

## *Tips for Fundraising Success*

### **It's January – What to Do Now**

#### 4 Steps to Start the Year Right

### **First, 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 were 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's 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 donors 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 extensive experience in fundraising, works with organizations to identify opportunities, harness resources and implement strategies that lead to sustainable growth.*

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