

# NONPROFIT FUNDRAISING CHECKLIST

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Marketing Strategies to Engage  
More Donors in 2018

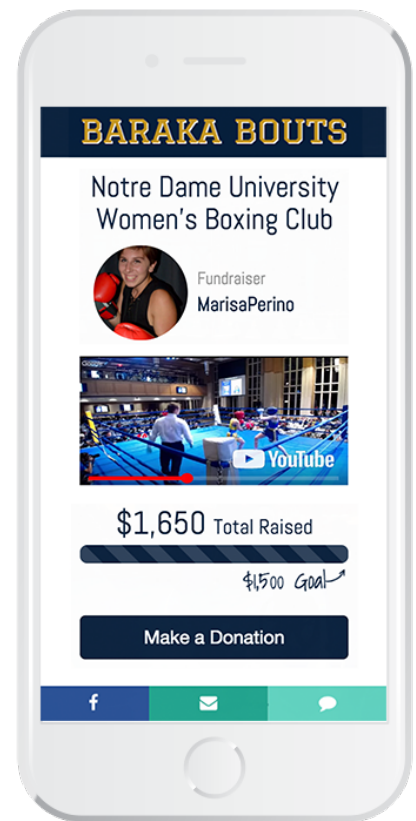




# PLAN AHEAD

## Fundraising Marketing Checklist

If you're like most nonprofits, you're getting ready for your next run/walk, event, gala or fundraising campaign. If you're thinking about the experience you want your donors to have, then you are already one step ahead! To help you engage more donors at your next event, we've created a must-do checklist to make sure you make the most of every moment with your donors.





# 1. PERSONAS

## Start with Your Audience

Identifying your audience(s) is nearly as important as identifying the benefactors of your cause. You want to make sure you understand your donors, supporters, volunteers and Board members' interests and motivations. Taking the time to create personas for your audiences will save time, effort, and guide the marketing strategies throughout your campaign. To create personas, pose the following questions to your fundraising team:

### Donors and Volunteers

- ☐ Where are they located?
- ☐ What job role do they hold?
- ☐ Why are they interested in your organization?
- ☐ How much have they donated to/supported your mission? This year? Last year? Prior?
- ☐ How do they learn about the cause you support?
- ☐ What social media outlets are they active on?
- ☐ What is their age range?
- ☐ Are they married or single?
- ☐ What level of education did they achieve?

### Board Members

- ☐ Where are they located?
- ☐ What job role do they hold? Professionally and with your organization?
- ☐ Why are they interested in your organization?
- ☐ What skills can they lend?
- ☐ Is their network a channel for support?
- ☐ What role can they play in fundraising, brand awareness or finding corporate sponsorships?

### Our Personas

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# 2. IDEAS

## Try Something New

If you've done the same event year after year and you're starting to see a drop in attendance, or if this is your first time fundraising, we encourage you to try something new. While every type of campaign can benefit from a multi-channel approach, it isn't always practical. As a start, many nonprofits elect to add text-to-give to their event promotion. Here are a few other ideas to consider:

### Ideas

- ☐ Keyword and short code
- ☐ Social media sharing links
- ☐ Mobile messaging
- ☐ Digitized direct mail
- ☐ Peer-to-peer fundraising
- ☐ Live event thermometer

### What is Text-to-Give?

It's a simple equation: the more people who know about your text-to-donate campaign, the more funds your organization can raise to help further your mission. Text-to-donate can be strategically promoted across every channel your organization uses, from direct mail and email to social media. By using your organization's verified mobile numbers, you are guaranteed to reach almost every single recipient of your text-to-donate campaign with your fundraising message and call-to-action.



### Our New Ideas

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# 3. GOALS

## Set SMART Goals

Before you start writing an ever-growing 'to do' list, set SMART goals for your event. Different than activities, goals give you and your team a shared purpose to work towards (i.e. build 100 more homes, protect 50 more children, give 100 animals a new home, grow in community).

Follow this rule of thumb for setting attainable goals:

### Specific

Your goal should be clear and communicate your intended outcome, why it's important, who are the benefactors, who are the contributors, and any potential risks.

### Measurable

Your goal should have metrics that can be measured to demonstrate progress. Common goals are:  
# of new donors, # of volunteers signed up, \$ money raised and # of recurring donations

### Attainable

Your goal should push boundaries but also be realistic to attain. This helps maintain momentum and encouragement throughout the campaign.

### Relevant

Your goal should not only matter to your organization, but also to your donors. Make sure you close the gap between the ultimate need and the means to fulfill it.

### Timely

There is no better time than now to get started on donor engagement. Create a sense of urgency with a start and end date.

SMART  
GOALS

### Our Goals

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## Design a Clear Call-to-Action

Here are a few calls-to-action to consider:

- ☐ [Donate Now](#)
- ☐ [Join Our Movement](#)
- ☐ [Sign Up \(newsletter, blog, event\)](#)
- ☐ [Volunteer](#)
- ☐ [Give Today](#)
- ☐ [Download Guide](#)
- ☐ [Follow Us \(social media channels\)](#)
- ☐ [Attend Information Session](#)
- ☐ [Become a Member](#)
- ☐ [Become a Sponsor](#)
- ☐ [Learn More](#)

The image displays two mobile devices showing the CHOC Children's website. The smartphone screen shows the homepage with a donation form. The tablet screen shows a page for the 'CARLY the CHOCO FACTORY' event, including event details, sponsors, and a ticket purchase section.

# 5. THANK YOU

## Thank Your Supporters

While the art of showing appreciation has lost its depth in today's fast-paced world, you don't want to lose this opportunity to build a long-term relationship with your donors. After weeks and months of planning your campaign, it can be hard to see through to after the event to thank your donors. But, this is a very vital step in growing your donor base. It's no secret that when donors feel recognized, appreciated and see the impact their money makes, they will give again. Here are a few simple, but meaningful ways to thank your donors:



### Send a Video

If you're an Executive Director or member of your organization's fundraising team, use video to say thank you, share the impact their contributions will make and call out a few notable donors to personalize your appreciation.



### Write a Letter

Use free e-thank you notes from sites like [gratefulness.org](http://gratefulness.org), [paperlesspost.com](http://paperlesspost.com), [smilebox.com](http://smilebox.com) or [hallmarkecards.com](http://hallmarkecards.com) that are nicely designed, expresses your sentiment and allows you to upload your list and send quickly.



### Digital Donor Wall

Create a section on your website that recognizes all your donors. Have a running list of contributors, categories and profile key donors with their pictures and why they give to your organization.

### Our Thank You Plan

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# 6. SOCIAL MEDIA

## Share Your Story on Social Media

One of the best ways to ignite passion with supporters is to use the power of social media to share your story. Despite the recent changes to the Facebook algorithm, more than 57% of donors give to a cause after watching a video about an organization's mission on social media. Are you maximizing your reach on social media? Here are a few tips to consider:



### Donate Directly from Your Facebook Page

Make it easy for your followers to donate by including a donation page link in your posts or embed your form within Facebook. You can also have your Donate Now button link to your website donation page.



### Boost Donations with Images and Hashtags

Use a hashtag to promote your organization or a specific campaign so your supporters can spread the word and you can track campaign performance easily. Use images and videos to bring your campaign to life.



### Enable Social Sharing for More Reach

Get your campaign in front of more people by promoting your social media links on all of your communications – text, email, direct mail, blog posts, website, events, radio or TV appearances, etc.

### Our Social Media Plan

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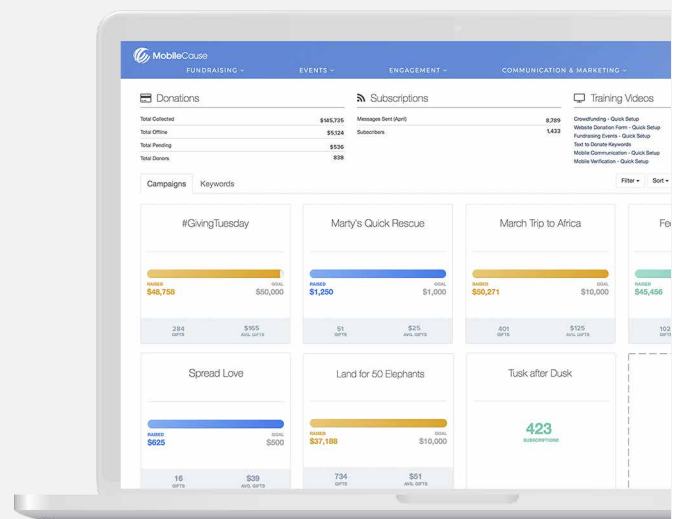
## Measure and Track Campaign Results

You may be thinking, I know how much I raised, what else do I need to track? Data and analysis are powerful tools that can help you develop better donor relationships, raise more money, build a larger donor base and offer many other benefits. All you need is a simple system to track and report on campaign results. The Top 10 metrics that your Board (and donors) care about, include:

## Top 10 Metrics

- ☐ Fundraising goal
- ☐ Amount raised (increase/decrease from previous campaigns)
- ☐ Number of donations (increase/decrease from previous campaigns)
- ☐ Percentage growth in number of donors
- ☐ Impact (how did the money help)
- ☐ Average donation amount
- ☐ Pledge fulfillment percentage
- ☐ ROI (total fundraising minus expenses)
- ☐ Donor retention rate
- ☐ Number of recurring donations

## Reporting



## Our Metrics

# 8. MISSION

## Deliver Funds to Fulfill Benefactor Needs

Now that you have the funds needed to fulfill your benefactors' needs, you can share the moment that you deliver the resources with your supporters. One of the most powerful examples of this is using Facebook or YouTube Live. For example, if you are an organization that is helping with recovery efforts from a natural disaster, you can hit record from your smartphone or your tablet and your donors (who may be located miles away) can watch their donations live at work.

Seeing families given essential supplies, or children given a toy at the moment it happens, closes the gap between your donors and your mission. It's incredibly powerful to use technology to make more meaningful connections with your donors. It doesn't take much to share this moment, but here are a few steps to keep in mind:

### Capture the Moment

To give your donors a sense of the impact and give more meaning to their gifts, a little pre-staging can go a long way.

- ☐ Tell them through text, email or social media when you'll be delivering the goods or the funds so they can watch it live.
- ☐ Use a keyword and short code to learn more or inspire more giving (i.e. Text UNITED to 41444); this sends them a text message with a link to an online form.
- ☐ Focus on the benefactor but don't be too invasive with photos or videos of their experience; share their story and gratitude on all your communication channels.

### Logistics

Create a shipping and packing plan if your campaign called for supplies. You can also fundraise to cover shipping and packing costs and ask for volunteers to help you pack.

### Peer-to-Peer Fundraising

If you ran a peer-to-peer or crowdfunding campaign, you could invite your top fundraiser to join you to meet the benefactors and create a more personal experience for them.

### Our Disbursement Plan

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# 9. REFLECT

## Take Time to Reflect

We often don't take time to reflect on what went well for campaigns and what did not. You always want to be learning and evolving your fundraising and engagement strategies. Try some of these ways to reflect on your campaign:

Reflection Ideas

☐ Meet with your team to get their feedback

☐ Talk with your donors to ask them why they gave

☐ Spend time with your benefactors to hear how you made the most impact

### Re-cap Plan to Review Campaign Successes and Areas for Improvement

Activity	Goal	Results	Notes

# 10. SEO

## Build Authority on Your Website

Are there topics or keywords that are synonymous with your organization's brand? You can be found by interested supporters if your website URL appears higher in a search engine's results. For example, if your organization supports health-related issues, ensure that you are creating educational content on your website that connects your organization with the topic and helps your website be discovered via relevant search results. Google Analytics makes it easier to learn what your audience is searching for and how to expand your reach through the power of SEO (search engine optimization). To start with the basics, you can:

### SEO Basics

- ☐ Be an administrator on your website's Google Analytics site
- ☐ Use Google Analytics to better understand what your donors are looking for
- ☐ Try it out yourself: type in relevant words or phrases and see where your website ranks
- ☐ Develop content to post on your website and share via social media to drive up your search engine rankings
- ☐ Create topic clusters to help search engines find your site relevant to what your supporters need
- ☐ Write evergreen content or blog posts about specific topics to help reinforce your authority on those topics
- ☐ Identify and assign 3-4 keywords to specific pages on your website through content mapping to maximize your exposure in search results

### Our SEO Plan

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Changing the world for the better is not an easy task, but is an important journey to creating a better balance in our society.

Those in need, need you more than ever. Use this guide to help you plan and try new approaches, such as text-to-give, online and peer-to-peer fundraising to boost your efforts and make an even greater impact on the world.

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## About MobileCause

MobileCause provides an innovative suite of digital fundraising and donor engagement solutions that help nonprofits do more good with a full suite of customizable, mobile-friendly solutions including online forms, fundraising events, crowdfunding, campaign promotion, data management, and credit card processing with zero transaction fees. MobileCause is trusted by thousands of nonprofit organizations.

For more information, visit [mobilecause.com](http://mobilecause.com), call us at **888.661.8804** or email us at [info@mobilecause.com](mailto:info@mobilecause.com).