



8 WEEK WORKPLAN

Workbook – 8 Week Work plan for a
Successful Giving Day

An interactive workbook to help you create, plan and
implement your 8-week Giving Day campaign

BEST PRACTICE #1-SOCIAL MEDIA

For an online event, social media plays a huge role. Even if you are new to this way of communicating, San Angelo Gives is the time to dive in and get your feet wet! Utilizing Facebook and other platforms will help you communicate to your current and future donors pre-event, during and long after the event.

Questions

1. What social media platforms will you use for San Angelo Gives?

2. What are the key messages you will convey on these platforms?

3. Which social media prize challenges will you attempt to win?

4. Do you have a staffing plan? Who will run your social media campaign?

5. What other tools/resources do you need to implement this practice?

Notes:

BEST PRACTICES #2-BOARD ENGAGEMENT

Board participation is a crucial element for success on May 5th. How will you engage your board and activate them to assist with your San Angelo Gives campaign?

Questions

1. What will be your goal for board giving? (100% increase from last year, etc.)

2. What prize challenges will you and your board work on together?

3. What donor engagement strategies will your board employ?

4. What social media activity will you ask of your board?

5. What other communication/marketing activities will your board engage in?

6. What other tasks or strategies will you ask your board to participate in?

Notes:

BEST PRACTICE #3-DONOR ENGAGEMENT

Engaging your donors before, during and after San Angelo Gives drives home the importance of donor stewardship, cultivation and keeps them aligned with your organization for continued engagement, support and gifts.

Questions

1. How will you engage your current donor base?

2. How will you thank your donors on May 5th?

3. What is your plan to thank your donors after May 5th?

4. How will you engage new donors?

5. What tools/resources do you need to implement this practice?

Notes:

BEST PRACTICE #4-DONOR ENGAGEMENT – KNOW YOUR AUDIENCE

To craft the right and most effective message, you need to know your audience. Who are they? How can you find them and how can they be your best ambassadors?

Questions

1. Who are your current audiences?

2. Who do you want to target? (prioritize them)

3. How will you find them?

4. Your Message: How is the world different because you exist? What stories of impact can you share?

5. What tools/resources do you need to prepare and develop to implement this practice?

Notes:

BEST PRACTICE #5-GOAL SETTING

Goals for San Angelo Gives are more than financial. Manage your expectations for setting your overall philanthropic goals: new donors, visibility, marketing, social media.

Questions

1. What is your financial goal for San Angelo Gives?

2. What is your donor goal?

3. What are your other goals?

4. How do you plan on measuring these goals?

5. What tools/resources/staff do you need to implement this practice?

Notes:

BEST PRACTICE #6-MAXIMIZE COMMUNICATION TOOLS

Once you've defined your audience, crafted your message and set your goals, maximize the right communication tools available to you.

Questions

1. What communication tools are you already using in your organization?

2. What tools are you not currently using that you would like to incorporate into your campaign?

3. What current marketing collateral can you add a San Angelo Gives message to?

4. What tools/resources do you need to implement this practice?

Notes:

DEVELOP AND EXECUTE YOUR PLAN

Using your notes from the best practices, you are now ready to put it all together. Use the template below to create your 8-week workplan.

Keep in mind that the first 4 weeks of your plan should be dedicated to planning and preparation. The 2nd half of your plan should be implementing; starting with soft marketing, then transitioning into heavy marketing at the 2-week mark.

San Angelo Gives Goals:

Dollar Goal: _____

Donor Goal: _____

New Donor Goal: _____

Other goals:

Week Eight - Meet, Plan, Discuss

Checklist

- ___ Set weekly meetings with your staff or volunteers who will be assisting with your campaign
- ___ Meet and complete this workplan
- ___ 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				

Week Seven - Teasers and Preparations

Checklist

- ___ Download all items from the Nonprofit Marketing Toolkit
- ___ Begin outreach to form partnerships and support
- ___ Add a San Angelo Gives logo to your email signature
- ___ Add a teaser or save the date block to your website and outgoing enewsletters
- ___ San Angelo Gives updates at your monthly or quarterly board meeting
- ___ Make sure you have completed all checklist items from the previous week!

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

Week Six -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 5th
- ___ Reach out to other NPOs in your sector and see if there are some ways you can partner
- ___ Create staffing plan for May 5th

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

Week Five - 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 5th.
- ___ Boast your sanangelogives.org 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 Four - 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 San Angelo Gives 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.)

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

Week Three - Prepare for 2-week Marketing Blitz

Checklist

- ___ Customize email templates from toolkit and schedule eblasts to go out
- ___ Finalize social media schedule and content
- ___ Schedule key meetings with donors (pre-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 Two - 2-week Heavy Marketing Begins

Checklist

- ___ Amp up social media posts – add San Angelo Gives graphics to Facebook and Twitter
- ___ Begin sending emails
- ___ Make targeted phone calls to donors
- ___ Have a kickoff event and talk to donors about San Angelo Gives (suggested)
- ___ Flier businesses in your area

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

Week One - Heavy Marketing Continues

Checklist

- ___ Make sure you have your donor data link and know how to access (know who)
- ___ Continue heavy social media presence
- ___ Remind board of roles (outreach, sending emails, etc.)
- ___ San Angelo Gives PSAs and posts – share on social media
- ___ Finalize day-of event plans
- ___ Finalize day-of roles and staffing plan
- ___ Schedule social media posts before going to bed

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

May 2 – San Angelo Gives

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
- ___ Check your donor link 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 San Angelo Gives – 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 you's 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-event thank you reception/event, photo-op

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				