

Tips for Fundraising Success
It's January – What to Do Now
4 Steps to Start the Year Right
David Levy – January, 2019

Congratulate yourself and your team: You made it through the end of the year fundraising. Take stock of your accomplishments. What were your successes? What did you do well? After you take a day or two for yourself, then it's time to get back to work. What you do now, will have a direct impact on this year's end of year fundraising efforts.

Step 1: THANK

- Thank your donors for making the past year a success. What are the major accomplishments for the agency in the past year? What are you looking forward to in the coming year? Share this information with your donors.
- Send donors their 2018 donation summary that can be used for tax purposes.
- Be sure to call to thank key donors and prospects personally.
- Engage the agency Board of Directors and Staff in the Thank You process

Step 2: LEARN

- Who are the agency's donors?
- Who gave for the first time?
- Who gave in the past, but didn't contribute this year?
- Who are your long term donors who have been supporting the agency for many years?
- What are the giving trends? Your donor software probably has some excellent end of year reports to help you analyze your data.
- Make sure that you record any information about your donors, either in your donor software or in your files.
- Make a commitment to visit key donors over the course of this year – start now. Make a list, then contact them for appointments.

STEP 3: ORGANIZE

- Review your database, lists, email lists, etc. Update, de-dupe and correct.
- Make sure that the information that you have in your head is recorded.
- Have any of the donor passed away this year? Have you acknowledged this? How do you plan to keep in touch with the family?

STEP 4: FOCUS

- Create or review your campaign plan.
- What are your goals for this year?
- Choose one or two new things that you are going to implement this year. Do what it takes to make these innovations happen.

David Levy, with over 30 years of experience in fundraising, works with organizations to identify opportunities, harness resources and implement strategies that lead to sustainable growth.

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