



ANNUAL FUNDRAISING PLAN

Calendar and Goals Workbook

A digital guide with insider tips to fundraising success in 2018





Keep the Donor at the Center of Your Plan

Help donors feel valued and involved in your cause—this reduces churn and deepens the connection to your supporters, creating less work for you.

PLANNING

Start with a Strategy and Define Tactics

We asked our 800 attendees at our "Jumpstart Your Annual Fundraising Plan" webinar, "**What are your biggest annual fundraising challenges?**"

We found out that even if you have the time to plan your fundraising calendar for the year, with great campaigns and events, if you fail to properly plan your communication and donor engagement strategy, you are leaving valuable donation opportunities on the table.

Other big hurdles attendees face are:

- **24%** said that **developing a strategy** was difficult
- **34%** have a hard time **deciding which tactics** are best

That inspired us to provide a deeper dive into annual planning strategies with this workbook. We're providing you with some insight into:

- Monthly messaging strategy from our Digital Marketing Experts
- Editable writing samples that you can customize
- Save and use for future planning for your organization

Do you have a small team and need digital fundraising expertise?

Our Digital Marketing Experts can help you create compelling campaigns, contact digitalservices@mobilecause.com to learn more.

GUIDE

Workbook and Messaging Strategy

01
JAN
2018

INSIDER TIP

Send a survey to your donors to ask about the programs that matter the most to them throughout the year

| SUN | MON | TUE | WED | THU | FRI | SAT |
|----------------------------|-----------------------------------|-----|---------------------------|--------------------|----------------------------------|-----|
| | 1 New Year's Day | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 Cut Energy Cost Day | 11 | 12 | 13 |
| 14 | 15 Martin Luther King, Jr. Day | 16 | 17 | 18 | 19 Get to Know Your Donor Day | 20 |
| 21 National Hugging Day | 22 | 23 | 24 | 25 Opposite Day | 26 | 27 |
| 28 | 29 | 30 | 31 Backward Day | | | |

Your Communication Plan [update the fields below to customize]

| | |
|----------------|--|
| 1/1/18 | Direct Mail (Headline and Call-to-action) |
| DATE | Happy New Year from [Org Name]! |
| Exposition | Make a difference in peoples' lives this year. Visit [orgname].com to find out how you can help |
| 1/10/18 | Social Post (Video Link) |
| DATE | It's important to think about those in need today and always. |
| Impact | Watch how generous donations helped the [Family] get through the cold winter. #CutEnergyCostDay |
| 1/22/18 | Text |
| DATE | Sending a virtual hug from [Org Name]! |
| Ask | The homeless need more than a hug right now. Text [KEYWORD] to [00000] to donate any amount you can. |
| 1/31/18 | Email (Embed Image or Video) |
| DATE | Subject: You helped turn a family's life around |
| Stewardship | Dear [Name], Meet the [Family], they were able to get housing this winter because of your donation... |

Insider Tips and Calendar

Each month features a full calendar and cheat sheet of major holidays, giving days, awareness days and insider tips to begin organizing your campaign planning.

Your Communication Plan

A multi-channel fundraising communication plan will enable the broadest reach of your message to increase your fundraising results. It also creates a more seamless experience for donors across channels and devices, and from program to program.

Pre-written sample messages are provided each month for you to modify for your organization. Simply click into any date or text field to customize the message to convey your organization's brand and story. Save it and share it with your supporters, volunteers and donors.

Messaging Strategy

Follow our proven communication strategy to increase donor engagement and results. Messages should fall into the four types detailed below and be scheduled so they begin by creating awareness and build to cultivating a long-term relationship with donors.

Exposition

Explain to your donors who you are and why they should care about your cause. Communicate strategically in the beginning of the month through direct mail, email, social posts and texts.

Impact

Ramp up your communication in the middle of the month to let donors know how they can make a difference. Feature those who benefit from your organization in a post or newsletter.

Ask

Create emails to ask and thank donors for their support. Also reach out via text and social posts to increase giving.

Stewardship

Continue to cultivate your relationship with your donors through storytelling on social media, email and text dialogue.

01 JAN 2018

INSIDER TIP

Send a survey to your donors to ask about the programs that matter the most to them throughout the year

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|---|-----|---------------------------|--------------------|--|-----|
| |  1 New Year's Day | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 Cut Energy Cost Day | 11 | 12 | 13 |
| 14 |  15 Martin Luther King, Jr. Day | 16 | 17 | 18 |  19 Get to Know Your Donor Day | 20 |
| 21 | 22 National Hugging Day | 23 | 24 | 25 Opposite Day | 26 | 27 |
| 28 | 29 | 30 | 31 Backward Day | | | |
| | | | | | | |

Your Communication Plan (update the fields below to customize)

DATE

Exposition

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Impact

DATE

Ask

DATE

Stewardship

02 FEB 2018

INSIDER TIP

Show your donors how much you love them by sending personal messages in February

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-------------------------------------|---|-----------------------------------|--|-----|--|----------------------------------|
| | | | | 1 |  2 Groundhog Day | 3 National Wear Red Day |
| 4 Super Bowl World Cancer Day | 5 | 6 | 7 | 8 | 9 Pizza Day | 10 |
| 11 Make a Friend Day | 12 | 13 World Radio Day |  14 Valentine's Day | 15 | 16 Chinese New Year | 17 Random Act of Kindness Day |
| 18 |  19 President's Day | 20 World Day of Social Justice | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 Mardi Gras | | | |
| | | | | | | |

Your Communication Plan (update the fields below to customize)

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Exposition

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Impact

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Ask

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Stewardship

03 MAR 2018

INSIDER TIP

Remind donors what their dollars have done for your organization already by sharing your impact in an infographic

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----------------------------|-----|------------------------------------|---|---------------------------|--|--|
| | | | | 1 |  Employee Appreciation | 2 World Wildlife Day |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| | | | | International Women's Day | | |
| 11 | 12 | 13 |  National Pi Day | 15 | 16 |  St. Patrick's Day |
| Daylight Saving Time Begins | | | | | | |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| | | Spring Equinox Day of Happiness | World Poetry Day | World Water Day | Puppy Day | |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| Medal of Honor Day | | | | MLB Opening Day | Good Friday | |
| | | | | | | |

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Ask

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Stewardship

04 APR 2018

INSIDER TIP

Encourage peer-to-peer campaigns or rally your donors together for volunteer days

| SUN | MON | TUE | WED | THU | FRI | SAT |
|--|---------------------------------|--------------------|-----|-----------------------------------|--|-----------------------|
|  1 Easter Sunday April Fools' Day | 2 World Autism Awareness Day | 3 | 4 | 5 | 6 | 7 World Health Day |
| 8 | 9 | 10 Siblings Day | 11 | 12 Grilled Cheese Day | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 |  20 Get to Know Your Donor Day | 21 |
|  22 Earth Day | 23 | 24 | 25 | 26 Denim Day Admin Prof Day | 27 Arbor Day Take Your Child to Work Day | 28 |
| 29 | 30 International Jazz Day | | | | | |
| | | | | | | |

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Stewardship

05 MAY 2018

INSIDER TIP

Grow your donor base by sending personal messages to families and small businesses

| SUN | MON | TUE | WED | THU | FRI | SAT |
|---|---|-------------------------------------|-------------------------------|------------------------|------------------------|---|
| | | 1 | 2 Teacher Appreciation Day | 3 World Freedom Day | 4 Star Wars Day | 5  Cinco De Mayo |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13  Mother's Day | 14 | 15 International Day of Families | 16 | 17 | 18 Bike to Work Day | 19 |
| 20 Armed Forces Day | 21 | 22 | 23 | 24 | 25 Geek Pride Day | 26 |
| 27 National Burger Day | 28  Memorial Day | 29 | 30 | 31 | | |
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Stewardship

06 JUN 2018

INSIDER TIP

Have fun with your message and surprise donors by announcing your Run/Walk event on Doughnut Day

| SUN | MON | TUE | WED | THU | FRI | SAT |
|--|---------------------------|----------------------|-----|---|--|--------------------------|
| | | | | |  1 National Doughnut Day | 2 Repeat Day |
| 3 | 4 Cancer Survivors Day | 5 Environment Day | 6 | 7 Global Running Day | 8 World Oceans Day | 9 |
| 10 | 11 | 12 | 13 | 14 Flag Day | 15 | 16 |
|  17 Father's Day | 18 | 19 | 20 |  21 First Day of Summer | 22 Take Your Dog to Work Day | 23 Public Service Day |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| | | | | | | |

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Ask

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Stewardship

07 JUL 2018

INSIDER TIP

Celebrate the mid-year milestone with your donors by shooting a video to show them how their dollars helped

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-------------------------------|--|-----|---|--------------------------|---|---------------------------|
| 1 | 2 I Forgot Day | 3 | 4  Independence Day | 5 | 6 | 7 Global Chocolate Day |
| 8 | 9 | 10 | 11 | 12 | 13 Friday the 13th | 14 |
| 15 Give Something Away Day | 16  Ice Cream Day | 17 | 18 Nelson Mandela Day | 19 | 20  Get to Know Your Donor Day | 21 |
| 22 Parents Day | 23 | 24 | 25 Hot Fudge Sundae Day | 26 Aunt and Uncle Day | 27 | 28 |
| 29 | 30 International Day of Friendship | 31 | | | | |
| | | | | | | |

Your Communication Plan (update the fields below to customize)

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Exposition

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Impact

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Ask

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Stewardship

08 AUG 2018

INSIDER TIP

Plan a day or weekend camp supporting your organization and others to involve donors on a personal level

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-------------------------------|-----|---------------------------|----------------------|-----------------------------|-------------------|-------------------------------|
| | | | 1 | 2 Ice Cream Sandwich Day | 3 | 4 |
| 5 Day of Friendship | 6 | 7 | 8 Dollar Day | 9 Book Lovers Day | 10 S'mores Day | 11 |
| 12 International Youth Day | 13 | 14 | 15 Relaxation Day | 16 Joke Day | 17 | 18 |
| 19 Humanitarian Day | 20 | 21 Senior Citizens Day | 22 | 23 | 24 | 25 Secondhand Wardrobe Day |
| 26 Women's Equality Day | 27 | 28 | 29 | 30 | 31 | |
| | | | | | | |

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Stewardship

09 SEP 2018

INSIDER TIP

Recruit volunteers for your Day of Charity by appealing to them before Labor Day and right after to stay timely

| SUN | MON | TUE | WED | THU | FRI | SAT |
|---------------------------|---|--------------------------|---|--|----------------------------------|---------------------------------|
| | | | | | | 1 College Colors Day |
| 2 | 3  Labor Day | 4 | 5  Day of Charity | 6 | 7 | 8 International Literacy Day |
| 9 Rosh Hashanah Begins | 10 Swap Ideas Day | 11 Rosh Hashanah Ends | 12 | 13  Positive Thinking Day | 14 | 15 |
| 16 Working Parents Day | 17 | 18 Yom Kippur Begins | 19 Yom Kippur Ends Talk Like a Pirate Day | 20 | 21 Day of Peace | 22 First Day of Fall |
| 23 | 24 | 25 | 26 | 27 | 28 National Good Neighbor Day | 29 |
| 30 | | | | | | |

Your Communication Plan (update the fields below to customize)

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| DATE | <hr/> |
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| DATE | <hr/> |
| Ask | <hr/> |
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OCT 10 2018

INSIDER TIP

Before the busiest time of the year for giving, send out a survey to ask donors how and why they want to give

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----------------------------|--|------------------------------------|---|---------------|---|----------------------|
| | 1 Coffee Day | 2 | 3 | 4 Taco Day | 5 World Teacher's Day | 6 World Smile Day |
| 7 | 8  Columbus Day | 9 | 10 | 11 | 12 World Sight Day | 13 |
| 14 | 15 | 16 World Food Day Boss's Day | 17 | 18 | 19  Get to Know Your Donor Day | 20 |
| 21 Sweetness Day | 22 | 23 | 24 | 25 | 26 Pumpkin Day | 27 |
| 28 Make a Difference Day | 29 | 30 Cat Day | 31  Halloween | | | |
| | | | | | | |

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11 NOV 2018

INSIDER TIP

Build up communication before #GivingTuesday by teaming up with local businesses to appeal to donors in new ways

#GivingTuesday Tips

#GivingTuesday is a Uniquely Mobile Experience

#GivingTuesday is a social media movement at its core and nearly 80% of all social media time takes place on a mobile device. Getting people to promote your campaign from their phone will help reach more donors.

Share Your Fundraising Goals

Let your community know your #GivingTuesday goals and share updates throughout the day so they can share in the results and help you achieve them.

#GivingTuesday Inspires More Supporters

Donors under the age of 35 prefer to give to and get involved with nonprofits that they hear about from friends and social networks. Make it easy for them to get involved in more ways.

| SUN | MON | TUE | WED | THU | FRI | SAT |
|--------------------------------|--------------------|---|-----|---|----------------------|-------------------------------|
| | | | | 1 Extra Mile Day | 2 Day of the Dead | 3 |
| 4 Daylight Saving Time Ends | 5 | 6 | 7 | 8 | 9 | 10 Forget-me-not Day |
| 11 Veteran's Day | 12 | 13  World Kindness Day | 14 | 15 Entrepreneur's Day | 16 | 17 |
| 18 | 19 | 20 | 21 | 22  Thanksgiving | 23 Black Friday | 24 Small Business Saturday |
| 25 | 26 Cyber Monday | 27  #GivingTuesday | 28 | 29 | 30 | |
| | | | | | | |

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Stewardship

12 DEC 2018

INSIDER TIP

Create an end-of-year wrap-up video to show your donors how much they did to help your organization all year

Year-End Giving Tips

Why a Year-End Campaign is Important

From Thanksgiving to New Year's Eve, generosity skyrockets. People donate to causes they care about more frequently than any other time of year. A strong year-end push can set your organization up to start 2019 stronger than ever.

Comprehensive Year-End Giving Campaigns

Reinforce your message with multiple appeals. It takes a minimum of three exposures of your message for a person to make a decision.

Schedule Messages and Include Impact Metrics

Schedule your text messages for consistency, regardless of what you are doing. Also include impact metrics within your donation page so donors can see how their gift is being used.

| SUN | MON | TUE | WED | THU | FRI | SAT |
|----------------------|---|---------------------|-----------------------------------|-----|---------------------------|-------------------------|
| | | | | | | 1 World AIDS Day |
| 2 Hanukkah Begins | 3 Make a Gift Day | 4 Cookie Day | 5 | 6 | 7 Pearl Harbor Day | 8 Lost and Found Day |
| 9 | 10 Hanukkah Ends Human Rights Day | 11 | 12 | 13 | 14 Ugly Sweater Day | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 First Day of Winter | 22 |
| 23 | 24 Christmas Eve | 25 Christmas Day | 26 National Thank You Note Day | 27 | 28 | 29 |
| 30 | 31 New Year's Eve | | | | | |

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Stewardship

7 Steps to Your Own **DAY OF GIVING**

This guide provides ideas on different days throughout the year to reach out to supporters or donors. You can also create your own Day of Giving and have a fun and unique day solely for your organization.

- 1 Utilize multiple channels for communications**

Share your message through multiple communication channels to increase the likelihood of them being seen and to keep your cause top-of-mind with donors.
- 2 Communicate frequently**

Start early and continue to provide consistent communication up to and through your Day of Giving.
- 3 Share videos**

Share a video from a person who benefited from your organization or have the Executive Director provide an update or say thank you to make it personal.
- 4 Boost social media posts on your Day of Giving**

Increase the volume of your posts on your Day of Giving to be sure you are seen by a broader audience. Tailor messages to get the word out about other opportunities to support your cause beyond donations.
- 5 Demonstrate impact**

Let donors know you are close to your goal to increase the number and amount of gifts. Include impact metrics for different donation amounts to make it more attainable.
- 6 Ask donors if they can be acknowledged**

Some donors prefer to be anonymous, but others use it as a way to share their passion for helping others, including your cause. Share the names of donors or a link to your Real-Time Event Thermometer on your Day of Giving on social media.
- 7 Send a thank you**

In addition to an email with their tax receipt, take it one step further and send a written thank you to stay connected with your donors on a personal level. Send at least two updates on how donations are being used to make a difference through your organization.

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, call us at **888.661.8804** or email us at info@mobilecause.com.