2024 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 _____

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4. Story and theme

- [ ] Theme/story
- [ ] Photographs? (Signed release?)

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/post card?)
- [ ] 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?

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☐ Postcards/letters for warm-up
☐ Followups (your thank you letter)

8. Warm up

☐ Thank-a-thon (staff, board members)
☐ 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?

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