



## How to Plan a Giving Campaign That Works

With each new season comes a fresh opportunity to take a step back to analyze and refresh your nonprofit's fundraising strategy from top to bottom. This is especially true now that we're one full year into the pandemic, making it the perfect time to step back, review your goals, and start planning a giving campaign that meets your organization's current needs.

What is a giving campaign, you ask? It's a multi-channel strategy that fundraisers develop to raise money for a particular cause. It's often used to raise

money for an organization's annual fund, which supports nonprofit operating expenses, including rent, staff salaries, equipment, fundraising tools, and more.

Nonprofits also use this strategy for capital campaigns or end-of-year campaigns, but no matter the goal, this strategy needs to include steps to both find new donors and retain old donors to bring a max ROI (return on investment) for your nonprofit.

Here are seven steps your nonprofit can take to create an effective giving campaign:

### 1. Put Together Your Team

An annual campaign is usually one of the largest ongoing efforts that your nonprofits executes, and having the right team in place is critical to its success.

What that looks like may vary depending on the size of your organization. A smaller nonprofit may have under \$5 million in expenses, but larger organizations may have expenses into the billions.

Similarly, smaller nonprofits have fewer staff members to dedicate to new projects because all hands are already on deck. Due to staff restraints, it can be beneficial for smaller nonprofits to appoint one point-person to keep everything organized, and then assign the various moving parts to other team members based on skill set. When your organization has a smaller team, it can be very beneficial to have your entire team involved in brainstorming and executing your strategy. In contrast, large nonprofits often have entire teams dedicated to marketing and fundraising, meaning that you can pull staff from all related areas to form a dedicated team. Ideally, larger organizations will develop a team that pulls from many different talent pools, including marketing, development, event management, design, and more.

### 2. Analyze Your Donor Data

Once you have your team in place, the next important step is to review data from past giving campaigns. While the beginning of the year is usually dedicated to annual reviews, there's no strict rule saying you can't start now! In fact, we recommend checking in on the progress of your campaign every quarter.

You'll want to gather data on the number of current donors you have, how many recurring donors you have, how many major donors you have, the amount of your average gift ... you get the idea!

Knowing this data can help you set goals for your new giving campaign, and monthly and quarterly reviews help make sure your fundraising campaign stays on track! Regular reviews can also help you catch potential issues sooner, such as a drastic drop in recurring donors (add recurring nudges to your forms to counteract this!) This way, if you aren't garnering the expected results, you still have time to pivot your strategy to ensure success.

No matter what, having effective [fundraising database and management tools](#) is necessary so that you not only have accurate data to refer to, but they'll also help you compile reports and gather insights.

### **3. Set Your Giving Campaign Goal**

Once you know where your organization has been, you can plot a path to the future. Not only do you want to challenge yourself to grow as a fundraiser, but you also need to clearly communicate the impact their donations are having to your donors.

Using the [SMART method](#) for goal-setting can help make sure your nonprofit's goals are viable, because it makes sure your goals are specific, measurable, achievable, relevant, and time-bound.

For example, if your organization raised \$500,000 dollars last year, try setting a goal that's 5-10% higher than your actual amount raised last year. That will give you a specific number that's achievable and relevant (donations help your organization achieve your mission).

It's also an easily measurable goal, as are goals for adding a certain number of new donors, or increasing your percentage of donors retained (average recurring donor gives [42% more](#) in one year than those who give one-time gifts). Giving yourself a timeframe to achieve your goal completes the last part of the acronym by making it time-bound.

Once you've set your SMART goal, making sure to communicate the impact of your goal to donors. This is especially true if you're trying to raise more than last year. You don't want your donors to think you're just being greedy, so let them know exactly how increased funds will help your nonprofit achieve the mission that your donors already care so much about.

### **4. Create a Calendar of Events**

Since your giving campaign will span the entire year, try creating a calendar of events to help keep your staff on track.

It should include all major events like Giving Tuesday or any other "giving months/days/etc." that relate to your mission. However, it should also include events specific to your nonprofit, such as the founder or organization's birthday (great for one-off giving pushes) or your annual fundraising gala.

A calendar that includes all major events and the dates during which strategic actions will take place will help you know when to start planning those events so they go off without a hitch.

### **5. Find the Right Tools**

Once you know your goal and have an events calendar to help you reach that goal, it's time to find the tools you need to help you hit said goal! Modern fundraising means your organization has a vast array of software solutions to automate essential tasks and facilitate your online engagements.

While the tools you choose will likely be based on your fundraising campaign's strategy and goals, here are few types that can help you knock it out of the park:

- **Text giving.** Text giving is a great way for supporters to give on the go and when it's convenient for them. Look for tools that can do both [text-to-give and text-to-donate](#).
- **Peer-to-peer fundraising.** A great way to expand your existing supporter base, your peer-to-peer should provide each participant with their own branded page to fundraise with.
- **Auction planning and management.** Choose auction software that allows bidding based on donor preference, such as from a mobile app, or remotely from a desktop computer. Your online auction tool should also let attendees to preview auction items, outbid others, and even check out within the tool itself (instead of having to write a check).
- **Mobile-responsive donation pages.** Did you know that over [half of web traffic comes from mobile devices](#)? Nonprofits who don't use mobile-optimized forms are missing opportunities.
- **Gift Assist.** Gift Assist is a tool that allows your donors to agree to pay the processing fee as a part of their overall donation. This helps reduce costs for your nonprofit and increases fundraising, so make sure Gift Assist is included in any fundraising platform you choose to work with.
- **Matching gifts.** Matching gifts can help you receive even more funds without having to ask your supporters to give again. You can make finding gifts easier for your donors by embedding a searchable matching gift database right on your online donation form.
- **Integrations.** Picking a tool that offers integrations simple means choosing a tool that works with other fundraising tools and engagement platforms. For example, you'll want to make sure that your fundraising platform integrates with your CRM, or that your new donor data can sync up with your email marketing tool. Integrations help ensure that your data remains centralized and easily accessible within your database.

## 6. Promote Your Giving Campaign

If no ones knows about your giving campaign, then you're not going to get very many donations. Luckily, there are more ways than ever to promote your giving campaign. Here are a few ways to get you started:

- **Email.** An established organization likely already has donors subscribed to some sort of regular newsletter, and this is the perfect place to not only [ask for donations](#) for your annual campaign, but also show donors just how far last year's funds went! You can also use email to send out a survey to previous donors asking for feedback that can help you fine-tune this year's annual campaign.

We recommend segmenting your list (something that's easy to do with Qgiv's data package) to help you send customized messages to new donors, major donors, long-term donors, etc.

- **Text marketing.** Text marketing is still vastly underutilized despite having a 98% open rate. You can not only send out a giving campaign announcement that links to your online donation form, but you can also use it to send impact updates to your donor throughout the year. This shows your donors they're appreciated, and it may even help convert your one-time donors into recurring donors. Just make sure you have permission before opting past donors into text marketing!
- **Press releases.** If you have talented writers on staff, your nonprofit can start sending out press releases, no special training required! And there are lots of reasons you can send a press release.

Do you have a big gala coming up to help support your giving campaign? Write a press release! Did you surpass your event goal by 20%? Write a press release. Need to increase your goal to increased need in the community? Write a press release.

You'll want to make sure you show gratitude to your supporters ("Thanks to the support of the Orlando community, etc.") *and* communicate how these funds will make a difference in your community. You're more likely to be sending a press release to local news outlets and blogs, and they'll want to make sure your news will matter to their local readership.

- **Social media.** When we were analyzing the data from nonprofits and donors across the country for our [Navigating the Unknown report](#), we did find some surprises. Social media being the # driver of charitable giving wasn't one of them! There are so many ways to share your mission and raise donations on social media. The most important things to remember are that variety (and videos, since 57% of people who watch nonprofit videos go on to make a donation) will [keep your donors engaged](#), and that there *is* a such thing as over-posting!

## 7. Thank Your Donors

Finally, one of the most important ways you can support your giving campaign is by making sure past, current, and future donors all feel appreciated. Your giving campaign will thrive if you focus on building meaningful and long-lasting relationships with donors.

You can start new donors off on the right foot by making sure to your online fundraising platform allows you to send personalized thank you emails out automatically each time a gift is made. You can even use this as the opportunity to show donors how to set up a weekly gift and become a regular giver.

For recurring donors, try updating your thank you emails once a month to reflect *current* impact from their gift. Regular, fresh updates give your donors the motivation they need to keep giving and making a difference!

It's also important to give special thought and attention to thanking long-term and major donors. Not sure how to properly thank your most passionate supporters? Check out this [dedicated guide to showing your donors love through thank you letters](#).

### Additional Resources

If you follow these tips and have the right tools, it's much easier to plan and succeed with a giving campaign. To continue your research as you create a winning giving campaign strategy, explore these additional resources:

- [INIE's Guide to Storytelling and Branding](#). Great storytelling is a major priority when it comes to your annual campaign. Explore this in-depth resource for tips to help you become a better storyteller in time for your next fundraising campaign.
- [Continuing Your Nonprofit Education](#). Continuing your nonprofit education is a crucial component of a successful online fundraising strategy. Check out these great educational events to learn more!
- [Navigating the Unknown](#). If 2020 taught us anything, it's that nonprofits need to have a plan in place for both the good times and the bad. Learn how you help your nonprofit navigate difficult times with success!

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