

END OF YEAR FUNDRAISING CAMPAIGN CHECKLIST

Need help with your Year End Fundraising Campaign?

[Click here to check out our End Of Year Fundraising Toolkit now](#) – and you can keep track of your progress by ticking the boxes below when you have completed each section.

1. *Review*

Assess your starting position

- Current acquisition rate
- Current retention rate
- Monthly donors
- Annual donors

2. *Goal Setting*

Set your targets

- SMART goals
- Tactics
- Responsibilities assigned

3. *CRM Solution Preparation*

Get your Fundraising CRM system ready to go

- Addresses standardized
- Goneaways attributed
- Deceased suppressed
- Telephone and Mail preferences selected
- Duplicates removed

4. *Messaging*

Refine your campaign messaging

- Key message chosen
- Tell your story
- Make the ask

5. *Engaging Supporters*

Select channels for delivering the campaign

- Personalize comms
- Tailor emails
- Direct mail
- Website
- Social media

6. *Analyze the results*

When the campaign is over, don't forget to assess how it went

- Amount raised
- Average gift amount
- Response rate
- Cost per dollar raised
- Click through rate
- Acquisition rate
- Retention rate



Get started today!
[Click here to download
the End of Year
Fundraising Toolkit](#)