

# B D

## Big Day of Giving Campaign 2018 Work Plan

# O O

***Nonprofit Planning Guide for a Successful Big Day of Giving Campaign***



SACRAMENTO REGION  
COMMUNITY  
FOUNDATION

Big Day of Giving is brought to you by the Sacramento Region Community Foundation

<https://bigdayofgiving.org> | <https://sacregcf.org> | [bdoq@sacregcf.org](mailto:bdoq@sacregcf.org)

## Table of Contents

Planning .....	2
Goal Setting & Budget.....	3
My Goals.....	3
My Budget (direct expenses).....	3
Roles.....	4
Assignments Worksheet.....	4
Messaging/Storytelling .....	5
Tools .....	6
Timeline .....	7
Tips for Success.....	8
Checklists.....	9



**24 Hours to Give  
Where Your Heart Is**

**05.03.18**

#BDOG2018

bigdayofgiving.org

**Big  
Day  
of  
Giving**

## 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 years (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 accessed 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

### Am I Ready?

Important questions to ask as you get ready to start planning your attack:

- ▷ How committed is my organization?
- ▷ Is my board aware of the event and do they support it?
- ▷ Do I have enough staff and/or volunteers to achieve the goal?
- ▷ Do I know how this event fits into my overall fundraising goals?
- ▷ Do I personally have the time and skills to lead this project?
- ▷ Am I personally committed to this event?

“Success doesn't just happen, it is planned for - Anonymous”



## Goal Setting & Budget

Raising unrestricted dollars is always a win, but participating in Big Day of Giving can yield incredible results in other ways, too. Start with the reasons why you want to participate, then use that information to determine your goals.

Your budget should reflect actions to help achieve your goals. For example, if your main non-monetary goal is to expand your social media reach and skills, then spending marketing dollars on digital ads vs. mailing letters, may be a better approach.

### My Goals

- ▷ Unrestricted dollar goal: \$ \_\_\_\_\_
- ▷ Donor goals
  - # of donors: \_\_\_\_\_
  - # of NEW donors: \_\_\_\_\_
- ▷ Non-monetary goals: (some examples: increased visibility, board engagement, organizational capacity, social media, collaborate with other nonprofits, establish relationships with businesses, corporate sponsors, etc.)

---



---



---



---



---

### My Budget (direct expenses)

Remember, you've got to spend money to make money!

Expense	Estimated	Actual
BDOG Registration		
Software (email, other)		
Printing & materials		
Mailing/postage		
Social media advertising		
Event expenses (venue, food, decorations, rentals, etc.)		
Miscellaneous/other		
<b>TOTAL EXPENSES</b>		

## Roles

Now that you have some idea of what you'd like to achieve on May 3rd, 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.

### Assignments Worksheet

Role	Tasks	Name of Staff/Volunteer
<b>Team Captain</b>	Foundation liaison, attend trainings, TC calls, project manager, facilitate team meetings	
<b>Social media</b>	Schedule posts, create graphics, monitor accounts, interacts	
<b>Email marketing</b>		
<b>Donor Engagement</b>		
<b>Board Engagement</b>		
<b>Event Coordinator</b>		
<b>Website/GivingEdge</b>		
<b>Contingency plan</b>		
<b>Street team</b>		

## 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 making a difference? Who or what 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.

## Questions

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

---



---



---

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

---



---



---

- ▷ Will your BDOG campaign and messaging center around a specific program, purpose or theme? Some ideas are...

---



---



---

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

---



---



---

- ▷ Who will tell your story and what methods will you use to tell your story?

---



---



---

## Tools

Now that you have an idea of what your story will be, you will need to assess what tools you will need to get your message out effectively! Telling a story with an email will be different than telling it with a tweet. Tools are meant to help you stay organized and work efficiently and quickly, eliminating time consuming processes. They can also work for you and when used properly, can maximize your fundraising potential.

▷ **Social Media platforms suggested**

- Facebook
- Twitter
- Instagram

▷ **Social Media management tools**

- Hootsuite
- Everypost
- Tweetdeck
- Bit.ly: Shorten links to save space on Twitter (twitter automatically shortens URLs too)
- [Comparison chart on features](#)

▷ **Email software**

- Constant Contact: Free for 60 days, \$20/mo. after
- Mail Chimp: Free (2,000 email addresses & 12k emails per month)
- Vertical Response
- [Comparison chart of Email marketing software](#)

▷ **Customer Relationship Management (CRM)** software is a term that refers to practices, strategies and technologies that companies (in this case nonprofits) use to manage and analyze donor interactions and data throughout the donor lifecycle, with the goal of improving relationships with donors, assisting in donor retention and increased donations. CRM systems are designed to compile information on donors across different channels -- or points of contact between the donor and the organization. CRM systems can also give staff detailed information on donors' personal information, donor history, preferences and concerns.

- Most popular CRMS include:
  - Salesforce
  - DonorPerfect
  - Blackbaud
  - Raiser's Edge
  - [Comparison chart of CRM systems](#)

▷ **Google Analytics** is a service offered by **Google** that tracks and reports website traffic. This service can help you determine what content is most effective on your website and the behavior of visitors.

- <https://www.google.com/analytics>

## 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 Big Day of Giving 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 3<sup>rd</sup> is the “heavy marketing” period and includes:
  - Direct call-to-action communications
  - Heavy social media
  - Printed items drop
  - Scheduled emails

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	1	2	3	4	5



## Tips for Success

There are a hundred and one things you can do with your Big Day of Giving 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 Team Captain Webinars.** These informational 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 will take place once a month and registration information is sent via The Bark! E-newsletter.
- ▷ **Networking Events:** The Foundation will host two networking events leading up to the Big Day of Giving 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 on a team captain call in March. 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 BDOG related issues? If you have a personal Facebook account, log in and in the search bar enter “Big Day of Giving Learning Community” 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:** Bigdayofgiving.org has a lot of information for you to use. Rules and FAQs, Toolkit with graphics and template, listing of the prize 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 3rd.
- ▷ **Use E-mail Marketing Thoughtfully and Sparingly.** Donors have complained in the past about receiving too many emails. Limit the number of emails you send prior to the day and send only one or two on May 3rd.
- ▷ **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.

## Checklists

### Week One (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

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Week Two (March 12 - 16) Teasers and Preparations**

Checklist

- \_\_\_ Download all items from the Nonprofit Marketing Toolkit
- \_\_\_ Begin outreach to local businesses to form partnerships and support
- \_\_\_ Add a BDOG logo to your email signature
- \_\_\_ Add a teaser or save the date block to your website and outgoing e-newsletters
- \_\_\_ Give BDOG 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!

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				



**Week Three (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 3rd
- \_\_\_ 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 3rd

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				



**Week Four (March 26 – March 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 3rd
- Boast about your GivingEdge 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				



**Week Five (April 2 – 6) 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 BDOG 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 posts, etc.)
- \_\_\_ Go over contingency plan and make all suggested preparations. A copy can be found in the toolkit.

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				



**Week Six (April 9 – 13) Prepare for 2-week Marketing Blitz**

Checklist

- \_\_\_ Create email blasts and schedule of releases
- \_\_\_ Finalize social media schedule and content
- \_\_\_ Schedule key meetings with donors (pre-dog commitments)
- \_\_\_ Finalize partnerships with businesses and other nonprofits
- \_\_\_ Contact local media (press release/events)

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				



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

Checklist

- \_\_\_ Amp up social media posts – add BDOG graphics to Facebook and Twitter
- \_\_\_ Begin sending emails
- \_\_\_ Make targeted phone calls to donors
- \_\_\_ Have a kickoff event and talk to donors about BDOG (suggested)
- \_\_\_ Flier businesses in your area
- \_\_\_ Finalize day-of roles and staffing plan

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				





**Week Eight (April 23 – April 27) Heavy Marketing Continues**

Checklist

- \_\_\_ Make sure you have access to your CiviCore account and know how to access your donor data
- \_\_\_ Continue heavy social media presence
- \_\_\_ Remind board of roles (outreach, sending emails, etc.)
- \_\_\_ Utilize BDOG PSAs and Instructional videos – share on social media
- \_\_\_ Finalize day-of event plans
- \_\_\_ Schedule social media posts before going to bed
- \_\_\_ Prepare your own website to have BDOG on the front page and direct donors to your donation page on bigdayofgiving.org

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				



**May 3 – Big Day of Giving**

Checklist

- Kick off at midnight with a bang! Ensure at least 10 donors give at midnight or during the first hour of giving
- 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 (Use #BDOG2018)
- Check your donor data 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				



**Post BDOG – Day After and Beyond!**

Checklist

- \_\_\_ Get some rest!
- \_\_\_ 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 yous to businesses and other NPOs you partnered with
- \_\_\_ Send an update to your board, staff, volunteers, networks and donors list on your results!
- \_\_\_ Decide if you will have a post-even thank you reception/event

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				

