(ONLINE) FUNDRAISING CAMPAIGN IN A BOX

A Planning Resource from Network for Good & Firefly Partners







www.networkforgood.org/npo

www.fireflypartners.com

© 2009 by Network for Good & Firefly Partners

Copyright holder is licensing this under the Creative Commons License, Attribution 3.0. http://creativecommons.org/licenses/by/3.0/us/

Please feel free to post this on your website or email it to whomever you believe would benefit from reading it. Thank you!

(ONLINE) FUNDRAISING CAMPAIGN IN A BOX

What's in the box? Does the box have cookies in it? Mmm... cookies...

Here are a few A's to your Q's regarding Network for Good's campaign planning tool:

What is this guide all about?

In addition to your ongoing fundraising, advocacy and communication activities, there are times throughout the year when you need to lead your members through a series of actions. Whether it's communication-list building, hitting a fundraising target to support a new program or structure, or gathering support for a community initiative (to name a few possibilities), you'll get the most bang for your buck by conducting a campaign. Rocky economic times require all of us to stretch our resources as far as they can go—efficiency and effectiveness are the rock stars here—and online tools will allow you to do outreach, tracking, follow-up and other activities necessary to reach your goals.

... And what do you mean by campaign?

When you Google "define: campaign," you will get no fewer than 40 unique definitions. For the purposes of this planning resource:

A **campaign** is a series of operations undertaken to achieve a set goal(s), and it operates within a particular time period with defined start and end dates.

Essentially: It's a set of actions you need people (including yourself and your team) to take in order to reach a goal or goals.

What should I do before I dive into this planning tool?

Determine whether your campaign fits the criteria above. If your message is "We need money" - you'll need to finesse how you ask for those funds.
Figure out what type of campaign you're undertaking: fundraising, advocacy, policy issue, education, etc.
Do an internal check of what online resources/tools/services you have in place and evaluate which ones to use.

Where should I turn for help along the way?

- The Network for Good Learning Center: www.fundraising123.org
- Network for Good's Nonprofit 911 Training Series Archives: www.nonprofit911.org
- Network for Good's Tips e-Newsletters <u>sign up here</u>.

There are other campaign-planning tools we recommend; find the list at the end of this document.

Step 1: What are you trying to accomplish?

Any campaign worth its salt is about getting results. What results are you and your organization looking to achieve?

Fill out this form to kick off the most important portion of the planning phase—determining your audience(s) *in order of greatest priority to least**:

Are you thinking, "Hey, wait: We're trying to reach the *general public*," or, "Isn't there just one big pool of donors/advocates/etc.?" If so, let's rewind and flesh out the best practice thinking around this common situation:

■ There is no such thing as "the general public." How this phrase ever entered our vernacular we may never know. People come in all shapes and sizes, likes and dislikes, passions and pursuits. Even saying "potential donors" can get you into trouble—how do you target such a vague cloud of people?

In each section we'll kick off the planning tool with a couple of examples from our favorite fictitious nonprofit — Paws for the Cause — as they plan an online fundraising campaign to fund the construction of a new pet shelter.

- Segmentation is the key to engagement. Campaign communications are vehicles you should be using to talk about the impact of your work not about yourself! Become donor/advocate/supporter/subscriber-centric by setting your campaign up for targeted and effective messages.
- Some audiences are more important than others within the context of your campaign! Do you need legislators to take action? Do you need your current supporters to mobilize and become fundraisers for you? Think about your goals and who holds the key to your success. Lack of participation from primary groups can cause your campaign to falter or fail.

1. Campaign Accomplishments			
Audience	Action(s) Desired		
Current Donors	Set up recurring donations		
	Make a one-time donation designated to the shelter project		
	Forward information to five friends (viral marketing)		
Animal lovers in local community	Give us email addresses + opt in to updates		
	Make a donation by Q3 of the year		
	Help us grow our house file by using Tell A Friend actions		

^{*} This prioritization is as important as figuring out the audiences themselves.

Step 2: How are you going to accomplish these goals?

So - you have groups of people and actions you want them to take. How are you going to tell your story in a compelling manner?

What themes, messages and ideas are you going to take from your arsenal of content to encourage *action*?

Complete this form to tease out those important campaign components.

2. Campaign Components					
AUDIENCE	Action(s) Desired	Overarching Message(s)	ACTIVITIES		
Current Donors	Set up recurring donations	Help us continue to serve the animals	eSolicit with link to recurring gift form		
	Make a one-time donation designated to the shelter project	Help save more animals with a new shelter	eSolicit with a need statement for support of the new shelter		
	Forward information to five friends (viral marketing)	Share our story	Push TAF in newsletters and donation receipts		
Animal lovers in local community	Give us email addresses + opt in to updates Make a donation by Q3 of the year	Learn how you can make a difference in our community Your support can help save more pets	Put info in shelter(s) urging visits to site Prominently display newsletter signup on all web pages Insert soft solicitations in all e- publications		

Step 3: Which communication channels will you use?

Here is a great opportunity to evaluate the activities and messages you laid out in the previous section. There are a variety of online and offline channels that you can use to send the right message to the right audiences. Use this checklist to evaluate the effectiveness of each channel, and then elaborate on how you will use them in this campaign.

Don't forget to consider your offline communication channels and tools! You can boost your results by leveraging and coordinating your offline and online efforts. Is your Executive Director speaking at a local event? Include your campaign in any publicity you are doing around that event. Look for opportunities to cross promote!

3. Online and Offline Communication Channels				
ONLINE CHANNELS	OFFLINE CHANNELS			
☐ Organization's website	☐ Traditional public relations			
Search marketing – paid and organic searches	Paid advertising – print, outdoor, television, radio, etc.			
 Online public relations – syndicated content, podcasting, dot-com outlets, online magazines and blog coverage 	☐ Direct Mail			
☐ Paid online advertising – banner ads and purchased content in others' enewsletters	☐ Events			
☐ Email marketing	☐ Broadcast programming			
 Social networking and community – YouTube, Facebook, MySpace, Flickr, Twitter, etc. 				

Step 4: What resources do you need?

Is email an important part of your plan but you're still communicating with supporters via Outlook (eek!)? Is your website set up to take online donations? Do you have a quick and easy 'Sign Up for News' interface on your website? Use this portion of the planning tool to ensure that you have all of your tools and resources in place to make your job—and the jobs of your audience(s)—as easy, effective and cost-effective as possible.

4. Online Tools and Resources	
Tool	Service(s) We Use
☐ Online donation processing	
☐ Email marketing	
☐ Organization website	
Presence on social networks (if applicable)	

Not properly equipped (yet)? Take a peek at this sample toolbox:

Online Donation Processing CUSTOM DONATENOW

DonateNow is an online donation processing service for nonprofits to accept credit card gifts on the Web.

- Customized donation pages that look exactly like your Website
- Process one-time or recurring donations from supporters
- On-screen and email receipts, plus instant donation notification
- A configuration wizard makes setup and upkeep quick & easy

Email Marketing EMAILNOW

EmailNow (powered by Emma) was built by email marketing experts to do the tough stuff for you. It allows you to send beautiful email appeals without having to become a designer or a software engineer or someone who knows HTML or CAN SPAM laws.

Website CHANGE.ORG, GRASSROOTS.ORG, GODADDY.COM

(Visit these website providers' websites to learn more about what they can offer nonprofits.)

Social Networks CAUSES ON FACEBOOK, MYSPACE

Causes provides the tools so that any Facebook user can leverage their network of real friends to effect positive change.

Step 5: Who's in charge here? (Who will execute your campaign steps?)

Accountability will make or break the success of a campaign. As much fun as it is to pass the buck, now is as good a time as any to decide which members of your organization, board or volunteers are responsible for the different portions of your campaign. Planning the staffing and responsibilities before you push 'go' will aid in a number of ways:

Determine the key movers and shakers of the campaign.

In the course of planning, you may find that the development director is responsible for 90% of the campaign's activities and tasks. Revisit your list and decide whether to add additional human resources to those activities or take them off that person's plate entirely.

Figure out the timeline.

We'll dive into this a bit more in Step 7, but keep in mind that staffing decisions may impact the overall timing of your campaign. As much as we in the nonprofit sector love working extremely long days and weekends (note the return of the facetious tone), there are only so many hours in the day. If one or two people are spearheading all communications, be realistic about how long it will take for copywriting, editing, distribution and follow-up activities.

Create transparency into your campaign.

Empower your employees and volunteers to find answers and the people who have those answers quickly. This transparency not only comes in handy when questions arise but when the campaign is rolling along or near conclusion—accountability is king for taking the pulse of your initiative and reporting after it's completed.

5. Campaign Team and Activities				
ACTIVITIES	RESPONSIBLE PARTY			
 eSolicit with link to recurring gift form eSolicit with a need statement for support of the new shelter Push TAF in newsletters and donation receipts 	Annual GivingCommunications			
 Put info in shelter(s) urging visits to site Prominently display newsletter signup on all web pages Insert soft solicitations in all e-publications 	Annual GivingCommunicationsShelter staff			

Step 6: How are you going to measure your success?

Let's rewind a little: What does "success" even mean for your campaign? Think back to Step 1 about your campaign goals.

In plain terms: What actions will people take and results occur because of your campaign? Complete this worksheet and get very detailed about your end results and indicators.

This is the time to put on your professional, metric-driven hat and nail down your target numbers. The idea that you have "created awareness" is not necessarily going to impress your Board of Directors. Instead, wow them with conversation rates, list-building, website traffic and any other number results into which they can sink their teeth.

Note: Many organizations skip this important step because they are afraid that their efforts will fall short of their goals. Our advice – fear not! Your projections are your best guess at the time – you want to work as efficiently and as diligently as you can to reach or even surpass your goals, and your campaign can be subject to all sorts of unplanned influences.

So roll up those sleeves and write down 3 or 4 measurements of success.

6.1 Campaign Success Measurements
We will add 5,000 email addresses to our house file.
Our organization will raise \$6,000 online.
Ten percent of our donor base will convert to becoming recurring givers.

Set Up Ongoing Levers

Measuring success does not just happen at the pizza parlor (or Chinese food restaurant or bar if you prefer) when you celebrate the conclusion of your campaign. It happens throughout the campaign process. Rather than covering your ears and eyes as you continue down the road to campaign glory, be sure to do oil checks and regular maintenance to be sure you're on the right track.

For each of the above metrics you have set for overall campaign success, set contingency plans for underperforming or wildly successful results:

6.2 Ongoing Measurements				
ACTIVITIES	ACTIVITY COMPLETION TARGET DATE	ONGOING MEASUREMENT AND BENCHMARK PLAN		
eSolicit with link to recurring gift form eSolicit with a need statement for support of the new shelter Push TAF in newsletters and donation receipts	06/30	If we do not reach \$3,000 online by 12/31 we will update the solicitation message and re-solicit. or If we surpass \$3,000 online by 12/31 we will congratulate all constituents and change the message to "Join your neighbors and donate to double the donation total."		
Put info in shelter(s) urging visits to site Prominently display newsletter signup on all web pages Insert soft solicitations in all e-publications	06/30	If we do not reach 2,000 new subscribers by 10/31 we will send an additional TAF request to current subscribers. or If we surpass 2,000 new subscribers by 10/31 we will push an End of Year eSolicit and TAF to all of the new subscribers who have not yet made a donation.		

	If we do not reach [intermediate goal] by [date] we will [follow-up action]. or
	If we surpass [intermediate goal] by [date] we will [follow-up action].
	If we do not reach [intermediate goal] by [date] we will [follow-up action]. or If we surpass [intermediate goal] by [date] we will [follow-up action].
	If we do not reach [intermediate goal] by [date] we will [follow-up action]. or If we surpass [intermediate goal] by [date] we will [follow-up action].

Step 7: What are the timeline and benchmarks?

One of the defining features of a campaign is that it has a defined start and end. Now that you have planned out the 'who, what and why' questions of your campaigns, it's time to determine the **when**.

Continue to build your campaign plan by setting ownership and deadlines for the associated activities. Begin with the end in mind – if your campaign will run from 9/1 - 9/30, work backwards to be sure that all activities will happen in a smooth manner. Don't use magical thinking to set deadlines! Run activities in parallel if you are worried about compression time-wise.

7. Campaign Timeline and Deliverables				
ACTIVITIES	RESPONSIBLE PARTY	ACTIVITY COMPLETION TARGET DATE		
eSolicit with link to recurring gift form eSolicit with a need statement for support of the new shelter Push TAF in newsletters and donation receipts	Annual Giving Communications	06/30		
Put info in shelter(s) urging visits to site Prominently display newsletter signup on all web pages Insert soft solicitations in all e-publications	Annual Giving Communications Shelter staff	06/30		

Conclusion

Flipping through this planning guide probably took you about four minutes. Sitting down and completing it thoroughly may take hours, days and/or meetings with other key decision-makers. Take the time to plan as fully as possible; you'll thank yourself down the road when you have a clearly defined roadmap you (and others) can easily reference.

Once you have completed the seven steps to campaign success, be sure to transfer the finished product to the **Online Fundraising Plan Chart** so you have your entire initiative in one place (sans white-out, scribbles and doodles from that last planning meeting you had).



Note that no single framework works for everyone who tries it: Maybe you change up the order you complete your plan. Perhaps you're a one-person show, so the staffing section isn't pertinent to your situation. Whatever the case may be, take a deep breath, get excited and get started!

Good luck with your campaign!

Other Resources

- Assessing an Email Fundraising or Advocacy Appeal (DonorDigital) -http://www.malwarwick.com/learning-resources/e-newsletters/images-archive/assessing-an-email-appeal.pdf
- Fundraising Planning Worksheet (GrassrootsFundraising.org) http://www.fundraising123.org/files/KleinNP911 Fund Plan Worksheet.pdf
- Just Enough Planning Guide (Spitfire Strategies) http://www.justenoughplanning.org/
- Smart Chart 3.0 (Spitfire Strategies) http://www.smartchart.org/

Share, Share!

This guide is licensed under the Creative Commons License, Attribution 3.0 http://creativecommons.org/licenses/by/3.0/us/

Please feel free to post this document on your blog or website, or email it to whomever you believe would benefit from reading it. If you'd like to inquire about a co-branded version of this guide for your chapter, conference, or association, <u>please contact us</u>. Thank you!

One More Thing

If you have a comment or question about this guide, please drop us an email at fundraising123@networkforgood.org. We'd love to hear from you!

And if you are looking to reach new supporters and raise more money for your nonprofit, Network for Good's online fundraising specialists are just a phone call away: 1.888.284.7978 x1. We're here to help by:

- Processing donations for your charity with <u>Custom DonateNow</u>
- Enabling you to communicate your supporters with <u>EmailNow</u>
- Providing free training, tips and best practices through our:
 - o Weekly tips newsletter
 - o Nonprofit 911 series
 - o Online Learning Center

And if you are looking for a small but mighty consulting company, connect with our colleagues at Firefly Partners. Their services range from <u>online strategic planning</u> and <u>campaign design and execution, webmaster services</u>, and <u>web design</u>.

For details, visit <u>www.fireflypartners.com</u>. Like Network for Good, Firefly strives to provide top notch services at an affordable price.



Online Fundraising Campaign in a Box

Audience	Action(s) Desired	Overarching Message(s)	Activities	Responsible Party(ies)	Activity Completion Target Date	Ongoing Measurement and Benchmark Plan
Current Donors	 Set up recurring donations Make a one-time donation designated to the shelter project Forward information to five friends (viral marketing) 	 Help us continue to serve the animals Help save more animals with a new shelter Share our story 	 eSolicit with link to recurring gift form eSolicit with a need statement for support of the new shelter Push TAF in newsletters and donation receipts 	Annual GivingCommunications	• 06/30	If we do not reach \$3,000 online by 12/31 we will update the solicitation message and re-solicit. or If we surpass \$3,000 online by 12/31 we will congratulate all constituents and change the message to "Join your neighbors and donate to double the donation total."
Animal lovers in local community	 Give us email addresses + opt in to updates Make a donation by Q3 of the year 	 Learn how you can make a difference in our community Your support can help save more pets 	 Put info in shelter(s) urging visits to site Prominently display newsletter signup on all web pages Insert soft solicitations in all e-publications 	Annual GivingCommunicationsShelter staff	• 06/30	If we do not reach 2,000 new subscribers by 10/31 we will send an additional TAF request to current subscribers. or If we surpass 2,000 new subscribers by 10/31 we will push an End of Year eSolicit and TAF to all of the new subscribers who have not yet made a donation.
						If we do not reach [intermediate goal] by [date]
						we will [follow-up action].
						If we surpass [intermediate goal] by [date]
						we will [follow-up action].
						If we do not reach [intermediate goal] by [date]
						by [date] we will [follow-up action].
						or If we surpass [intermediate goal]
						by[date]
						we will [follow-up action].
						If we do not reach [intermediate goal] by [date]
						we will [follow-up action].
						or If we surpass [intermediate goal]
						by[date]
						we will [follow-up action].
						If we do not reach [intermediate goal]
						by [date] we will [follow-up action].
						or
						If we surpass [intermediate goal] by [date]
						we will [follow-up action].
						If we do not reach [intermediate goal]
						by [date] we will [follow-up action].
						or
						If we surpass [intermediate goal] by [date]
						we will [follow-up action].