

# Module Overview & Resource Guide

**Topic: Year-End Campaigns**

## Description

Your year-end campaign is one of the most strategic fundraising initiatives of the year. A successful campaign has the power to engage champions, re-energize your donor base, and significantly boost year-end giving. This module will walk you through the planning process using a step-by-step Excel tool that helps you establish goals, clarify your campaign's message, collect transformational stories, and segment your calls to action.

## Outcomes

By the end of this module, you will be able to:

- Use historical data to set thoughtful year-end campaign goals
- Create a unifying campaign message that aligns with your ministry's mission
- Identify and gather meaningful stories to support your campaign
- Tailor your asks to different donor segments for increased impact
- Prepare for campaign evaluation and future improvement

## Folder Contents & Instructions

Your folder contains several resources to support your work in this module:

### **HOMEWORK\_Year-End Campaign Tool.xlsx**

- **Purpose:** Primary tool for planning and documenting your year-end strategy
- **Action Required:** Complete Steps 1–4 using your ministry's context. Each tab includes a **top portion for your data** and a **bottom portion with completed examples** for guidance.

## **RESOURCE\_Repurposing Stories\_FILLABLE.pdf**

- **Purpose:** Extra resource for story development
- **Action:** Use this guide to identify existing content and fill gaps with compelling stories that align with your campaign goals.

## **Next Steps: Pre-Work for Our Next Session**

In preparation for our next session on **developing a Year-End Fundraising Strategy**, please complete the following using the **HOMEWORK\_Year-End Campaign Tool**:

### **Step 1: Goals and Focus**

Gather data from the last two years of your year-end campaigns. Use this data to:

- Analyze trends
- Set new goals for this year in each category
- Justify your goals with strategic reasoning

### **Step 2: Key Messages**

Craft a campaign statement using this framework:

- What's the **problem** you're addressing?
- What's the **solution** your ministry offers?
- What's the **outcome** your donor can help make possible?

This foundational statement will guide your entire campaign messaging.

### **Step 3: Story Collecting**

List stories that support your key message from various perspectives (e.g., beneficiary, volunteer, donor).

- Evaluate what you already have
- Note what's missing
- Make a plan to gather additional stories

Examples are included on the sheet to spark ideas.

#### **Step 4: Calls to Action**

Consider whether you should segment your audience (e.g., major donors, monthly givers, lapsed donors).

- Define specific asks for each group if needed
- Come prepared with questions or ideas about donor segmentation—your insights will benefit the group!

#### **Bonus Resource**

Use **RESOURCE\_Repurposing-Stories\_FILLABLE.pdf** to:

- Identify ways to reuse existing stories across channels
- Ensure alignment with your campaign theme
- Save time and effort in content creation

#### **You've Got This!**

Planning a strategic year-end campaign is a significant task, but also a powerful opportunity to deepen donor relationships and grow your ministry. Use the tools provided, ask for help if needed, and come to the session ready to share, refine, and strengthen your campaign with your peers.