

# Top 5 Things to Do Before Year-End

01



## Create a Specific Plan for Year-End Donors

Identify which donors on your caseload typically give at the end of the year. If you haven't already, develop a plan to ensure you've properly thanked them for previous gifts, shared information that aligns with their passions, and prepared a compelling offer to present.

02



## Review Donors Who Are Behind

Take stock of donors who are behind on their giving this year. Year-end is a natural time to check in, ensure they have the information they need, and discover whether their giving interests have evolved.

03



## Report Back on Prior Gifts!

Conduct a thorough review of donors on your caseload who have already made a gift—particularly those likely to give again at year-end. Have you properly thanked them? Have you reported on the impact of their gift? If not, make this your priority before making any new asks.

04



## Jump Start Qualification

Year-end is an ideal time to accelerate the qualification process for donors in your qualification pool. Use your thank-you communications or other natural outreach opportunities to introduce yourself and build a deeper connection with each donor.

05



## Dream Up Transformational Asks

While you may not have time to make a transformational ask before year-end, you can begin to imagine what this might look like for a few (three to five) key donors. Consider which steps you can take now to start laying the groundwork for a future transformational ask.

# Learn More About Veritus

As you consider our various services and offerings, here are some resources to help you learn more about who we are and what we're about!



## Learn More About Our Services

We have a variety of quick videos that explain more about our different services so you can find the right service for you.

Learn more at the following links: [Consulting Services](#), [Strategic Planning & Organizational Development](#), [Donor Offers](#), [Enterprise Partnership](#), [Customized Training](#).



## Listen to Our Podcast

In many aspects of life, we're quick to outsource to someone with more experience or knowledge. Yet, there's often resistance about outsourcing the management of your relationship fundraising programs. In this podcast episode, hear from Jeff about this topic and what you need to know about it. Listen [here](#).



## Read This White Paper

From the start, we've approached major gifts, and now mid-level, anchored in a set of operating principles. In this free White Paper, we share these principles and why they must be core to your culture and fundraising strategy. Download your copy [here](#).



## Apply for our Free Donor File Assessment

We believe in the power of data and after analysing hundreds of donor files, we know the warning signs that you might be missing. This FREE assessment will guide you toward the strategies that will help you grow your revenue and retain your donors. Get started and apply [here](#).

Ready to learn more? Contact Andy Milligan at  
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