

# Year-End Campaign Planning

## JULY

Review previous year's performance across channels.

Continue sending standard campaigns, if you have them, as well as a mix of stewardship and engagement messages for your supporters.

## AUGUST

Set goals for Year-End campaigns (Nov + Dec), across channels, and start drafting a more formal plan.

Continue sending standard campaigns, if you have them, as well as a mix of stewardship and engagement messages for your supporters.

## SEPTEMBER

Continue sending standard campaigns, if you have them, as well as a mix of stewardship and engagement messages for your supporters.

## OCTOBER

Continue sending standard campaigns, if you have them, as well as a mix of stewardship and engagement messages for your supporters.

### ✉ DIRECT MAIL/EMAIL

For packages that normally drop in early November, move the package mail date to mid/late October.

Do not apply this timing adjustment if you have a mission aligned with election cycle where you could benefit from mail dates closer to the election.

### 📣 ADVERTISING

Keep evergreen ad campaigns live, especially in paid SEM.

Opt not to launch or to pause larger tentpole campaigns in the time periods closest to the election.

Consider eliminating broadcast from your plans as it gets closer to election day and reinvest into digital channels.

## ➡ CHANNEL PLAN

In what channels will you reach your audience(s)?

1. Direct Mail
2. Email
3. Organic Social
4. Paid Advertising
5. Donor Advised Funds
6. Partnerships
7. Tribute Gifts
8. Legacy gifts
9. Website

## NOVEMBER

Pre or On-Thanksgiving - Holiday "Thank You" Message

One week before Giving Tuesday - Kickoff campaign

Day of Giving Tuesday - Campaign blowout

Day after Giving Tuesday - Campaign extension or Thank You/Impact follow up

### ✉ DIRECT MAIL/EMAIL

Move package mail date to mid-November after the election.

### 📣 ADVERTISING

Resume tentpole and broadcast campaigns after election day.

## DECEMBER

Mid-month Stewardship or Cultivation Message - Demonstrate need, share impact, build urgency

Dec 26-30 - Year-End campaign lead up messages

Dec 31 - Year-End campaign blowout

## JANUARY

First week of January Year-End - "Thank You" Message including overview of the impact made through generous gifts.

### KPIs to review and track:

1. Total amount raised
2. Number of gifts received
3. Average gift size
4. Number of new donors
5. Donor retention rate (how many donors are returning donors?)
6. Conversion rate (of all the people who saw your fundraising appeal, how many of them took action?)
7. Cost per dollar raised (how much did you spend for every \$1 you raised?)
8. Return on investment (how much did you raise for every \$1 you spent)

### Questions to consider:

1. How much money did you raise last year?
2. Was response rate and/or average gift different than the prior year?
3. Have any of your key audiences changed (grown, shrunk) in a way that would change this year's performance?
4. Is there a new marketing channel you want to incorporate this year that will broaden your reach or incur more expenses?



## GOAL SETTING

