



MIDLANDS GIVES

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Community Foundation

8 Week Workplan for a Successful May 1st!

An interactive workbook to help you create, plan and implement your
8 week Midlands Gives campaign



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PLAN



PROMOTE

Getting Started: Planning

Planning is the most important aspect of a successful campaign. Before you dive in, take a moment to answer these questions and get your plan of attack in order.

- Evaluate your performance from previous year (if applicable)
 - What did we do well?
 - What tweaks should we make?
 - Look at last year's donor data- know your donors and their behavior
- How much money do I want to raise? How many donors engaged?
- What other goals do I want to set? Some examples are increased visibility, capacity in social media, stronger board/staff alignment, new donors, increased knowledge in fundraising, new partnerships, etc.
- Do I have a current list of active donors and their contact information? Is it compiled in an easily accessible location? (spreadsheet, database?)
- Will my campaign attempt to:
 - Raise a pool of matching funds
 - Compete for a prize challenge
 - Use social media
 - Have an event
 - Collaborate with another nonprofit
 - Partner with a business

Getting Started: Goal Setting

Goals for the Midlands Gives are more than financial. Manage your expectations for setting your overall philanthropic goals: new donors, visibility, marketing, social media.

1. What is your financial goal for Midlands Gives?

2. What is your donor goal?

3. What other goals do you have?

4. What is your plan to secure a matching gift? How much do you want to raise?

5. How do you plan on measuring these goals?

6. What tools/resources/staff do you need to implement this practice?

Notes:

Best Practice #1: Board Engagement

Board participation is a crucial element for success on May 1st. How will you engage your board and activate them to assist with your Midlands Gives campaign?

1. What will be your goal for board giving? (100%, increase from last year, etc.)

2. What prize challenges will you and your board work on together? (Prizes will be announced Feb. 2018)

3. What donor engagement strategies will your board employ?

4. What social media activities will you ask of your board?

5. What other communication/marketing activities will your board engage in?

6. What other tasks or strategies will you ask your board to participate in?

Notes:

Best Practice #2: Donor Engagement

Engaging your donors before, during and after Midlands Gives drives home the importance of donor stewardship, cultivation and keeping them aligned with your organization for continued engagement, support and gifts.

1. How will you engage your current donor base?

2. How will you thank your donors during May 1?

3. What is your plan to thank your donors after May 1?

4. How will you engage new donors?

5. What tools/resources do you need to implement this practice?

Notes:

Best Practice #3: Know Your Audience

To craft the right and most effective message, you need to know your audience. Who are they? How can you find them and how can they be your best ambassadors?

1. Who are your current audiences?

2. Who do you want to target? (prioritize them)

3. How will you reach them?

4. Your Message: How is the world different because you exist? What stories of impact can you share?

5. What tools/resources do you need to prepare and develop to implement this practice?

Notes:

Best Practice #4: Messaging/Storytelling

The story you tell will be the most important aspect of your marketing strategy. Here are a few tips and questions to ask yourself as you begin to craft your messaging:

- Talking about your impact and not the need is one way to capture your audience. How is your organization working to change for the better? Solutions, not problems will attract more attention and help to hone your narrative.
- Visuals (graphics, photos, videos) can be a very potent aid in getting your message across in a short amount of time. Think about what visuals could help represent your story and your organization's impact.

1. How is your organization's story unique from other organizations with similar missions and services?

2. How does your organization make an impact on our community? Are there individual stories of success you can share?

3. Will your Midlands Gives campaign and messaging center around a specific program, purpose or theme?

4. What communication tools will you use to tell your story? Consider tools your organization already uses and how you may want to incorporate them.

Best Practice #5: Social Media

For an online event, social media plays a huge role. Even if you are new to this way of communicating, Midlands Gives is the time to dive in and get your feet wet! Utilizing Facebook and other platforms will help you communicate to your current and future donors pre-event, during and long after the event.

1. What social media platforms will you use for Midlands Gives?

2. What are the key messages you will convey on these platforms?

3. How will you use social media to promote your prize challenges strategy?

4. Do you have a staffing plan? Who will run your social media campaign?

5. What other tools/resources do you need to implement this practice?

Notes:

Develop and Execute Your Plan

Using your notes from the best practices, you are now ready to put it all together. Use the template below to create your 8-week workplan.

Keep in mind that the first 4 weeks of your plan should be dedicated to planning and preparation. The 2nd half of your plan should be implementing, starting with soft marketing, then transitioning into heavy marketing at the 2 week mark.

Our Midlands Gives Goals:

Dollar Goal: _____

Donor Goal: _____

New Donor Goal: _____

Matching Gift Goal: _____

We will compete for the following prize challenges:

Other goals:

What is your plan to accomplish these goals?

Timeline

The power of a 24-hour giving day is the sense of urgency it creates for donors to act within a short amount of time. Oversaturation and fatigue are real factors to consider, which is why Midlands Gives' work plans and check lists work on an 8- week plan.

- Weeks 1-4: Planning and Preparations
- Weeks 5-8: Marketing and Execution

In addition to the 8-week plan, your marketing timeframe should also be broken up into two sections:

- The first two weeks of April we call "soft marketing," which means a light approach:
 - Casual/indirect communications
 - Save the dates
 - Inserted info in already scheduled correspondence
 - Invites to events
 - Light social media
- The two weeks prior to May 1st is the "heavy marketing" period and includes:
 - Direct call-to-action communications
 - Heavy social media
 - Printed items drop
 - Scheduled emails

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SOFT MARKETING

HARD MARKETING

Roles

Now that you have some idea of what you'd like to achieve by May 1st, it is time to think about the tasks that need to get done and who you have on your team to help you complete those tasks. Whether it is a volunteer, a board member, or paid staff, it's time to think about assembling your team.

| Role | Tasks | Name of staff/volunteer |
|--------------------------------|--|-------------------------|
| Midlands Gives Lead Contact(s) | Project manager, attend trainings, maintain profile, and communicate with Midlands Gives team as needed. | |
| Social Media | Schedule posts, create graphics, monitor accounts, interact, etc. | |
| Email Marketing | | |
| Donor Engagement | | |
| Board Engagement | | |
| Event Coordinator | | |
| Website/CiviCore | | |
| Day-of Team | | |

Week Eight (March 5-9) Meet, Plan, Discuss

Checklist:

- ___ Set weekly meetings with your staff or volunteers who will be assisting with your campaign
- ___ Make sure you have completed filling out your plan
- ___ If you are creating special printed materials, decide what those will be and begin design & production
- ___ Decide on what and how many prize challenges you will attempt to win
- ___ Finalize donor email/contact lists and make sure all information is ready to use
- ___ Create outreach strategy for current donors

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Week Seven (March 12-16) Teasers and Preparations

Checklist:

- ___ Download all items from the Nonprofit Marketing Toolkit at www.midlandsgives.org
- ___ Begin outreach to local businesses to form partnerships and support
- ___ Add a teaser or save the date block to your website and outgoing e-newsletters
- ___ Midlands Gives updates at your monthly or quarterly board meeting
- ___ Create target list of asks for matching gifts
- ___ Make sure you have completed all checklist items from the previous week!

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Week Six (March 19-23) Preparing for Your Soft Marketing Launch

Checklist:

- ___ Decide on communication tools
- ___ Determine who will run your social media campaign (staff, hired consultant, volunteer, etc.)
- ___ Decide if your organization will attend or host an event on May 1st
- ___ Reach out to other NPOs in your sector and see if there are some ways you can collaborate
- ___ Begin making asks for matching gifts
- ___ Create staffing plan for May 1st

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Week Five (March 26-30) Soft Marketing Launch

Checklist:

- ___ If you are using printed materials, drop them in the mail no later than next week (NPO bulk mail takes about 10 days)
- ___ Work on your “thank you” plan for donors for day-of and post-May 1st
- ___ Do a check and make sure you have completed all previous checklist steps
- ___ Implement current donor outreach plan

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Week Four (April 2-5) Continue Soft Marketing

Checklist:

- ___ Create board task list and assign to members
- ___ Send invites to day-of events (if having one)
- ___ Schedule key meetings with donors (pre-commitments)
- ___ Begin talking about your involvement in Midlands Gives at meetings and events. Bring postcards with you and leave in office lobbies, coffee shops, etc.
- ___ Continue to implement your communications plan (emails, social media, etc.)

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Week Three (April 9-13) Prepare for 2-week Marketing Blitz

Checklist:

- ___ Create email blasts and schedule of releases
- ___ Finalize social media schedule and content
- ___ Finalize partnerships with businesses and other nonprofits

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Week Two (April 16-20) 2-week Heavy Marketing Begins

Checklist:

- ___ Amp up social media posts – add Midlands Gives graphics to Facebook and Twitter
- ___ Begin sending emails
- ___ Make targeted phone calls to donors telling them about the event
- ___ Finalize day-of roles and staffing plan

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Week One (April 23-27) Heavy Marketing Continues

Checklist:

- ___ Make sure you know how to view your donor data through the CiviCore site
- ___ Continue heavy social media presence
- ___ Remind board of roles (outreach, sending emails, etc.)
- ___ Finalize day-of event plans
- ___ Schedule social media posts for May 1st
- ___ Prepare your own website to have Midlands Gives on the front page and direct donors to your donation page on midlandsgives.org, including changing the link on your donate now button.

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May 1st – MIDLANDS GIVES!

Checklist:

- ___ Kick off at midnight with a bang! Ask board members to help kick off your campaign by donating at midnight.
- ___ Pound the pavement! Get out into the community. Attend events
- ___ Check in with all board members and make sure they are ready to implement your plan.
- ___ Be active all day on social media
- ___ Check your donor data every hour and make sure you are thanking donors in real time either on social media or email.

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Post Midlands Gives – Day After and Beyond!

Checklist:

- ___ Get some rest!
- ___ Download donor data and add it to your mailing and email lists
- ___ Continue your plan of thanking all donors
- ___ Implement donor thank you plans. (i.e. who will receive calls, send personal letters, thank you cards, emails, etc. (check your staff role list)
- ___ Send thank you's to businesses and other NPOs you partnered with
- ___ Send an update to your board, staff, volunteers, networks and donors list on your results!
- ___ Develop plan to continue to engage and communicate with new donors

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Tips for Success

There are a hundred and one things you can do with your Midlands Gives fundraising campaign. We hope you have found some inspiration through taking yourself through this work plan! As you are preparing and planning, here are a few extra tips to help you along the way:

Attend Midlands Gives Webinars: These sessions will keep you informed and up-to-date on the latest updates on website functions, prizes, and other items. It will also provide you the opportunity to ask questions to the organizers. These webinars take place once a month.

Mixer Events: The Foundation will host networking events leading up to Midlands Gives for you to meet and connect with fellow nonprofit participants. This is a great opportunity for you to join forces with another organization.

Prize Challenges: These will be announced during the February Midlands Gives webinar. Think about if it makes sense to attempt to win one and how you can message these prizes to donors to boost your messaging!

Facebook Learning Community Group: Want advice or to ask a question to your peers? Looking to connect or have fun with Midlands Gives related issues? If you have a personal Facebook account, log in and in the search bar enter “Midlands Gives NPO Learning Exchange” and ask to join. This is a closed group created specifically for nonprofit participants.

Meet With Your Mentor: If you were assigned a mentor this year, make sure to connect with them at least once or twice! This is a golden opportunity for some one-on-one technical assistance with the pros.

Use the Website: Midlandsgives.org has a lot of information for you to use: Rules and FAQs, Toolkit with graphics and template, listing of the prizes and challenges and much more.

Thank Your Donors in REAL TIME: You will be able to log in to your CiviCore account to access your donor information on the day of giving! Along with your marketing efforts, it should be #1 on your list of to-dos for May 1st.

Partner with a Business: Find a coffee shop, restaurant or other business that can help you. Businesses can help by using their own social media accounts, host an event, provide kick-backs to purchases, and more.

Secure Matching Funds: Matching funds are funds you raise before the day of giving on your own that you can advertise on the day! Donors love to know that their dollars will be amplified by donating to you.