



The Year-End Fundraising Planner

A Worksheet to help you organize and plan a successful year-end fundraising campaign.

INTRODUCTION

Your year-end campaign is important not only because it takes place when your donors are the most generous, but it also reinforces your organization's commitment to fundraising while recruiting, maintaining, and expanding your donor base.

Your year-end campaign should deliver a consistent, compelling message across multiple channels to support a single fundraising goal. A campaign is a process, not a single appeal. Your campaign should be a well-orchestrated series of activities that happen for a specific amount of time.

Use this planner to help organize your plan and optimize your key components for a more successful December campaign. You'll have a basic action plan that you can share with your team, your boss, and your board.

Part 1: Examine Your Data & Create the Perfect Plan

[Hint: Use your donor management system to aggregate your fundraising data to create a clear picture of your past performance and opportunities]

- a. How much money did you raise last December?
- b. How much money do you need to raise this December?
- c. List other fundraising goals you may have, such as number of new donors, new monthly donors, etc.:
- d. Write out no more than 4 sentences that make up your core case for giving. If there are matching gifts involved, make that one sentence. Refer back to the [four questions](#)—are they covered here?
- e. Outline your #GivingTuesday plans. How will they complement or stand out from your other December appeals?
[Hint: Consider differentiating your #GivingTuesday outreach by empowering your board members, volunteers, and supporters to raise funds on your behalf. [Network for Good's peer-to-peer fundraising software](#) makes it simple to set up and fun and easy for your fundraisers.]
- f. Set the dates for the beginning and end of your annual campaign.

- e. List 2 to 3 photos that would add just the right emotional drama to the story you plan to tell with your appeals.

- f. Write 3 possible [subject lines](#) for your first email appeal.

- g. A compelling fundraising appeal answers [four key donor questions](#): Why me? What for? Who says? Why Now? Following the 4 questions, write down a phrase or sentence responding to each.

- h. Do you plan to test your emails? If so, what will you test?

- i. List three specific segments of your list who you plan to target with your December campaign. How will you customize communications for each group?

- k. Review your planned send dates and create a communications calendar for the rest of the year. Add a phrase or sentence for each piece of outreach to indicate any testing, segmentation, or versioning you plan to do. Consider copying and pasting this as a separate document, and add as many rows as necessary to create a complete view of your communications plan.

Date	Type	Message	Call to Action	Audience	Notes

[Hint: Remember to sync your online and offline calendar and be sure to send at least 3 emails between Christmas and New Year's Eve. This is when the majority of year-end giving happens!]

Part 3: Optimize Your Giving Experience

[Hint: [Network for Good's smarter donation pages](#) are easy to configure and customize with your message, giving options, and images. Plus, they help you make it easy for donors to give at higher donation amounts.]

- a. Review your website, especially the home page and donation page. How can you transform your home page it into a fundraising-only page in December? What calls to action should be removed? Write down the key changes you would like to make.

- b. Draw a freehand sketch of what you would like your site to look like during year-end fundraising. Make a copy for your webmaster and post a copy in your workspace.

- c. What are the traffic-driving elements you plan to employ this year-end giving season? This could include social media promotion, social media advertising, search marketing, traditional advertising, etc. Who will be responsible for each set of tactics?

