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# Year-End Planning Guide

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**The year-end fundraising season** is often the most charitable and also the busiest time of year. It's a time to ask those who are interested in your cause to pitch in and support your organization. Use this guide to help you create, craft and execute your year-end fundraising campaign.



# September

The Creative Month



This is the month you should spend cultivating the creative theme, messaging and imagery that will comprise your year-end fundraising campaign. This is when you should renew your own understanding of your organization's mission. Go out and talk to the people you help. Ask what they are dealing with right now and what they could do with more support. Knowing your beneficiaries' needs and stories will inspire your year-end creative direction.

## 5 Things to Remember

- People give to help a person not a crowd.
- Position the individual giver as the hero.
- Your organization is a conduit between donor and beneficiary.
- Donors are empathetic – ensure your message is, too
- Donors need to feel and witness the issue(s) you address, in both writing and imagery.

## 5 Things to Do

- Take a close-up photo of a person you help.
- Ask a person you help to describe the challenges they currently face.
- Ask your program staff to share at least one story a week of someone you help.
- Create a storyboard of images about an individual's cause-and-effect story.
- Evaluate your past solicitations and corresponding stories – what worked and what didn't?

## Key Dates

**WEEK 1:** Visit with people you help.

**WEEK 2:** Analyze past solicitations.

**WEEK 3:** Storyboard themes.

**WEEK 4:** Choose a story and narrative for the year-end campaign.

# October

The Planning Month

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Now that you have decided on your creative theme and imagery needed, October is a time to organize and plan for the year-end campaign. During this planning month, your team should present the strategy and approach for the year-end campaign to the organization. This includes reviewing various methods that will be used to seek support, the timing and intended outcomes of each solicitation approach.

## 5 Things to Remember

- You have “donors” – not “email donors,” “direct mail donors” or “online donors.”
- Donors should be exposed to the solicitation story through various approaches.
- Even if a donor receives a message one time, you need to remind them about the opportunity to give.
- Extend the narrative of the story across multiple solicitations.
- Plan stories across all channels based on your audience.

## 5 Things to Do

- Determine the schedule of solicitation release dates.
- Present the timing, logistics and story of the year-end campaign to all staff.
- Ensure that you are ready to suppress donors that give during the campaign from future solicitations.
- Create a donation page, direct mail and email wireframe.
- Create a social media schedule.

## Key Dates

**WEEK 1:** Present the timeline, story and logistics to the organization.

**WEEK 2:** Review online donation pages.

**WEEK 3:** Create wireframes for all solicitation approaches.

**WEEK 4:** Determine mobile needs for campaign.

# November

The Learning Month

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Now is the time to start the process of seeding the year-end campaign by helping your constituents learn about the stories you plan to present. Insert year-end story concepts in newsletters. Start presenting some aspects of the creative strategy to your constituents. Ask your followers to act on behalf of the issue. This is the time to educate and reignite their interest in your cause before they are asked to give.

## 5 Things to Remember

- Performing an act is a reinforcement of their interest and passion for your cause.
- People need to warm up to giving – inspire them before asking.
- Educate before exposing individuals to big concepts related to your cause.
- Rather than thank individuals for supporting your organization, thank them for supporting your cause and issue(s).
- Individuals need a reason to give and that reason is the people you help.

## 5 Things to Do

- Create a learning series about the issue for constituents.
- Ask your constituency to act in support of the issue.
- Seek constituent input on the creative for year-end.
- Prepare for Giving Tuesday.
- Thank donors for their remarkable contributions.

## Key Dates

**WEEK 1:** Send a message about the issue.

**WEEK 2:** Ask donors to act for your cause.

**WEEK 3:** It's Thanksgiving. Thank donors for their contributions.

**WEEK 4:** Finalize Giving Tuesday solicitations.

# December

The Giving Month

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Finally, it's time to start asking your following to support the organization and people you serve. The month of December begins with Giving Tuesday and ends with an "ask" on December 31. Don't forget to spend time asking and thanking donors. Don't wait until after the season is over.

## 5 Things to Remember

- Make your solicitation memorable by thanking and asking the individual to support your cause.
- Don't forget to incorporate an ask through phone calls during this month.
- Giving Tuesday is an opportunity to ask people to start giving.
- Launch the campaign with direct mail, followed by two emails and a solicitation on the last day of the year.
- Remove donors from future solicitations if they already gave.

## 5 Things to Do

- Send handwritten notes two days before Giving Tuesday to thank donors for being remarkable.
- Time email campaigns to land mid-morning.
- Send at least two emails, a week and a half apart.
- Create an experience for donors during the month of December.
- Call past donors to ask for their support.

## Key Dates

**WEEK 1:** Send Giving Tuesday solicitation.

**WEEK 2:** Send first email solicitation.

**WEEK 3:** Call past donors asking them to support if they have not given.

**WEEK 4:** Send final reminder to give on December 31.



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## Planning Your Next Campaign? Let's Talk!

We're happy to partner with you and execute a strategic fundraising campaign that will inspire your audience to give. We combine the most up-to-date research with our creative edge to help you reach new goals through powerful messaging and design. Send us an email at [info@achieveagency.com](mailto:info@achieveagency.com) or call (317) 637-3000.

## At Achieve, we help you investigate, activate and motivate people for your cause.

We leverage our expertise in research, technology, creative and strategy to understand and inspire your audience – whether current or yet to be discovered – to take action. We provide the knowledge and understanding before applying such learning to test and activate an audience for companies and causes. We do this because the best campaigns are backed by solid research to truly understand how people move from belonging to a movement to believing in it – and ultimately owning the movement.

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