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# The End to End Fundraising Campaign Workbook

# Foreword

**This guide and workbook is designed to help you turn your mission, idea, or project into a successful online fundraising campaign. We encourage you to print this. No, seriously. Hold it, write on it, and take it with you. Think, learn, scribble notes, and follow your questions. It's your new friend! Others have done this, and you can, too.**

**Set aside 30 minutes each day to work on your campaign and it will all get done. By reading this, you're already doing it! So let's keep it going.**

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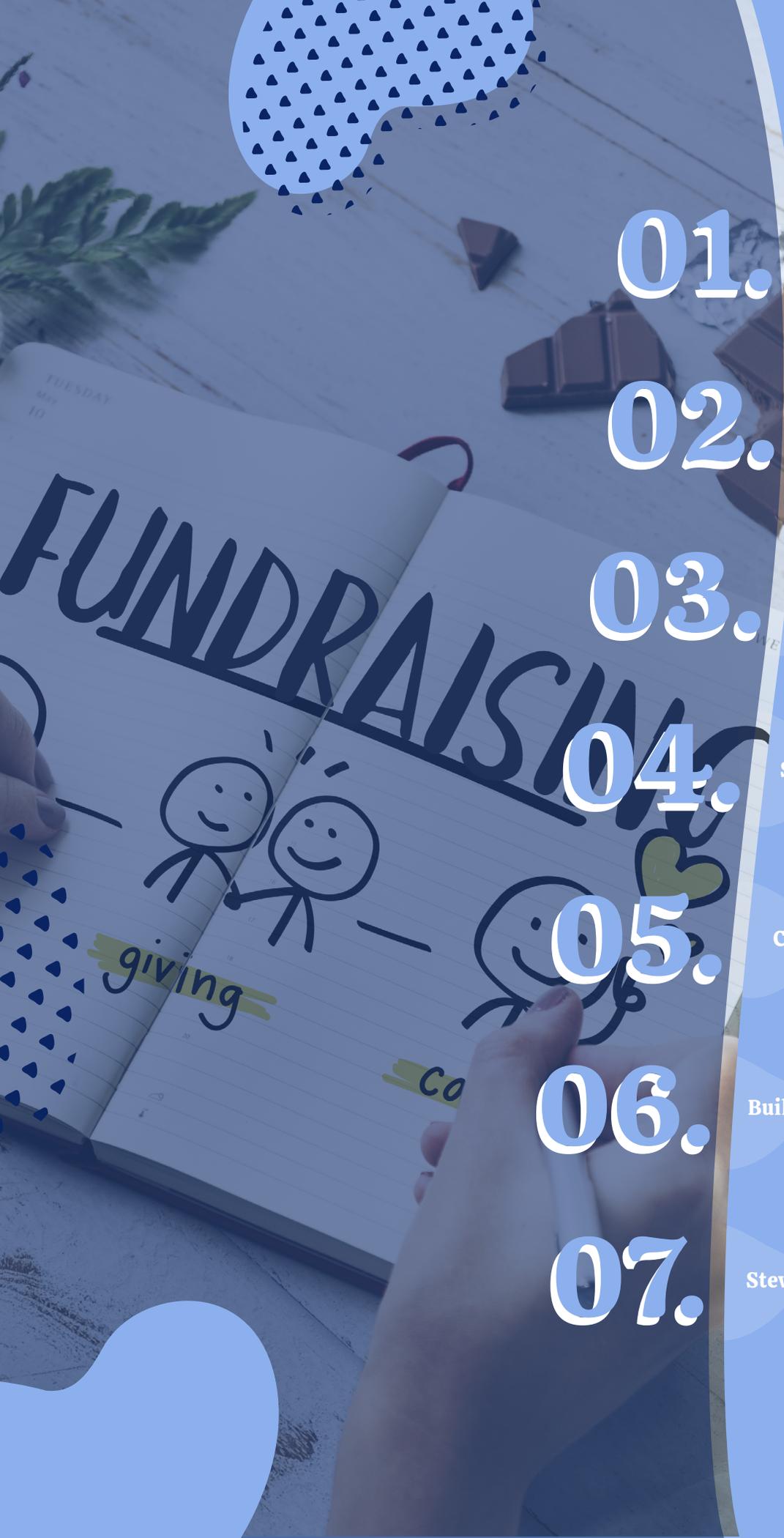
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# **Identify Amazing Stories at Your Organization**

01.



The importance of having a variety of funding opportunities and narratives cannot be overstated. Gone are the days when the majority of an organization’s supporters give annual gifts out of loyalty to an unrestricted or general fund. Today’s supporters want transparency, they demand accountability, and they expect more impactful results from their gifts. They want to know they’ve made a difference!

Diversity in stories allows the various aspects of good your organization is doing to all take center stage. And showcasing a variety of storytelling voices allows you to reach and connect with a diverse audience of supporters.

When it comes to finding these stories and storytellers, internal promotion is key. By first looking internally, you’ll be able to build awareness and excitement about your fundraising, develop an administration team to showcase your opportunities, locate your first storytellers, and gain important feedback and traction for your campaigns before they’re made public.



Where do you find your storytellers? Meetings with department heads, boards of directors, employees, and stakeholders is a great place to start! In-person meetings provide a unique opportunity to brainstorm and spitball ideas. Consider opening a meeting with an exercise.

### **Objective.**

Start to identify the philanthropic passions of people within the room.

### **Exercise.**

- 1.** Pose the question, “if you were given \$1,000 and you had to give it away, how would you spend it?” There are no limits or restrictions on where those funds can go. They can be to your organization or to elsewhere. Give people 5 minutes to think and jot down any/all places they’d gift these dollars, one post-it per idea.
- 2.** Go around the room and have each person share where they’d contribute their gift(s) and place their post-its on a wall or board. You’ll likely have a broad spectrum of passions represented. Notice that very few people will present their area of interest in a way that sounds like they’re begging for crumbs. They’ll talk about these opportunities with tenderness, compassion, enthusiasm, and a sense that the organization or team they’re supporting is tackling an important obstacle.

3. | As a group, organize the post-its into themes. Are there any large categories like emergency relief, kids, social justice, or community building, that emerge?
4. | Looking at the large themes, are there stories to be told or giving opportunities that already exist with your organization that pertain to these areas of passion?
5. | Of the stories that are identified, who are the best people to tell the story?

**Results.**

| Contribution Areas | Theme(s) | Similar Stories at Your Org | Storyteller Candidates |
|--------------------|----------|-----------------------------|------------------------|
|                    |          |                             |                        |
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This exercise is wonderful at moving people away from titles and roles and towards what makes each person a feeling, caring, inspired individual. By sharing with the group, stories naturally emerge and the group starts to better understand the “why” behind the gift. The team in the room will start to identify larger themes that are meaningful to the group, and the exercise will ultimately transition into the current stories and existing opportunities within your organization.

Consider making this kind of brainstorming part of a quarterly or biannual strategy to identify opportunities. This can also be incorporated into an internal roadshow where meetings are held with all departments to introduce (or remind people about) the fundraising strategy, discover ideas, and develop a plan for which stories to bring to life.

Personal meetings are some of the best ways to discover not only ideas, but the people best suited to tell them!

### **Other Ways to Collect Stories.**

- 1. Physical or digital message boards.**  
If you have a place where people see announcements, make sure people know that you’re accepting ideas and list your contact information. If there are common areas like lobbies, a break room, etc with a means of posting messages, make use of them.



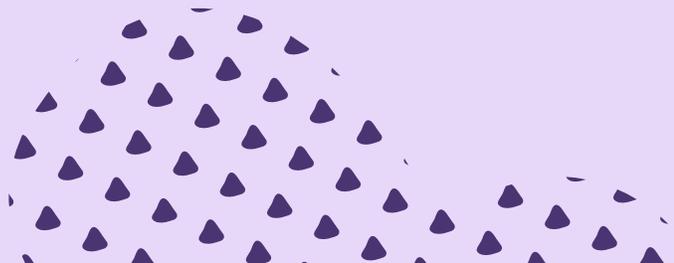
- 2. Intra-office communication.** If HR needs everyone in the organization to sign a document, what channel is used to communicate with the team? Use that channel to let people know that they can submit ideas. Do you have a messaging resource that can blast a provocation to everyone? Is there a company-wide distribution list for email that can be used?
- 3. Stall Street Journal.** If your organization is particularly large, you might have announcements displayed in bathrooms or on the back of stall doors. That's valuable real estate!
- 4. Digital boards in elevators.** Take advantage of a moment of quiet to make sure people know that you're open to ideas and want to help people build and showcase their opportunity.
- 5. Tabling events.** If you have community events where people can learn more about various opportunities, make sure to have a table/booth and some information that can be provided about how to submit an idea to be showcased. Don't narrow your focus to just the foot traffic at the event, also talk with other groups that have tables. Make sure that these groups/teams/organizations know about your organization's fundraising program and start thinking about the needs that they have that could be fulfilled by sharing their story.
- 6. Analyze your previous efforts.** If you have previous efforts to reflect upon, look at what causes or events have done really well. Chances are, there are already passionate storytellers for these opportunities. You should also look at initiatives that didn't gain traction; are there different storytellers or a different, more compelling way to tell the story that might better engage people? Some coaching might make all the difference!
- 7. Look at current needs.** Consider ways to wrap a new or different story around already identified needs.



# Define Your Campaign Narrative



02.





Now that you have a list of story ideas, it's time to select those that are the most compelling and flush out the narrative you will present to inspire support. The following ten steps will help you define the narrative of your campaign.

1. Focus Your Vision. Here is your blank canvas of infinite possibility... what will you create?

**Hint:**

Use this space however you'd like to start making notes, sketching the moving pieces on mapping out the course of your project. There's no wrong way to do this!

2. Distill it down. What is your campaign for / about?

3. “Moan Session” Before we focus on solutions, what’s the problem? What do you hope to change with this campaign? What’s in the way? Go ahead, let it all out!

4. What benefits do you want to gain through this campaign?

- Build a community of followers
- Market your org / group / project
- Crowdfund ideas & feedback
- Attract sponsors / collaborators
- Tell your story more effectively
- Centralize your communications
- Presell products / rewards
- Collect funding from my network

List Others Below:

5. “Solution Session” How will this campaign solve some of the problems you discovered above? What do you need? What is the bigger issue you could solve?



6. What impact will be created when someone supports your campaign?



7. Give your campaign an inspiring title! Your campaign’s title should be 7 or 8 words long and read like a rallying cry to inspire supporters to contribute and share the campaign.

Here’s a little exercise to help you brainstorm elements of your campaign’s title:

- a. Action Verbs: (What is your campaign doing?)
- b. Subject / Who / What: (What is your project about?)
- c. Impact: (What’s the outcome? What will supporters be a part of?)

Now, put these elements together to create an inspiring campaign title:



**8.** Create your campaign's summary. Your summary is a short (140 character) description that builds off the title to focus on what you want people to do and the impact that will have.

- a.** Call to action: (Help/join us, support the... , engage in... etc.)
- b.** What the campaign/project is doing
- c.** The impact/outcome

Now, put these pieces together in an inspiring <140 character summary:

**9.** Now let's tell your story. Your fundraising campaign's description should read like a story and provide the basic details your supporters will want to know before they open their wallets and grab a credit card. Bring excitement into your writing and push people into action!

Here's one of our favorite formulas to get you started:

- a.** Define a character or characters. Who's involved? What's their backstory? What are their hopes and dreams?

- b.** Present conflict. What's standing in the way of their dreams? What is the problem?
- c.** Inspire Action. "Together, we can overcome [the conflict] and help [the characters] do x, y, z."
- d.** Make The Ask. Tell the audience what to do. "Donate now and reach out to three other people you know will support it."
- e.** Show the impact. Tell the audience what impact is made in the world because of their support. "Because of your support, these children will finally be able to..."
- f.** Leave them wanting more. Let the audience know this is an on-going story and that they should keep checking back for updates.

And here are some key tips to keep in mind:

- a.** If you aren't ready to write the whole story yet, that's ok! Skip it for now and focus on your goals and community building. The more understanding of your audience you have, the better your story will be. Look at other successful campaigns for inspiration and collaborate with your team to pull together ideas, images and text. It may evolve between now and your campaign's launch as you get new ideas and talk to more people!
- b.** Your campaign should be specific to your audience. Avoid being overly general and address the specific groups you will approach. How can you make this personal, interesting, and important to them?
- c.** Your story should be short enough to skim (300-500 words with lots of pictures and graphics!) and include the basics of why, what, who, how, and a direct ask for support.



Go ahead, take a stab:

**10.** You're off to a great start! Now complete this checklist before you move on:

- Find 3-5 other fundraising campaigns online for inspiration. Take notes on things you see or like. Try to pick a variety of successful and unsuccessful campaigns and read their titles, descriptions, and watch their videos. What do you notice? What can you do to emulate them or avoid their pitfalls?
- Draft out your campaign title and summary This isn't final, but it will help you talk to more people and get ideas and feedback.
- Tell a colleague, friend, or loved one or two that you're thinking of running a fundraising campaign. Share your ideas, get their feedback, and add their ideas to your thoughts in this section.
- Get a small notebook or start a digital note on your phone where you can collect ideas when inspiration strikes. Trust us, you'll be getting new ideas all the time!



# **Assemble Your Team**

03.





Teams raise over 3x as many gifts as people working solo. The additional minds can add creativity and color to storytelling and there's diversity in skills surrounding needs like image creation, video, social media outreach, budget creation, etc. Plus, each person has their own audience they can reach out to!

There are a few essential positions that every team will need to fill, although who fills these roles may look different depending on your internal team, campaign, and resources. You may need to combine several positions into one, or add a role that is not listed here; you may even end up with smaller sub-teams under the umbrella of your main team. Personalize the roles and duties to best fit your project and optimize your productivity.

Whatever your launch team looks like, think critically about what work needs to be done and how it can be delegated to various team members. Think also about what kind of time commitment you can reasonably expect from each of your team members.



Consider the following roles as a starting point:

▶ **Campaign Lead/Project Manager/ Team Leader.** This person is in charge of the direction of the project and the team as a whole.

**Key responsibilities include:**

- Determining the vision and setting goal(s) for the overall initiative
- Delegating tasks
- Leading meetings
- Maintaining a project plan, including progress status
- Communicating between team members, staff, volunteers, and other involve parties

▶ **Marketing Lead.** This person takes the vision and goals of your overall initiative from the Project Lead and shares them with the world. They should expect to work closely with your Project Lead and Social Media Lead.

**Key responsibilities include:**

- Making your initiative known and visible
- Using a combination of social media, email, direct mail, media mentions, advertising campaigns, and event promotion
- Planning the communications schedule
- Increasing awareness through any and all channels
- Employing clear Calls To Actions (CTAs)





▶ **Content Collector.** This person works with video and photography to provide visual materials for your campaign. It is important to have this person for any events that will fall in the days or weeks leading up to your launch, as those events allow Content Collectors to take pictures or recordings of people actually engaging with your organization.

Content Collectors may also be able to compile promotional videos or gather quotes from those who interact with your project or projects. This role lends itself to a small team rather than an individual. Your Content Collector(s) should work with your Project Lead, Story Curator, Marketing Lead, and Social Media Lead to provide and curate imagery and videos for your initiative.

**Key responsibilities include:**

- Taking photos or video at events
- Curating photos from previous events, if archives exist
- Gathering photos from volunteers or participants

▶ **Story Curator.** This person determines the story of your campaign and organization. The narrative they craft should be compelling. They can expect to work closely with your Marketing Lead and Content Collectors to ensure that all stories are ready to go in a timely manner and are told in a way that moves people to act.

**Key responsibilities include:**

- Writing copy
- Collecting visual media
- Conducting interviews





▶ **Social Media Lead.** This person runs your campaign's social media accounts. While this position would be easily combinable with the Marketing Lead, it might be helpful to have multiple team members working in this role, especially if they have expertise with specific forms of social media. If you have a small team of social media gurus, elect a point person to ensure consistency across the various platforms or involve a volunteer or brand ambassador. The Social Media Lead should expect to work closely with the Project Lead, Marketing Lead, and Content Collectors.

**Key responsibilities include:**

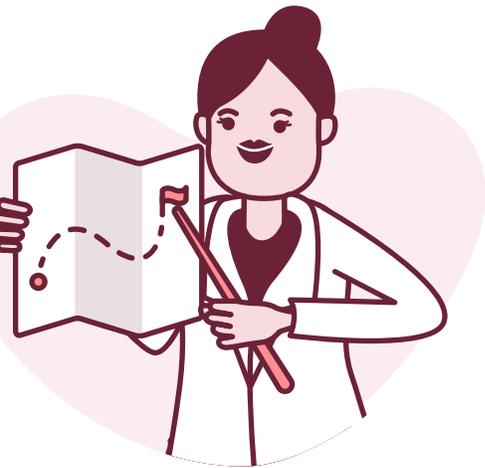
- Drafting or collaborating on content
- Executing best practices for timing and framing of content
- Interacting with your network to maximize engagement

▶ **Matches and Challenges Coordinator.** This person reaches out to potential leadership and major gift donors to organize matching contributions or challenges. Some donors may stipulate how they would like their gift to be used, but if not, it is up to the Matches and Challenges Coordinator to determine how that gift could most effectively increase giving. For challenges, consider engagement, new donors, total donors, and total donations as possible goals to unlock a challenge gift. This person should expect to work closely with the Project Lead and Stewardship Ambassador, as well as the Marketing and Social Media Leads to promote the challenge once a donor has been secured.



### Key responsibilities include:

- Maintaining a database of current and previous large gift donors
- Reaching out to potential large gift donors
- Determining matching and challenge criteria
- Promoting challenges and matches leading up to and during your giving event



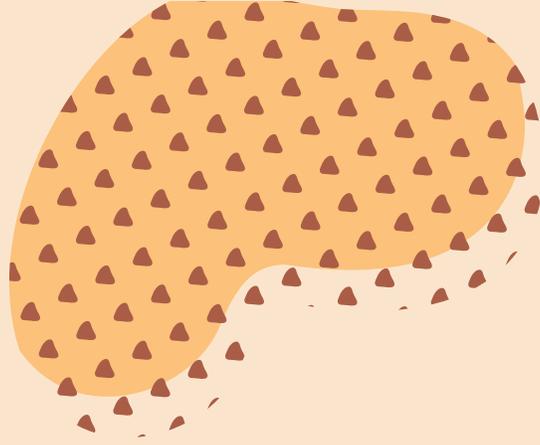
▶ **Stewardship Ambassador.** This person plans and creates the stewardship journey for your donors. Depending on your organization it may be a full time role, a partial role, or an additional responsibility. However, the more love you can give this effort, the more love you will receive from your supporters in the long-term!

### Key responsibilities include:

- Creating a Stewardship timeline for follow-up communication post event, X number days following, and up to 6 months afterwards
- Identifying the best channels through which to thank donors
- Creating copy for the thank you message or working with others to deliver a personalized experience
- Determining visual content to go with the thank you message, such as a video, photo, or carousel of images
- Maintaining segmented lists

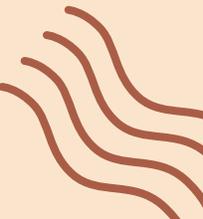
Try filling in needed roles for your team below. Remember to consider how time-intensive a given role might be so that you properly delegate responsibilities.

| Task                            | Title         | Assigned Person | Time Intensiveness |
|---------------------------------|---------------|-----------------|--------------------|
| Staffing and Project Management | Campaign Lead |                 | High               |
|                                 |               |                 |                    |
|                                 |               |                 |                    |
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## **Set Your Fundraising Goal**

04.





A realistic fundraising goal can make or break a great campaign. Set a goal too low, and people might not know that there's more good you can do with additional support. Set a goal too high, and you risk overwhelming your audience with the magnitude of your challenge.

In this section, we'll learn how to establish ambitious yet attainable goals, develop a budget, and avoid pitfalls.

### **Consider Costs and Budget.**

It's easy to determine a goal when there's a set cost that you need to meet in order to bring your project to life. This might look like:

1. | The cost of travel to an event, accommodations while there, and admission
2. | A number of opportunities you'd like to be able to provide

- 3. | The cost of materials for a building project
- 4. | The price for the new piece of equipment you'd like to purchase

A helpful exercise is to sit down and create a budget. As you think about your project, what are all the different components that have expenses?

- 1. | Do you have to get to the airport?
- 2. | Will you have to ship/mail items to the destination of the competition or presentation?
- 3. | How many people are you supporting?
- 4. | What are the different materials you'll need to create the thing (tiny home, race car, aquaponics system, etc.)?



Try laying out the expenses you will have below. The more detailed you are, the better idea you'll have about the minimum amount you'll need in order to be successful, as well as an idea about stretch goals that will allow you to achieve more or enhance your efforts.

| Expense Description | Expense Amount |
|---------------------|----------------|
|                     |                |
|                     |                |
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|                     |                |
|                     |                |

## SMART Goals.

If your campaign doesn't revolve around set costs, it's time to discern what a realistic amount to ask is. It's easy to set pie-in-the-sky goals, but if you want results, clarity is key. If a goal is SMART—specific, measurable, attainable, relevant, and time-bound—it is well defined, within reach, and it makes it easy to focus on the steps needed to achieve success.

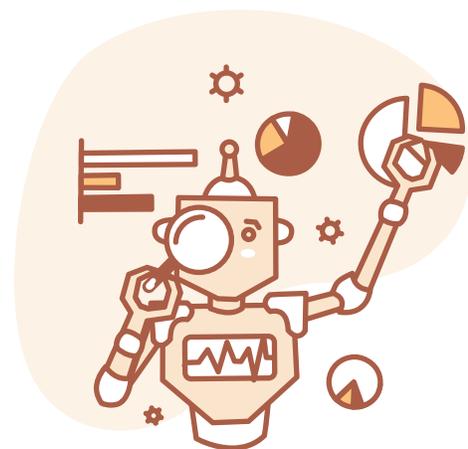
Let's dig into each of the criteria:

- ▶ | **Specific** - know exactly what you're trying to achieve.
- ▶ | **Measurable** - establish milestones and criteria by which you'll know when you've achieved your goal. Most teams measure their success by financial milestones. And those that post their goals and illustrate progress **raise 35% more** than those that keep the goal hidden.
- ▶ | **Attainable** - make sure your goal can be reached. Of the campaigns that achieve their goals, **72% raise between \$1-10,000** and \$5,000 is the average raise amount. Don't set yourself up for failure with a goal you can't hit (**61% of campaigns fail**)!
- ▶ | **Relevant** - make sure the goal is impactful for your project and is aligned with your mission.
- ▶ | **Time-bound** - set a timeline with an end date. There's a common misconception that the more time you give people to give, the better. In reality, there is a spike of activity in the first 3 days of a fundraising campaign and again in the final 3 days. The valley in between these peaks can take an emotional toll; make it short! A sense of urgency is what gets people off the fence and involved with your project. Set the length of your campaign to 30 days or shorter if possible.

Remember, ambiguity is the enemy as you define your goal with clear, concrete milestones. Be as clear and precise as possible.

### Calculate Your Reach.

Now that you have your budget determined, it's time to see if the figure is realistic, given your marketing reach. Keep in mind that 80-90% of the funds that you raise will come directly from the marketing efforts of your team. The bigger your audience, the larger your reach!



Work through this exercise:

**1.** How much will you ask for?

**2.** Divide that amount by \$50. Average online crowdfunding donations range from \$25 - \$80. This is the number of \$50 donations you will need to reach your goal:

**3.** Divide that number by .25. Assuming that 25% of the people who are driven to the page will donate an average of \$50. Note that actual conversion rates are around 4% for twitter clicks, 10% for Facebook clicks and 50% for personal email appeals to friends and family. This is the number of people who will need to visit your campaign page:

- 4.** Divide that number by .85. 80 - 90% of the funding a campaign receives is from donors who are driven there by the direct marketing efforts of the campaign team. Only 10 - 20% of donations come from donors who find out about the campaign from other sources. This the number of people your marketing must drive to your campaign page:

What was your final number? Between the members of your team, do you have enough contacts to realistically reach your goal?

One way to determine this is to open your social media accounts that you plan to use for outreach, as well as your email account(s)/ database, and jot down the following:

- a.** Number of people you plan to send a personalized email:

- b.** Number of Facebook friends:

- c.** Number of likes on your group/organization's dedicated Facebook page:

- d.** Number of Twitter followers:

e. Number of Instagram followers:

f. Number of Youtube subscribers:

g. Number of LinkedIn connections:

h. Number of monthly visitors to your blog/website:

Does the number of people you'll need to reach seem more attainable now that all your channels are mapped out in front of you? If not, start over until you reach an amount that makes sense for your network.

### Calculators.

If you're still wondering if your goal is realistically attainable, here is a **great tool** that takes into consideration your team size, amount of time you have to prepare, as well as your various channels of outreach.



## Stretch Goals.

When it comes time for gifts to start coming in, you may find your campaign reaching your goals quickly. It's an incredible feeling to find success early! But motivating donors to continue giving after a goal has been reached is tricky.

Stretch goals are all about communicating with your donors, so they should have an outward impact. Your donors don't care as much about some of the metrics that are important to your in-house team, like average gift size and conversion rates. Show them how an additional contribution will move your efforts forward.

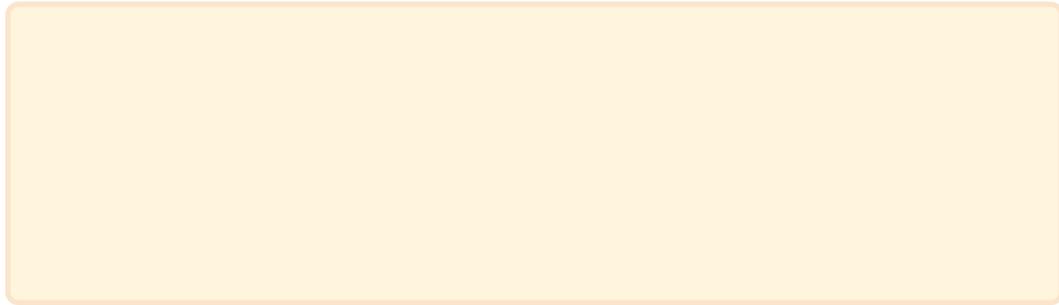
If you're fighting food insecurity, how much do you need to raise to provide an additional 50 or 100 meals? If you're planning a community garden or a new building, could additional funding allow for additional features or a larger space?

While your main goal should be challenging but attainable, stretch goals allow for an added level of ambition. Your primary goals should get you to a place where you are pleased with what you can accomplish; stretch goals can push that to the next level, so bring out those pie-in-the-sky, best-case scenario plans.

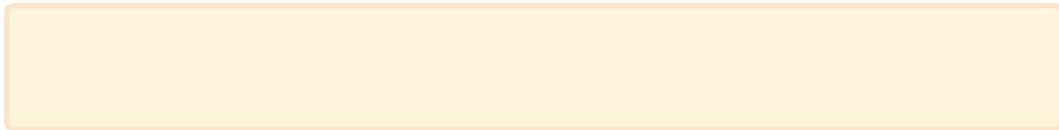
1. List additional things you **WANT** to have that go beyond your core objectives:



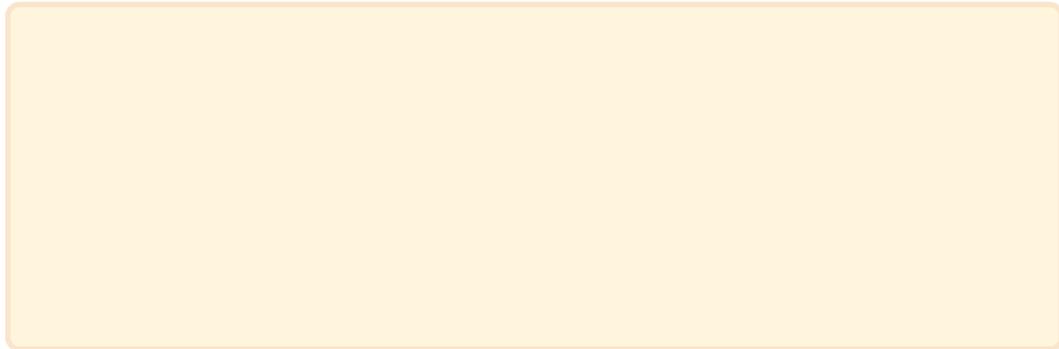
**2.** What's the impact these items would have in the world?



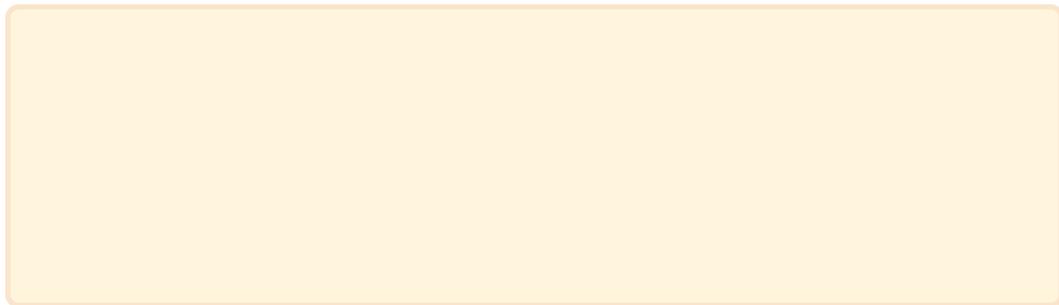
**3.** How much would these cost?



**4.** Go nuts: List things you WISH to have assuming "anything is possible"



**5.** What's the impact these items would have in the world?

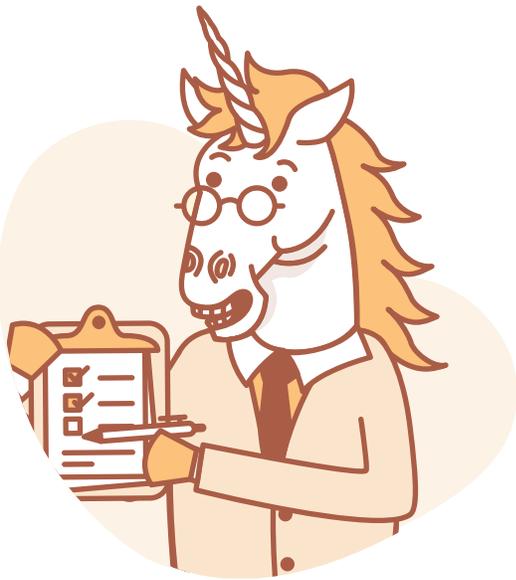


6. How much would these cost?

A powerful approach is to set your initial goal conservatively (while still covering your bare-bones needs) and intentionally plan stretch goals to release as soon as you reach each milestone.

This will do a few things:

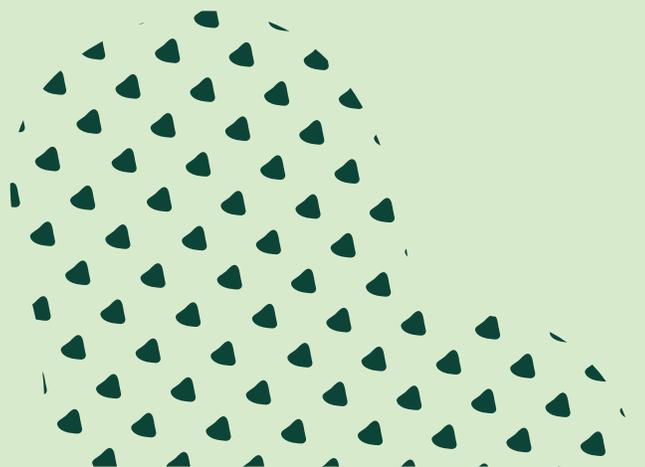
- ▶ You'll jump out and show more dramatic success faster (the sooner you get to 30% of your initial goal, the better).
- ▶ Your success will demonstrate proof that people trust your team and believe in your project.
- ▶ It will give you a great reason to reach out to your supporters with updates once you're ready to announce your next stretch goal. They want to hear about your success!
- ▶ You'll have the opportunity to ride the wave of excitement as you crush through your initial goal(s).

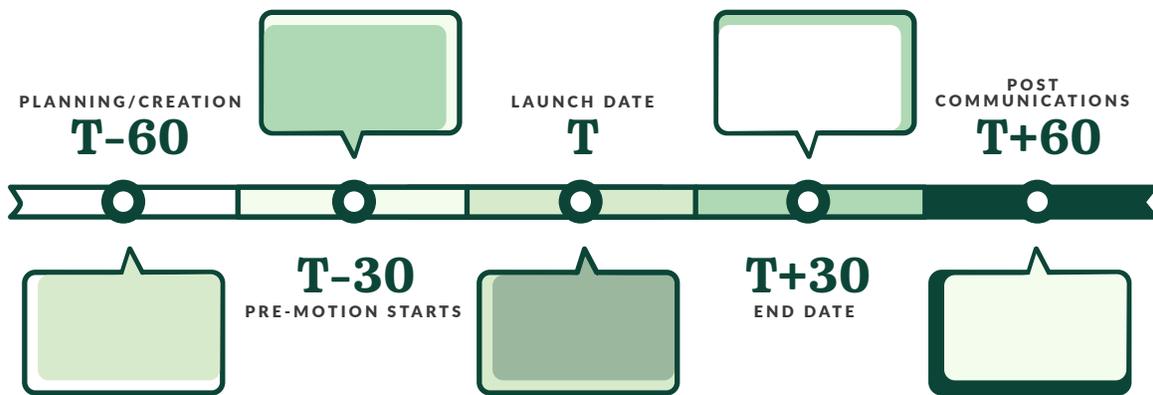




# Create Your Timeline

05.





Create a timeline:

1. Enter your desired Launch Date (T) in the center box above.
2. Subtract 60 days from your launch date and enter it into the box on the left. This is when you should start planning. Make sure you have at least 2 months before your campaign is planned to launch to prepare.
3. Subtract 15-30 days from your launch date. This is when you should begin pre-promoting your campaign at a minimum.

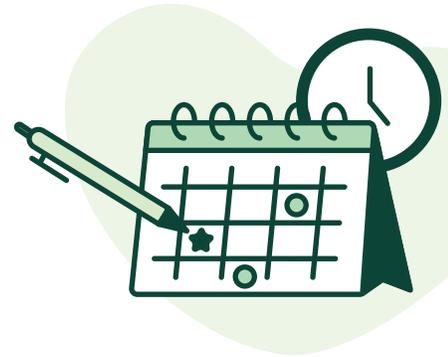
4. Add 30 days (or your campaign's duration) to your launch date to determine your campaign's end date. Pro Tip: Shorter is better. Short timelines leverage urgency to motivate donors. 30 Days is the gold standard for great campaigns.
5. Add 60 days to your launch date and enter it in the box on the right. This is when you should conclude your follow-ups and thank-you's because you want to make sure you keep updating your supporters long after your campaign ends!

### Key Milestones.

Once you have these general dates set out, it's time to create a calendar of key milestones. Some dates will be firm and may be set even before the team is fully formed, but others may be more flexible. Be sure to include deadlines for your:

1. Written and visual content submissions
2. Content review and approvals
3. Social media and email blasts - check out our donor communications templates for help
4. Soft Launch
5. Supporter updates
6. Stewardship messages

While not all teams opt for a soft launch, we have observed the practice of a soft launch for select supporters and community members ranging anywhere from one week up to three weeks prior to the big event to build momentum.



| Key Milestone | Date |
|---------------|------|
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# **Build Your Marketing Plan**

06.





Don't fall victim to the fallacy that "If you build it, they will fund." People aren't going to just stumble upon the story and decide to support it! 80-90% of the support received will be from traffic your team drives there.

So, let's identify your potential community! This step will have space for you to address the following categories of supporters.

### **First Degree Contacts.**

▶ **Campaign Champions.** List ten individuals who will act as "Campaign Champions" - those personally invested in your campaign and committed to its success.

- Ask Champions to contribute before or during the public launch to help build early momentum.
- Estimate each champion's contribution amount. These donations should total 15-30% of the total funding goal.







**Business & Organizational Supporters.** List the businesses and organizations that will be interested in your campaign.

- Think about how your campaign affects them and what they might gain from your efforts. What can you offer them? (Sponsorship opportunities, co-branding, matching donations opportunities)
- Think about what direct contacts you may have at each organization. Don't be intimidated by the size of the organization... shoot for the moon!

| Business/Org | Why passionate? | What's in it for them? | What's in it for you? | Contact Information |
|--------------|-----------------|------------------------|-----------------------|---------------------|
|              |                 |                        |                       |                     |
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|              |                 |                        |                       |                     |
|              |                 |                        |                       |                     |

- ▶ **Personalized Outreach.** For these folks who share a natural affinity for your organization, mission, and cause, it's best to reach out personally. Try using personalized video as a way to boost your engagement rates and secure that much-needed early support. Not sure where to start with video outreach? Check in with our experts here at [ThankView!](#)



### Attracting a Crowd.

If you're planning to break outside of your first degree connections, you'll need a specific plan to do so. Let's think about how to spread your message even farther!

- ▶ **Local Media Outlets.** List local publications, blogs, or organizations that would be interested in covering your story:

| Publication/Org | Why Interested? | Contact Info | Date of Contact |
|-----------------|-----------------|--------------|-----------------|
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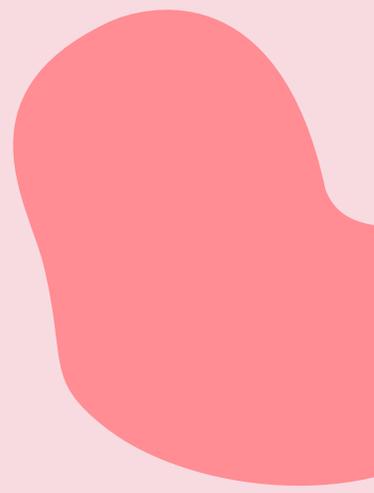








# **Steward Your Supporters**



07.



## **Thank You.**

These two seemingly simple words can have a profound impact on the success of your fundraising. While significant effort goes into creating your initial campaign, the sustainability of ongoing support is equally crucial. Many organizations track their donor retention rates, and for good reason! If a new donor gives only once – **as nearly 70% do** – then you’re often left with a loss on your initial investment to gain that new donor.

Remember, giving is a full-circle cycle. If you want supporters to be generous with their time, treasure, talent, and/or testimony again then you need to be thoughtful in how you communicate with them during and after the campaign.

So, let’s dive into the ways that you can successfully convey impact and admiration for your wonderful community!

## How to Express Gratitude.

Saying thanks in the right way is crucial. Though it can take many different forms, supporters want to feel appreciated and want to know how their money, time, and other efforts have helped your cause. This should be at the core of your stewardship communications.

Here are some notes to help you go above and beyond:



- ▶ **Get Your Personalization Right.** Make sure that you are acknowledging supporters by their preferred names and titles, and that you have the correct contact information. This helps tell the donor that you know who they are and care about them as a person.
- ▶ **Segment Your Supporters.** Think about the segments that matter most and plan your stewardship accordingly. For example, offering unique experiences to people who give above a certain amount could be worth the effort. Also think about your donor demographics (age, geographic location, etc.) when considering how to say thank you. The more you can tailor to the individual the better!
- ▶ **Use Donor-Centric Language.** Make sure you are constantly and consistently expressing how the donor specifically helped your cause, not just sharing general stats. If one donor single-handedly funded your entire campaign, how would you treat them and what would you say to them? Keep that in mind as you write your communications.
- ▶ **Mimic How Supporters Communicate.** You don't want to risk thanking your supporters in a communication that they may not even open. They'll never know how much your organization appreciates them! You can save time and resources by expressing thanks in their preferred channel based on how they've interacted with you. On average, **ThankView open rates for videos are 2x higher than typical email campaigns.**

- ▶ **Don't "Thask".** Asking for another donation or including a "give now" link in a thank you communication is not stewardship. **One of the top reasons people stop giving is because they are over-solicited and under-appreciated.** Keep your messaging focused on donor impact.



Beyond these elements, you'll also want to ask yourself:

1. How quickly should a donor be thanked after a campaign gift?

**Pro Tip:**

Ideally a donor should be thanked immediately - first-time donors who get a personal thank you within 48 hours are **4x more likely to give a second gift.** However, if time doesn't allow, make sure to thank everyone the day a campaign ends. Even if the update is a simple thank you with a reminder to stay tuned, this helps keep the donor invested.

2. How many updates should they receive at a minimum and over what time period?

**Pro Tip:**

Try to give at least 3 post-campaign updates. We recommend the day the campaign ends, a week after, and 1-2 months after when the impact has been reached. To create an even more meaningful experience, you can send donors an update six months or a year after the campaign ends as a check-in.

3. How long should you wait before making another ask?

**Pro Tip:**

A survey of nearly 3,000 donors found that 63% of respondents preferred a nonprofit to wait at least seven months before asking for a second gift.

4. What do you want a supporter to do after the campaign?

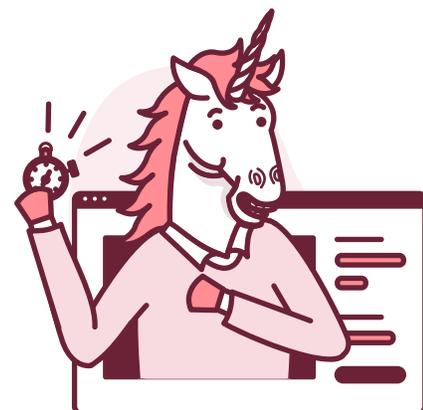
**Pro Tip:**

(Example: Keep following our robotics team, be willing to support other great causes, etc.)

Knowing the answers to these questions will help guide the decisions and strategy for effective stewardship.

## Timeline for Showcasing Donor Impact.

Saying thank you is not a one-and-done task. Although you do not want to overwhelm your supporters with various communications, saying thank you several times is crucial. Plan a schedule for when you will reach out with notes of thanks as well as updates on the campaign.



Consider this timeline for thanking supporters:

- ▶ **Thank You #1: Within 24 hours of the gift or at the close of the campaign.** As a best practice, finding a way to thank a donor immediately after they give is a must. Aside from a tax receipt, this confirms with the donor that you received their information and their money went to the correct cause. To help keep supporters invested, you can tell supporters that more updates about the cause will be sent to them in the near future.
- ▶ **Thank You #2: Within two weeks of the campaign ending.** In addition to any personalized touches for your supporters, this is the ideal time to send a mass communication, so that everyone knows the overall success of your initiative and next steps.
- ▶ **Thank You #3: 30 days after the close of the campaign.** Start giving detailed specifics about how you are using (or plan to use) the donor's money. The more information you can provide, the more the donor will feel like they are still on the journey with you.

- ▶ **Thank You #4: 3-6 months after the close of the campaign.** This is a great time to show the impact versus tell the impact. Images, videos, personal testimonies and other pieces can be collected and shared with your supporters, as a means to provide an in-depth update on the status of their investment with your cause.
- ▶ **Thank You #5: 6-12 months after the close of the campaign.** Think about how surprised you would be to receive a note of thanks and update on a cause you supported a year ago, with no additional ask attached! This is truly a treat for your supporters. Tell them what you accomplished in the past 365 days because of their generosity and be sure to provide contact information in case supporters want to respond.



### **Create a Stewardship Matrix.**

To help organize your stewardship efforts, consider creating a stewardship matrix while planning your campaign so that you can easily schedule and reference your communications.

Below is a templated example of a matrix broken out by donor gift levels, but you can categorize by whatever segments make the most sense for your team.

## Stewardship Calendar Matrix Example.

|                      | Thank You #1                                       | Thank You #2                     | Thank You #3                 | Thank You #4                            | Thank You #5                                      |
|----------------------|----------------------------------------------------|----------------------------------|------------------------------|-----------------------------------------|---------------------------------------------------|
| <b>\$1 - \$49</b>    | Thank You Email                                    | Notecard and Mass Email Update   | Livestream Invite and Update | Video Update                            | Email Update with Photos                          |
| <b>\$50 - \$99</b>   | Thank You Email                                    | Notecard and Mass Email Update   | Livestream Invite and Update | Video Update                            | Email Update with Photos                          |
| <b>\$100 - \$499</b> | Thank You Email                                    | Notecard and Mass Email Update   | Livestream Invite and Update | Video Update                            | Email Update with Photos                          |
| <b>\$500 - \$999</b> | Personalized Video Email and Social Media Shoutout | Notecard and Mass Email Update   | Livestream Invite and Update | Video Update and Small Event Invitation | Phone Call Update and Follow-Up Email with Photos |
| <b>\$1,000+</b>      | Personalized Video Email and Social Media Shoutout | Phone call and Mass Email Update | Livestream Invite and Update | Video Update and Small Event Invitation | Phone Call Update and Follow-Up Email with Photos |

GIFT LEVEL

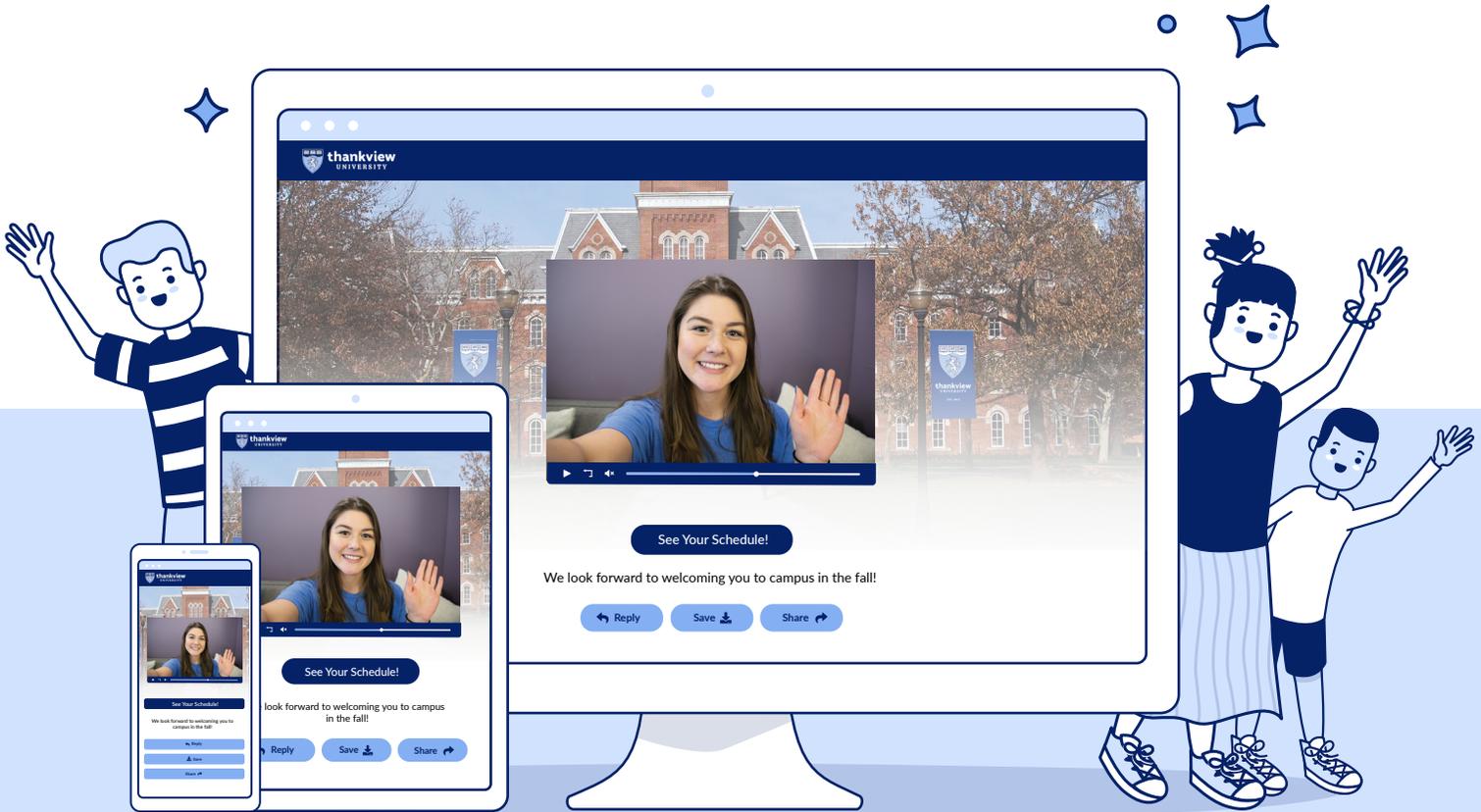
Now create your own!

|         | Thank You #1 | Thank You #2 | Thank You #3 | Thank You #4 | Thank You #5 |
|---------|--------------|--------------|--------------|--------------|--------------|
| SEGMENT |              |              |              |              |              |
|         |              |              |              |              |              |
|         |              |              |              |              |              |
|         |              |              |              |              |              |
|         |              |              |              |              |              |
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# thankview

Improve engagement rates and maximize donor retention



“ **Fabulous.**  
A clever way to thank donors! ”



“ The ThankView video was  
a **delightful surprise.** ”



“ Love the **personalized video**  
to me. Wow. Impressed! ”



**Build Donor Relationships that Matter with Video**  
Learn more at [ThankView.com/demo](https://ThankView.com/demo)

