

Year-End Fundraising Checklist

Use this checklist to plan a successful year-end fundraising campaign strategy. From goal-setting to campaign follow-up, these tips will get your team ready for the most lucrative time of the year.



PLAN

Follow these steps to set goals, outline tactics, and align your team around fundraising best practices for your year-end campaign.

Evaluate past campaign performance. Analyze quantitative metrics and qualitative feedback to find resources to repurpose, mistakes to avoid, and a balanced focus.

Establish the campaign's focus. Describe what you hope to achieve beyond "donations" by explaining how your financial goal will impact your mission.

Describe your why. Ideate with your team on the tangible impact stories you can share in your communications to motivate supporters to give.

Create a timeline. Assign a due date and owner for each task (and subtask) to ensure you've covered all deliverables and that your team's bandwidth is balanced during this busy time of year.

Set a SMART goal. Outline the campaign's goals using the SMART method so that your financial goal is specific, measurable, ambitious/attainable, relevant, and time-based.

Segment your donors. Create lists of donor groups (individual donors, major gift donors, recurring donors, etc.) and format a customized ask for each group.

Gather assets. Create or collect imagery, copy, and design aspects as early as possible.



EXECUTE

Be sure to include the following elements and tactics when executing your campaign.

Communications

- A. **Send save the date.** Send an email in October to notify donors of your campaign launch date and build excitement.



Have your campaign live when you send your save the date to encourage early gifts or fundraising.

- B. **Build in enough time for direct mail.** Maintain the campaign brand for printed assets and include the URL to your campaign page.
- C. **Send more than one appeal.** To stay top of mind during this extra busy holiday season, you must send emails and post on social media more often than normal.



Don't stress about donor fatigue. Not only does the holiday spirit encourage giving, but if you don't ask for donations, another nonprofit will.

Campaign Page

- A. **Publish now.** Don't get caught up in the minutiae or design of your campaign page at the expense of your launch date—you can continue to edit and update it once it's published.
- B. **Transform your Giving Tuesday campaign for year-end.** If you're strapped for resources, use one campaign page for all of your end-of-year fundraising and simply change the branded elements (photos, colors, tagline) from Giving Tuesday to a more general theme.
- C. **Make it personal.** Customize your campaign page with storytelling elements (impact blocks, photos from the field, etc.) to engage potential donors.
- D. **A/B test.** If this is your first year-end campaign, track measurable elements (like click-through rate on your donation form) to establish a benchmark for next year.



FOLLOW UP

Donors acquired on Giving Tuesday are three times more likely to become fundraisers for your organization.¹ Turn new donors into lifelong supporters by continuing to steward them after the rush of the giving season.

Say thank you. Again. Send a second, personalized thank you note separate from the automated email that is sent out right after a donation is made.

Finish the story you started by showing how the campaign moved the needle for your mission. Pull the numbers, demonstrate impact, and share beneficiary stories.

Segment donor thank yous the same way you segmented appeals. Large gift donors should get a phone call, a handwritten note, or other special acknowledgement.






Create thank you videos featuring the people you serve, and send to recurring donors, volunteers, or your biggest donors.

¹ Classy, "The State of Modern Philanthropy: Examining Online Fundraising Trends." <https://go.classy.org/reports/the-state-of-modern-philanthropy>



EXTRA TIPS

-  **Perform a campaign evaluation** in January to note what aspects worked, which metrics improved, and any other key insights to set yourself up for success for next year.
-  **Feature the impact of your year-end campaign** when you send out your annual report communications. Highlight the success and impact to remind donors why they give during a time when many are strapped for cash.
-  **Organize all year-end content** in a living document so that knowledge doesn't live with just one person on your team.