



# Nonprofit Nation Implementation Guide

October 2021, Plan Your Year-End Campaign

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## Video Narrative

### What is a Year-end Giving Campaign?

A year-end giving campaign is a combination of fundraising strategies and activities with the goal of maximizing the funding potential during a certain time period.

### Why do we need Year-end Giving Campaigns?

Year-end giving campaigns take advantage of the overall giving spirit during the holiday season. People feel more generous and are more inclined to give to charity.

### What/How

#### Step 1: Determine Your Goals

One of your obvious goals will be fundraising dollar amount. You may decide to have goals like a response rate for appeal letters or a reactivation rate for donors who have not donated in the past 3 years.

Your goals will steer the Strategies and Activities you choose.

#### Step 2: Determine Your Overall Budget

The single most determining factor in what you will do is your overall budget for the campaign. How much will you allocate to printing and postage? This will determine the parameters of who you will mail to. It will also limit what you can and can't do.

#### Step 3: Determine Your Strategy/Activity Mix

Take a look at last year. What went well? What needed improvement? What has run its course and needs to be replaced? List every activity where you will be asking for money and that will be considered part of this campaign.

### **An example of a Strategy/Activity Mix**

#### Individual Donor Strategies

Appeal Letter to everyone who has given in the past 5 years

Postal mail to those who we only have addresses for.

Email campaign to those we only have email addresses for

Christmas Card to Monthly and Major Donors

Website Donation Page around Year-End Giving Theme

#GivingTuesday Campaign

Holiday Newsletter with direct ask

Season Kickoff Thank You Gala (early November)

Companies/ Churches Strategies

Appeal Letter to Companies

Schedule two Mission Moments with Local Churches

Step 4: Plan

### **Budget per Activity**

Knowing how you will allocate your larger budget to all the activities will help you keep costs down and reallocate money as necessary.

### **Goals per Activity**

What specific goals do you have for each activity? How much of the fundraising goal is the activity expected to bring in?

### **Timeline**

A project management trick is to start from the in-home date or date of the event and work backwards. A timeline for the appeal letter is in the resources section to help you with that activity.

### **To-Dos per Activity**

Now that you've decided on your strategies and activities and the timeline to get everything done, you will want to list out all of your to-dos. This can be

accomplished with a paper list or a digital task manager. One task manager I like that is free and can be shared with a team is Monday.com. I have the link in the resources section and the template suggestion for the year-end campaign.

### **Determine Theme and Messaging**

It's a good idea to select a unifying theme and message that you will use in all your activities. This helps create a cohesive message and images. It also helps if people see more than one piece of content to quickly recognize your campaign.

### **Advertise/Promotions (if applicable)**

You may need to promote activities like #GivingTuesday. Planning out your advertising and promotions and putting it in your timeline will help you keep on top of things.

### **Step 5: Execute**

Work your to-dos and timeline to execute your plan.

### **Step 6: Monitor and Control**

This is an important part of your plan. Knowing how you will monitor and control spending and deadlines will help you keep your sanity during a stressful time of year. Who is responsible for what? What reports and their deadlines will you need to keep on top of things?

### **Step 7: Review**

A Right, Wrong, Missing, and Confusing report on the campaign can help you sift through all of the data and put to paper the good, the bad, the ugly, and how to make it better next year.

## Year End Campaign Plan

Step 1: Determine Your Goals

Step 2: Determine Your Overall Budget

Step 3: Determine Your Strategy/Activity Mix

Step 4: Plan

Budget per Activity

Goals per Activity

## Timeline

A project management trick is to start from the in-home date or date of the event and work backwards. A timeline for the appeal letter is in the resources section to help you with that activity. [📄 Appeal Process Timeline.pdf](#)

## To-Dos per Activity

Determine Theme and messaging

Advertise/Promotions (if applicable)

## Step 5: Execute

Work your to-dos and timeline to execute your plan.

<input type="checkbox"/>	To-Do
<input type="checkbox"/>	

## Timeline

Person Responsible	Activity	Due Date

## Step 6: Monitor and Control

This is an important part of your plan. Knowing how you will monitor and control spending and deadlines will help you keep your sanity during a stressful time of year. Who is responsible for what? What reports and their deadlines will you need to keep on top of things?

Person Responsible	Report	Due Date

## Step 7: Review

### Right

What did we do right? What were the positives?

### Wrong

What could we have done better?

### Missing

What were we missing this time? What ideas did we have to improve next time?

### Confusing

What was confusing? Where did we misstep?