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GROUP

Building Authentic Donor Relationships

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# 5 Things You Must Do After the Holidays





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# Jeff Schreifels

- Principal
  - More than 32 years in developing, planning and executing strategic fundraising and marketing programs
  - Served as Development Director at several non-profits
  - Senior Strategy Director at The Domain Group, where he helped to develop record-setting fundraising programs for the agency's largest clients.
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# Stay Vigilant with Gift Processing

- Check gift reports daily
- If you know a gift was supposed to be received by year-end and you don't see it posted, follow up with your Data/Donor Ops team
- Do what you can to support gift processing – and thank your team!
- Promptly write thank you notes as gifts are processed – send within 24-48 business hours of the gift processing







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## Do a Year in Review

- There's no real down time in fundraising, but you can dedicate some time in your first week back at work to do a year in review
    - What strategies worked?
    - Which didn't?
    - What do you think you need to be more successful this year?
    - What opportunities do you want to pursue this year?
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# Do a Caseload Review & Refresh

- You'll want to plan to do a refresh in January/February once the books are closed
- Start now by assessing potential refreshes in your caseload
  - Are there donors you need to move to mid-level or back into direct mail?
  - Are there some donors you know need to move to a different tier?
- You don't need to complete a full review and refresh right when you get back, but start getting an idea of where things have landed so you're prepared







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# Make Time to Thank Your Team

- Intentionally thank your internal team
  - Specifically note if people supported on an ask, provided program updates to donors, etc.
  - Share the impact of their support whenever possible
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# Take Time for Self-Care

- Even if you take off some time over the holidays, you should still make an effort to prioritize self-care as you get back to work.
  - The holidays can be draining in a different way, and you've just made it through several challenging and hectic months.
  - Take a moment to identify your accomplishments and celebrate your successes.
  - Don't feel like you need to rush right back in at full force.
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A woman with long dark hair, wearing a blue and white striped button-down shirt, is standing and gesturing with her hands while talking to a man. The man, seen from the back, is wearing a dark maroon shirt and has his hand near his chin in a listening pose. They are in an office with desks, papers, and a laptop visible. Large windows in the background let in bright light. The word "Questions" is overlaid in large white font across the center of the image.

# Questions





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