# NWA Gives Foundations Guide

Welcome to NWA Gives! Each April, we create a giving day that inspires our community to give to local nonprofits. While we ask individuals to give, each nonprofit must ask our residents to support their specific organization. This guide will take you through the steps to plan a successful campaign.

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# SECTION 1: Goal Setting

There's an old saying, "If you don't know where you are going, how will you know when you get there?" Goal setting is the primary tool that prevents your organization from wandering aimlessly through the abyss of fundraising and awareness campaigns.

### Why Are You Joining the NWA Gives Campaign?

Do you want to raise more money for your organization? What is the money going to be used for? Does your organization need better visibility to attract new clients, staff, volunteers or supporters? In this section you will consider the elements that will help you set SMART goals, such as:

- Who is your organization and what do you do?
- What sets you apart from other organizations?
- What problem are you addressing?
- How are you addressing it?
- How will this particular campaign and its objective help achieve your larger goal as an organization?
- How can the donor get involved?
- Why should the donor support this campaign?

### What are your current needs?

Remember to consider both financial and non-financial goals.

| FINANCIAL | NON-FINANCIAL |
|---|---|
| Cash | Awareness |
| Products | Volunteers |
| Services | Clients |
| | Supporters |

### Create SMART goals

Once you have considered what your needs are, it's time to create SMART goals. This acronym is used in a variety of professions and you may have seen the letters stand for different qualities. For our campaign, we believe SMART goals are:

**S**pecific
**M**easurable
**A**ccountable & Agreed upon
**R**ealistic
**T**ime-bound

## Is your goal specific?

Many nonprofits create goals that, while laudable, are nebulous and difficult to evaluate. For example:

Nonprofit A set its goals to raise $5,000 and raise awareness of its organization. While it may be easy to decide if the financial goal was reached, evaluating “awareness” is more difficult.

Nonprofit B set its goals to raise $5,000, reach 15 new donors, acquire 25 new followers on Instagram/Facebook and have 5 new volunteers apply to the organization by August 1. This goal is easy to evaluate and the information obtained can be used to set future goals.

## Is your goal measurable?

What are you measuring?
To answer this question you need to know who you want to reach: previous donors, new donors, volunteers, clients, influencers… You also need to know what you want these audiences to do: donate, give (more) time, lobby on your behalf… Will you simply track the amount of funds you raised or are you interested in the number of donors or donor subsets like new donors.

Who will measure it?
Once you know what you are measuring you need to know who at your organization will keep track of your metrics. Do you have the staff capacity to measure it? Do you need to find a volunteer who can assist with time or expertise?

How will they measure it?
NWA Gives, through its technology partner Pure Charity, will provide you with financial data from your fundraising campaign. You can then manipulate your data to answer the financial side of your goals. You will be responsible for comparing your data to past performance and any other metrics you have set.

Your organization will also be responsible for tracking your social media, website traffic, phone & email contacts, etc. and establish a methodology for tracking your goals.

Who will it be reported to and how?

Your information is only valuable if it is shared with the people who need it in a format that is understandable. What information should be shared with the general public, your volunteers, staff & Board? Have you put the data into a usable format? Usable data allows you to evaluate your SMART goals (see Section 9: Evaluation for charts to capture your data).

### Is your goal realistic?

Consider both internal and external circumstances.

| EXTERNAL | INTERNAL |
| --- | --- |
| Economic<br>Political<br>Cultural | Previous performance<br>Staffing<br>Volunteers<br>Board involvement<br>Expertise<br>Technology<br>Resources |

When considering whether your goal is achievable, start by looking at your past performance. Do internal and external conditions suggest you will do better or worse this year? If this is your first campaign, start small and test your strategies to see what works for you. Remember to consider both financial and non-financial goals.

### Are your goals accountable and agreed upon?

Determine who in your organization is responsible for each step of your campaign and include them in goal-setting. If only one set of people decide the goals and rely on others to achieve them, they may miss important factors in attaining the goal and lack enthusiasm for supporting staff and volunteers. Goal setting should be a team-wide process that ensures that everyone knows their role and has bought into the campaign.

### Is your goal time-bound?

Have you set a timeframe around your goals? While NWA Gives Day provides an easy timeframe for financial targets, non-financial goals may continue long past the event. For example, an organization may decide to attract 15 new volunteers by the end of August or acquire 4 new sponsors by the end of April.

SMART goals ensure that you set achievable goals that will produce measurable evidence that can then be used to inform future decision-making. You can use this worksheet to capture your goals.

| | | Financial Goal | Non-Financial Goals |
|---|---|---|---|
| Specific | Have you identified what you want to achieve? | | |
| Measurable | How will you know if you reached your goal? | | |
| Accountable/Agreed upon | Do participants agree on the goals and how to reach them? | | |
| Realistic | Given past and current data, can you reach this goal? | | |
| Time-bound | Is there a time frame for reaching each goal? | | |

# SECTION 2: Build your Team/Involve Key Advocates

Decide who at your organization will lead the campaign and act as point person. Then identify who will be involved in supporting the campaign and in what role. Whatever your structure, you will want to maximize the number of advocates your nonprofit can use to spread your message.

Make sure your advocates have clear messages, roles and guidelines to help them feel confident in their roles and ensure they spread the correct message for your campaign.

**Board members** - Make sure that your board members are engaged! Your board is an important resource for reaching out to other key advocates and supporters.

- Explain how it fits in to your overall plan for development
- Demonstrate the power of NWA Gives – show them our website, engage them with the videos, and share that this is a day that gives them a reason to ask others for support AND gives whomever they engage a reason to give
- Work with them to set a $$ goal for the event. Ask for their ideas around engagement in the community. How can we make this FUN and raise money for our organization at the same time?
- Explain WHY raising additional dollars will be helpful and HOW the organization will benefit from the additional $$

**Volunteers** - Advocacy can be seen as an extension of the valuable gift of time they already extend to your organization.

**Previous donors** - Approach dedicated previous donors for their support in spreading awareness and approaching new donors.

**Corporate Sponsors** - Corporate supporters can contribute much more than just financially. By sharing their support of your organization through their internal and external networks, they can create awareness for your organization. If you have multiple corporate sponsors, you can create a friendly competition to see who can involve the most employees in your campaign.

**Clients** - It may or may not be appropriate for your organization to involve its clients in the campaign. Where appropriate, clients can share the advocacy role and spread awareness of your nonprofit's mission and message and drive potential donors to your campaign.

**Influencers/Community Leaders** - Use your connections to ask people with high visibility in the community to share your message.

For new organizations that don't yet have a volunteer base, you can search for new volunteers in a variety of ways:

- Ask for help on any communications vehicles you use (website, social media…)

- Look for local volunteer websites and organizations to post your opportunities
- Post on social media sites that appeal to people who might be interested in your organization
- Engage local media
- Ask friends to boost your reach

Now that you have identified who might participate on your team, you need to know what you are asking them to do and when they will need to participate. The more specific you can be about what you are asking them to do, the more likely they are to accept your invitation. Before you approach a potential team member:

- Outline the roles you need filled
- Use our timeline to decide when you need their help
- Be clear about the time commitment you are asking for
- Schedule meetings far in advance so team members can plan to attend

You may want to create sub-committees that can tackle different areas of your campaign. The chart below shows some of the tasks you may want to delegate to your sub-committees.

| Communications | Fundraising | Ambassadors | Event Day |
|---|---|---|---|
| Key message | Database/statistics evaluation | Media spokesperson | Communications Center |
| Visuals | Donor segmentation | Social media posts | Social media |
| Communications calendar | Targets | Fundraising reach | |
| Social media | Matching funds | | |
| Website | Sponsors/Partnerships | | |
| Newsletter/Bulletin | | | |
| Direct communications | | | |
| Media release | | | |

The most important part of asking for help is letting your potential volunteer know why you are passionate about your goal and why their help is important in reaching it. Section 4: Crafting Your Story can help you develop a compelling narrative to attract your team.

# SECTION 3: Creating Your Plan

Now that you know your goals, you can now figure out how to achieve them. Create your strategy based on your organization's strengths.

**Gather your Team** (See Section 2: Build your Team)
Who do you need to make the plan work?
How are the responsibilities divided?
How will you communicate?

**Set your Strategy**

- Build a Coordinated Multi-Channel Campaign
- Establish a Sense of Urgency
- Craft a Short, Clear Call to Action
- Set Clear, Realistic Goals
- Make It Easy to Act
- Tell Your Story Visually
- Be Different
- Engage Your Supporters

**Communications** (see Section 4: Communications & Branding)
How will you communicate? Use a variety of methods (see Section 4: Branding & Communication)
How often will you communicate? Communication will be infrequent in the beginning and intensify leading up to the day of the event.
Website: Create or update your Pure Charity webpage as soon as possible and link the page to your website and vice versa.
Who will control communications? Ensure one person controls the look and feel of your campaign and shares templates and standards with key advocates who will assist with communications.

You can use this worksheet to draft your plan.

| Action | By When? | By whom? |
|---|---|---|
| Determine team members | | |
| Set a kickoff meeting date | | |
| Agree on goal | | |
| Divide team into task groups | | |
| Create campaign brand | | |
| Build communications strategy & timeline | | |
| Assemble campaign stories and create outreach | | |
| Recruit ambassadors | | |
| Create matching fund | | |
| Plan and Execute day of events | | |
| Plan thanking and donor cultivation | | |
| Evaluate | | |

**Sample Planning Timeline**

| | |
|---|---|
| September | Register at [www.nwagives.org/register](www.nwagives.org/register) |
| October | Build your team |
| November | Create your plan |
| December | Begin finding matching donors |
| January | Attend trainings & build fundraising page |
| February | Begin communications campaign |
| March | Ensure event day team is in place |
| April | NWA Gives Day!!! |

# SECTION 4: Crafting Your Story

People give when they feel strongly. Your story needs to evoke emotion and a sense of need in order to encourage potential donors to give. A personal connection to your organization can be created by crafting a compelling story. Consistent messaging throughout your campaign will ensure your story is heard.

Before designing your messages for your campaign, make sure you know your:

- Mission
- Vision
- Core Values
- Logo
- Tagline
- Programs/services

Keep your language warm and aspirational, but give concrete examples of how their gift can transform a life or solve a problem. Use a story to illustrate how you create change and make the donor the hero of your story.

Your story should:

- provide a concrete example of need (problem)
- show what the perfect world would look like (ideal)
- demonstrate how your nonprofit can resolve the conflict between the need and the ideal (solution)
- give the donor the opportunity to bring about the desired outcome (hero)

Keep in mind the following best practices:

- Stay away from facts and figures
- Be specific, genuine and authentic, not generic
- Avoid jargon and salesperson language
- Balance the need with hope for change
- Use quotes and powerful statements
- Use multi-sensory experience when possible
- Share the emotion behind the impact

Don’t forget to use images to make your story vibrant and catchy.

- Avoid using overly dramatic or very generic stock photos
- Don’t use stereotypical images
- Use good quality images
- Ensure your images demonstrates the message you want convey

Use this worksheet to brainstorm ideas.

| | |
|---|---|
| Campaign Theme | |
| Visuals | |
| Tagline | |

# SECTION 5: Creating Your Communications Plan

Develop a communications strategy for your message and story. Remember that:

- People give to people. Create a personal experience that resonates with each individual donor.
- Create a compelling case for support. Consider tying your campaign to a matching fund or specific program.
- Create an omni-channel experience. Be sure to coordinate your communication efforts across every channel (web, print, social media, direct mail, mobile).
- Be intentional with your email strategy. Start early, but be aware of donor fatigue. Make your emails personal and conversational. Be sure to be clear on what you want recipients to do.
- Segment donors and tailor messages to reach them. Target donors with relevant content and contextualized asks.
- Optimize your website. Make sure your donate button is obvious! Redirect your donate button to your NWA Gives webpage during the weeks surrounding Giving Day. Create a “More Ways to Give” section to capture potential volunteers and in-kind donors. Make sure your website is up to date.
- Equip your social media advocates with social content and images for your campaign. Be sure to encourage your followers to share your content.
- Create templated emails for your key influencers and board members to share.
- Get creative with incentives for participants to encourage them to share your message and recruit donors.
- Create a video to share your story, and connect with your audience.

### Benefit from the NWA Gives Brand

- Brand your campaign with NWA Gives graphics.
- Follow NWA Gives channels and share our posts.
- Participate in NWA Gives social media campaigns like the Heart in Hand campaign.
- Include NWA Gives tags on your social media posts - @nwagives and #nwagives

Using your goals, identify who you want to communicate with and how you will reach them. This can include: emails, texts, regular mail, phone calls, social media, paid advertising, earned media and in person communications.

The majority of campaigns will use a variety of these approaches. The first 4 methods require the use of your database. Accuracy of this information is important in reaching your targets. Take the time before you begin your campaign to update your database. You can also use your database to identify new opportunities and develop customized approaches through segmentation. Examine your database to find subgroups, or segments, based on qualities they have in common (interests, level of involvement, geographical location, age, education level, donor status, etc.). Segmenting donors allows organizations to send more personalized communication and targeted communications approaches. Not every media needs to reach all target audiences.

| Medium | Lead | Target | Date 1 | Date 2 | Date 3 | Goal | Outcome |
|---|---|---|---|---|---|---|---|
| **Website** | | | | | | | |
| **Email** | | | | | | | |
| **Text** | | | | | | | |
| **Call** | | | | | | | |
| **Newsletter** | | | | | | | |
| **Twitter** | | | | | | | |
| **Instagram** | | | | | | | |
| **Facebook** | | | | | | | |
| **Advertising** | | | | | | | |

# SECTION 6: Matching/Challenge Funds

Whether you are asking for a financial donation or the gift of time, people give to people. The more personal you can make your request, the more likely you are to succeed.

Use the data you found in Section 2 to identify superstar supporters who might help with making connections or providing matching funds.

### Matching Funds/Challenge Grants

Matching or challenge funds can be a powerful tool in convincing donors to give. By telling donors their donation can lead to additional funds, you make them feel that their gift can do more. It can also create a sense of urgency - if they don't give now, the extra gift will be lost.

What is a Matching Fund?

Matching funds are additional dollars contributed directly to your organization from a donor, company or community partner (or some combination) to help encourage donations to your nonprofit. Where possible, matching funds should be a 1:1 match, which allows you to say that your dollar will be doubled.

What is a Challenge Grant?

A Challenge grant is similar to a matching fund in that it is a previously agreed upon donation from a supporter or group of supporters who will make a donation to the event but the amount of support is contingent upon a condition being met. For example, a sponsor may donate $500 only if your organization receives $1000 in public support. Alternately a challenge may involve a challenge to get a certain number of new donors, or social media likes.

Who are potential matching fund/challenge grant donors?

- Board members
- Foundations
- Individuals who are invested on an emotional level (volunteers, previous donors)
- Vendors and companies with whom you have a longstanding relationship
- Corporate sponsors

Don't forget that a variety of donors (individual or institutional) can come together to create a matching or challenge fund. Matching/challenge funds don't need to be big. By saying that a donor will match the first $100 given, your organization can get the ball rolling!

## Prizes

Thanks to the sponsorship of First Security Bank, NWA Gives offers a variety of prizes to encourage donors to give and create a sense of fun and friendly competition. A full list of prizes is available on the NWA Gives website. By letting your community of potential donors know about the prizes, you can target giving so that your organization wins a prize. For example you can encourage donors to give during a particular hour to win an hourly prize.

# SECTION 7: Thank Your Supporters

Congratulations! Your campaign is over, but your job isn't done. It's time to thank the people who helped you achieve your goals and let them know how their gift has had an impact on your organization and the people you serve. Be sure to include an impactful story of what their gift means.

Thank your donors within 24 hours of their gift (the more personal the better). Your strategy may include:

- Social media posts
- Send individual videos
- Phone calls
- Texts
- Emails
- Report to and thank matching fund team
- Thank advocates

Don't forget to thank your staff, volunteers, board members and anyone else who helped along the way. When you make people feel appreciated, they are more likely to help out again in the future. To increase the likelihood of continued participation, be sure to keep your supporters informed of your progress throughout the year.

Donor cultivation should happen all year. Think about how you will keep donors informed over the year about your cause. Make sure supporters receive organizational communication (social media, newsletter, email, annual report) that doesn't ask for anything in return. When possible, include individual communication in your donor cultivation strategy and don't forget to make it personal!

# SECTION 8: Evaluation

By evaluating your campaign now, you will gain valuable insights and will be prepared for your next campaign. You can customize and use the charts below to capture your statistics. You may want to capture statistics outside of your current goals in case your goals in future campaigns change.

| Element | Before | After | Change +/- | % |
|---|---|---|---|---|
| Funds raised | | | | |
| # of donors | | | | |
| # of matching gifts | | | | |
| # of returning donors | | | | |
| # of donors who gave less | | | | |
| # of donors who gave more | | | | |
| # of new donors | | | | |
| # of donors $10-99 | | | | |
| # of donors $100-999 | | | | |
| # of donors $1000+ | | | | |
| Board participation | | | | |
| # of sponsors | | | | |
| | | | | |

| Element | Before | After | Change +/- | % |
|---|---|---|---|---|
| Social media impressions | | | | |
| Twitter followers | | | | |
| Twitter engagements | | | | |
| FB/Instagram followers | | | | |
| FB/Instagram engagements | | | | |
| Postal addresses | | | | |
| Phone numbers | | | | |
| Email addresses | | | | |
| Volunteers attracted | | | | |
| Clients gained | | | | |

Once you have captured your statistics, you can share them with key stakeholders, and identify which strategies were most effective.

**Prepare for your Next Campaign**

While your campaign is still fresh in your mind, use your statistics and key learnings to create recommendations for next year. If your plan didn't already document all the elements of your campaign, write it down now. Make sure you capture key dates; communication documents; key advocates' names, responsibilities and contact information; and any other useful information. Be sure to store the information together in an easy-to-reach location. Make sure you have access to all your documents and social media accounts so if one team member leaves, you don't lose your access and information. Think about what advice you'd give for the next campaign.

What worked and didn't?
Where did things go as planned and where did it go off the rails?
What things did you forget to consider?
Were there any exceptional circumstances?

The more information you compile now, the easier it will be next year. Be sure to make recommendations on next year's:

Goals
Communications strategy
Event Day Execution
Required Resources (eg.  people, technology, funding for marketing)
Timeline

By creating recommendations now, you'll strengthen next year's campaign.

More resources for creating a great campaign can be found at www.nwagivestraining.com