoy a kind welcome from those who can connect them to the care and services they need.

From feeling isolated and alone, Greg now has renewed faith in himself all because someone like you was willing to offer support.

Please, make a gift to Margaret's today of \$x, \$y, \$z, or any amount to help others like Greg at a time when they struggle to find housing, a hot meal, a helping hand or simply the reassurance that they are valued.

Thank you so much for your understanding and compassion. Your generosity is deeply appreciated and valued. Wishing you and your loved ones a warm, safe holiday and the very best for the New Year.

Warmest regards,

Diane Walter  
Executive Director

P.S. With a generous gift of \$x, \$y, \$z this holiday season, your support can be the reason why someone like Greg spends his or her winter in an apartment of their own for the first time!