



Year-End Review Workbook

Hey, you - yeah, you! The one trying to do it all!

We see you. Fundraising can feel hectic – you’re always bouncing from one project to the next, often with very little time in between. The end of the year is a bustling time with a ton of activities. By the time you reach New Year’s Day, your nonprofit is launching its new annual campaigns before you’ve wrapped up your financials from the previous year.

Planning out your next moves is crucial to your organizations’ performance, donor retention, and overall functionality. While planning helps keep your fundraising tactics in check, getting started often keeps your sanity at bay – and staying sane is the most important aspect going into a new year of fundraising!

This workbook includes basic questions that can help you start evaluating different areas of your nonprofit and their performances over the last year. What worked? What didn’t work? Then we included lots of links to further reading on each topic.

Every nonprofit is different; some of these questions will apply to you, some will not, and many will bring up even more questions. We hope this workbook helps you kickstart your planning while also having fun.

The Qgiv Team



YEAR-ROUND FUNDRAISING

Take a look at your overall fundraising and identify the strong and weak points of your performance over the last year. These questions are also great for evaluating individual campaigns in addition to your overall yearly fundraising.

What campaign was most successful? What went well?

What campaign fell short of its goals? How could it have been improved?

What goal did you set for yourself this year that you achieved? What helped you reach your goal effectively?

What did you want to achieve this year that didn't happen? What can you do better next time?

What resources do you need to make next year's fundraising better?

Are there any programs, events, or initiatives that cost you more than they earned?
How can those be streamlined to be more efficient?

What are some fundraising methods you'd like to try in the coming year?

What are the changes you need to make to use those new methods?

Continue the Conversation | Year-Round Fundraising

Fundraising is an art – there's always room for expansion, experimentation, and perfecting the methods we use to raise money. Here are some resources your team might enjoy discussing as you talk about your fundraising successes and challenges.

Fundraising FAQ

(<https://www.qgiv.com/blog/fundraising-faq/>)

We get a lot of insightful questions about fundraising, from basic best practices to advanced concepts. This article compiles some of the most frequent questions we receive and answers them with tons of great articles.

10 Tips for Building Buzz Around a Web-Based Donation Campaign

(<https://www.qgiv.com/blog/web-based-donation-campaign/>)

If you've had problems in the past year with campaigns falling flat, take a look at this article. We've got some great ideas that will help you build hype and raise awareness for your next campaign.

Creating an Effective Fundraising Plan

(<https://www.qgiv.com/blog/under-development-guest-post-creating-an-effective-fundraising-plan/>) The first step in executing a great fundraising campaign is building a great fundraising plan. Diana Hoyt from MatchMaker Fundraising Software weighed in on how nonprofits can build a fundraising plan that will help your campaign succeed.

Asking for Donations from Individuals

(<https://www.qgiv.com/blog/asking-for-donations-from-individuals/>)

This article is a great resource for beginning fundraisers and veterans alike. It focuses on the best practices nonprofits use to guide their fundraising asks when they're soliciting donations from individual donors.

Asking for Donations from Companies

(<https://www.qgiv.com/blog/asking-for-donations-from-companies/>)

Corporate sponsorships have always been part of the philanthropic landscape, but there's an increasing prevalence of close relationships between nonprofits and for-profit companies. This article covers some best practices that will help you navigate this kind of fundraising.

Crowdfunding vs Peer-to-Peer Fundraising: Which is Right for Me?

(<https://www.qgiv.com/blog/crowdfunding-vs-peer-to-peer-fundraising-which-is-right-for-me/>)

If you've ever wondered the type of fundraiser that is right for you, you are not alone. The terms "Crowdfunding" and "Peer-to-Peer" can be ambiguous to some. This article breaks down these two popular fundraising methods.

DONOR PATTERNS

Keeping track of your donors' patterns – when and how they gave, whether they lapsed or upped their commitment, etc. – helps you evaluate your performance over the last year and improve your strategies this year! This section will help you gauge the health of your donor base and pinpoint areas you can improve upon.

How many return donors did you have this year? What percentage of donors churned in 2017?

How many new donors did you have this year? Was that number above or below your goal?

What can you do to boost donor retention next year?

What can you do to find new donors next year?

What donor retention methods worked best for you this year?

What donor acquisition methods worked best for you this year?

How can different departments at your organization help with donor acquisition & retention?

What are three donor retention practices you can start next year?

Continue the Conversation | DONOR NUMBERS

Building and maintaining your donor base is how you'll help your nonprofit grow and will make strides towards changing the world. It takes time, effort, and strategy to build a community of donors that will sustain your organization; these resources will help you.

Grow Your Giving: Donor Cultivation Strategies for Every Nonprofit

(https://www.qgiv.com/blog/wp-content/uploads/2016/07/Donor_Cultivation_eBook.pdf)

This comprehensive guide to donor cultivation covers best practices and strategies to captivate donors, build relationships with them, and establish relationships with them that will help them (and you!) reach philanthropic goals.

Donor Love Is Everything

(<https://www.qgiv.com/blog/wp-content/uploads/2016/08/John-Lepp-Donor-Love-Is-Everything.pdf>)

John Lepp does two things: he loves donors, and he helps those donors change the world. In this article, he weighs in on how nonprofit organizations can make very simple changes to their routines that have huge results on their donor retention rates.

6 Ways to Customize Your Thank-You Page

(<https://www.qgiv.com/blog/customizing-thank-page/>)

This practical article breaks down 6 small changes that you can make on your thank-you page that will make an immediate impact on your donors.

How to Retain More Donors during Your Annual Campaign

(<https://www.qgiv.com/blog/annual-fundraising-campaigns/>)

It's easy to target your messages to donors when they support a specific campaign or restricted fund. But how do you work on donor retention when they're donating to your annual campaign? This page breaks it down.

How to Reach Your Millennial Donors

(<https://www.qgiv.com/blog/millennial-donors/>)

Knowing your donor audience is important for your fundraising, but knowing how to engage with them isn't always easy. This article goes over ways in which you can reach out to one of the most influential generations.

Five Donor Retention Practices You Can Do in Five Minutes or Less

(<https://www.qgiv.com/blog/resources/donor-retention-five-minutes/>)

Donor retention doesn't have to mean a ton of extra work; in fact, some of the most impactful gestures you can make only take a few minutes of your time. This infographic breaks down 5 donor retention tactics that only take a few minutes of your time.

COMMUNICATION CHANNELS

Communication isn't what it used to be! Your donors and other supporters are inundated by information 24/7 – standing out from the noise long enough to get your message across is difficult. Taking time to review your communications practices is a great way to make sure your donors hear you.

What were your communications channels this year?

Did you notice any change or shift in the effectiveness of your communications channels?

What challenges did you face this year as you communicated with existing and potential donors?

What communication channels were most effective? Which were least effective?

Based on this year's activity, what adjustments should you make to your communications strategy next year?

What are your new communications goals for next year?

What resources will you need to accomplish your communications goals next year?

Continue the Conversation | COMMUNICATION CHANNELS

Communication isn't as simple as it used to be. Years ago, nonprofits communicated with their supporters by letter or in person. Today, it's a little more complicated – donors are online, on social media, using email, reading direct mail, and learning about charities from their friends. Here are some resources you can use to expand your reach and communicate effectively with the people who support you.

How to Run an Effective Email Campaign

(<https://www.qgiv.com/blog/run-effective-e-mail-campaign/>)

Communicating with donors through email is a tried-and-true tactic that can still be tricky to do right. This short list of strategies will help you make the most of your email communications with donors, whether you're asking for support or updating them on your latest campaign's progress.

3 Simple Ways Mobile Messaging Can Drive Donations

(<https://www.qgiv.com/blog/drive-donations-with-mobile-messaging/>)

Everyone seems to be glued to their smartphones these days. This guest post from Mobile Commons is full of ideas that will help you communicate with donors through the one channel that donors always use – text messages.

Micro-Video for Nonprofits

(<https://www.qgiv.com/blog/micro-video-nonprofits/>)

If a picture is worth a thousand words, how many words is a video worth? It's impossible to tell! Videos are a powerful way to make an impression on supporters in email, on social media, and other places online. They don't have to be long videos, either; this article breaks down the art of the micro-video and includes some great examples.

5 Nonprofit Email Best Practices You Can Apply Right Now

(<https://www.qgiv.com/blog/5-nonprofit-email-best-practices/>)

Email is a continuously used facet of the communication world, and with many users opening them up on their mobile devices, they are just skimming through. This article helps to explain how to better your emails with images, and how to shorten your content.

What's Up With All Of Those Facebook Donation Options

(<https://www.qgiv.com/blog/whats-up-with-all-of-those-facebook-donation-options/>)

Facebook has integrated its way into the world, becoming a staple for communication. With all of its uses, you can now apply your own donation form on Facebook. There are numerous options on how to integrate the form to your page, and it can be a little confusing. This article helps differentiate these issues.

STORYTELLING

Your organization's story is its most valuable asset. Take a little while to pin down the specifics of your story! Think about the mood and tone that will dominate your messaging next year; it'll make creating new materials for new campaigns easier ensure that your mission and ideas are consistently conveyed across different channels.

Sum up your nonprofit's mission in a sentence or two. What is it that you do?

Rephrase that so your donor is at the center. What does your donor accomplish through you?

Do you think you effectively told donors what they accomplish through you in the last year?

What's the driving theme behind your nonprofit's story?

Who are some board members, volunteers, or other people who have benefitted from your organization that would be willing to share their stories?

What's your least-read page or publication? How can you use your story to make it more interesting to a wider audience?

What are the biggest obstacles you've faced in the past when you've tried to tell an inspiring story that moves your audience?

How can you overcome those obstacles next year?

Continue the Conversation | STORYTELLING

Your organization's story is your best tool – it's what inspires people to support you, conveys your mission to the world in terms that people understand, and is the guiding force that drives your brand. Making sure you've established a great narrative for your organization is a critical part of fundraising, and it's important to periodically update the story you're telling to the rest of the world.

Here are some great resources that will help you tell your stories effectively.

Nonprofit Storytelling: Who Cares, Anyway?

(<https://www.qgiv.com/blog/nonprofit-storytelling-who-cares-anyway/>)

If you've never really thought about the stories you're telling online, in emails, and in your direct mail campaigns, this is an important article to read. It breaks down why nonprofit storytelling is so important, and it offers some ideas about ways to share your story once you've decided what it is.

Nonprofit Instagram Accounts to Follow

(<https://www.qgiv.com/blog/nonprofit-instagram-accounts-follow-3/>)

Some of the best stories are told most effectively through photos. This resource rounds up some of the best nonprofit Instagram accounts around; if you're looking for inspiring ways to share your story online, check this out.

“Our Kids Don't Have Recess” – A Peer-to-Peer Story

(<https://www.qgiv.com/blog/our-kids-dont-have-recess/>)

Want to see the power of a great story in action? This article tells the story of The Education Cooperative in East Walpole, Massachusetts, and the effect their story had on their first-ever peer-to-peer fundraiser.

Micro-Video for Nonprofits

(<https://www.qgiv.com/blog/micro-video-nonprofits/>)

We've included this link in other parts of this guide – it's just so good! Videos are a powerful way to tell your story, and this article is proof that your videos don't have to be long or complicated to make a big impact.

Qgiv's Top 3 Animal Shelter Fundraising Tips

(<https://www.qgiv.com/blog/animal-shelter-fundraising-tips/>)

A picture is worth a thousand words, especially with cute animals. Pictures create a story for an organization, and a lasting narrative. This article breaks down examples of the use of pictures, success stories, and reaching out to the community.

EVENTS

Events are a cornerstone of traditional fundraising. But times are changing rapidly – lots of nonprofits are re-evaluating their events on a regular basis and tweaking them to appeal to their donor base. Keeping an eye on your events, their attendance, and their efficiency is important! These questions will get you started as you evaluate your past events.

What events did you throw this year that were successful? What made them a success?

What events did you throw this year that were not successful? Can you pinpoint why they weren't successful?

Have any of your events been successful or unsuccessful several years in a row? Which ones?

Are any of your chronically unsuccessful events replaceable? If not, are they fixable?

How can you make your successful events even more successful?

Continue the Conversation | EVENTS

Running events is tricky; you have to keep expenses low enough that they're profitable for your no profit, but you want to make them nice enough that donors are willing to pay to attend them. If you're struggling with events or if you just want to try to make them a little more efficient, check out these resources.

4 Easy Ways to Raise Event Awareness through Social Media

(<https://www.qgiv.com/blog/4-easy-ways-to-raise-event-awareness-through-social-media/>)

More and more of your potential donors and event attendees get their news, learn about events, and coordinate their social calendars on social media. Here are some tips that will help you publicize your event on different social channels.

Peer-to-Peer Fundraising: How to Run a Profitable Campaign

(<https://www.qgiv.com/blog/peer-to-peer-fundraising/>) Peer-to-peer events can be huge fundraising opportunities for nonprofits, but it does take planning and careful execution to make them successful. This page breaks down basic peer-to-peer fundraising tactics and some strategies for making them successful.

Selling Peer-to-Peer Event Merch? Here are Some Ideas

(<https://www.qgiv.com/blog/peer-to-peer-store/>)

Selling merchandise at an event is a big undertaking. These tips are written specifically for fundraisers who are selling merch in conjunction with a peer-to-peer event, but many of them are applicable to regular events, too.

[Guest Post] Don't Come to This! Silly Fundraising Ideas with Marketing Automation

(<https://www.qgiv.com/blog/fundraising-ideas-with-marketing-automation/>)

James Hutto of ValeoMarketing shares some ideas for lighthearted non-events – a whacky kind of fundraising event that some nonprofits are adopting with great success. If you're looking for an unconventional fundraising idea, this might give you some ideas.

The Key to a Successful Peer-to-Peer Fundraiser

(<https://www.qgiv.com/blog/key-to-a-successful-peer-to-peer-fundraiser/>)

Since Peer-to-peer fundraising is growing, so are the ways in which to make these events more successful. These ideas focus more on the gamification of peer-to-peer and how to engage with participants within your event.

WEBPAGE & DONATION FORMS

Believe it or not, your nonprofit's website and your donation form can make or break your online fundraising efforts. Taking a few minutes to look at your website from a donor's perspective and to consider various points of your online presence is the first step toward streamlining your online fundraising.

When was the last time you updated your website?

Pretend you're a potential donor and run through your website. What are three things you would change to make it more current?

What resources would you need to update your site?

Go to your donation page and make a donation (even just \$1). What is good about the donation experience? What's not good?

What would you do to make the donation process more donor-friendly?

Take a look at the confirmation page after you've processed your donation. What stands out to you in a positive way? What could you change to make a better impression on your donors?

When you receive your donation receipt, read it a couple of times from a donor's perspective. Do you love it? What do you like about it? What don't you like?

Continue the Conversation | WEBPAGE & DONATION FORMS

Your website is the online powerhouse that fuels your presence on the Internet. It's where people go for information about your nonprofit, to make donations, and to read about what you're doing in your community.

How to Build Your Best Fundraising Site

(<https://www.qgiv.com/blog/wp-content/uploads/2016/08/How-to-Build-Your-Best-Fundraising-Site.pdf>)

This eBook walks you through the significance of each section of your website and how to optimize it to move your donors to give. It also goes through the best practices for building a donation page that will make the giving process quick and easy.

5 Signs Your Website Needs a Facelift

(<https://www.qgiv.com/blog/5-signs-website-needs-facelift/>)

Not sure if your website needs to be refreshed? Take a look at this article. It explains 5 signs that your site needs work and how to address common problems found on nonprofit websites.

Donation Form Check-Up Checklist

(<https://www.qgiv.com/blog/resources/donation-form-check-up-checklist/>)

Run through this checklist to give your online donation forms a quick check-up. The way your donation form is set up has a huge influence on whether or not people actually donate to your nonprofit; this checklist will help you find and fix the most common pitfalls we see on nonprofit donation forms.

Ask a Web Designer

(<https://www.qgiv.com/blog/wp-content/uploads/2016/08/Ask-a-Web-Designer-1.pdf>)

Chris Morata, Qgiv's head of design, answers some frequently asked questions about website design and about mistakes he often sees on nonprofit websites. He sees hundreds of websites every month and has excellent advice for how organizations can keep their websites fresh and user-friendly.

Crowdfunding for Non-Profits: Build a Great Form

(<https://www.qgiv.com/blog/crowdfunding-for-nonprofits-build-form/>)

Different types of fundraising require unique approaches to their donation forms. Crowdfunding has become a popular type of fundraising for many nonprofits, and this article provides a step by step breakdown of customizing a crowdfunding donation form.

Improving Your Nonprofit Website on a Budget

(<https://www.qgiv.com/blog/improve-nonprofit-website/>)

Having a mediocre website is hard in the fundraising world. It won't resonate with donors, and will leave you struggling to generate funds, when they are limited in the first place. Learn how to not miss out on potential donors and volunteers in this resourceful guest article.



Year-End Review Workbook

WE'RE HERE TO HELP YOU!

How do you feel after going through this workbook? Confident? Determined? Overwhelmed?

All of those are valid reactions. And no matter how you're feeling, the team at Qgiv can help.

Whether you're happy and confident or overwhelmed or full of new ideas, we've got the expertise that can help you get where you want to be. We've got tons of great tools, offer flexibility you can use to experiment with different methods without tons of risk, and a customer support team that will answer all of your questions the whole way.

You can reach your fundraising goals. And, if you want help, we can give it to you.

2018 is your year. You have the tools you need to succeed. You have a roadmap.

We can't wait to see you thrive!

The Qgiv Team

