

8 WEEK WORKPLAN

COASTSIDE GIVES

May 1st 2018

BEST PRACTICE #1 GOAL SETTING

By now you should have your goals and strategy set for Coastside Gives. Your goals should be more than financial and should encompass new benefits to your organization. Plan for overall philanthropic goals: new donors, visibility, marketing, & social media.

Questions

1. What is your financial goal for Coastside Gives 2018?

2. What is your goal for total number of donors?

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

4. How do you plan on measuring these goals?

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

Notes:

BEST PRACTICES #2 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 Coastside Gives?

Questions

1. What will be your goal for Board participation? (campaigns, a give or get, cash donations from each Board member?)

2. Will you engage your Board for prize challenges?

3. Will your Board help to engage donors? What engagement strategies will your Board employ?

4. Are there other communication/marketing activities you will engage your Board in?

5. Are there day of tasks you will ask your Board to participate in?

Notes:

BEST PRACTICE #3 DONOR ENGAGEMENT

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

Questions

1. How will you engage your current donor base?

2. Will you engage your donors for prize challenges?

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

4. How will you steward your new donors?

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

Notes:

BEST PRACTICE #4 DONOR ENGAGEMENT - KNOW YOUR AUDIENCE

To craft the 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?

Questions

1. Who are your current donors?

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

3. How will you find 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 #5 SOCIAL MEDIA

For an online event, social media plays a huge role. Even if you are new to this way of communicating, Coastside Gives is the time to dive in and up your expertise! Utilizing Facebook and Instagram will help you communicate to your current and future donors before, during, and long after the event.

Questions

1. Aside from Facebook and Instagram will you use any other social media platforms for Coastside Gives?

2. What are the key messages you will convey through social media?

3. Who will be responsible for your social media leading up to Coastside Gives and on May 1st?

4. Will you participate in the Social Media prize challenges?

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

Notes:

BEST PRACTICE #6 MAXIMIZE COMMUNICATION TOOLS

Once you've defined your audience, crafted your message, and set your goals, maximize the right communication tools available to you. Utilize the Coastside Gives tool kit and choose what works best for you!

Questions

1. What communication tools are you already using in your organization?

2. What tools are you not currently using that you would like to incorporate into your campaign?

3. What current marketing collateral can you add a Coastside Gives message to?

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

Notes:

BEST PRACTICE #7 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 second half of your plan should be implementing, starting with soft marketing, then transitioning into heavy marketing at the 2 week mark.

CoastsideGives Goals:

Dollar goal: _____

Donor Goal: _____

New Donor Goal: _____

Prize Goal: _____

Matching Gift Goal: _____

We will compete for the following prize challenges:

Other goals:

Eight Weeks Until Coastside Gives (March 5-9th) Meet, Plan,

Discuss Checklist

- ___ Set weekly meetings with your staff or volunteers who will be assisting with East Bay Gives
- ___ Complete your plan for Matching Gifts and be ready to launch it
- ___ Make sure you have completed your Coastside Gives plan
- ___ Is your contingency plan complete and ready to go?
- ___ 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
- ___ Who will you ask to create campaigns? Begin to check in with them
- ___ Finalize donor email/contact lists and make sure all information is ready to use
- ___ Create outreach strategy for current donors remind them about pre-scheduling donations
- ___ Begin outreach to local businesses to form partnerships and support

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				

Seven Weeks Until Coastside Gives (March 12 -16) Teasers

and Preparations Checklist

- ___ Begin prepping for scheduled donations – Who will you target? How will you communicate with them?
- ___ Add the Coastside Gives logo to your email signature
- ___ Add a teaser or save the date block to your website and outgoing newsletters and emails
- ___ Market the opportunity to schedule donations
- ___ Give Coastside Gives updates at your monthly staff meetings and/or quarterly board meeting
- ___ Create target list of asks for matching gifts
- ___ Make sure you have completed all checklist items from the previous week!

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

Six Weeks Until Coastside Gives (March 19 - 23) Preparing for Your Soft Marketing

Launch! Checklist

- ___ Decide on all 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

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

Five Weeks Until Coastside Gives (March 26- 30) Soft Marketing

Launch Checklist

- ___ Check in again with Campaign Creators. Do you have the right number, are the creators committed?
- ___ Follow up on Matching Gifts, how soon can you secure them?
- ___ 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
- ___ Boast about your Coastside Gives profile! Use it to help promote your participation!
- ___ Do a check and make sure you have completed all previous checklist steps
- ___ Implement current donor outreach plan

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

Four Weeks Until Coastside Gives (April 2-6) Continue Soft

Marketing Checklist

- ___ Pre-Scheduled donations should be coming in, are there targeted donors that need help with this?
- ___ Spruce up your profile one last time
- ___ Create board task list and assign to members
- ___ Send invites to day-of events (if having one)
- ___ Schedule key meetings with donors (pre-commitments)
- ___ Talk about your involvement in Coastside Gives at meetings and events. Bring materials with you and leave in office lobbies, coffee shops, etc.
- ___ Continue to implement your communications plan (emails, social media posts, etc.)

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

Three Weeks Until Coastside Gives (April 9 - 13) Prepare for 2-week Marketing

Blitz Checklist

- ___ Campaign Creators should be following your lead with a marketing blitz
- ___ Finalize matches
- ___ Finalize social media schedule and content
- ___ Schedule key meetings with donors (pre-commitments)
- ___ Finalize partnerships with businesses and other nonprofits
- ___ Review the contingency plan with your Coastside Gives team

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

Two Weeks Until Coastside Gives (April 16-20) 2-week Heavy Marketing

Begins Checklist

- ___ Campaign PUSH
- ___ Amp up social media posts – add Coastside Gives graphics to Facebook and Instagram
- ___ Begin sending emails
- ___ Make targeted phone calls to donors
- ___ Flier businesses in your area, card drop at sponsor businesses (optional)
- ___ Finalize day-of roles and staffing plan

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

The Week of Coastside Gives (April 23 - 30) GO TIME - Heavy Marketing Continues & Last Chance Preparation and Review

Checklist

- ___ Continue heavy social media presence
- ___ Remind Board of roles (outreach, sending emails, etc.)
- ___ Remind donors and Board of prize participation commitments
- ___ Finalize day-of event plans
- ___ Prepare your own website to have Coastside Gives on the front page and direct donors to your donation page on coastsidegives.org
- ___ Have a kickoff event and talk to donors about Coastside Gives (suggested)

	Task	Staff	Status	Notes
Planning				
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Donor Engagement				
Board Engagement				
Other				

MAY 1st

Checklist

- ___ Kick off at midnight with a bang!
- ___ Attend events as available
- ___ Check in with all Board members and make sure they implemented your plan
- ___ Be active all day on social media, post about prizes, progress, & good news
- ___ Check your donor link every hour and make sure you are thanking donors in real time either on social media or email.

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				

May 2nd Post Coastside Gives

Checklist

- ___ Continue your plan of thanking all donors
- ___ Reach out to Campaign Creators, Board members, and sponsors with special thanks
- ___ Review staff commitments for post Coastside Gives
- ___ Send an update to your board, staff, volunteers, networks and donors list on your results!

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				

Post Coastside Gives (May 7 – May 11)

Checklist

- ___ Confirm ALL donors have been thanked
- ___ Post Coastside Gives staff meeting to define next steps
- ___ Create report on results including goals met and impact on annual budget
- ___ Add all donors to your database
- ___ Begin donor segmentation
- ___ Decide if you will have a post Coastside Gives thank you reception/event

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				