SouthCoast Community Foundation · Nonprofit Resilience Network

# Year-end giving: quick reference

Following today's session — a Resilia in-app checklist for the weeks ahead.

This is an optional program; use the pieces that fit your team.

Presented by Resilia

NOV 2026 – FEB 2027

What's ahead

# Four checkpoints, four months

**NOV 2–8**

**Map your timeline**

Confirm your plan and review best practices.

**NOV 9–22**

**Build and prep**

Draft your appeal, rally your board, schedule Giving Tuesday content.

**DEC 1 & 31**

**The two big days**

Giving Tuesday, then one final push to close the year.

**JAN–FEB**

**Reflect and share**

Review results, survey donors, and tell your impact story.

# Your Program Checklist

| Track | Nov 2–8 | Nov 9–15 | Nov 16–22 | December | January | February |
|---|---|---|---|---|---|---|
| Plan | **1. Map timeline**<br>2. Best practices + test page | 3. Coach: review plan | — | — | — | — |
| Messages | **4. Draft appeal** | 5. Write messages | 6. Schedule GT emails | 7. Plan Dec 31 | 8. Year-round session<br>9. Coach: year plan | — |
| People | **10. Lapsed donors** | 11. Board session | 12. Major donor calls (through Dec 20) | — | — | — |
| Stewardship | — | **13. Stewardship session** | 14. Thank-you matrix | 15. Checklist (by Dec 1)<br>16. Plan Jan–Mar (mid-Dec) | 17. Donor survey | 18. Impact story |

**EGreen** open from day one. Within a row, a step unlocks after the one before it.

NOVEMBER

# Build and prep your campaign

**NOV 2–8**

- Map your timeline
- Review best practices and test your page

**NOV 9–15**

- Draft your appeal and messages
- Review your plan with a coach
- Invite lapsed donors back
- Activate your board
- Learn how to keep new donors

**NOV 16–22**

- Schedule your Giving Tuesday emails and posts
- Decide how you'll thank each donor group

**ONGOING THROUGH DEC 20** Keep calling your major donors.

DECEMBER

# The two biggest days

**DEC 1 — Giving Tuesday**

7:00 AM — launch email

Noon — midday email + social push

7:00 PM — final push email

**DEC 31 — Final push**

8:00 AM — launch email

Midday — social post

7:00 PM — final push

Review the rules for year-end gifts first.

DON'T FORGET Stewardship checklist set up by Dec 1 · Plan stewardship through March by mid-December

JANUARY–FEBRUARY

# Reflect and share

JANUARY

**Map year-round engagement**

Catch up on a session about the donor journey across the year.

JANUARY

**Review your campaign with a coach**

Check results against your goals and map next year's strategy.

JANUARY

**Ask donors what inspired their gift**

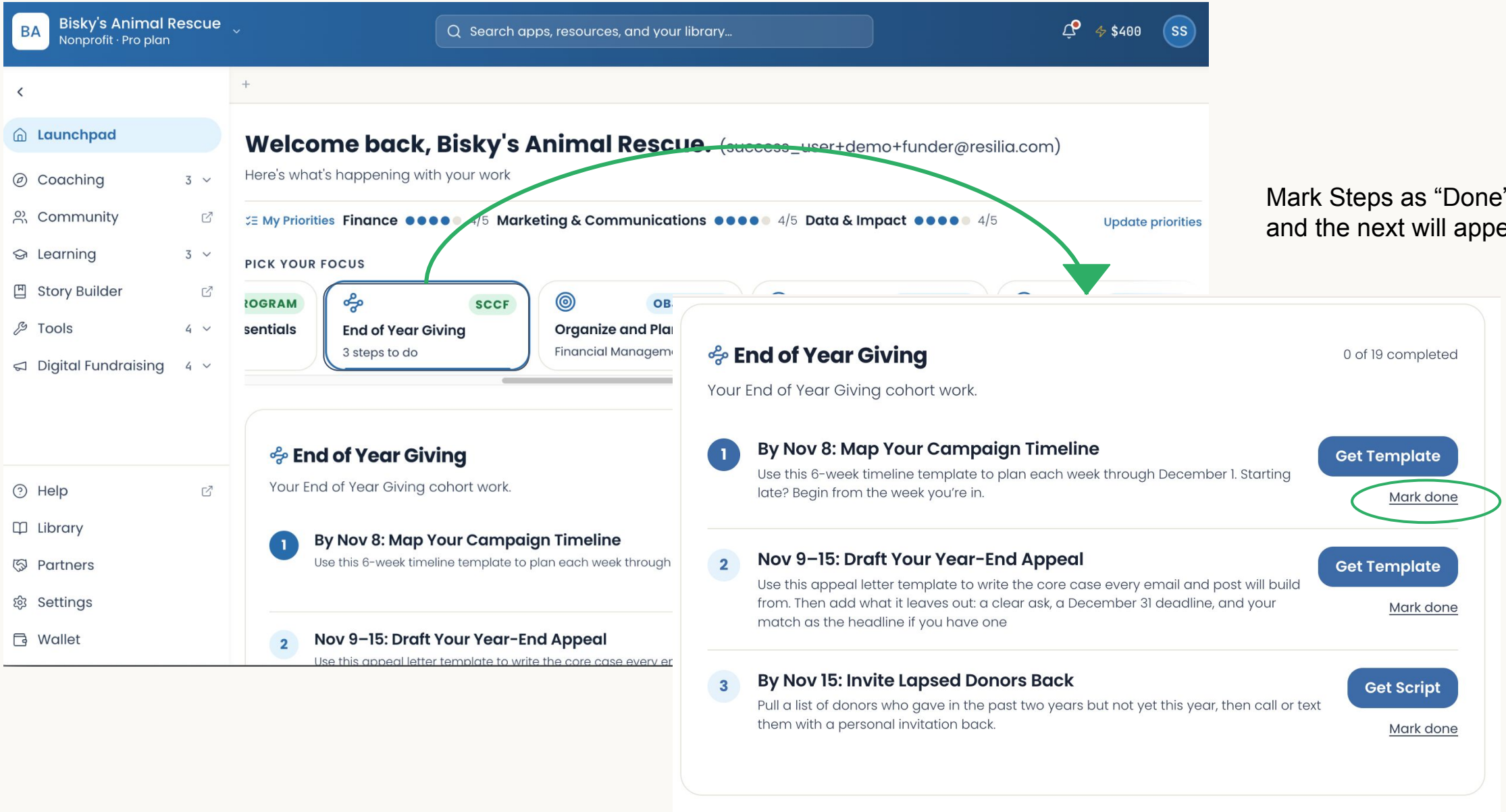
A short survey alongside your reflection email.

FEBRUARY

**Show donors what they made possible**

Build your impact story in Story Builder.

# What the Program looks like on your Resilia Dashboard




Mark Steps as "Done" and the next will appear!