YEAR-END CAMPAIGN IMPLEMENTATION CALENDAR

Please note: The following dates are based on date that the year-end campaign is mailed. These action items serve as a guide and, depending on your campaign efforts, you may wish to add more to the list.

■ 120 DAYS OUT

- **Team**
  - Identify members of year-end giving campaign team
  - Plan 1st planning meeting with year-end giving campaign team
- **Discussion Points**
  - SMART *(Specific, Measurable, Attainable, Relevant and Time-Based)*
  - What are your financial goals?
  - How are you making an impact *(people, places, things)* and what is the connection to your mission
  - Present a clear call to action with a sense of urgency
  - What is your specific ask?
  - Give thanks
  - Language matters - Stay positive, friendly, and conversational
  - What – the goal
  - Why – the story
  - How – call to action
  - When – timeline
  - Who is your target audience and/or segment of donors; does it make sense to develop separate appeals if feasible/realistic
    - ■ Volunteers
    - ■ Clients
    - ■ LYBUNT (Last Year but Unfortunately Not This year).
      - □ The donor supported your organization during the last fiscal year but did not return to donate again this year.
    - ■ SYBUNT *(Some Year but Unfortunately Not This year)*
- **Develop framework for ask letter which should include:**
  - 2 pages
  - Signature(s)
  - PS
  - Giving amount
  - Story/appeal

- **Mail Piece**
  - Secure bids from vendors and decide on options for letter preparation *(i.e. printer, mail house and/or internal)*
  - Gather assets *(Logos, specific graphics, photos, stories, impact statements, quotes, videos - including permissions for use)*
  - Decision on letter and envelope size
  - Decision on printed envelopes and/or mailing labels
  - Secure/confirm postal indicia (first class, bulk, mailing/return envelopes and/or postcard)
- **Identify/secure matching gift opportunities/sponsor**
- **Develop campaign goals to include:**
  - Successful delivery/returned mail/email
  - Email open rate
  - # of responses by week (filter by distribution strategy)
  - % of donors (new, renewed, upgraded)
  - Average gift size; change prior previous year
  - $ and/or % increase over last year
  - Social media likes and/or shares
  - $ and/or % toward goal
  - Donor retention – next gift after the holiday
  - X% increase over prior year
- ....
- ....
- ....
- ....

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YEAR-END CAMPAIGN IMPLEMENTATION CALENDAR

■ 90 DAYS OUT

- Due Date for 1st draft of letter, mailing and reply envelopes and contribution form
- Review/approval of letter, mailing and reply envelopes and contribution form
- Include any required donation statements on letter/envelope/contribution form (may vary by state)
- Decision on hand signed, personal notes or printed signature(s)
- Decision on giving levels
- Decision on what funds will be used for (program, general operating, other)
- Integrate campaign into other organization year-end events
- ....
- ....
- ....

■ 60 DAYS OUT

- Print/review mailing list (check for valid address etc.)
- Decision on who will sign letters (volunteer and/or staff)
- Develop donor retention/thank you plan; consider different strategies based on giving levels. Thank you should occur within 48 hours of making gift and/or after campaign giving deadline
- Year-end material to printer
- Secure year-end gift from individual board members/key stakeholders
- ....
- ....
- ....

■ 30 DAYS OUT

- Test online giving links on website/social media
- Materials returned from printer to mail house or internal
- Identify and secure help for volunteers/staff (i.e. mailing and/or thank you)
- ....
- ....
- ....

■ 14 DAYS OUT

- Update website to include year-end giving appeal and/or GivingTuesday
- Identify staff/volunteer to be included on mailing for test purposes
- ....
- ....
- ....

■ 7 DAYS OUT

- Reminder to assign and ask the test mail recipient to notify the team when the test mail piece is received
- ....
- ....
- ....

■ 3 DAYS OUT

- ....
- ....
- ....

■ DAY BEFORE MAIL DROP

- ....
- ....
- ....

■ DAY OF (MAIL DROP)

- Year-End Campaign letter mailed
- Notify "test" mailing recipient that mailing has dropped
- ....
- ....
- ....

■ THROUGHOUT MONTH OF DECEMBER

- Mail reminder postcard and/or complete reminder calls
- ....
- ....
- ....

■ DAY AFTER

- o ....
- o ....
- o ....

■ WEEK AFTER

- Plan/schedule post campaign evaluation meeting with Campaign team
  - o Changes for next year
  - o Successes
  - o Timing challenges
  - o Conclusions/take away notes for next year
- Celebrate accomplishments
- Prepare/distribute impact report: report on goals/success measures
- ....
- ....
- ....

YEAR-END CAMPAIGN IMPLEMENTATION CALENDAR

■ **SUGGESTED TIMELINE FOR 2021**

- November 15-29 – Mail the year-end letter
- November 25 – Thanksgiving
- November 30 – Giving Tuesday
- Once a week, all of December – Series of Year-End Giving emails, each week removing people who have already given
- Mid December – Mail follow-up postcard to those who have not yet given (strategy for confirming and/or note "thank you if given already")
- December 29-30-31: Final year-end emails
- Week of January 3 – Finalize year-end giving records and begin thank you campaign
- ....
- ....
- ....
- ....
- ....
- ....
- ....

For More information,
visit *https://sharityglobal.com*.

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