



Holiday Communication **Planning Guide** **2023**





Create your plan for success.

Imagine a moment in November where you can click “send” on your end-of-year appeal letter and let Chalk Line handle the rest. What would it feel like to know you’re able to give your donors the tools to join you in your year-end giving opportunities?

Chalk Line is here to execute your holiday communication needs, whether that mailing is a special fall gift, end-of-year Appeal, or Christmas card. Our goal is to help you align your donor communications so you can spend more time doing the work you have been called to do. Each communication touchpoint connects you and your donor. This guide is here to help you keep you on track for success.

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Important Dates & Deadlines

If you need help designing...

- For pre-Thanksgiving design items, order by **November 7th** and approve your design by **November 14th**.
- For pre-Christmas design items, order by **December 1st** and approve your design by **December 8th**.

If your letter has a mail merge field for a personal greeting...

- For pre-Thanksgiving mail merge letters, order by **November 7th** and approve by **November 14th**.
- For pre-Christmas mail merge letters, order by **December 1st** and approve by **December 8th**.

If your item is ready to print ...

- For pre-Thanksgiving items, order by **November 14th**.
- For pre-Christmas items, order by **December 8th**.

If you would like your item to mail on a specific date...

Use Chalk Line's Prep-Ahead service to pre-schedule your mailing date at least 7 business days ahead.

- For fall cards to arrive before Thanksgiving, schedule on/before **November 14th**.
- For end-of-year appeals to arrive before Giving Tuesday, schedule on/before **November 22nd**.
- For end-of-year appeals to mail the day before Thanksgiving, schedule on **November 22nd**.
- For Christmas cards and end-of-year appeals to arrive before Christmas, schedule on/before **December 13th**.
- For items to be mailed before the end of 2023, order by **December 18th**.

If you have a specialty order or would like to order a volume discount item...

- For fall partner gifts, order by **October 31st**.
- For specialty orders or volume discount items to mail/ship before Thanksgiving, order by **October 31st**.
- For specialty orders or volume discount items to mail/ship before Christmas, order by **November 27th**.

October 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31 Deadline to order fall partner gifts, fall volume discount items & Thanksgiving specialty orders				

November 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7 Deadline to order Thanksgiving design & mail merge items	8	9	10 Chalk Line closed - Veteran's Day	11
12	13	14 Deadline to order Thanksgiving print-ready items & approve PDF proofs	15	16	17	18
19	20	21	22 Last available Prep-Ahead date before Thanksgiving	23 Chalk Line closed - Thanksgiving	24	25
26	27 Deadline to order Christmas partner gifts, volume discount items & Christmas specialty orders	28	29	30		

December 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Deadline to order Christmas design & mail merge items	2
3	4	5	6	7	8 Deadline to order Christmas print-ready items & approve PDF proofs.	9
10	11 Chalk Line's ship-by date for UPS /FedEx Ground for pre-Christmas arrival.	12	13	14	15	16
17	18	19	20	21	22	23
24	25 Chalk Line closed - Christmas	26	27	28	29	30
31	1 Chalk Line closed - New Year's Day					



End of Year Frequently Asked Questions:

What is the Chalk Line *Prep-Ahead* service?

Chalk Line offers the *Prep-Ahead* service so our customers can submit and approve end-of-year communication and gifts with a designated mail/ship date that is at least 7 business days in the future. Once your *Prep-Ahead* order is submitted, it is reviewed, printed, prepared for mailing, and held until the earmarked *Prep-Ahead* date. This service ensures your orders are mailed on the date that aligns with your end-of-year communication goals.

Can I still order my item after the specified deadline?

You can order your item at any time. However, items ordered after the deadline cannot be guaranteed to mail/ship to arrive in time for the desired holiday date.

Can I include a giving envelope or giving slip with my end-of-year appeal letter?

Yes, we can include enclosures. Our giving envelopes are size #9, and we offer giving slips at 1/3 page size (3.65 in x 8.5 in) and 1/4 page size (3.65 in x 5.5 in). Please note that additional enclosures may increase the postage and labor costs, as well as increase the turnaround time to accommodate the additional printing and processing time. We encourage you to budget additional processing time in planning orders with enclosures.

What is a mail merge letter and why do I need to approve a proof?

A mail merge letter has one or more fields that can be personalized using data in your mailing list spreadsheet. The most common type of field is a personalized greeting at the beginning of the letter. Our team will send a PDF proof for you to review of the letter with a sample merge for you to verify that all the merge fields are accounted for and correctly filled. This ensures that your mail merge letter order is completed and mailed correctly.

Chalk Line can only merge fields on page 1 and 2 of a front/back letter. We cannot include mail merge fields on additional pages.

How do I know if my item needs to be handled by Chalk Line's design team?

Your item will be handled by Chalk Line's design team if it requires Chalk Line's design team to develop your design before making the item print-ready (e.g., new or holiday-specific letter designs, design updates, or custom magnets, photo cards, fall or Christmas cards, prayer cards, and postcards, etc.).

You will have the opportunity to review the design and any changes requested, and you will be asked to approve the PDF proof prior to the order being printed. Please budget at least 5-7 business days during the holiday season for the design process in addition to the regular turnaround time.



How do I approve proofs, upload additional documents, and communicate with Chalk Line about my order?

Use the timeline on the website to send any messages, approve proofs, and upload additional documents. When our team sends communications via the timeline, you will receive an email notification. **Please note these email messages from our order system are “no-reply” type emails.** Please click the green “VIEW ORDER” button within the email to click through to your order.

If you have an item that requires a proof, please review your proofs promptly and respond on the timeline. Please check for communication from us to ensure that your order is processed in a timely manner.

How do I know that my order was placed successfully?

When you place your order, you will see a confirmation screen with your order number once the order is successfully placed. If you do not, please make sure your item is not still in your cart. You will also receive an email notification. To view your order, click the green “VIEW ORDER” button within the email to click through to your order.

Can I schedule my mailing for the day after Thanksgiving?

No. Chalk Line will be closed the day after Thanksgiving.

How long will my order take?

During the holiday season, please plan for additional processing time on design and print orders due to the additional holiday volume. All submissions are processed in the order in which they are received. Through December 31, we are unable to accommodate any same-day requests, including any email-only orders. We recommend adding an additional 5-7 days to your regular turnaround time. In addition, by using our *Prep-Ahead* service, you can schedule your mailing date at least 7 business days ahead to accommodate additional processing time.

When is the last day I can submit my order to ensure it is postmarked by December 31?

December 18 is the deadline for orders to be guaranteed to be postmarked by December 31, 2023. Orders submitted after this date may still be mailed prior to December 31, but it cannot be guaranteed.

Will Chalk Line be closed for the holidays?

Yes. Chalk Line will be closed in observance of the following holidays:

Veterans' Day - November 10
Thanksgiving - November 23-24
Christmas - December 25-26
New Year's Day - January 1

Build Your End-of-Year Appeal

Prompt:

Write your answer here:

Personalize your letter to your donors.
Begin with a warm, conversational tone.
Your donors are your friends.

Center your donor as the hero of your story
using donor-first language at the beginning.

Share a story of one changed life from
your (or one of your teammate's) ministry.
Highlight what you have accomplished this
year.

Highlight how your donor can make a
difference as a part of your ministry team.
What is your clear call to action?

What tools can you include with your letter
that will help make giving easy for your
donors (i.e., a giving envelope or giving
slip)?

Reinforce your thankfulness and gratitude
for your donors' partnership in your closing
paragraph.

Find one or two high-quality photos that show the impact of your ministry.



Tips for Planning Your End-of-Year Appeal

Take time to clean up your mailing list.

Make sure your records are up to date. Go through your mailing list and make any additions, deletions, or changes before you submit your order. If you are including a mail merge greeting or personal giving information, make sure it is accurate.

Curate your Year-End mailing.

Decide who will receive your appeal letter. Some people send to their entire mailing list, and others target segmented groups to encourage one-time gifts and new monthly donors. It is up to you to determine who is the best audience.

Craft your message.

A powerful message encourages a generous response. Think about the following:

- What happened this year that stands out?
- Did you reach any milestones and/or were there any stories of impacted lives you can share?
- How did your donors make an impact in your work?
- How can you center your donors as the heroes of your story?
- What is your call to action?

Use our end-of-year appeal worksheet to craft a thoughtful, donor-first appeal.

Make a plan for your mailing.

Decide what the timeline for mailing should be. Start planning early to ensure that your mailing is prepared and submitted with time to spare. Use the dates included in this guide to determine when you should begin.

Write your thank you message ahead of time.

Your thank you message is just as important as your appeal letter. Acknowledging your donors' generosity and centering them as the heroes of your story creates a strong connection between you and your donors. Order Thank You cards from Chalk Line so you can begin sending thank you cards as soon as you receive a gift.

Use all the tools in your toolkit.

A written appeal can be boosted by digital and social media tools. Consider whether sending an email appeal along with your print mailing is appropriate for your donors. Share your progress with your donors and consider how you can engage with them digitally.

Create an environment that inspires you.

Put on holiday music, grab your favorite drink, and set a timer to work on your letter. Find ways to keep stay prayerful, positive and focused.

Sample Holiday Communications Timeline

Timeframe	Goal	Communications Overview	Communication Vehicle
Early October	Inspire your donors	Share the impact of your ministry one last time prior to sending your appeal letter.	Letter
Mid-October	Surprise and delight	Send your donors something small that will surprise and delight them.	Seasonal card, partner gift, or bookmark
November	Drive donations	Provide an end-of-year appeal letter that reaches donors' mailboxes before or around Thanksgiving.	End-of-Year Appeal
November to December	Engage with your donors	Send thank you notes for gifts received, make phone calls, and update your progress using digital tools.	Thank you notes, phone calls, emails
December	Remind your partners to give	Send your December letter that includes your annual recap and ways to give two weeks after your appeal.	Letter
Christmas	Strengthen your partnership	Send a Christmas card mailing that will create connection with your partners and encourage a warm, personal relationship.	Seasonal card



www.chalkline.org

friends@chalkline.org