



YEAR-END FUNDRAISING CHECKLIST

Phase 1: Set Goals, Plan and Build

- ☐ Evaluate your previous campaigns to define what's worked and hasn't
- ☐ Outline your fundraising goals
 - ☐ SMART - specific, measurable, achievable, relevant and time-bound
 - ☐ How are you going to measure success?
 - ☐ Define your budget for this campaign
- ☐ Evaluate your tech stack and access
 - ☐ Customer Relationship Management System (CRM)
 - ☐ Email Service Provider (ESP)
 - ☐ Website and / or landing pages
 - ☐ Online donation platform and forms
 - ☐ Google Analytics, Google Tag Manager and / or other reporting tools
 - ☐ Paid digital channels - pixels, tracking capabilities
 - ☐ Access to shared inboxes such as info@
 - ☐ Project management tools
- ☐ Outline roles and responsibilities for this campaign - will you need outside support from vendors, contractors, specialists, agencies, etc.?
- ☐ Define your audience - Segment your audience to personalize your message. Examples include:
 - ☐ Donors (One-time, monthly recurring, major gift, etc.)
 - ☐ Supporters (Email subscribers, volunteers, advocates, fundraisers, etc.)
 - ☐ Giving behavior (giving amount, frequency, how recent they gave, etc.)
 - ☐ Demographics (geography, age, communication preferences)
- ☐ Develop your content strategy
 - ☐ What do you want to convey? What's your high-level messaging? Do you want to reflect on the past year or look to the future?
 - ☐ Reinforce **why** your organization needs funding - what is the impact of a year-end donation?
 - ☐ Define the look and feel of your campaign
- ☐ Develop your channel plan - balance budget, capacity and capabilities
 - ☐ Paid channels: PPC, Display ads, remarketing, paid social, direct mail
 - ☐ Earned channels: reviews, media coverage, social shares, speaking engagements
 - ☐ Owned channels: website, blog, email, social media, text messaging
- ☐ Timing and cadence - Develop your content calendar to outline deadlines
- ☐ List out and assign all copy and creative assets required for the campaign



Phase 2: Launch, Engage and Optimize

- ☐ Make sure all links work, proof all copy & creative, and that data is tracking properly
- ☐ Ensure all elements have been proofread, reviewed and approved by the appropriate teammates
- ☐ Share campaign progress with influencers, stakeholders, and staff
- ☐ Communicate what's working so people know where to focus their time
- ☐ Continue to build out content leading into the new year
- ☐ Plan for your follow up January - March communications and how you'll upgrade folks from one-time donors to ongoing supporters