



THE YEAR-END READINESS CHECK

90 DAY COUNTDOWN

FOCUS. PLAN. PUSH. SUCCEED.

90	89	88	87	86	85	84	83	82	81
80	79	78	77	76	75	74	73	72	71
70	69	68	67	66	65	64	63	62	61
60	59	58	57	56	55	54	53	52	51
50	49	48	47	46	45	44	43	42	41
40	39	38	37	36	35	34	33	32	31
30	29	28	27	26	25	24	23	22	21
20	19	18	17	16	15	14	13	12	11
10	9	8	7	6	5	4	3	2	1

THE BEST TIME FOR NEW BEGINNINGS IS NOW.

YOU HAVE 90 DAYS.

**TO BEGIN:
KNOW WHERE YOU STAND**

AUGUST

**GIVING IS FLAT
OR DECLINING.**

**EVERYDAY DONORS ARE
HARDER TO REACH.**

DO YOU KNOW WHERE YOU STAND?



Performance Metrics

HOW ARE YOU TRACKING AGAINST LAST YEAR?

HOW ARE YOU TRACKING AGAINST BUDGET?

YOUR LIST



Who are you asking?



Are they current?



Who hasn't renewed?

Strategic Planning

YOUR CAMPAIGN BUDGET

- Do you have one?
- Do you know what it costs to reach your donors?
- Is it approved?



AUGUST CHECKLIST

Mon	Tue	Wed	Thu	Fri
3	4	5	6	7
10	11	12	13	14
17	Pull metrics 18	Brainstorm list 19	20	21
Determine budget 24	25	Decide on strategies 26	27	Decide on matching gifts 28
Map Sep/Oct/Nov milestones 31				

Every day, check off one readiness item.

SET THE STAGE

SEPTEMBER

THE NOISE PROBLEM

**Every organization is in your donor's inbox.
What makes yours different?**



Strategic Reflection

THREE QUESTIONS

- What did your donor make possible this year?
- What would be lost without their support?
- What do you want them to feel?



Where to look

GO FIND THE STORY

- Program staff
- Leadership
- Board
- Donors
- Clients

The story is out there.

YOUR CHANNELS



- Email
- Direct mail
- Social
- Phone
- Personal asks
- Video

**DOES YOUR CHANNEL
MIX MATCH WHERE
YOUR DONORS ARE?**



ON VIDEO

**IT DOESN'T
HAVE TO BE
PRODUCED.**

**IT HAS TO
BE REAL.**

A man with dark hair, wearing a light blue button-down shirt, is shown from the chest up. He is holding a black telephone receiver to his ear with his right hand. He has a slight smile and is looking off to the right. The background is a blurred office environment with shelves and papers. Overlaid on the image is white text in a bold, sans-serif font.

**ON PERSONAL ASKS
WHO DESERVES A CONVERSATION?**

OTHER LOGISTICS

- **Donation page audit**
- **Acknowledgment letter templates**
- **Who's covering the holidays?**

SEPTEMBER CHECKLIST

Mon	Tue	Wed	Thu	Fri
	1	Schedule video production, if applicable 2	3	4
7	Decide on your list criteria 8	9	10	Pull sample lists to figure out cleanup 11
Determine keystone donors 14	15	Mail: schedule mailing timeline 16	17	Finish gathering your stories of impact 18
Determine year-end theme 21	22	Begin writing copy and design 23	24	Create content calendar 25
Assign personal asks 28	29	Begin early donor outreach 30		

Every day, capture a story of impact.

EXECUTE THE PLAN

OCTOBER AND NOVEMBER

OCTOBER CHECKLIST

Month of heavy lifting

Mon	Tue	Wed	Thu	Fri
			Finalize content calendar ¹ and begin asset creation	²
Test your donation page ⁵	⁶	⁷	⁸	⁹
Canadian Thanksgiving ¹²	¹³	Finalize your mailing package ¹⁴	¹⁵	Pull your lists ¹⁶
Send mailing to printer/mailhouse ¹⁹	²⁰	Finalize email content ²¹	²²	²³
²⁶	²⁷	Finalize any website content or landing page ²⁸	²⁹	Finish your video ³⁰

Every day, timeblock something for the year-end campaign.

NOVEMBER CHECKLIST

Stick the Landing!

Mon	Tue	Wed	Thu	Fri
Finalize all digital content ²	First round personal asks done ³	⁴	Finalize acknowledgment templates ⁵	⁶
⁹	¹⁰	¹¹	¹²	¹³
Target mail drop ¹⁶	¹⁷	Schedule your emails ¹⁸	Schedule your social content ¹⁹	Finalize all Giving Tuesday assets ²⁰
Target Kitchen Table date ²³	Schedule Giving Tuesday posts ²⁴	²⁵	US Thanksgiving ²⁶	²⁷
Stewardship mode begins ³⁰				

Every day, timeblock something for the year-end campaign.

STEWARDSHIP AND CELEBRATION

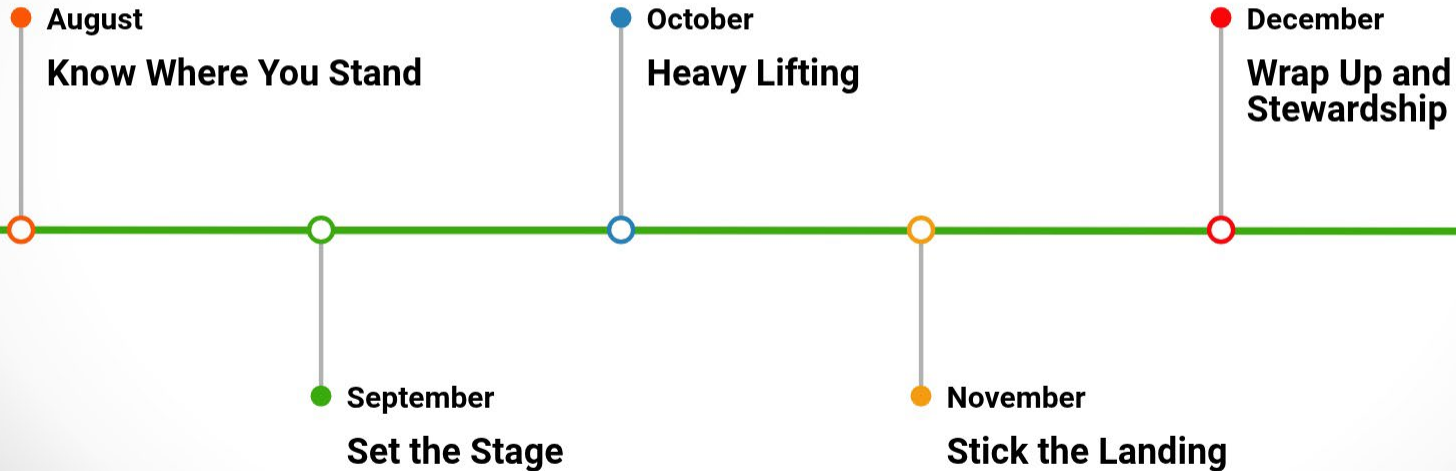
DECEMBER

DECEMBER CHECKLIST

Mon	Tue	Wed	Thu	Fri
	Giving Tuesday 1	2	3	4
Reconfirm holiday staffing schedule 7	8	9	10	11
14	15	16	17	18 Finish Round Two asks
21	22	23	24	25
28	29	30	31 You made it!	

Every day, talk to a donor.

THE TIMELINE



A photograph of a wooden clipboard with a silver clip at the top. A white sheet of paper is attached, featuring a checklist titled 'CHECKLIST' in bold, uppercase letters. The checklist has six items, each preceded by a checked box. A black pen lies diagonally across the bottom right of the paper. The background is a light-colored surface with a small green plant in the top left corner.

CHECKLIST

- ☒ Define objectives
- ☒ Gather information
- ☒ Analyze options
- ☒ Create plan
- ☒ Implement plan
- ☒ Review and adjust

YOUR ACTION ITEM THIS WEEK

KNOW WHERE YOU STAND.



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