



FUNDRAISING MONTHLY CHECKLIST

Use this checklist to review the previous month to see where you are and if you're on track to meet your annual goals or if adjustments are needed. Use the extra lines to add things specific to your nonprofit.

Month/Year:

Date Completed	Item
1. 2. 3. 4. 5. 6. 7.	Fundraising Management 1. Compare actual revenue from the previous month to budget. Was it over or under? Why? 2. Compare actual expenses from the previous month to budget. Was it over or under? Why? 3. What adjustments need to be made for the coming month? 4. Review your Fundraising Plan. What are the main things you need to focus on in the coming month? What projects need to be started? 5. Is your 3:1 Ratio on track? 6. What additional help or resources may be needed in the coming month? 7.
1. 2. 3. 4.	New Donors 1. How many new donors made gifts this month? How many total donors do you have now that have made a donation in the past 12 months? 2. Did your New Donor Welcome Kit go out to all new donors? 3. Are you on track to hit your Donor Acquisition Goal for the year? 4.
1. 2. 3. 4.	Donor Acknowledgement 1. Update your general "thank-you" letter text. 2. Check your Donor Acknowledgement Plan for action items including emailing Board members or volunteers to get their help in thanking donors. 3. What warm touches are planned for the coming 90 days that you need to start working on now (videos, reports, etc.)? 4.

1. 2.	Events <ol style="list-style-type: none"> 1. What activities need to happen this month in support of upcoming fundraising events? 2.
1. 2. 3. 4.	Monthly Donors <ol style="list-style-type: none"> 1. Review donations from monthly donors. Are there any who missed a payment that need a phone call? 2. What activities do you have planned this month to thank your monthly donors? 3. What activities can you do during the coming month to get a few more monthly donors? 4.
1. 2. 3.	Direct Appeal <ol style="list-style-type: none"> 1. What activities need to happen this month in support of the next upcoming direct appeal? 2. Review any direct appeals from the previous month to see what the results are. Are they on track or not? Why? 3.
1. 2. 3. 4.	Major Gifts <ol style="list-style-type: none"> 1. Review your list of top 10 donors. 2. Choose at least 2 to connect with during the coming month (call, email, video, coffee date, facility tour, etc.). Schedule those activities. 3. Of those donors you've been building relationships with, which ones need a warm touch this month? 4.
1. 2. 3. 4.	Grants <ol style="list-style-type: none"> 1. Review Your Grant Deadline Calendar to see what deadlines are coming up in the next 90 days. 2. Check to see if any follow-up is needed on outstanding proposals. 3. Check to see if any reports are due. 4.

<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 	<p>Social Media</p> <ol style="list-style-type: none"> 1. Review your Social Media Plan. Note on your calendar any specific activities you need to do in preparation for social media this month. 2. Review your social media numbers. What was the most engaging post from the previous month? Why? 3. Review any campaigns scheduled for this month, including \$5 Fridays or Wish List promotions. 4. What feel-good or cause-specific holidays are coming up in the next 90 days that you can leverage? 5. What can you do in the coming month to increase your social media following? 6.
<ol style="list-style-type: none"> 1. 2. 3. 4. 	<p>Newsletter</p> <ol style="list-style-type: none"> 1. Review your newsletter numbers from last month. Are there any items you need to have a closer look at (open rate, click through rate, etc.)? 2. Make a note on your calendar of any activities needed for this month's newsletter. 3. How many new names did you add to your email list last month? What activities are you planning to grow the list this month? 4.
<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	<p>Marketing</p> <ol style="list-style-type: none"> 1. Make a list of everything you did during the previous month to spread the word about your nonprofit. What worked? What didn't? Why? 2. How many times did the organization appear in the news or gain exposure during the month? What media exposure is planned for the coming month? Were appropriate "thank you" notes sent to the media reps? 3. How many speaking engagements or presentations did the organization provide during the month? What speaking engagements or presentations are planned for the coming month? 4. What ideas do you have about additional marketing activities you can do in the coming 90 days? 5.
<ol style="list-style-type: none"> 1. 2. 3. 4. 	<p>Lapsed Donors</p> <ol style="list-style-type: none"> 1. Pull and review a list of recently lapsed donors (people who haven't given in the past 12 months). 2. Send notes or emails to newly lapsed donors to try to get them back. 3. Call those who renewed during the previous month to thank them. 4.