

Year End Campaign Checklist



Task	Aug - Sept	Oct	Nov	Dec
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 donar renewal goal				
Other segments (volunteers, staff, clients, etc.)				
Major and monthly donors				
Acquisition				
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?				
LYBUNTS 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				

Task	Aug - Sept	Oct	Nov	Dec
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.