



Dear colleagues,

The year-end fundraising season can begin as early as September and summer is a perfect time to begin planning. Successful year-end campaigns are well coordinated efforts that offer your Affiliate an opportunity to reach your donors and prospects in a variety of ways, with a variety of customized messages. Project Rock has developed a year-end fundraising toolkit to guide the content, timing, segmentation, and tailoring of your year-end appeals. Please consider utilizing this resource, which includes a simple guide to year-end fundraising, as well as templates for sample emails, letters, and scripts for you to review and customize for your local Affiliate.

- Dennis G. Serrette

Senior Vice President, Partnerships and Advancement



Why a year-end push?

Whether your Affiliate follows a January to December or July to June fiscal year, the end of the calendar year is considered “the giving season”— a time when most Americans consider their philanthropic priorities and make their annual gifts. In fact, **nearly one-third (31%) of annual giving occurs in December** alone. For this reason, it is crucial for nonprofits to plan for and execute a year-end fundraising campaign to engage donors during this generous time.

Nearly 50% of nonprofits raise the majority of their funds between October and December. By utilizing the Project Rock Simple Year-end Fundraising Guide and supporting templates, your Affiliate will be well-resourced for a successful year-end campaign. While the resources are available year-round, it’s important to begin planning in the summer months so that execution is effective and efficient come fall.

Resources

Project Rock offers a comprehensive year-end campaign toolkit with templates and instructional overviews for use, including:

- Annual Appeal Letter
- Phone-a-thon Call Sheet for Volunteers
- Phone-a-thon Script for Volunteers
- Giving Tuesday Email Series
- President’s Letter

Visit the Project Rock website to access the toolkit and download these helpful templates at the following link:

[Project Rock Toolkit](#)

We also offer a *Simple Guide to Year-End Fundraising* which outlines the recommended timing, audience, segmentation, objectives, and content of each tool. This guide will help you determine which of these tools will suit your affiliate’s needs best. Download your guide here:

[Simple Year End Fundraising Guide](#)



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Elements of a Successful Year-End Campaign

Year-end fundraising campaigns can facilitate an influx of funds in November and December, but your year-end push doesn't have to be a last minute scramble. Starting your year-end campaign planning now will allow you ample time to develop a well thought-out approach, engage volunteers, and develop the timelines and collateral you need so execution of your plan is a cinch. Follow these steps to get started:

1. Set a goal.

Whether it's a monetary goal, an acquisition goal, retention goal, or migration goal, it's important for your affiliate to determine what you wish to accomplish for your year-end campaign so that you can build a plan focused on your desired outcomes.

2. Build your story.

Think about the milestones, accomplishments, success stories, and impact figures you've achieved throughout the year. Collect the anecdotes and compelling statistics that demonstrate the impact of your affiliate's work in the community early on and begin to develop the content of your appeals.

3. Identify your audience.

Depending on your goals, you may target many different audiences for your year-end campaign. Consider segmenting your donors into your target groups – "VIP" major donors, renewals, lapsed donors, and brand new prospects – and customize each group's appeal.

4. Determine your communication channels.

Will you send emails? Snail mail? Social media? Phone-a-thons? All of the above? Ensure you have all the resources you need to execute your campaign and recruit volunteers, hire interns, or research outside vendors that may help enhance your capacity.

5. Set the timeline.

Be sure to establish launch dates for each portion of the campaign, assign tasks to team members – staff, volunteers, Board members – and keep those responsible accountable by communicating plans and progress.

**#GIVING
TUESDAY**
December 3

Don't forget Giving Tuesday is on December 3, 2019. A Giving Tuesday strategy is included within the Project Rock [Simple Year-End Giving Guide](#) and a sample e-blast series with recommendations for email objectives, audiences, segmentation, ask amounts, and even sample email content, can be found on the Project Rock Toolkit. View the customizable e-blast series here:

[#GivingTuesday Promotion Email Series](#)