



Year-End Giving Planning Toolkit

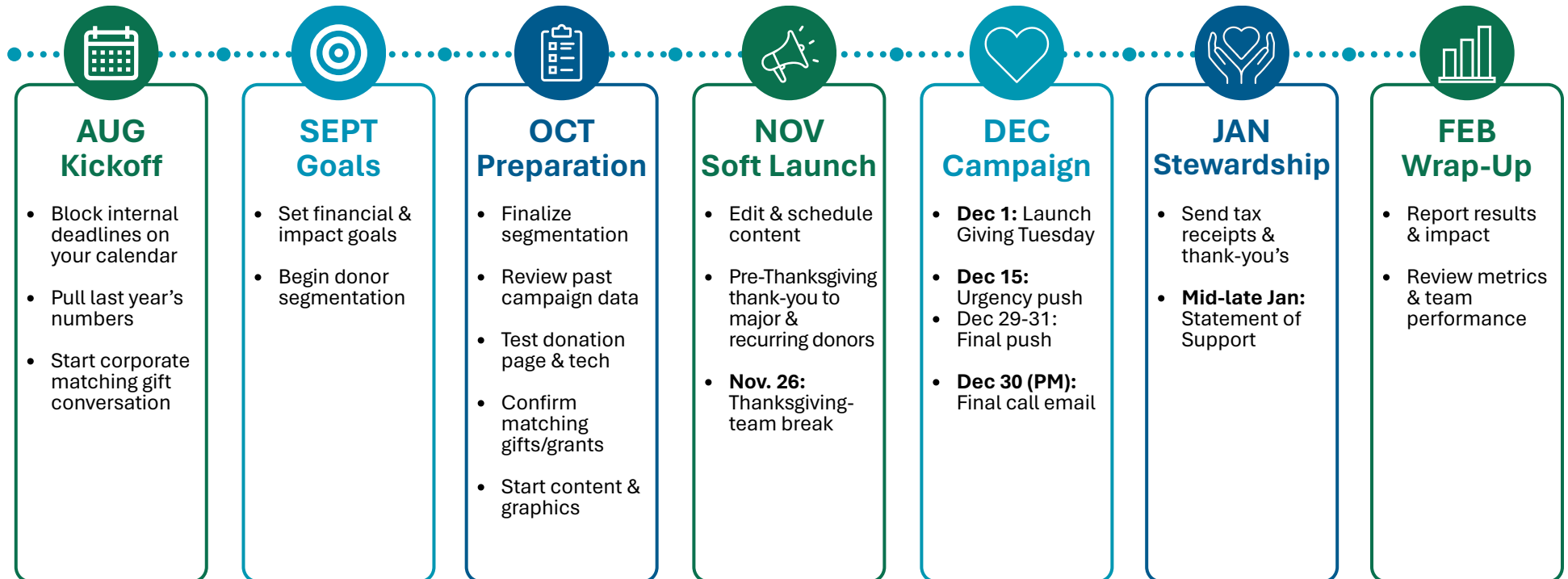
Your Campaign Roadmap

2026-2027 Campaign

PLANNING • PREPARATION • LAUNCH • STEWARDSHIP

Campaign Roadmap

Block these dates internally now. Adjust the exact days to fit your team, but keep the sequence.



The heaviest giving happens in a six-to-eight week window between late November and December 31. Plan early so that window works in your favor.

Goal-Setting Worksheet



Pull results from last year's campaign to set measurable goals for this year.



LAST YEAR (REFERENCE)

Total raised (Nov-Dec): _____

Total number of donors: _____

Average gift size: _____



THIS YEAR (2026-2027 GOALS)

Revenue goal: _____

Donor count goal (new & returning): _____

New donor goal: _____

GivingTuesday-specific goal
(if tracked separately): _____



BIGGEST LESSON FROM LAST YEAR'S CAMPAIGN



TOP 3 IMPACT STORIES TO FEATURE THIS YEAR

Preparedness Checklists

Use these handy checklists to ensure preparedness for donor segmentation and web/tech functionality



DONOR SEGMENTATION

- ☐ Major donors identified and pulled into their own list
- ☐ Recurring / sustaining donors identified separately
- ☐ Lapsed donors (gave previously, but have not donated in the last 12-18 months)
- ☐ First-time / prospective donors identified
- ☐ Board members and staff added to an internal-advocate segment
- ☐ Messaging drafted or adjusted per segment (not one blanket appeal for all)
- ☐ Segment lists exported / synced to your email and mail platforms



Aim to have these segments defined before the mid-November soft launch.



WEBSITE & TECH READINESS

- ☐ Donation page tested on desktop and mobile
- ☐ Donation page tested with a real (small) transaction, start to finish
- ☐ Recurring-gift option visible and working
- ☐ Automated donation receipt / confirmation email tested and on-brand
- ☐ Payment processor can handle expected GivingTuesday / Dec 31 traffic spikes
- ☐ Campaign-specific landing page or URL live and linked everywhere (email, social, print)
- ☐ Analytics / UTM tracking in place to measure channel performance
- ☐ Thank-you page and post-donation email sequence reviewed



Test early. For small issues now, not on GivingTuesday or Dec. 31!

Corporate Matching Gift/ Challenge Grant Tracker



Start these conversations in August or earlier — matching and challenge gift agreements often take 6–8 weeks to finalize.

COMPANY / FUNDER	CONTACT NAME	ASK AMOUNT	STATUS	TARGET CLOSE DATE

Successful year-end campaigns don’t happen by accident. They are intentionally planned, thoughtfully executed, and strengthened by consistent stewardship before, during and after the giving season. By investing time now to prepare your strategy, organize your communications, and align your team, you’ll be positioned to build stronger donor relationships and achieve greater impact when it matters most. **Mission360 Strategies partners with nonprofit leaders to strengthen fundraising strategies, deepen donor engagement, build organizational capacity, and advance missions with confidence.**

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