Toolkit

60-Day Fall Fundraising Plan

A step-by-step guide to launching a seasonal campaign and raising more money

Network for Good

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INTRODUCTION

Why a Fall Campaign?

There's nothing like a chill in the air and the aroma of pumpkin to give us renewed energy as the dog days of summer come to a close. Fall brings a hopeful anticipation, a "let's get down to business" feeling that perfectly translates into a prime fundraising opportunity.

A fall fundraising campaign is a chance to rally your community's support before the hectic, stressful giving season begins. It can also serve as a component to your donor retention strategy.

What's more, a fall campaign can help reinforce an organization-wide commitment to fundraising while recruiting, maintaining, and expanding your donor base.

A fall campaign should deliver a consistent, compelling message across multiple channels to support a single fundraising goal. A campaign is a process, not a single appeal. Your campaign should be a well-orchestrated series of activities that happen for a specific amount of time.

Ready to create your fall campaign and raise more money before things get crazy at year-end? This guide will show you how to plan and execute successful outreach.

A seasonal campaign can help you:

1. **Relate** your message to donors using their preferred method of contact
2. **Optimize** and expand your reach through multiple channels
3. **Maximize** your overall fundraising strategy
4. **Generate** more revenue than stand-alone fundraising appeals
5. **Benefit** the entire organization, regardless of its size or status

The Campaign Calendar

Analyze Fiscal Status

60 days before campaign kickoff

Carefully reviewing your budgets and accounts before launching your fall campaign it essential to your campaigns success. It is a crucial first step to help create a realistic perspective of what budget shortfalls or surpluses mean and how they might relate to your mission, operations, strategic plan, current and future capacity building.

Basic knowledge of your organization's financial status will help you develop, then execute, the spring campaign. The fiscal analysis should answer the following questions:

1. How has our organization's financial snapshot changed in the last year?
2. Do we have any unmet financial needs?
3. How will the fall campaign impact current and future operations?
4. How can the fall campaign advance our mission?
5. How will the revenue generated impact current or future capacity objectives?
6. What details of the organization's fiscal status should be shared as part of the fall campaign?

Review & Update Case for Support

50 days before campaign kickoff

A fall campaign cannot be effectively launched without evaluating the current status of each element vital to your organization and its operations.

What programs or operational functions are not happening because of an expected revenue shortfall? How is fundraising or resource development under performing? OR, if you have a revenue surplus, what will happen, with programs and operations, because of an expected budget surplus? Compare the your annual strategic plan with what actually happened over the past 12 months. This should reveal any gaps in performance versus objectives.

Three things to consider before designing your campaign:

1. If the mission is truly driving operations as well as advancing the strategic plan, how much revenue is required to maintain the momentum?

2. If there is a surplus, where can funds from an seasonal campaign be applied to improve services and programs or expand capacity?

3. Are additional actions plans needed to maximize the impact of a successful seasonal campaign?

After you have reviewed your fiscal status, operational needs and comprehensive strategic plan, you have set a good foundation for a well-planned, highly effective donor-centric fall campaign.

Establish Action Plans

45 days before campaign kickoff

When it comes to campaign design, what works best for one type of nonprofit could be the wrong approach for another. To create the most compelling fall campaign that will generate the greatest impact, financial and non-financial, consider your fundraising and non-fundraising objectives, then answer the following questions:

1. What would the ideal results look like?
2. What are you trying to accomplish?
3. What call to action would motivate your target audience?
4. Whom are you trying to target?
5. What do you most want them to do for your organization?
6. Would a one-time donation or recurring gift raise the most funds?

Budget

As ideas emerge and evolve, you will need to establish a budget for your campaign. If you already have a seasonal campaign written into your budget, great! But, realistically, do you need more resources to create the kind of campaign you have in mind? Are those funds available? Can your board members or gift-in-kind donations, an individual donor or corporate sponsor help close the gap?

Scope

Only you can decide how big or how small your campaign should be. But it's important to think and define the scope about what your nonprofit can do (and, what you can't do) to generate the best results.

1. Who will you target?
2. When and for how long?
3. How will you engage prospective donors?

4. What communication channels will you use: direct mail, email, social media, and/or through newsletters and traditional media?
5. Will it be a one-time appeal or will follow-up be required?
6. What response systems will need to be in place for it to be effective?
7. How will follow-up and thank-you messages be managed?
8. What metrics are required to quantify the effectiveness of the campaign?

Select Campaign Lead or Team

Now that you have the basics figured out, you will need to accept or delegate the role of a campaign lead to coordinate all that is needed to successfully launch and manage the campaign.

Depending on the size of your organization's board and staff, it may be necessary to recruit volunteers as well. If certain tasks require specialized skills or your solicitation process requires a high volume of hours and labor to effectively execute and follow-up, tap into the right people to get the job done.

Choose Focus or Theme

40 days before campaign kickoff

Your campaign's focus and call to action must me compelling and donor-centric.

You and your prospective donors realize this campaign is about fundraising, yet communicating your organization's financial needs alone will not get the job done. Most likely, it will have the exact opposite effect as people are less likely to contribute to an organization that is perceived to be stressed beyond its abilities, either because of an overwhelming cause, mission or financial sustainability.

Whether you send a direct appeal via traditional mail, email or social media, your theme should be centered on an emotionally compelling story.

Focusing your appeals on an individual is more likely to resonate on the emotional level than focusing on heartbreaking statistics at your prospective donors.

This campaign message gives you the opportunity to connect and engage with your donor base as well as new prospective donors. It's tempting to share everything that is wonderful about your organization.

Don't.

Even if the content is so great that people read every single word of your never-ending saga about the previous or upcoming fiscal year, by the time they do, the urgency of your call to action will have faded by the end of your 4 page appeal.

Use imagery to capture the essence of your story. Chose an image that instantly relates to your mission-driven operations, strategic plan and/or capacity building efforts. Imagery can be powerful in driving home your message, especially if it is a clear photo of one person or one animal looking straight at the camera (and the donor).

Segment Lists

35 days before campaign kickoff

Because this campaign is donor-centric, it's important to make careful choices on how to segment your donor lists.

Data-driven management of lists and databases will give you the ability to identify and target your donors and prospects while personalizing your message or communication channel(s) to consistently engage them in the most effective way possible. A well-segmented database will also empower you to have accurate information on how your campaign performed.

Basic segmentation should be done by giving date – or divided into current donor, lapsed donor, and non-donor (prospect). To personalize your appeals, you will need the following:

1. Name (first, last, title)
2. Address (including City, State, Zip)
3. Email Address
4. Last gift amount (if any)
5. Gift rating, score (if any)

You can optimize your annual campaign by tailoring your message, its delivery method as well as personalizing follow-up and thank you letters to individual segments.

For the most effective campaign (and follow up), a donor management system made for nonprofit fundraising is key. It will allow you to easily track donors and their gifts, group segments, and send tailored communications. You'll also quickly learn how your campaign is performing. (Network for Good's easy-to-use donor management system makes it simple to do these things and more. Find out how you can get started today.)

Develop Giving Levels

30 days before campaign launch

To raise more money, be sure to state desired or recommended donations. Your recurring donors may be familiar with and supportive of your organization, but may not know what is expected or needed to sustain it. New prospects may be inspired to contribute, but they have no idea what would be an appropriate donation.

There are a number of ways you can guide your potential donors while increasing the likelihood of achieving your fundraising goals without alienating donors Failing to provide specific gift amounts is the most common mistake organizations make when conducting a seasonal campaign.

If you're using this opportunity to upgrade or "renew" recurring donors, don't use vague language like "renew now!" This approach fails for a number of reasons, when considering donors:

1. May not recall their previous gift(s)
2. May not have time to look-up the amount they donated last year
3. Personal circumstances or financial situation may have changed
4. May be unaware of new needs, capacity building your organization has planned or underway
5. Fail to consider changes in the economy, which may make a $100 gift a smaller donation than it was last year.

A simple way to identify giving levels is to review the giving levels from your donor base to determine whether there are set points, i.e., $100, $250 or $500, which your current donors usually contribute. Multiply these amounts times the number of prospects your campaign intends to reach and engage, then compare that amount to your fundraising goals to decide on giving levels for an effective campaign strategy.

Build Communication Channels & Assets

25 days before campaign kickoff

Your fall campaign should be a series of activities that deliver your inspiring message to as many targeted prospective donors as possible while using the full spectrum of media and communication channels. Which channels you choose to use will depend in part on the resources – time, talent and money – available for the campaign. The review and analysis of your donor base segments should have helped you drill down on what channels each donor prefers.

Online fundraising is the fastest growing area for nonprofit organizations.

Ensure that your online donation methods are both simple to use and secure. All of Network for Good's online fundraising tools, including donation pages and peer-to-peer fundraising campaigns, are fully secure and PCI compliant to keep your transactions and donor information safe.

Establish analytics for your online fundraising efforts. Monitor the following statistics and calculations:

- Click-through rate from your email appeals
- Percentage of donation page visitors who give
- Percentage or donors who give through another channel (such as mail)
- Overall response rates (through all channels)
- Total number of gifts
- Total amount of gifts
- Average gift
- Response rate

To maximize your online gifts, it's important to have a donation page that makes it easy for donors to give. A giving experience that evokes your campaign theme and offers suggested giving amounts will help you convert more donors and see higher average gifts. Need a smarter donation page? Network for Good can help—schedule a free demo today.

Phone solicitation can be used as the primary method of engaging donors or as a follow-up action plan after emailing or sending out a direct mail piece. The clear advantage is that a phone solicitation is very personal, enabling authentic engagement with your donor base and prospective donors.

Although they should never sound like it, phone solicitations should always be scripted, providing responses to any possible objections and a list of organizational contacts that can directly address questions.

Even if your team has experience with phone solicitation, provide a training session outlining the fundraising objectives of this particular campaign. Empower your team with simple but effective techniques to deliver the message enthusiastically. Engage with donors and prospects, and consistently close the call with a donation. If the phone solicitation is a follow-up to direct mail and/or online appeals, make sure that the solicitors are very familiar with the materials that were sent out, ideally having copies available as they make calls.

Again, be certain that systems are in place to monitor the effectiveness of phone solicitations measuring results against attempted calls, call times, and individual solicitors.

The most crucial aspect of the communication method or methods you incorporate into your spring campaign is that the messaging is consistent, even if the verbiage varies for various target audiences.

Create Appeals

20 Days before campaign kickoff

Regardless of the communication channel(s) used, the design of your appeal is the heart and soul of your fall campaign. Its impact and effectiveness will directly determine your fundraising results. Your appeal must have:

1. Donor-driven content
2. Innovative, inspiring content
3. Use the inform-engage-invite technique (see below)
4. Feature a relevant story that climaxes with an emotive hook
5. Highlight donors as superheroes
6. Specify a call to action with a sense of urgency
7. Use valuable real estate provided by a P.S. (post-script)
8. Initiate or cultivate a relationship
9. Images and materials that demonstrate value and quality
10. A coordinated thank-you message ready to send

Equally important is what *not* to do when designing your appeal:

1. Don't use the opportunity to explain every facet of every program
2. Don't make the organization appear desperate or the cause overwhelming
3. Don't make assumptions about what is known about your organization
4. Don't portray the donations as the ultimate goal – and a transaction

Engage and Invite Technique

One of the most successful presentation methods to use is the Inform, Engage and Invite technique. Tell your compelling story, informing the prospective donor of the mission in a personalized, relatable way. Engage them by asking rhetorical questions and then invite them to be part of the organization, part of the solution, by making a donation or otherwise respond to your call to action.

Branding & Socializing the Campaign

15 days before campaign kickoff

Every part of your campaign automatically becomes a part of its branding and marketing.

A seasonal campaign provides wonderful opportunities to issue press releases, social media announcements and blog updates. Effective marketing can be done at key points throughout your campaign, including:

- Goal announcement
- Story selection
- Campaign kick-off or launch
- Benchmarks toward fundraising goal
- Homestretch or last minute reminders
- Matching gifts opportunities
- Spotlight program participants
- Thank and recognize donors
- Announce final results

Follow-up Appeals

EVERY 72 HOURS, BEGINNING the day your campaign kicks off

As with all strategic fundraising, the post-launch activities and follow-up to your annual campaign should focus 80% of your energy and resources on the 20% of donors who are going to champion your cause and give larger amounts. These donors and prospective donors should have been identified while segmenting your donor lists and then again as target prospects were selected.

The range of follow-up is unlimited, so it is best to be guided by the most popular contact methods categorized by your segmentation process. Here are some effective follow-up options to accelerate your campaign

- Postcard reminders to direct mail appeals are very effective for traditional, more mature (older) donors and potential donors.
- Phone banking can also be performed as part of a prompt, personalized follow-up to your annual campaign launched to generate excitement while providing positive, personalized engagement with donors and prospects, reinforcing the urgency of your call to action.
- Social media, including Facebook, Instagram, Twitter, Pinterest and LinkedIn can target specific demographics, typically younger donors and prospects.
- Website integration should focus your organization's home page or landing page on your fall appeal. In addition to restating the messaging and urgency of the call to action, your website can provide updates, third-party endorsements, testimonials, charity ratings, and security systems, especially on the donation page, which will increase confidence with online donation processes.
- Recognition should be bestowed on donors and team members who significantly advanced your annual campaign.

Thank & Recognize Donors

1 day after gift is received

No matter what communication channels are used, always send a personalized thank you message to donors as soon as possible. The message should simply and clearly express gratitude, recognizing the impact of the donation. Whenever possible, explain exactly how their gift will be used to address the cause. Do not include their donation history or any additional appeals as part of the thank you message.

A prompt, personalized thank you is an integral part of the relationship building process. Recurring gifts or monthly sustainers need to receive steady but unique acknowledgment and thank-you messages for their ongoing commitment to your organization and its mission.

Measure Results & Refine Plan

COMPLETED 30 days after launch

From the launch of the campaign, you will want to track the results for each target segment and communication method so that the best parts of the campaign can be repeated.

After your board and organizational leadership have reviewed and analyzed the final results of the fall campaign, let your staff and volunteers who helped launch the campaign know the results of their efforts.