Your Fundraising Calendar for 2012

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On behalf of GuideStar USA, Inc.
It’s time to plan for 2012. We all hope that good times will return and fundraising will spring back. But we can’t count on it.

Although we can’t do a lot about the economy, we can plan creatively and strategically to get the highest return for our fundraising effort. And, as Donald Trump says, “If you’re going to be thinking, you might as well think big.”

Here’s a calendar that will nudge you to keep you on your toes so you can stay ahead of the game.

**January—It’s Thank You Time**

I hope you receive a flood of gifts in December and particularly at year’s end. Thank, thank, and thank your year-end donors again and again.

*Penelope Burk* found that donors were far more likely to give again if they received a prompt, personal thank you. So go overboard and show your donors some love. Consider yourself in the gratitude business and elevate it to a high art.

- Create a welcome package for new donors and extend a special personal greeting to them.
- Invite them to a special party or tour.
- Send them a special newsletter.
- Have someone your organization serves write them an appreciative note.

Form a Friendmaking Committee of your board members and give them the job of turning donors into true friends of your organization. You might be surprised at your board members’ creativity!

My own motto for thanking is “Find seven ways to thank your donors, and they’ll give again.”

Make the occasion of the gift an experience of joy and celebration on both your part and your donor’s part. Studies show that first-time *online donors* can be particularly fickle. Go overboard with these donors to establish a warm connection quickly.

If you can switch these donors to giving offline in the future, they will be worth much more in the future. According to *Blackbaud*, donors acquired online who give through multiple channels are worth up to three times more than those who give through a single channel.

**February—It’s Major Donor Month**

It’s time to add some firepower to your major donor efforts. We all know that the major money is out there. Are you systematically developing relationships with current and potential major donors?

Set a firm goal for how many major donor visits you will accomplish each month. And then make it happen. Don’t let anything stop you from making these visits—they’re absolutely essential. This month, recommit to getting out of the office.
You can make many different kinds of visits:

- Thank you visits
- Advice visits
- Update visits
- “I’d love to hear your story” visits
- “I’d love to share our latest project” visits
- “I want your opinion and feedback” visits
- “Can you help us with some prospect strategies?” visits
- Asking visits

Set an all-staff monthly strategy session on all of your major donors. This monthly meeting is the glue that will keep your major gift program humming along productively.

**March—Social Media Time**

Social media helps your donors stay connected with you and your mission.

I bet your cause could get a whole lot more out of Facebook, Twitter, YouTube, and LinkedIn. Remember, the world is on Facebook these days—it’s even helping to spawn revolutions.

Make sure your organization is present in social land—it’s where you can make many friends for the cause. Social media helps your donors stay connected with you and your mission.

Don’t forget that people are social creatures. When your donors take part in the lives of others whom they are helping, they are happier and live longer.

This month, assemble and empower a group of smart young people who will drive the social media conversation for your organization.

- Be sure your cause has interesting things to say and share online.
- Ask questions of your supporters online.
- Seek their input online.
- Rally the troops, ask for help, drum up volunteers—all online through social media.

**April Is Overhaul Your Messaging Month**

Just how snappy are your messages about your cause? Are they interesting? Imaginative? Full of energy?

Are you using stories, pictures, videos effectively? Or are you still using that old lofty academic tone that so many nonprofits favor? Remember it’s the story that evokes an emotional connection—not statistics!

It’s time to ditch the long, hard-to-read sentences and paragraphs. Time to create headlines and subheadings that tell your story quickly with power.

- Create a tone that’s casual and friendly.
- Find a story or a theme to use all year.
- Create a metaphor that is delightful and charming.
- Use an icon or picture that exemplifies your metaphor.

Take a look at your newsletter. Revamp it into something that’s full of pictures. Stop taking about you, your staff, and “organizational news”—instead fill it with stories about people you are helping and the difference you are making in the world.

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Take a look at your design. Make sure there is plenty of white space and it’s not too cluttered. The type needs to be at least 12 point size. Don’t let a designer get too creative with your appeal, or the pitch might get lost.

**May—It’s Party Time!**

You can raise much more money with fewer events.

May is time to take stock of your events. Lay out the numbers. Figure in the costs of staff time and resources. Add up all the numbers—including staff.

Then calculate your net profit for each event. What’s the return you’re getting on your investment (ROI)?

Are all of your events really worth it?

Remember that you can raise much more with fewer events. Events have the highest cost per dollar raised of any fundraising strategy.

The average net cost from events is about 50 percent of each dollar raised. Mailing campaigns cost about 25 percent per dollar raised, and major gifts cost about 10 percent per dollar raised.

The real money in events comes from sponsorships. And they take time to develop and close. If you are packing too many events into a year, you’ll never have time to plan far enough ahead to secure major sponsorships.

So ditch your next event, and you’ll make more money!

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**June: It’s Retreat-Planning Time**

Time to pull your board together for a one-day retreat. There are lots of themes you can tackle:

- Conduct a board self-assessment. Are your board members happy with their experiences on the board? Discuss the results.
- Tackle the most important strategic issues facing your organization. How are you going to deal with them?
- What’s your organization’s plan for the next year?
- Get your board members fired-up for the cause—and put them to work.
- Ask your Friendmaking Committee to report to the rest of the board—their example will get at least some of the non-committee members into action making friends and opening doors.

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An annual retreat is essential for another important reason. Downtime outside of a formal meeting gives your board members a chance to socialize with each other and get to know each other.

Social time helps knit them into a more cohesive group of team members. And that’s what you want!
July—It’s Planning Time

If your fiscal year ended on June 30, you are probably entering a welcome lull. It’s time to take a breath. And plan.

Now’s the time you can take stock. How did your fundraising go this past fiscal year? Evaluate everything—your special events, your staff, your board’s participation, every single fundraising strategy.

Reconfirm your fundraising priorities. What are you really raising money for? What do you need to promote? Can you find some new special donor-friendly projects to promote?

It’s time to set new goals for the year. What kind of increase is really possible? If you plan for fundraising increases, spell out exactly how you’ll make those goals. Never, ever set goals based on wishes and hopes. Instead, define a specific strategy to back up each expanded fundraising goal.

Practice saying “Yes” and “No.” No to pie in the sky numbers! Yes to a careful assessment of what’s possible and then a realistic strategy that has time lines and accountability.

August—Focus on Planned Gifts

To many nonprofits, organizing a planned giving program seems daunting and complex. Exactly where do you start?

Planned giving doesn’t have to be complicated:

1. First, identify people who are your best estate giving prospects—they are your longtime donors who give consistently year after year.
2. Then plan to send them a note twice a year promoting an estate gift.
3. Get rid of all the jargon and simply chat with them about the idea of leaving a bequest.

Taking a simple step-by-step approach to planned giving makes it easy to implement.

September—Year-end Fundraising Time!

You’re entering major fundraising season—the year’s end. If you are like most nonprofits, you’ll raise most of your funding during the last quarter of the year.

Lay out a step-by-step year-end fundraising plan.

· First warm up your donors for the ask. Try starting with a “thankathon.” Gather hordes of volunteers and clients together; feed them pizza perhaps; and get them on the phone thanking donors. Or try sending a warm-up letter thanking donors for their past support.

· Then lay out a multi-channel fundraising effort—using direct mail, phone follow-ups, postcards, e-mail, and social media. Use the exact same message over and over in each medium. And lay out a sequence of appeals that reminds your donors over and over how much they care about your cause.
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This is how powerful fundraising is done these days.

Today’s recession-weary donors will respond better to a specific appeal.

Be sure you have a clear dollar goal that is tied to a specific project or outcome, even if it’s just keeping the lights on: “Our goal is $250,000 so we can do xxxxx.”

Also, be sure you let donors know your track record of producing measurable results. That just may be the number one reason donors will choose you over another charity.

October—Pull Out the Stops with Face-to-Face Asks

Don’t forget to include face-to-face asks in your year-end strategy. Select 100 donors and map out a plan to see all of them during the year-end fundraising season. If you can’t see all 100, then choose 50, or 40, or even 30.

Call out the troops; put your board members and key volunteers to work. Make it an all-out-effort—with teams, goals, a deadline, a theme, and awards. Make it fun!

This strategy alone can put you over the top of your goal—even in this economy.

November—Time to Tweak Your Web Site

Now’s the time get ready for that onslaught of year-end online gifts.

According to Network for Good, 40 percent of online donors make their gifts in December, and 40-60 percent of those donors will give on December 30 or 31.

Add a Web page that says, “Your gifts at work.”

Some 59 percent of all donors are doing “more research” before making their gifts—and much of that research is happening online. You need to add credibility to your Web site:

· List your board members
· Include testimonials
· Add any endorsements
· Post links to your GuideStar and Charity Navigator listings

Add a Web page that says, “Your gifts at work”—with a pie chart of your revenue sources and how you use the money. Post your overhead percentage—that’s what today’s wary donors want to see, because they are less trusting than in the past.

December—Show Everybody Some Love!

This month will probably find you busy with your year-end appeals, parties, and gifts to honor donors. There’s not much time for the big picture.
So this month focus on appreciating everybody! Send holiday wishes to your wonderful donors who help make your work possible. Take time out to thank your board members for all they do for the cause. Board members are so seldom appreciated.

This month focus on appreciating everybody!

And be sure you thank the staff. An appreciated and acknowledged staff is also a high-performing staff. Remember it’s the small thank yous and appreciations that make staffers feel appreciated. They’ll reward you with loyalty and even better performance.

Enjoy the holidays! Take a rest for the New Year. And begin again in 2013 with vigor and renewed energy!

About the Author

Gail Perry is the author of *Fired Up Fundraising: Turn Board Passion into Action* and founder of Gail Perry Associates, a Raleigh, North Carolina-based consulting and training firm. You can find more fundraising tips in her Fired Up Fundraising blog, found at [www.firedupfundraising.com](http://www.firedupfundraising.com).

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