

Year-End Appeal Timeline

Month-to-Month Action Items for Nonprofits



Meet with key teams (staff, board members) to discuss themes and donor segments

Meet with financial team to set fundraising goals

- Review campaign results from previous three years
- Review year-to-date budget and make projections
- Establish budget for campaign
- Finalize overall campaign theme

Segment donors into groups, such as:

- Average gift size
- Donor type (in-kind/financial)
- Date of most recent gift

Set giving levels for each donor segment



Determine campaign elements needed, such as:

- Direct mail letter and envelope design
- Supporting graphics/photography/video
- Email template design
- Website landing page(s) design/build
- Thank you cards
- Social media post images and accompanying content

Write campaign letters for each donor segment

Produce supporting elements and campaign materials



Develop automated process for donation receipts

Develop manual process for writing and sending thank you cards

Finalize all year-end appeal content (letters, emails, social posts)

Begin scheduling social content

Send direct mail files and mailing lists to printer

Tie year-end campaign messaging into Giving Tuesday campaign

- Develop visuals/content for social media and email
- Plan schedule for roll-out and wrap-up



Week 1

- Direct mail appeals arrive in mailboxes
- Social media campaign begins
- Email campaign begins

Week 3

- Giving Tuesday campaign promotion begins

Week 4

- Giving Tuesday campaign ends with Thank You Wednesday social media posts and email



Week 1

- Update donors on progress via social media and email
- Begin follow-up with major donors who haven't given

Week 2

- Update donors on campaign progress
- Continue follow-up with major donors
- Begin follow-up with consistent donors who haven't given

Week 3

- Continue follow-up with major and consistent donors

Week 4

- Campaign progress update, thank donors for support, wish all happy holidays



Tally final campaign income and other key performance indicators

Share results with public and highlight 2-3 big plans for this year