

END-OF-YEAR-FUNDRAISING CAMPAIGN PLANNING

End-of-year fundraising doesn't just happen in December. It takes months of building lists, inspiring and cultivating donors, and testing and analyzing metrics. To help you get the most out of end-of-year opportunities, we suggest you plan ahead (you've started, right?) and follow a timeline. Here are some proven tactics that work:

July & August

Outline Campaign and Objectives

Set a goal for your campaign and the ways you'll reach that goal. Include a theme or narrative that you can carry throughout the campaign. Think of offering an incentive.



Align Plan Across all of Your Channels: Online, Offline and Social Media

Make sure your messages will be succinct across all channels, targeting your list's members via the methods they interact with you most.

September



Start Segmenting Your List

Run an activity report of your list and start segmenting by those who have donated before and those who have not. Feel like being even more specific? Sort those groups by years active/donation frequency/social media engagement so you can personalize the asks even more.

October



Start Generating Your Content

Get your blog posts, social shares and mailings created and get them on a publishing calendar. Be sure to have backup content as well, you never know what email/post will work and what won't. Create several versions of the same email/post so that you can quickly switch out content that isn't working.



Update Donation Pages

Make sure your donation pages are up to snuff. Include features like tell-a-friend and one-click recurring donations to make it even easier for them to donate.



Update Your Website

Don't forget about your website! Make sure your page has a clear ask and it's easy to donate. Use modals (basically a window that floats above the page) to hijack your homepage and showcase your campaign and donation request.

November



Start Engaging Your List

Start reminding your list what you believe in and engage them with small asks. Test your lists to validate and make sure you're seeing the responses you were hoping for. Adjust accordingly.



Send First Multi-Part Email (Officially Begin Campaign)

Here it is, the big kick-off! Make sure to reach out to your audience across all channels simultaneously. Have that backup content ready and implement as needed.

December



Send Update Email

Reach out to your list and remind them why you appreciate them. This email shouldn't be an appeal, but focused on cultivating support instead.



Send Two More Ask Emails

As December 25th approaches, keep the momentum going by sending at least two more email asks to your supporters!



End-of-Year Appeals

Ask at least two to three more times during the last few days of the year. This is the best time to be sending your end-of-year appeals!



Send Final Email

This is it, the end of the year! Be sure to email at least one fundraising ask on New Year's Eve as this is one of the most lucrative times of the year (tax savings and all that)!

January

Happy New Year!

Woohooo! You made it...now it's time to clean your list and say thank you!