

## Year-End Giving Campaign Checklist

### Six Month Timeline

MONTH	GOALS
<b>August</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assemble your team</li> <li><input type="checkbox"/> Develop your fundraising strategy</li> <li><input type="checkbox"/> Set your fundraising goal (Be SMART!)</li> <li><input type="checkbox"/> Determine potential partnerships</li> <li><input type="checkbox"/> Write content for email and socials</li> <li><input type="checkbox"/> Get branded visuals ready</li> <li><input type="checkbox"/> Get final approvals</li> </ul>
<b>September</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize partnerships</li> <li><input type="checkbox"/> Review plan with Board of Directors for final feedback</li> <li><input type="checkbox"/> Send out press release</li> </ul>
<b>October</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Soft launch</li> <li><input type="checkbox"/> Monitor KPIs for early troubleshooting</li> <li><input type="checkbox"/> Send out direct mail appeal letters</li> </ul>
<b>November</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Hard launch</li> <li><input type="checkbox"/> Kick off the thermometer (ideally by celebrating a big donation from a partner!)</li> <li><input type="checkbox"/> Giving Tuesday boost</li> <li><input type="checkbox"/> Kick off your matching campaign</li> </ul>
<b>December</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ramp up social media and email campaigns</li> <li><input type="checkbox"/> Boost your paid ads</li> <li><input type="checkbox"/> Last minute push on December 31st</li> </ul>
<b>January</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send out thank you letters</li> <li><input type="checkbox"/> Publicly announce final amount raised</li> <li><input type="checkbox"/> Gather reports &amp; analyze results</li> <li><input type="checkbox"/> Post-mortem meeting with team and Board of Directors</li> <li><input type="checkbox"/> Celebrate your hard work</li> <li><input type="checkbox"/> Set goals for next year</li> </ul>

## Year-End Giving Campaign Checklist

### Twelve Month Timeline

MONTH	GOALS
<b>March - May</b>	<input type="checkbox"/> Identify current fundraising needs and choose the one that would resonate during the holidays <input type="checkbox"/> Meet with your finance team about your projected budget
<b>June</b>	<input type="checkbox"/> Assemble your team <input type="checkbox"/> Choose your fundraising strategy and get approval <input type="checkbox"/> Brainstorm potential partnerships
<b>July</b>	<input type="checkbox"/> Set your official fundraising goal (Be SMART!) <input type="checkbox"/> Lock in all of your key dates <input type="checkbox"/> Reach out to potential partners
<b>August</b>	<input type="checkbox"/> Write content for email and socials <input type="checkbox"/> Get branded visuals ready <input type="checkbox"/> Finalize partnerships <input type="checkbox"/> Get final approvals
<b>September</b>	<input type="checkbox"/> Review plan with Board of Directors for final feedback <input type="checkbox"/> Send out press release
<b>October</b>	<input type="checkbox"/> Soft launch <input type="checkbox"/> Monitor KPIs for early troubleshooting <input type="checkbox"/> Send out direct mail appeal letters
<b>November</b>	<input type="checkbox"/> Hard launch <input type="checkbox"/> Kick off the thermometer (ideally by celebrating a big donation from a partner!) <input type="checkbox"/> Giving Tuesday boost <input type="checkbox"/> Kick off your matching campaign
<b>December</b>	<input type="checkbox"/> Ramp up social media and email campaigns <input type="checkbox"/> Boost your paid ads <input type="checkbox"/> Last minute push on December 31st
<b>January - February</b>	<input type="checkbox"/> Send out thank you letters <input type="checkbox"/> Publicly announce final amount raised <input type="checkbox"/> Gather reports & analyze results <input type="checkbox"/> Post-mortem meeting with team and Board of Directors <input type="checkbox"/> Celebrate your hard work <input type="checkbox"/> Set goals for next year