

# FOOLPROOF YEAR-END FUNDRAISING

UPDATED AND EXPANDED FOR 2019

PAMELA CROW



Basics & More™



## 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/purpose

### **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?
- 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 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?
- Warm up email?

## 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?
- Processes (different for new donors? thank you videos?)

**How will you celebrate?**