Webinar Agenda

• Building Blocks of Annual Fundraising with Christy Noel

• Creating Your Fundraising Game Plan with Xanika Covington

• Success Story: Turning Planning Into Action with Molly Snow

• Questions and Answers with Expert Panel
Speaker Introductions

Molly Snow  
Executive Director of Girls on the Run LA

Christy Noel  
VP of Digital Marketing Services

Xanika Covington  
Digital Marketing Strategist
Building Blocks of Annual Fundraising

Christy Noel
VP of Digital Marketing Services
1. Evaluate Past and Current Activities

Sit down and do a SWOT analysis. Take a look at what you’re doing currently. What is working? What isn’t?

- Where are you getting the most bang for your buck?
- What could you eliminate?
- Review each major fundraising initiative

Tip: Take the time to consider ways to improve current activities or try something new.
2. Set Your Goals

Determine what you want to accomplish and the steps you’ll need to take to get there.

- What is your mission, focus for the year, and fundraising goal for each initiative?
- How much money are you looking to raise?
- How many donors you want to engage?
- What is the ratio between new vs. returning donors?
- What is your recurring donation goal?
- What are milestones to help you stay on track?
Analyze the resources and assets you currently have. Are there any gaps preventing you from being successful? Resources include:

- Money
- People (staff, board members, volunteers)
- Expertise and special skills
- Technology or software

**Tip:** Although money is important, it isn’t necessarily the determining factor in your success. A group of passionate volunteers may give you more success than money can buy.
Spark donor interest and engagement to help increase repeat giving, reduce donor fatigue, and help lessen the pressure for a constant stream of new donors. Be sure to:

- Make donors part of your nonprofit’s story
- Show them how their donations are being used and what they help you accomplish
- Keep them up-to-date with what’s new
- Give them options to donate or get involved, both in-person, online and via mobile
5. Develop Strategies

Look at goals and SWOT analysis to determine where to make improvements and revisions to your plan.

- Increase direct response by 20% by sending via mail and email in tandem
- Tap into a previously under-cultivated demographics through segmentation
- Improve thank you response time to enhance donor relations
- Use video to make storytelling more emotional and increase donor engagement.

Tip: Schedule in time to review and revise your strategy.
6. Identify Implementation Tactics

How will you use the resources you currently have to help execute your fundraisers and reach your goals?

- Think about how far out you will need to start planning for each effort
- How will you collect donations or recruit volunteers? What channels will you use?
- Identify ways that technology can create time and cost efficiencies
Creating a Fundraising Game Plan

Xanika Covington
Digital Marketing Strategist

MobileCause
Build a Calendar

Map out your year and fill in the blanks. Fill your calendar in with key event dates and deadlines, then work backward to determine when you should start planning.

- Start with any annual events or other fundraisers you know you will have
- Add in your strategic milestones: money raised, volunteers recruited, donors acquired
- Fill out the rest of your calendar with efforts and events that will help you reach your goals
**Things to Keep in Mind**

- Think about each initiative from a before/during/after standpoint
- Remember, it’s not just about events (Giving Tuesday, anniversary dates, org milestones)
- Identify and solidify key players in your program and secure availability
- How does location factor in? Weather, call coverage, A/V equipment, etc.
- Timing impacts - when are people on vacations/away, holiday cards sent, etc.
- Determine any software solutions you’ll use and where/how that will fit in
Communication Planning

In addition to an event calendar for the year at large, create a communication calendar for campaign deliverables around each initiative.

- Create a communication calendar: When will you send what? What channels will you use?
- Identify recurring touchpoints
- Prevent too many communications all at once by planning them out in advance
- Don’t forget to send thank yous, acknowledgements, updates, and news
Example: Dinner Gala and Fundraising Luncheon Timeline

**Dinner Galas and Fundraising Luncheons**

**Pro Tip:** Display all revenue totals on your fundraising thermometer and then compel your audience to make donations and help you reach the goal.

<table>
<thead>
<tr>
<th>2-3 MONTHS</th>
<th>1-2 MONTHS</th>
<th>1-7 DAYS</th>
<th>LIVE</th>
<th>1-3 DAYS</th>
<th>1-2 WEEKS</th>
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<tbody>
<tr>
<td><strong>SETUP</strong></td>
<td><strong>PROMOTE</strong></td>
<td><strong>REMINDE</strong></td>
<td><strong>INSPIRE</strong></td>
<td><strong>THANK</strong></td>
<td><strong>ENGAGE</strong></td>
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<tr>
<td>- RSVP/ticketing form</td>
<td>- Videos, photos, and testimonials showcasing your upcoming event in order to promote fundraising pages across channels</td>
<td>- RSVP deadline</td>
<td>- Showcase the impact of giving</td>
<td>- Send thank you videos via text, email, and social media</td>
<td>- Announce upcoming campaign dates and details with supporters</td>
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<td>- Donation page for day-of and out-of-town gifts</td>
<td>- Invitations via direct mail, text messaging, email and social media</td>
<td>- Number of tickets</td>
<td>- Live giving demonstration and provide multiple ways to give</td>
<td>- Send thank you videos via text, email, and social media</td>
<td>- Announce upcoming campaign dates and details with supporters</td>
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<tr>
<td>- Raffle ticket purchase form</td>
<td>- Invitations via direct mail, text messaging, email and social media</td>
<td>- Date, time, and location (week before, day before, day of) via text and email</td>
<td>- Live giving demonstration and provide multiple ways to give</td>
<td>- Send thank you videos via text, email, and social media</td>
<td>- Announce upcoming campaign dates and details with supporters</td>
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<td>- Email ticket delivery</td>
<td>- Invitations via direct mail, text messaging, email and social media</td>
<td>- Out-of-town donation option</td>
<td>- Live giving demonstration and provide multiple ways to give</td>
<td>- Send thank you videos via text, email, and social media</td>
<td>- Announce upcoming campaign dates and details with supporters</td>
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<tr>
<td>- Mobile number verification</td>
<td>- Invitations via direct mail, text messaging, email and social media</td>
<td>- Rehearse live call-to-action and text-to-give and donation recognition</td>
<td>- Live giving demonstration and provide multiple ways to give</td>
<td>- Send thank you videos via text, email, and social media</td>
<td>- Announce upcoming campaign dates and details with supporters</td>
</tr>
</tbody>
</table>

**Mobile Cause Webinars**
Example: Run, Walk, Swim, Ride Timeline

2-3 MONTHS
BEFORE ACTIVE EVENT

SET UP
- Participant, team, and sponsor sign-up forms
- Peer-to-peer fundraising sign-up forms
- Mobile number verification
- Text-to-keywords and shortlinks for social sharing
- Participant and donor email confirmations
- Instructions for fundraisers (toolkit)

4-5 WEEKS
BEFORE ACTIVE EVENT

PROMOTE
- Invitations via direct mail, text messaging, email and social media
- Videos, photos, and testimonials showcasing your campaign that participants will use to promote fundraising pages
- Featured teams and participants
- Sign-up and donation forms via team captains

1-7 DAYS
BEFORE ACTIVE EVENT

REMIND
- Participant sign-up deadline
- How many participants have signed up so far
- Top fundraisers and teams so far
- How much left to reach goal
- Date, time, and location via text and email
- Tips for training
- Out-of-town donation options

LIVE
DAY OF ACTIVE EVENT

INSPIRE
- Encourage participants via text all day long
- Send fundraising goal results via text and email
- Send special instructions to team captains
- Instruct everyone to post photos and videos to social all day long with event #hashtag
- Show thermometer with all revenue totals and make asks to reach goal

1-3 DAYS
AFTER ACTIVE EVENT

THANK
- Send thank you videos via text, email, and social
- Share goal totals and highlight key teams, donors and sponsors
- Share photos, videos, and highlight reels
- Post personal thank yous on social media for captains, donors, and fundraising participants

1-2 WEEKS
AFTER ACTIVE EVENT

ENGAGE
- Announce upcoming campaign dates and details
- Share the different ways participants and donors can get involved
- Internal recap to discuss improvements needed for next campaign

Pro Tip: Integrate your event sign-up form and your crowdfunding setup page to ensure that every runner has their own peer-to-peer fundraising page.
Example: Giving Day Timeline

**Setup**
- Day(s) of giving donation form
- Ambassador sign-up form
- Instructions for ambassadors (toolkit)
- Recruit celebrities
- Real-time fundraising thermometer
- Email tax receipt
- Mobile number verification

**Promote**
- Videos, photos, and testimonials showcasing your day(s) of giving that ambassadors will use to promote the campaign
- Ambassador sign-up form via text messaging, email and social media
- Day(s) of giving details and goals via social media ambassadors

**Remind**
- Ensure that the donate button on your website links to the same page as your day of giving keyword
- Send reminder texts and emails and make social posts encouraging people to give during the day(s) of giving
- Link to your fundraising thermometer on your website

**Inspire**
- Repeat your call-to-action via all communication channels until your goal is surpassed (you cannot promote too much)
- Recognize donors in real-time on a thermometer and share ongoing campaign results
- Promote a special incentive (like a match) to help reach your goal

**Thank**
- Send thank you videos via text, email, and social media
- Share campaign totals and highlight key donors and sponsors across channels
- Share photos, videos, and highlight reels
- Post personal thank yous on social media recognizing donors and ambassadors

**Engage**
- Announce upcoming campaign dates and details to new donors and supporters
- Share the different ways donors can get involved
- Internal recap to discuss improvements needed for next campaign

**Pro Tip:** Encourage all your donors, ambassadors, family and friends to share the same donation link and post campaign updates across all channels all day long.
Success Story: Turning Planning Into Action

Molly Snow
Executive Director of Girls on the Run LA
Girls on the Run of Los Angeles County

Mission: We inspire girls to be joyful, healthy and confident using a fun, experience-based curricula, which creatively integrate running.

Vision: We envision a world where every girl knows and activates her limitless potential and is free to boldly pursue her dreams.
Annual Fundraising Plan

Start with financial goals:

- Individual giving
- Peer-to-peer fundraising
- Board get
- Corporate giving

Tip: Come up with a number for each goal based on past yearly totals and target a percentage of growth.
Make Goals Actionable

**Individual Giving**
- Reengage lapsed donors
- Inspire a culture of giving among coaches and volunteers via targeted campaign
- Encourage monthly giving—smaller donations on a regular basis create predictable revenue
- Launch two online campaigns centered on mission-related activities

**Peer-to-Peer Giving**
- Expand fundraiser base, use to recruit new advocates into program
- Select races and events that will attract and reengage previous participants
- Rewards can motivate (and don’t have to be cheap giveaways)

**Board**
- E² Educate and Empower board to fundraise
- Help board set meaningful, measurable, realistic goals to set them up for success

**Corporate Giving**
- Leverage personal connection and outreach to forge partnerships
- Think ahead: What’s coming up that may be of interest to identified partners
- Think differently: It’s not about event sponsorships anymore
Sample: Fall giving calendar with campaign and event timelines

<table>
<thead>
<tr>
<th>Key Event</th>
<th>Event date</th>
<th>Planning Date</th>
<th>Initiatives</th>
<th>Message</th>
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</thead>
<tbody>
<tr>
<td>Giving Tuesday</td>
<td>5-Dec</td>
<td></td>
<td>Begin drafting GOTR stories</td>
<td>Text a daily GOTR story (different each day) and share via social media</td>
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<tr>
<td></td>
<td>Nov 27-Dec</td>
<td>Early November</td>
<td>Text a daily GOTR story (different each day) and share via social media</td>
<td>Email GOTR story with Giving Tuesday prep</td>
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<td></td>
<td>1-Dec</td>
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<td></td>
<td>Send a GOTR story via text with video storytelling</td>
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<td></td>
<td>4-Dec</td>
<td></td>
<td></td>
<td>Send pre-Giving Tuesday email with video storytelling</td>
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<tr>
<td></td>
<td>4-Dec</td>
<td></td>
<td></td>
<td>Post on social media same video storytelling as email and text</td>
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<tr>
<td></td>
<td>5-Dec</td>
<td></td>
<td></td>
<td>Send text with Ask to Donate</td>
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<td></td>
<td>6-Dec</td>
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<td>Send text with total raised by campaign</td>
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<td>7-Dec</td>
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<td></td>
<td>Send email thank you with total raised and invite to GOTR 5K</td>
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<td></td>
<td>9-Dec</td>
<td></td>
<td></td>
<td>Text thank you with invite to GOTR 5K</td>
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<td></td>
<td>14-Dec</td>
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<td></td>
<td>Send post 5K email with how money raised is used and show girls in action at the 5K</td>
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<td>Year End Campaign</td>
<td>Mid-Nov to Dec 31</td>
<td>September</td>
<td>Begin campaign development - determine theme and look</td>
<td>Week 1: Why it's important to donate at the end of the year</td>
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<td>October</td>
<td>Create campaign emails, write text messages, set up messages for distribution</td>
<td>Week 2: How the money will be used</td>
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<td>November</td>
<td>Begin sending emails and texts: 1 email, 1 text and 1 social media post</td>
<td>Week 3: The impact GOTR makes on girls and their families</td>
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<td>(across all social media platforms used) weekly based on the message theme distribution calendar</td>
<td>Week 4: Happy holidays. Give the gift of creating self-worth in a girl, sponsor a girl for holiday gifts</td>
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<td>December</td>
<td>Continue sending emails, social media and texts</td>
<td>Week 5: Let's hear from the girls in the program</td>
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<td>Week 6: No girl turned away for financial reasons, aid provided to any girl who wants to participate</td>
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<td>January</td>
<td>Send thank you notes to individual donors</td>
<td>Week 7: Other ways to get involved</td>
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<td>Send email, text and social media updates on campaign results with thank you</td>
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Identify Recurring Touchpoints and Projects

Outline things that happen monthly or quarterly that can be planned for in advance.

Monthly
• Donation thank you letters (no ask)
• Mission-relevant story (ask)

Quarterly
• Monthly donor newsletter

Seasonally
• Special event invitations (5K)
Create a Calendar to Help Accomplish Your Goals

Map out internal and external projects and organize each communication you'll send by date, audience and communication. Example:

**Mon 10/10:** Coaches - Fundraising opportunity email  
**Thurs 10/20:** Major donors - Season update and invitation for call/meet  
**Mon 10/25:** All donors - Quarterly newsletter  
**Thurs 11/3:** Monthly donors - Quarterly update  
**Tues 11/29:** All donors - #GivingTuesday and launch of December campaign
Girls on the Run of LA
Annual Fundraising Results

- **Individual giving:** Increased 228% 2012-2016
- **Peer-to-peer fundraising:** Represents 7% of entire revenue budget
- **Board give:** Consistently over-performing (110% over goal) year to year
- **Corporate giving:** Increased 1,300% 2012-2016!

**Revenue sustainability:** Make time to analyze & observe trends to know where to assign limited resources each year.
Key Takeaways

**Have a plan:** Start early and work backward from key dates, work with the resources you have.

**Keep the donor at the center of your plan:** Help them feel valued and involved in your cause—this reduces churn, creating less work for you.

**Review, realize, repeat:** Look at what you’re doing, analyze your results, see how you can improve, and don’t be afraid to make a change if something isn’t working!
Questions and Answers

Molly Snow
Executive Director of Girls on the Run LA

Christy Noel
VP of Digital Marketing Services

Xanika Covington
Digital Marketing Strategist
MobileCause provides an innovative suite of digital fundraising and donor engagement solutions that help nonprofits do more good. To speak directly to an expert about implementing MobileCause software and strategy for your organization please call (888) 661-8804 or go to mobilecause.com/free-consultation