

**YEAR-END
GIVING**

**FOR THE
SMALL SHOP**



SINCE 2004

gaskill
strategies

YEAR-END FUNDRAISING PLAN WORKSHEET

This worksheet is your guide for creating a year-end fundraising plan. Collaborate with the CEO and Board Chair to set a realistic goal and break it into targets for each donor type. Use the plan to steer your efforts and keep your team and board on track. Remember to check in regularly, keep everyone updated, and adjust as needed.

1. Fundraising Goal:

- What is your total fundraising goal for the year-end? \$ _____
- Is this goal realistic? (Consider past performance and capacity) Yes No
- Are expectations aligned with leadership? Yes No

2. Sources to Target:

- Who can we target, connect with, and close by year-end?

Consider key donor groups such as:

MAJOR DONORS:

Who are the top individuals who can make significant gifts?

BROAD-BASE INDIVIDUAL GIFTS:

Who in your donor base is likely to give smaller, repeat gifts?

CORPORATIONS:

Who are the businesses with potential interest?

OTHER:

Foundations, matching gifts, or unexpected sources you can pursue.

- *Write the sources that you will strategically target for year-end giving through proactive planning, solicitation and follow-up.*

Sources:

1. _____
2. _____
3. _____
4. _____
5. _____

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3. Financial Objectives for Each Source:

- Take your total goal and divide it among your sources.

Set specific financial objectives for each and identify a leader for each goal.

Example:

MAJOR DONORS: What do we define as a major gift and how much can I expect?
Broad-base individual gifts: What do we define as a broadbase gift and what's a realistic target for smaller, more frequent gifts?

CORPORATIONS: What portion of the total will come from corporate gifts?
Other (if applicable): What amount could come from additional sources?

SOURCE	GOAL	OWNER
Major donors Individuals		
Broad-base donors Individuals		
Corporations		
Other (specify)		

* Other (if applicable): What amount could come from additional sources?

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4. Tailoring Strategies for Each Source:

- How will you segment and tailor strategies for each donor source? Develop specific tactics for each group:

MAJOR DONORS:

1. _____
2. _____
3. _____
4. _____
5. _____

BROAD-BASE INDIVIDUAL DONORS:

6. _____
7. _____
8. _____
9. _____
10. _____

CORPORATIONS:

1. _____
2. _____
3. _____
4. _____
5. _____

OTHER SOURCES:

6. _____
7. _____
8. _____
9. _____
10. _____

WHY GIVE?

Exercise Instructions: *Let's craft a six-word story that captures why people should support your organization.*

Start by reflecting on your mission—what's your core purpose, and how do you make a difference? Next, think about the specific ways your organization creates change and the emotional impact it has.

Use the space below to brainstorm and draft your six-word story. Aim for a clear and impactful message. Once you have your story, be ready to share it with others

Worksheet Template:

1. Mission Reflection:

Core Mission: _____

Difference Made: _____

2. Key Impact Areas:

Specific Ways We Create Change: _____

Emotional/Impactful Outcomes: _____

3. Six-Word Story:

Draft 1: _____

Draft 2: _____

Final Six-Word Story: _____

TIPS FOR CRAFTING THE ASK

Tell one story across all your appeals—emails, follow-ups, everything. Make it your rallying cry. *Say it square then say it with flair.*

Ways to tell your story:

Write the letter from **one person**. This can be a participant, board member or CEO.

Studies show **negative framing** works best. Fear of loss gets more attention than potential gain.

Share a **startling fact** to show the need (e.g., “1 in 5 children in our community goes to bed hungry”).

Relate to the time of year (Thanksgiving, holidays, end of year).

Say thank you: Open with thanks, give credit in the middle, and close with thanks.

Make it urgent. Urgency can be tied to meeting a challenge or addressing the need directly.
• Include the call to action throughout the appeal, not just at the end or in the P.S.



Include a photo.

- The need you’re trying to meet
- A human that embodies the need

Use **personal anecdotes** in your appeals.

Segment your donors and make sure the message matches their relationship:

The donor you have is your best donor. Think Recent (last 12-24 months), Frequent (more than once in 12 months), and Monetary value (those with high giving potential). The ask needs to acknowledge their support.

Frame your accomplishments in a donor-centered way (e.g., “You are why we can provide hope for families this year”).

The P.S. is the most important part. It should include a thank you, a call to give, and a reminder of how and by when to give.

No resources for segmenting donors? The appeal must be skillfully written so that the person receiving it doesn’t feel their past contributions are ignored.

YOUR STORYTELLING TOOLKIT

1

Email Script/PS

Ensure easy click throughs to give or reach you

2

Letters/E-Solicitations

Consisten across all platforms, personalize with notes, lift-letters

3

Elevator Pitch

Internalized and personal

4

Newsletters/Media

Year-end newsletter, media pitches, align with the ask

5

Website

Consistent messaging, easy to find how to give

6

Thank you.

Ensure your gift acknowledgement tells the same story.

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List the communication tools you can count on for your year-end giving efforts.

TOOL	RESPONSIBLE	IMPORTANT DATES

NEXT STEPS

What are the immediate next steps required to begin? Think of these steps as the things you will do first. These are a list of questions to get you thinking. After you complete these questions list any other things you must do to be successful.

Who do you need to meet with to gain approval and ownership?

How long will it take you to finish the plan? This ideally needs to be done in the next two weeks.

What data do you need to affirm the fundraising goal and sources?

How will you monitor your success and with whom?

In addition to the above what is essential to prioritize for success?

Your List of Priorities:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____

