



**FIREFLY**  
PARTNERS

# Year-End Fundraising For Nonprofits

## Campaign Planning & Checklist

Your end-of-year fundraising campaign is more than just a few emails you send in winter. It's an undertaking that requires months to plan and run. While it may be hard to think about December while you're still enjoying summer, the earlier you start planning, the better. Here are the four key phases to making your year-end fundraising campaign a smashing success:

### 1 Strategize & Plan

Review past fundraising campaigns and use your organization's financial plan to set a fundraising goal. Choose a start date, build a calendar, and gather images and stories for your messages. WHEN: JULY - AUGUST

### 2 Identify Audiences

Clean your list, segment your supporters, and craft specific messages for each group. Make a plan for how you'll use social media. Think about creative ways to thank and reengage donors. WHEN: AUGUST - SEPTEMBER

### 3 Finalize Assets

Approve designs. Build your emails, forms, landing pages, and social media posts. Test every email and form on multiple browsers and devices to ensure things look and work correctly. WHEN: OCTOBER

### 4 Ask & Adapt

As your campaign rolls out, monitor your messages and make sure you are responding to questions. Check in on what's working and make adjustments to ensure the best results. WHEN: NOVEMBER - DECEMBER

Your campaign doesn't end when you send the final email. The best ways to improve fundraising efforts are to analyze performance, learn from results, and develop plans for engaging audiences in meaningful ways throughout the year.

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# Fundraising Campaign Checklist

Use this checklist to keep your team organized and on track to run a successful campaign. These steps can help you with any fundraising push at any time of year. Let us know how we can work with you on strategy, design, and implementation.

- Analyze previous years' data to determine what worked and what didn't
  - Use your financial plan to set a fundraising goal
  - Secure a high-level donor who will commit to a matching gift
- Choose a start date and create a shared campaign calendar
  - Identify your audiences
  - Clean and segment your lists
- Gather stories and images for fundraising materials
  - Begin the design process
  - Complete the text of emails and landing pages
- Finalize design and layout and build emails and landing pages
  - Create a social media promotion plan
  - Establish the metrics you will track for reporting purposes
- Test every message on various browsers and devices
  - Test donation forms to ensure that they work and that data is captured
  - Update website images and calls-to-action on launch date
- Monitor performance of emails and social media posts
  - Respond to questions and concerns in a timely manner
  - Adjust campaign as needed based on results

## About Firefly

We put our technology expertise to work for progressive nonprofits who are tackling today's biggest social challenges. As you bang the drum for change, progress, and equality, our team is here to help. [info@fireflypartners.com](mailto:info@fireflypartners.com) | 303.515.7155

