



# YOUR FUNDRAISING WRAP-UP CHECKLIST





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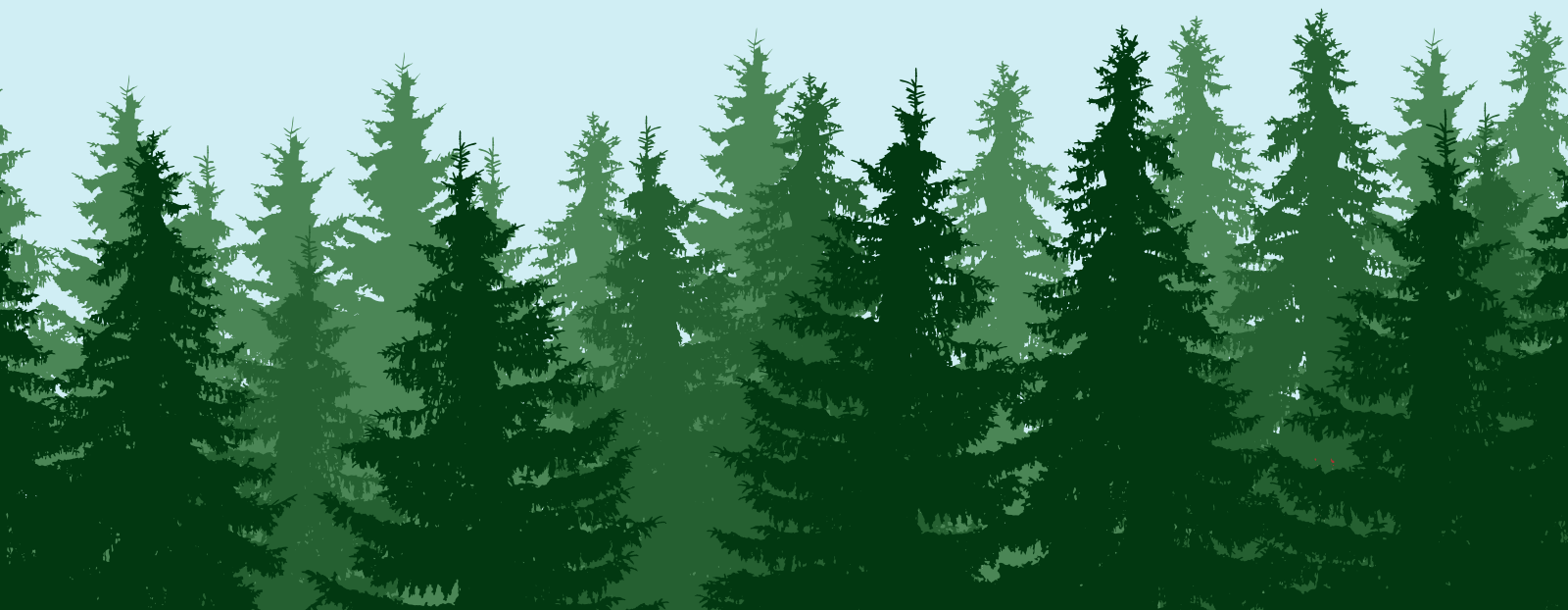
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# INTRODUCTION

Congratulations on completing another successful fundraiser! Before you move on to something else, there are a few simple to-dos that will make future fundraising efforts easier.



## CHAPTER 1

# TRACK YOUR SUCCESS

### Calculate your fundraising metrics.

This is one of the most important yet overlooked steps of a fundraiser. In order to make informed decisions next year, you need to know what has worked this year (and the years before). The numbers will be most accurate and easy to work with if you calculate them now and record them year over year.

# What to calculate.



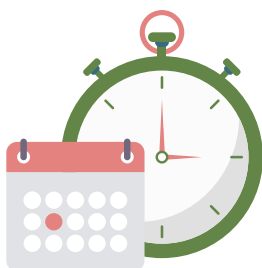
## Total Number of Funds Raised

Be sure each participant of your fundraiser has sent in their final numbers. If they haven't, consider attaching a reward to those who do turn them in on time.



## Promotions

Once you have those, add them all up. If you spent any money on gear, events, advertising or the like in order to promote your fundraiser subtract that from the total amount you raised. This shows you your actual profit and if that profit was big enough in relation to how much you spent on promoting things. Record this number to help in calculating how much you should spend on such promotional efforts next year.



## Average Time Spent

When you ask for the final amounts raised by your participants, also ask them to estimate how much time they spent over the course of the fundraiser.

This could help in two ways: One, you'll have an answer for when new participants ask what to plan for and two, you can see if there's a correlation between amount raised and time spent. In that way, you can learn from top fundraisers about how much time should be invested to keep up with their success.

## Pro Tip 1: Annual Overall Rate of Growth in Donations (%)

According to [Fundraising Report Card](#), this is defined as “net of gains and losses in giving from last year (divided by) the total value of gifts received last year.”

This is a great number to know if you're a group that prioritizes growth. If you keep track of this, you can better understand if your efforts are going in the right (upwards) direction.

The formula is

$$\text{rate} = [(x-y)/y] \times 100.$$

with x = the amount raised this year and y the amount raised last year.

## Pro Tip 2: Average Donation / Purchase

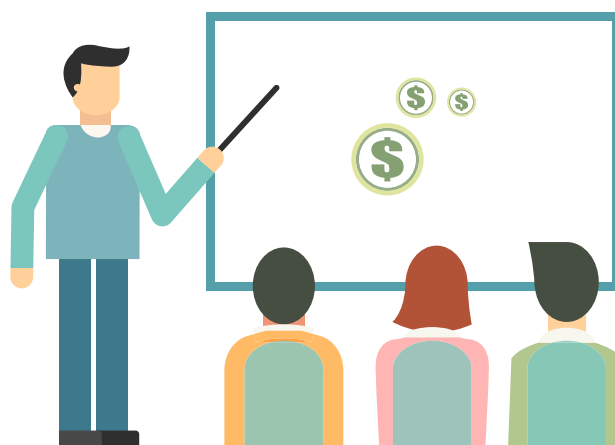
Fundraising Report Card calculates this by looking at “total dollars received (divided by) total number of gifts received (times) 100.”

You can use this to help you understand how much each donor impacts your group. This then serves as an incentive to contact more donors.

The formula is

$$\text{average} = x / y$$

with x = the total revenue of your fundraiser and y being the number of product purchasers.



## CHAPTER 2

# SEND OUT THANK YOU'S

Properly thank donors for their support.

As stated by [Classy](#), “in a survey asking donors why they stopped supporting an organization, 53% cited poor communication” as the main reason. Likewise, according to [Action Sprout](#), “one of the top reasons donors gave when asked why they stopped donating was that they were never thanked for their previous gift.” If you are interested in contacting the same folks with your fundraiser next year, rather than starting from scratch, listen up: you need to thank them!

# Things to remember when you thank donors.

## Be Old-Fashioned

There's a lot of great perks of living in the 21st century when it comes to fundraising efficiencies, but a loss is that things can feel a lot less personal. When it comes to thanking people who have helped support your organization, it's a good time to slow down and thank them from the heart, even with a handwritten note.

## Be Specific

One thing that your supporters will especially appreciate hearing is how their money directly impacted your organization. If you're a sports team raising money for jerseys, tell them who got the jersey they essentially paid for. That way they have a visual of who they helped and will more easily recall it when you ask them to consider helping again next year.

## Don't Be Boring

It's easy to follow a template to ensure your organization sounds professional when you write your thank you's, but people have read such notes before. They likely care to see your personality more so than your formalities. Tell a funny story of something that happened during the fundraiser or share an inside joke about your organization.

## Be Speedy

These are an easy thing to put on the long-term to-do list as you think to yourself, "I can sit down and whip them out another day." However, time is of the essence. This is especially true if you fundraised with Evergreen right before the holidays as your thank you could easily get lost in all the other holiday cards they receive. Or they could assume you weren't going to thank them and retain that negative thought in their mind even when you do.

## Pro Tip: Send Another One

One thank you is awesome in itself, but imagine if you sent a second about six months from now. That way, you could demonstrate tangible results – such as photos of your hockey jersey worn throughout the season. This would not only stand out as it's rare fundraisers take time for this, but it would also remind them to perhaps plan to donate again the following year.

NonprofitHub advises you to be specific: "Why did my donation matter? What did it accomplish? Why should I be hopeful and excited to contribute to the future my donations are creating? Whose life was changed? The follow up needs to be just as carefully crafted as the appeal and the thank-you."





## CHAPTER 3

# ASK FOR FEEDBACK

### Conduct a fundraising survey.

It's time for further fundraiser discovery before it's too late. We suggest sending out a quick survey to both your participants and your customers. You don't want to do this before you have taken care of the previous two steps as it's not as big of a priority and you want to thank customers before you ask more of them. However, you'll reap a lot of benefits if you do proceed with this step as it's the best time to get the truth about your fundraiser.

# Options for surveying.

## Survey Format

First, you'll want to figure out in what format you'll send your survey. You could use an existing tool which we'll review below or you could simply ask for some feedback via email or a phone call.

## Survey Apps

Some easy-to-use survey tools include [Typeform](#), SurveyMonkey and Google Survey. All are easy to use and quick to send. As opposed to a more manual survey, these allow you to set up a few questions with more standard options for responses so you can get more concise feedback.

## Questions to ask customers

- How did you hear about our fundraiser?
- How would you prefer to be contacted in the future?
- What would make this fundraiser easier for you?

You could also set up a scale of sorts that gathers a lot of info in just one question. See how SurveyMonkey did it below:

1. How likely is it that you would recommend this organization to a friend or colleague?

NOT AT ALL LIKELY

EXTREMELY LIKELY

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

10. How do you prefer hearing about our organization's fundraising activities? (Select all that apply.)

- |                                |                                       |
|--------------------------------|---------------------------------------|
| <input type="checkbox"/> Email | <input type="checkbox"/> Social media |
| <input type="checkbox"/> Phone | <input type="checkbox"/> Website      |
| <input type="checkbox"/> Mail  | <input type="checkbox"/> Text message |

Other (please specify)

## Questions to ask fundraiser participants

- How was your experience participating in this fundraiser?
- How organized do you feel the fundraiser was?
- What could be done to make the product delivery process run more smoothly?

Again, you could set up a scale like the one SurveyMonkey did here:

This section is designed to evaluate the quality of the fundraiser experience. Please select your level of agreement with each of the following statements about {Fundraiser Name}:

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	N/A
The fundraiser's goals are clearly explained.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The fundraiser was enjoyable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## What To Do With Data

Ideally, after you've gathered all the data, you will want to report on what you've discovered.

At the minimum put all the feedback in a safe folder and ensure a couple of the fundraiser leaders know where it is so they can review it for next year.

If more time is available, consolidating the responses and writing up a quick reflection on what you will do better next year will help you get started more efficiently when that time comes.

The very best thing to do would be to hold a meeting with fundraiser leadership and reflect on what you learned and what you will do next year. This in-person meeting will be the most effective way to get all around feedback and formulate strong, creative ideas.

## CHAPTER 4

# REFLECT, DELEGATE & PLAN

**Go through each of these steps.**

Now that you've taken down the necessary numbers, said a proper thank you and taken in feedback, it's time to sit down and jot a few notes. This is the step most people neglect as they think they will remember everything they need again the next year.

Be honest with yourself: you'll likely forget a few things. Likewise, whoever was in charge this year, might not be able to be involved next year. Now is the best time to perform the following three tasks so you are not scrambling from the start.

## Step One: Reflect

It's hard to comprehend how much you learned from your fundraiser, but after 50 years of doing this, we know that each year, you learn something new. The best thing you can do with this experience is to keep track of it and build up from there.

### Questions to ask yourself to effectively reflect on your fundraiser:

- What was one thing you did differently than last year that worked well?
- What was something new you tried that didn't work?
- Is there something you'd like to try again next year?
- Was there something that helped to boost participation from students/scouts/kids?
- Which community organizations helped (if any)? Would they be willing to help again?
- Who was most helpful (parents, students, teachers, couches) and what tasks did they cover? Would they be willing to help again?

## Step Two: Delegate

For most of us, it's hard to ask for help. Perhaps we feel shame that we can't do it on our own or we really believe we can, but for many of us, we simply don't want to burden others. The truth is, fundraising is a team effort and we haven't seen many fundraisers where one leader could tackle everything.

### Why Ask Now?

If you're convinced you do need help, another thing to consider is that by delegating tasks now, you're actually helping your

helpers. They can better plan for their responsibilities and will feel more ready when the time comes next year. If you ask for last minute help, they might still feel the need to say yes, but it'll be harder on them.

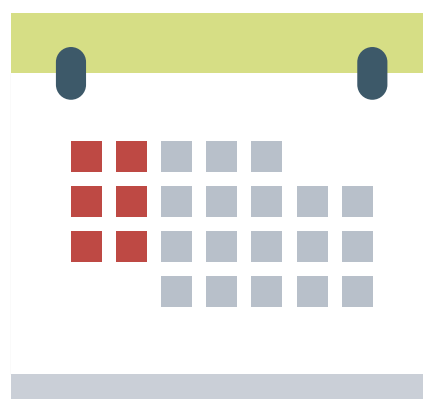
### Change in Leadership?

If you aren't certain you can help next year, be sure to find someone who might be able to step in if you can't. This is where your notes will be extra handy.

## Set Some Dates

It's really challenging to know exactly when your fundraiser will take place, but getting a general idea will increase participation and readiness. If you have no idea what dates will work, send out an email to participants with a few options and have them let you know as soon as they have a conflict.

Even if you don't have the exact date of the start and end of your fundraiser, select a date for your kick-off meeting. By setting this up now, you won't have to worry about it or risk forgetting to schedule it.



## CHAPTER 5

# CELEBRATE

### Calculate your fundraising metrics.

The previous four steps covered all you need to do to collect information and prep for next year's fundraiser. But is there a similar benefit to celebrating? Though celebrating your fundraiser won't help you plan for next year, it is a necessary (and fun!) piece of the process and there are several – often overlooked – benefits.

# How Celebrating Impacts Your Next Fundraiser

Without some sort of official end, participants may not feel like their efforts were recognized. If you don't take time for this, chances of them participating again next year go down.

Having to rally new participants is costly. In fact, according to [NonProfitPRO](#), "It costs less to have someone who participated in an event before come back than it does for you to acquire a brand-new participant...In some cases, that cost can be zero."

Additionally, if they do participate again next year, they may not feel as excited about their contribution. By hearing from leadership that they did a great job and made an impact, they will be more likely to feel their work is worth it.

## Various Ideas for Celebrating

Ideally, you could throw a big event, but since you just spent all this time raising money, it's maybe not the best idea to use your funds. If there isn't an opportunity for a free or sponsored event, try one or more of the following ideas.

### Social Media Sharing

One way to celebrate is simply through talking about the fundraiser on social media and publicly recognizing success. Try writing a series of posts sharing how much money was raised, what it impacted, who the top sellers were and maybe even some fun quotes from participants.

In a post, "[Why You Should Be Celebrating Your Fundraisers On Social Media](#)," The Guardian points out how Cystic Fibrosis Ireland does an awesome job of this.

"Social media allows us to recognise [participants] publicly so that they can then share with their networks," Caldwell says. "This becomes a very personal process because it builds loyalty both ways. It's a mutual acknowledgement."

They go on to point out how adding a personal tone to the posts, feels more authentic. Stick to language like "Well done, guys!" or "What an amazing achievement!" rather than something formal.

### Send Personal Notes

We talked about sending out thank you cards to your donors and the same benefits can come from sending out notes to participants. It can be a few simple words, but it's the thought that counts. This is also a nice private way to tell top-sellers about their achievements and congratulate them.

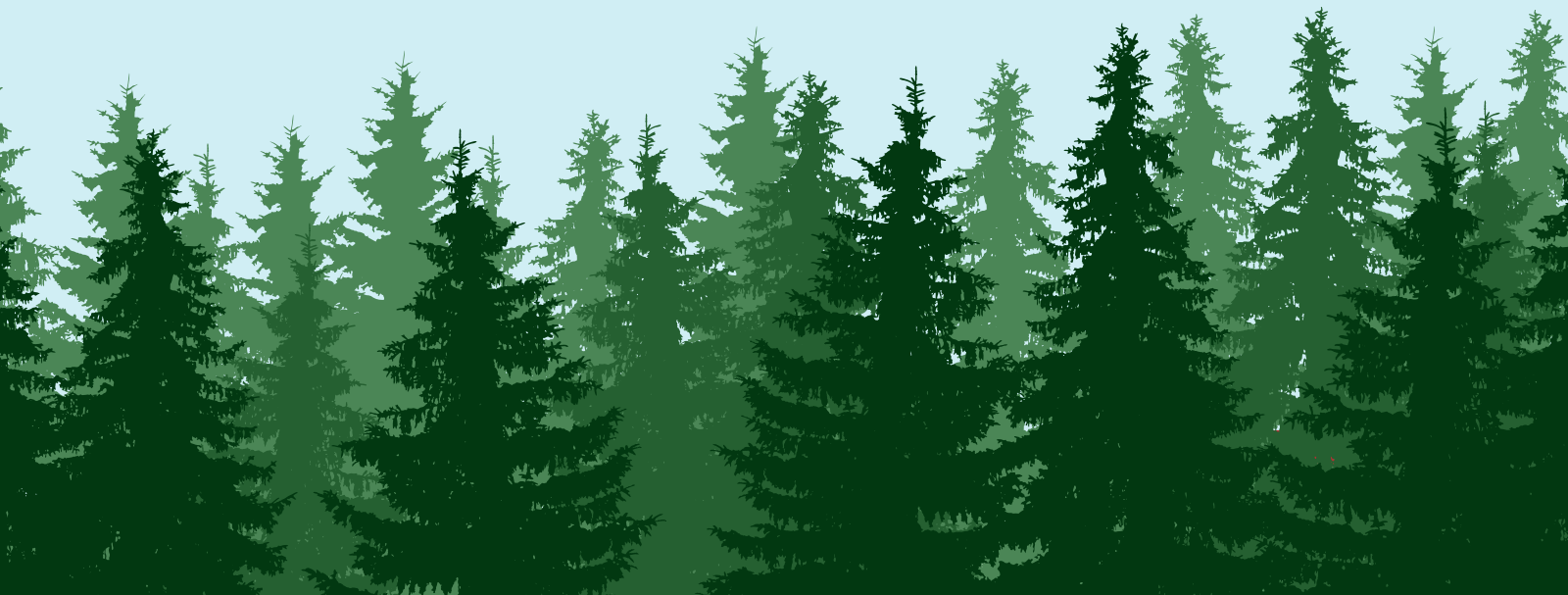
### Mix Up Your Activity

Maybe you can't afford a big celebratory event, but chances are your sports team, scouts, class or group will be meeting again. A great way to celebrate is to just switch up your routine. Maybe it's playing a game or watching a movie. Don't use money as an excuse not to celebrate.



# CONCLUSION

These steps are essential to really finalizing a successful fundraiser. By calculating your results and looking into the numbers, you can better prepare for future fundraisers. By thanking those involved you inspire them for upcoming years and show gratitude for the people who helped along the way. Now that you've wrapped up your fundraiser this year, it's on to the next!







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