



WORK PLAN WORKBOOK

An interactive resource to help you create, plan, and implement your May 8, 2018 Give Local 757 campaign.

Hampton Roads' Give Local 757 is your time to shine.

Use this three-step workbook to map out goals, design strategies, and assign tasks so that you and your team are fully prepared to win big.

STEP 1: Right away, **assign a lead** for your Give Local 757 campaign. The first task of the lead is to **organize a team** of your most enthusiastic and supportive advocates (staff, board, volunteers, donors, et.) and schedule the first meeting. Make sure each team member **views appropriate webinars** before meeting.

STEP 2: At your first team meeting, **develop your plan** by completing pages 3 – 12 of the workbook and incorporate the 5 best practices. Use “5 Steps to A Successful Giving Day” handout in toolkit. **Complete plan by February 28, 2018.**

STEP 3: Activate your plan. USE the (6) checklists for each of the 6 weeks leading up to the event. The checklists are a map to planning, communications, donor, and board tasks. Use **the sample task list** to keep track of who is doing what and when. This will help ensure you are on track of all tasks.

Good luck!

Step 1: INCORPORATE THESE BEST PRACTICES

Set Goals – (pg. 3)

Engage Your Board (pg. 4)

Engage Your Donors (pg. 5)

Tell Compelling Stories (pg. 6)

Use Social Media (pg. 7)

Maximize Communication Tools (pg. 8)

BEST PRACTICE #1 – Set Your Goals

Set your goals, Goals for Give Local 757 are more than financial. Manage your expectations for setting your overall philanthropic goals that can include finding new donors, re-engaging lapsed donors, and increasing visibility through marketing and social media. Start by defining specific goal(s), and then decide how you are going to measure them. (See page 17 for a sample Giving Pyramid, a great tool to ensure achieving your financial goals).

Questions to consider when defining your Give Local 757 goals:

1. What is your financial goal for Give Local 757?

2. What is your overall donor goal for Give Local 757? Will you have separate goals for current, lapsed, and new donors?

3. What is your plan to secure a matching gift? How much do you want to raise?

4. What is your goal to increase your social media awareness?

5. How do you plan on measuring these goals?

Notes:

IDEAS:
<ul style="list-style-type: none"> ✓ 10 INDIVIDUAL FUNDRAISING CAMPAIGNS WITH A MINIMUM GOAL OF \$300 PER CAMPAIGN. ✓ 25 NEW DONORS ✓ DONATIONS FROM 100% OF CURRENT DONORS ✓ DONATIONS FROM 30% OF LAPSED DONORS ✓ RAISE A TOTAL OF \$4,000 ✓ INCREASE FACEBOOK "LIKES" TO 725 BY MAY 8TH. ✓ 100 FUNDRAISER CAMPAIGN DONATIONS ✓ RAISE \$1,000 IN MATCH DOLLARS ✓ RAISE 50 \$50 DONATIONS BY 9 AM (WIN 50/50 EARLY BIRD AND/OR GOLDEN TICKET PRIZE(S)) ✓ ACHIEVE HIGHEST # OF DONATIONS IN CATEGORY (WIN BEST IN SHOW PRIZE) ✓ 50 DONATIONS SECURED BY BOARD

BEST PRACTICES #2 – ENGAGE YOUR BOARD

Board participation is a crucial element for success on May 8, 2018. How will you engage your board and activate them to assist with your Give Local 757 campaign?

1. What will be your goal for board giving? (100% Board Giving Challenge should be a minimum)

2. What prize challenges will you and your board work on together? (Prize list in Toolkit)

3. What donor engagement strategies will your board employ? (Personal or direct asks are the most successful so they need to be ready to make those direct asks with a personal message of why they're involved with the organization and why they should give.)

IDEAS:

- ✓ RUN FUNDRAISER CAMPAIGNS
- ✓ SHARE WITH THEIR PERSONAL NETWORKS (FRIENDS, FAMILY, WORK, CHURCH, CLUBS, NEIGHBORS).
- ✓ SEND EMAIL SOLICITATIONS
- ✓ POSTS ON SOCIAL MEDIA NETWORKS
- ✓ PROVIDE A MATCH
- ✓ SERVE ON COMMITTEE
- ✓ ASSIGN PRIZES
 - NIFTY 50 - ASSIGN EACH BOARD MEMBER 10 STATES TO RECEIVE A DONATION FROM.
 - 50/50 EARLY BIRD – ASSIGN EACH BOARD MEMBER # OF \$50 DONATIONS TO REACH 50 TOTAL.

4. What communication/marketing activities (including social media) will you ask of your board?

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

Notes:

BEST PRACTICE #3 – ENGAGE YOUR DONORS

Engaging your donors before, during, and after Give Local 757 drives home the importance of donor stewardship & cultivation, and keeps them aligned with your organization for continued engagement, support, and gifts!

1. How will you engage your current donor base?

2. How will you thank your donors on Give Local 757?

3. What is your plan to thank your donors after May 8th?

4. How will you engage new donors?

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

IDEAS:

- ✓ SHARE COMPELLING STORIES THAT WILL INSPIRE NEW DONORS TO GIVE TO AND FUNDRAISE FOR YOUR ORGANIZATION.
- ✓ USE CLIENTS AS AMBASSADORS TO ENGAGE DONORS.
- ✓ RUN FUNDRAISER CAMPAIGNS
- ✓ POST ON SOCIAL MEDIA NETWORKS
- ✓ SHARE WITH THEIR PERSONAL NETWORKS (FRIENDS, FAMILY, WORK, CHURCH, CLUBS, NEIGHBORS).
- ✓ MAXIMIZE CURRENT MARKETING TOOLS
- ✓ THANK THEM LIVE ON SOCIAL MEDIA AND BY EMAIL.
- ✓ GET CURRENT SUPPORTERS TO SERVE ON COMMITTEE, RUN FUNDRAISER CAMPAIGNS, HELP WIN PRIZES
- ✓ USE CURRENT DONORS AND BUSINESSES THAT SUPPORT YOUR CAUSE TO GET THE WORD OUT.
- ✓ HAVE A PLAN FOR ENGAGING DONORS AFTER THE EVENT

Notes:

BEST PRACTICE #4 – TELL COMPELLING STORIES

To craft the most effective and compelling message, you need to know your audience. Who are they? How can you find them and how can they be your best ambassadors? Your story must be compelling and to the point. How is the community better because you exist? Who lives will be impacted and how?

1. Who are your current audiences?

2. Who do you want to target and how will you find them? Prioritize them.

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

<p>IDEAS:</p> <ul style="list-style-type: none">✓ USE CLIENTS STORIES TO DEMONSTRATE THE IMPACT DONATIONS WILL MAKE✓ DEMONSTRATE THE DIFFERENCE YOU ARE MAKING IN THE COMMUNITY.✓ DETERMINE AUDIENCES YOU WANT TO TARGET AND COLLECT STORIES THAT WILL INSPIRE THEM.✓ USE CANVA.COM TO CREATE COMPELLING POSTS AND MARKETING MATERIALS.✓ USE ANIMOTO.COM TO CREATE COMPELLING VIDEOS TO TELL YOUR STORY.✓ MAKE SURE YOU HAVE COMPELLING IMAGES THAT WILL RESONATE AND INSPIRE ACTION.

4. How can your audience act as ambassadors to spread your message?

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

Notes:

BEST PRACTICE #5 – USE SOCIAL MEDIA

For an online event, social media plays a huge role. Even if you are new to this way of communicating, Give Local 757 is the time to try something new! Utilizing Facebook, Twitter, Instagram, emails and other platforms will help you communicate to your current and future donors leading up to, during, and long after the event.

1. What social media platforms will you use for Give Local 757?

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

3. What is your strategy to win the Tag...You're It or Selfie Challenge?

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

IDEAS:

- ✓ ESTABLISH FACEBOOK, TWITTER, INSTAGRAM ACCOUNTS AT A MINIMUM.
- ✓ POSTS VIDEOS DIRECTLY, DO NOT USE LINKS. YOU WILL HAVE MORE VIEWS.
- ✓ HOST A CONTEST TO INCREASE LIKES, SHARES, FOLLOWS, ETC.
- ✓ EMPLOY AMBASSADORS (STAFF, BOARD, DONORS, ADVOCATES, ETC.) TO SPREAD THE WORK ON THEIR SOCIAL NETWORKS.
- ✓ MAKE YOU AND ALL AMBASSADORS USE **HASHTAG #GIVELOCAL757** TO COMPETE FOR "TAG YOUR IT" PRIZE AND SO THAT NEW DONORS CAN FIND YOU.
- ✓ HOST LIVE VIDEO ON FACEBOOK TO ENGAGE DONORS, COMPETE FOR FB VIDEO CHALLENGE, AND TO HELP SPREAD THE WORD.
- ✓ SELECT A BONUS HOUR TO PROMOTE DONATIONS ON SOCIAL MEDIA.
- ✓ USE CANVA.COM TO CREATE ENGAGING POSTS AND COVERS.

5. What other tools/resources 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. From email marketing to traditional marketing to using your board as effective ambassadors, use what works best for you!

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 Give Local 757 campaign?

3. What current marketing collateral can you add to your Give Local 757 message to?

IDEAS :

- ✓ BOARD MEMBERS
- ✓ AMBASSADORS
- ✓ SOCIAL MEDIA CAMPAIGN
- ✓ EMAIL CAMPAIGN
- ✓ INCLUDE IN NEWSLETTERS
- ✓ POSTCARDS
- ✓ INCLUDE ON HOME PAGE OF WEBSITE
- ✓ BANNERS
- ✓ SIGNS
- ✓ BUSINESS CARDS WITH STICKERS
- ✓ DIRECT MAIL
- ✓ LETTERS

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

Notes:

Step 2:
DEVELOP YOUR PLAN
&
STAY ON TRACK

- Set your goals (pg. 10)
- Assign tasks (pg. 11)
- What to do now (pg. 12)
- 6 Weeks Out (pg. 13)
- 5 Weeks Out (pg. 13)
- 4 Weeks Out (pg. 14)
- 3 Weeks Out (pg. 14)
- 2 Weeks Out (pg. 15)
- 1 Week Out (pg. 15)
- Day-of (pg. 16)
- Post Give Local 757 (pg. 16)

Attachments

Giving Pyramid Sample (Pg. 17)

Incentive Prize Pool (Pg. 18-19)

DEVELOP AND EXECUTE YOUR PLAN

Using your notes above, you are now ready to put it all together.

First, state your Give Local 757 goal(s) and be specific! "Raising money" on Give Local 757 is not a goal. "Raising \$3,500 through 100% board participation, 20 lapsed donors, and 25 new donors" is.

Give Local 757 Goals:

Dollar Goal: _____

Total # of Donations Goal: _____

New Donor Goal: _____

Existing Donor Goal: _____

Lapsed Donor Goal: _____

Matching Gift Goal: _____

Social Media Awareness Goal: _____

Campaign Fundraiser Goals: # of campaigns _____

of donations _____

\$ Amount Raised _____

We will compete for the following prize challenges (list available in Toolkit at givelocal757.org):

Other goals:

SAMPLE TASK LIST

	Task	Assigned to:	Due Date:	Status	Notes
Planning					
Communication					
Donor Engagement					
Board Engagement					
Donor Stewardship					

NOW (February - March) - Meet, Plan, Discuss

Successful campaigns will spend at least six weeks planning and preparing.

Checklist

- ___ Register to participate in Give Local 757 at givelocal757.org
- ___ Have staff register and attend webinar on Tuesday, January 30, 2018, 2 PM
- ___ Complete your Give Local 757 profile. Login at givelocal757.org (upper right-hand corner)
- ___ Assign your Give Local 757 Captain to serve as project leader
- ___ Complete Work Plan Workbook pages 3-12
- ___ Download all items from the Toolkit at givelocal757.org
- ___ Announce your participation in Give Local 757 to your staff and Board of Directors
- ___ Post, tweet, and spread the word on all of your social sites that you are participating in Give Local 757
- ___ Finalize goals and prizes you will attempt to win
- ___ Create target list for matching gifts and begin making asks
- ___ Create target list for Ambassadors/Campaigns and begin making asks
- ___ If not already established, create social media accounts (i.e. Facebook, Twitter, Instagram, etc.). Start posting regularly to build your audience and overall reach. Have everyone associated with your organization (board, staff, volunteers, clients, etc.) “like” your page.
- ___ Start collecting photos, stories, testimonials you will use in your posts/marketing for your campaign.

Week 6 (beginning March 26) - Preparing for Your Soft Marketing Launch!

Keep in mind that the first three weeks of your plan should be dedicated to planning and preparation. The second half of your plan should be implementing - starting with soft marketing and then transitioning into heavy marketing two weeks out.

Checklist

- ___ Confirm Ambassador/Campaign commitments
- ___ Add the Give Local 757 logo to your email signature
- ___ Add a teaser or save the date block to your website and outgoing e-newsletters
- ___ Provide Give Local 757 updates at your monthly or quarterly board meeting
- ___ Decide if your organization will host an event on May 8th

- ___ Outreach to local businesses to form partnerships and support
- ___ Create outreach strategy for current donors, finalize donor email/contact lists and make sure all information is ready to use
- ___ Determine who will run your social media campaign (staff, hired consultant, volunteer, etc.) – begin posting stories on social media using images and videos (canva.com and animoto.com are great resources). Start posting 2x a week on Twitter and 1x a week on Facebook. Use #givelocal757
- ___ Create an ongoing reminder phone call list for those who request it and need it

Week 5 (beginning April 2) - Soft Marketing Launch

Checklist

- ___ Review your profile on givelocal757.org – make sure your logo and links are working, that you have posted photos and videos and that your description details your Give Local 757 goals.
- ___ Work on your “thank you” plan for donors for day-of and post-May 8th
- ___ Boast about your Give Local 757 profile on givelocal757.org. Use it to help promote your participation
- ___ Create staffing and volunteer plan for May 8th
- ___ Implement current donor outreach plan
- ___ Decide on special printed materials and begin design & production
- ___ Continue recruitment ambassadors to spread the word on social media, emails and by word of mouth around your community and campaigners

Week 4 (beginning April 9) - Continue Soft Marketing

Checklist

- ___ Create board task list and assign to members
- ___ Distribute promotional posters, flyers, postcards, etc.
- ___ Send invites to day-of events (if having one)
- ___ Schedule key meetings with donors(pre-commitments)
- ___ Begin talking about your involvement in Give Local 757 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.)
- ___ Decide if you will have a "war room" on the day of the event where volunteers and staff can gather and work together to grow the excitement. If so, begin coordinating logistics to make that happen.

Week 3 (beginning April 16) - Prepare for two-week Marketing Blitz

Checklist

- ___ Finalize all edits to your profile page on givelocal757.org (deadline: April 20th)
- ___ Customize email templates from toolkit and schedule e-blasts 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)
- ___ Send calendar invites to hold the date

Week 2 (beginning April 23) - Two-week Heavy Marketing Begins

Checklist

- ___ Amp up social media posts – add Give Local 757 graphics found in the givelocal757.org Toolkit to your Facebook, Instagram and Twitter pages
- ___ Begin sending emails – include your goal, share a brief story and insert a call to action to give on May 8
- ___ Submit press releases and editorials to your local newssources
- ___ Make targeted phone calls to donors
- ___ Have a kickoff event and talk to donors about Give Local 757 (suggested)
- ___ Flier businesses in your area
- ___ Finalize day-of roles and staffing plan

Week 1 (beginning April 30) - Heavy Marketing Continues

Checklist

- ___ Participate in the Give Local 757 Selfie Contest
- ___ Change social media banners and avatars to Give Local 757 graphics
- ___ Continue heavy social media presence
- ___ Remind board, staff, ambassadors, volunteers and committee of roles (outreach, sending emails, etc.)
- ___ Finalize day-of event plans
- ___ Send out an email to your base of donors and partners. Include your goal, share a brief story, and insert a call to action to give on May 8
- ___ Schedule social media posts before going to bed
- ___ Prepare your own website to have Give Local 757 on the front page and direct donors to your donation page on givelocal757.org
- ___ Draft thank you template letter in preparation for many letters to send post-Give Local 757

May 8, 2018 – Hampton Roads' Give Local 757**Checklist**

- ___ Kick off at midnight with a bang! Ensure at least 10 donors give at midnight or during the first hour of giving. Participate in the 50/50 Early Bird prize
- ___ Have a team of people on duty all day and until the close of Give Local 757 including someone prepared to answer questions by phone
- ___ Send email reminders and updates to donors and prospects
- ___ Check in with all board members, staff, volunteers, ambassadors, campaigners and make sure they are ready to implement your plan. Check in with them periodically to see how the day is going
- ___ Make necessary reminder phone calls
- ___ Keep track of how well you are reaching your goals and celebrate accordingly
- ___ Be active all day on social media and provide updates to celebrate progress and milestones & create a sense of urgency
- ___ Check your donor transaction report every hour and make sure you are thanking donors in real time either by phone, social media or email

Post Give Local 757 – May 9 and beyond!**Checklist**

- ___ Get some rest!
- ___ Email, post, and tweet thank you. Communicate your success in reaching your goals
- ___ Be sure to tell the story of what your success translates to as far as the impact it will have on the community
- ___ Implement donor thank you plans (i.e. who will receive calls, send personal letters, thank you cards, emails, etc.)
- ___ Send thank you's to businesses and others that you partnered with
- ___ Send an update to your board, staff, volunteers, networks, and donors list on your results
- ___ Roll new donors into your development plan and keep-up your engagement efforts. Remember, engaging new donors is critical because when new donors are properly followed up by, they will become long-time donors who give in a variety of ways.

Setting Your Goals – Giving Pyramid

You can do predictive planning around logical paths to your goals by creating a giving pyramid. It help your team think it through and also establish very specific goals.

If your giving pyramid feels ambitious but achievable, then it is a great place to start. If it seems too easy to achieve, boost the dollar amount. Too much of a stretch? Dial back

See the sample below from the “5 Steps to a Successful Giving Day” webinar:

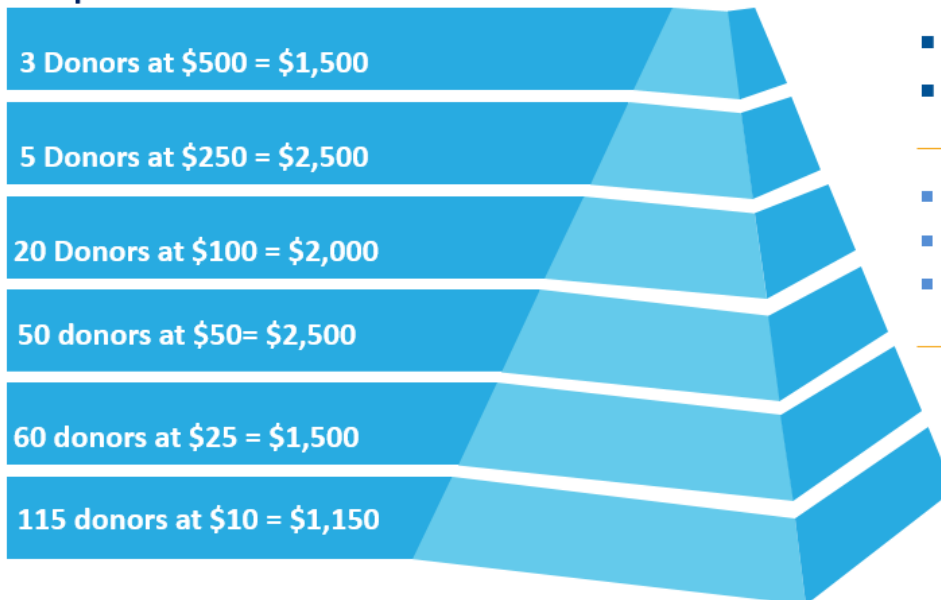
5 STEPS TO A SUCCESSFUL GIVING DAY



1. HAVE A PLAN

- Create a Giving Pyramid

Sample



- \$10,000 Goal
- 250 Donations

- \$1000 50/50 Prize
- \$757 Best in Show
- \$757 Golden Ticket

- \$11,150 Raised
- \$2,514 Prizes

\$13,664



2018 Incentive Prize Pool

(Updated 2.6.2018)

- Donor is defined as an individual or corporation/business. For purposes of awarding prizes that require unique donations, multiple donations from one donor to the same nonprofit will count as one gift.
- One organization cannot win both the 50/50 Early Bird Prize and a Grand Prize. If an organization qualifies for both, it will receive the larger Grand Prize. The 50/50 Early Bird Prize then will be awarded to the next organization on the leaderboard.
- One organization cannot win more than 2 prizes, not including the grand prizes and 50/50 Early Bird prize.
- Checks and cash donations do not qualify for prizes. Organizations are eligible for all other prizes with donations made online after midnight on May 8th.

Each Nonprofit qualifies to win not more than one of the following prizes:

Grand Prizes (4)

1st Place – \$5,000 awarded to the Nonprofit who receives the highest number of unique donations.

2nd Place - \$3,000 awarded to the Nonprofit who receives the second highest number of unique donations.

3rd Place - \$2,000 awarded to the Nonprofit who receives the third highest number of unique donations.

Fundraiser Campaign - \$1,500 awarded to the Nonprofit with the highest number of unique donations made through Fundraiser Campaigns.

50/50 Early Bird Prize (3)

The first 3 organizations to receive 50 unique donations of \$50 or more will be awarded \$1,000 each.

Each Nonprofit qualifies to win not more than two of the following prizes:

Challenge Prizes (13)

Best in Show Challenge - \$757 awarded to the nonprofit in each of the 8 categories with the highest number of unique donations.

1. Animal
2. Arts & Culture
3. Community Improvement
4. Education
5. Health
6. Human Services
7. Youth Development

New Donor Challenge - \$757 awarded to the nonprofit that receives the most new donors.

100% Board Giving Challenge - Get every member of your board to make a donation and receive an entry into a drawing to win \$757. Entries must include a list of your board members and be emailed to pcfvirginia@gmail.com no later than Friday, April 29th.

Notable Newcomer Challenge - \$757 awarded to the organization that is a first time participant in Give Local 757 and receives the highest number of unique donations.

Nifty 50 Challenge - \$757 awarded to the nonprofit that receives donations from the most U.S. states.

The MATCH Challenge - \$757 awarded to a random nonprofit chosen from all nonprofits who raise \$500 or more in matching funds. Must enter match amount in profile to qualify.

FUNdraiser Campaign Prize - \$757 awarded to a nonprofit with the highest number of Fundraiser Campaigns. Only campaigns with a minimum of 5 donations will qualify. Fundraisers may have multiple campaigns, but only one fundraiser page per nonprofit is counted towards the prize.

Social Media Challenge Prizes (3)

LIVE Video Facebook Challenge - \$757 awarded to a random nonprofit chosen from all nonprofits who host a "Live Video" on Facebook between the hours of Noon – 2 PM using the hashtags [#givelocal757](#), [#GL757LIVE](#).

Selfies for Good Challenge - \$757 awarded to a random nonprofit chosen from nonprofits who post "Selfies for Good" on Social Media May 1- 8. Selfies are pictures recognizing the Give Local event and using the hashtags [#GiveLocal757](#), [#GL757Selfie](#).

Tag... You're It Challenge – \$757 awarded to a random nonprofit chosen from all the nonprofits who use the hashtag [#givelocal757](#) on social media (Instagram, Twitter, Facebook) May 1 -8. Fundraiser Campaigns who use the hashtag will also be eligible.

Bonus Prizes (21)

Golden Ticket Prizes - One nonprofit will be randomly chosen to receive \$757 at
2:30 am, 8:30 am, 11:30 am, 1:30 pm, 8:30 pm, 10:30 pm

To qualify, nonprofits must have a minimum of 25 donations at the time of drawing.

Midnight Madness Prize, 12 - 1 am - \$757 awarded to the organization that receives the highest number of unique donations during this time.

Night Owl Prize, 3 – 4 am - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Sunrise Prize, 5 – 6 am - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Rise & Shine Prize, 6 - 7 am - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Early Commute Prize, 7 – 8 AM Prize - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Coffee Break Prize, 9 - 10 am - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Post Rush Hour Prize, 10 – 11 am - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Halfway There Fundraiser Prize, 12 pm - \$757 awarded to the organization who has received the highest number of unique donations from Fundraiser Campaigns at this time.

Lunch Break Prize, 12 - 1 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Afternoon Sprint Prize, 2 – 3 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Sunset Prize, 3 - 4 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Happy Hour Prize, 5 - 6 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

7th Inning Stretch Prize, 7 – 8 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Prime Time Prize, 9 - 10 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

Final Countdown Prize, 11 - 11:59 pm - \$757 awarded to the organization who receives the highest number of unique donations during this time.

