

5

COMPANION GUIDE: Your Year-End Appeal Companion Guide

Keys to a Donor-Centered Year-End Appeal

TALK TO THE DONOR

1

Donors give when they see themselves as the reason good things happen.

- Use donor-first phrasing: "Because of you, 400 families had a warm place to sleep."
- Count your "We" vs. "You" sentences and shift toward "You."
- Add one short, specific thank-you line.

2

ASK MORE THAN ONCE

Donors skim. Multiple asks give them more chances to act.

- Place your first ask at the end of paragraph one.
- Repeat the ask in your closing with fresh language.
- Use the P.S. — it's one of the most-read lines.

3

GIVE REAL NUMBERS

Concrete numbers make the impact feel real and achievable.

- Show what \$25, \$50, and \$100 accomplish.
- Suggest a specific increase from last year's gift.
- Offer monthly giving: "\$10/month = \$120/year."

4

MAKE RESPONDING EFFORTLESS

Every extra step costs donors. Remove friction wherever you can.

- Add a QR code linking directly to your giving page.
- Include a remit envelope or selection card.
- Keep online forms short with minimal required fields.

5

KNOW WHY NOW

"Year-end" isn't urgency. Give donors a real reason to act today.

- Tie urgency to a real deadline, capacity limit, or match.
- Explain what happens if the need isn't met.
- Avoid false urgency — donors notice.

Build Your Appeal Planning Checklist

Appeal Component	What to Decide	Assigned To
The Right Donor (Who)	Who do you want to get your appeal?	
The Right Envelope (Segment)	Do you want to segment out a portion of donors to get a similar but more specific appeal based on recent event, giving level, program interest, or capital campaign?	
The Right Ask (Why)	Amount(s) Impact area(s)	
The Right Urgency (Why Now)	Segmented Links Website QR Codes Remit Selection “card”	
The Right Reply (Ways to Give)		
The Right Reminder (Wraparound)	Social Posts: Newsletters: Eblasts: Emails: Online Giving: Radio/TV: Website:	
The Right Follow-Up (Thank You)	Timely Tie Back to Ask Video Thank You Social Media	

Build Your Appeal Calendar

Work backward from your mail or send date to set the internal deadlines below.

Date to Donor _____

Date to Mail or Send Email _____

Date to Mail House _____

Final Approval Deadline _____

Copy / Layout Draft Deadline _____

Planning Meeting _____

Before You Finalize the Calendar, Consider:

- Holiday schedule for vendors and mail carriers
- Time needed to create the appeal
- Time needed for internal approval
- Lead time required by your chosen delivery method

We Can Help Strengthen Your Year-End Appeal.

Ashley|Rountree can help you maximize your year-end giving and strengthen every part of your fundraising program — from strategy and donor engagement to campaigns, grants, and development planning.

Doug Scott, VP Fundraising Solutions

dscott@ashleyrountree.com

502-244-5835

