



## 2023 Year-End Fundraising Campaign Checklist

### 1. Review

- What is your overall donor retention rate \_\_\_\_\_ %
- How did you do last year by segment?
- Renewals \_\_\_\_\_
- New Donors \_\_\_\_\_
- Upgrades \_\_\_\_\_
- Monthly Donors \_\_\_\_\_

### 2. Preliminary

- What is your goal for this campaign?
- Goal for direct mail
- Goal for online
- Lapsed donor renewal
- Other segments (volunteers, staff, clients, etc.)
- Major donors
- Mid-level donors
- Monthly donors
- Acquisition

### 3. Integration: What channels will you use? What's the status of:

- Direct mail (mailing addresses)
- Email addresses (email addresses)
- Social media (followers/likes)
- Phone numbers

### 4. Story and theme

- Theme/story

## 5. What strategies will you use for each segment?

- Direct mail (when mailed? in-house? design needed?)
- Email appeals (when? how many?)
- LYBUNTS and SYBUNTS (Follow-up appeal?)
- How will you weave direct mail and email together?
- Update your donate page?
- Website home page takeover?
- Will you use video?
- How will you integrate social media content
- Facebook advertising?
- Sharing (via email, social media, etc.)
- Monthly giving donors?

## 6. Create your timeline and set your budget

- What will drop and when?
- Staffing (last few days of the campaign)
- Mail house cost
- Postage
- Printing, video, etc.
- FB targeted ads/promoted posts

## 7. Design, layout and production

- How will you get your envelope opened?
- Letterhead or designed letter?
- Print shop, in-house?
- Personalized ask strings?
- Reply vehicle and return envelope?
- Postcards/letters for warm-up
- Followups (your thank you letter)

## 8. Warm up

- Thank-a-thon
- Personal thank you calls/visits to major donors
- Impact report
- Donor newsletter
- Gratitude Report
- Warm up email/s

## 9. Followup

- Do you have a gift acknowledgement policy?
- Updated thank you letter and email
- Updated thank you redirect page
- Welcome kit to new donors?
- Personal outreach?
- Processes (different for new donors? thank you videos?)

**How will you celebrate your successful campaign?**