LINDSAY SIMONDS CONSULTING

End-of-Year Fundraising checklist

EARLY FALL

- [ ] "Blue-sky" Brainstorming: Ideation without limits - give thorough consideration to every possible asset, opportunity, risk, and contingency.
- [ ] Segmentation & Engagement Planning: Dividing your audience by who is most likely to support, somewhat likely to support, and least likely to support.
- [ ] Content Creation: Using all of the above, what content do you know you'll need -- i.e. website/landing pages, emails, press releases, presentations, progress reports, blogs, calls to action, drip campaigns, social media content, etc.

SOFT LAUNCH

- [ ] Begin engaging with your segmented audiences.
  - [ ] High-engagement supporters: They know all about your organization so the ask will be easier. They are also a valuable source of information.
  - [ ] If possible, further define pockets of donors based on interests, regions, group affiliations, hobbies, cause preferences, etc.
  - [ ] The more your appeals align with the specific interests and concerns of your donors, the more likely they'll be to respond favorably to your outreach.

PUBLIC LAUNCH

- [ ] Activation: Appeal to your less-engaged audiences and the population at large.
  - [ ] Recruit, engage, appeal, and activate as many donors as you can.
  - [ ] Make sure that your medium and low engagement supporters see the activity and fundraising progress the first time they get a glimpse of the campaign.
- [ ] Focus on Mass Marketing: Press releases, email blasts, social media campaigns, and website takeovers are all worth doing.

THANKSGIVING & GIVING TUESDAY

- [ ] Know Your Audience: Reflect on what's most important and find ways to stand out from the crowd.
- [ ] Engage your audience in ways that add value to them:
  - [ ] Remind them about the purpose of the week & the importance of gratitude and connection.
  - [ ] Share memorable experiences and what they've done for people in your organization's community.
- [ ] #GivingTuesday: The launchpad that'll carry your organization through the end of the campaign.
  - [ ] Get more intentional about the messaging.
  - [ ] Reach new donors, elevate your brand, and lead a global conversation around generosity in all forms.

RECAP - RESET - RELAUNCH

- [ ] Take a beat, relax, and review:
  - [ ] What's been working well, where to double-down, and what might be improved.
  - [ ] What trends are you seeing and how might your engagement strategies be further optimized based on that data?
- [ ] Make adjustments as needed for a successful finish.
- [ ] Activate key supporters as evangelists.

HOME STRETCH

- [ ] Ideas for the mad sprint to the end of the year:
  - [ ] Revisit donors you've already engaged but who have not yet given.
  - [ ] Re-engage those who have already given.
  - [ ] Roll out donation matches, sponsorships, prizes, and incentives.
  - [ ] Do a livestream or send video messages from staff.
  - [ ] Highlight important community members, key volunteers, or participating nonprofits.
  - [ ] Talk about the impact that their financial support means to your organization.
  - [ ] Tease plans for the new year & invite them to join in.
  - [ ] Lock in any major gifts opportunities that may still be out there.

LS C LINDSAY SIMONDS CONSULTING

End-of-Year Fundraising activities

CHRONOLOGICAL ORIENTATION TO END-OF-YEAR GIVING

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