## Year End Campaign Checklist

**By the Numbers**
- By segment, how did you do last year?
- What’s your renewal rate?
- Breakdown renewals at various giving levels.
- Breakdown all year-end giving.

**Set Goals**
- Direct mail and online / email goals
- Leadership or gift clubs; # of gifts, $ amount.
- Lapsed donor renewal goal
- Other segments (volunteers, staff, clients, etc.)
- Major and monthly donors

**Integration Channels: What’s the Status of...**
- Mailing Addresses and Email Addresses
- Social Media Follower
- Phone Numbers

**Story and Theme**
- Theme / Purpose
- Financial Goal
- Project

**Choosing Strategies for Each Segment**
- Direct mail appeals: What format? When? In-house?
- Email appeals and telephone calls: When? Who? How many?
- Activate social media: When? Who? Content?
- LBYUNTS and SYBUNTS

**Create Your Calendar and Timeline**
- What will drop when? (Give yourself some wiggle room.)
- Lead times and prep times included.
- How many will you mail / email / phone?
- Staff your office during the last few days of December.

**Set Your Budget**
- Mail house, address lookups, design, consultants, copywriters
- Postage, web enhancements; photography, printing, video
- FB ads, social media content

**Design, Layout, Production**
- Letterhead or designed letter
- Print shop, mail house?
- Reply vehicle and return envelope
- Postcards for warm up, followups, or thank yous

**Warm Up Donors Before You Ask**
- * thankathon
- * update letters or emails?
- * personal thank you visit to large donors?
- * impact report?

**Plan Your Thank You Programs**
- New donor welcome package
- Gift accounting and reporting processes
- Paper acknowledgement processes
- Phone call and email processes

**What Do You Need to Improve Before Your Launch?**
- Figure out data, reporting, and renewal rate.
- Website, donation page, and processing system
- Automatic and paper “thank you” processes
- Entire TY system and calendar
- Staffing
- Social media capacity
- Get your team bought-in and on board

**Campaign Rollout**

### August - September
- Set design, brand, purpose, goal, budget
- Line up people resources
- Engage designer and mail house
- Pull your data and plan your segments
- Printing, web enhancements
- Design reply cards and envelopes
- Social media ramp up
- Warm up donors with a thankathon, impact report, or special event
- Engage videographer or photographer
- Draft and approve letters

### October
- First letter, postcard, or phone call announcing campaign, purpose, goal
- Emails begin, telling stories related to your goal and purpose
- Web and donation form enhancements completed
- Draft and approve emails, social media, and the rest of the appeal letters to go out
- Weave monthly giving requests
- Plan your board solicitation

### November
- Second appeal letter dropped with the hard ask
- Emails and social media out every week supporting the theme and campaign
- Facebook ad campaign
- Build up to #GivingTuesday
- Enhance your thank you and acknowledgement processes
- Late November- followup letter or phone call - we haven't heard from you!

### December
- Phone call followups
- Donor renewals are highest priority
- #GivingTuesday launches Late December:
  - Change out website homepage to be your donation page
  - Three email appeals the last week of the year, with one on Dec 31st.