



Sage Nonprofit Solutions

eBook: Year-End Campaign Planning Guide

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Introduction

This eBook was created to complement the webcasts being held in September of 2011, they really do go hand in hand. The webcasts will cover much more detail about best practices, resources, and strategies to increase your End of Year fundraising campaigns. Utilizing the tools and examples below, along with the webcasts, you can build a successful End of Year fundraising campaign and have it launched in a very short time.

You can find out more about the webcasts and additional information at the following links:

<http://www.slideshare.net/sagenonprofit>

<http://community.sagenonprofit.com/category/article-category/webcasts/recorded-webcasts>

This document is divided into three sections to match your steps in the planning process.

End of Year Campaign Planning

The Campaign Planning section lays out a timeline and schedule of tasks to launch your End of Year campaign. This timeline is only a suggested plan to help you see how the various parts fit together. You can modify the plan to fit your organization's needs. Many groups are able to launch their campaign in less time than we have outlined here with focused effort.

Email Templates

The Email Templates included in this section are designed to give you ideas of how to structure your emails and help get you off the dreaded "white page." Again, these are only suggestions of what you can include in your campaign emails. It is much more important to have the communications coming from your organization's voice rather than trying to hit all of the points listed in the samples.

Sample Campaign

The Sample Campaign section includes a completed Campaign Planning Worksheet as well as written examples of each email in the series. They are written using a fictional organization focused on childhood literacy, except for the sample Thank You/Follow Up. The sample Thank You is from a real organization and is included because it is a great example of the practices we are discussing.

It is our hope that these examples will spark ideas for your own appeals. We do not recommend copying them word for word as you know the best way to speak to and connect with *your* donors.



*Best of luck
in your
End of Year
campaigns!*



End of Year Campaign Planning

Campaign Overview

September	Brainstorm, research, and schedule your campaign
October	Design, write, and prepare communications
November	Finalize all communications and test the campaign
December	Launch

September – Brainstorm, research, and schedule your campaign

- Review Last Year's Campaign
 - What worked? What did not work?
 - What do the stats tell you?
 - What has changed for your organization in the past year?
- What are your organization's goals this year?
- Complete End of Year Campaign Planning Sheet

October – Design, write, and prepare communications

- Draft Email Series
 - Timeline and templates/ideas below
- Design look and feel of the campaign
 - Create email templates
 - Load content and graphics into your email system

November – Finalize all communications and test the campaign

- Have multiple staff members review all campaign content
 - Emails, landing pages, donation forms, etc.
- Have the campaign approved by appropriate staff members
- Run multiple tests of the entire campaign
 - Run a few tests yourself pretending to be a donor
 - Also ask volunteers or others less familiar with the campaign to run through it as well
 - Email >> Landing page >> Donation >> Thank You email
 - Edit or fix any issues
- Send warm-up appeal email/letter (optional)
 - Monthly newsletter or separate mailing
 - Updates on year, preview of campaign
 - Send out at least one week before the first appeal

December – Launch Campaign

- Appeal 1 – Campaign Kickoff – 1st week in December
 - Sets up campaign and tone
- eCard – For acknowledgement of support – 3rd week in December
 - If including a holiday greeting, send before the period most applicable to your donors

Schedule for 2011 Winter Holidays

Hanukkah	Tuesday, Dec. 20 – Tuesday, Dec. 28
Winter Solstice	Wednesday, Dec. 21
Christmas	Sunday, Dec. 25
Kwanzaa	Monday, Dec. 26 – Sunday, Jan. 1

- This eCard is a gentle reminder about the campaign and helps keep your organization “top of mind”
 - Can do separate card for donors and non-donors
- Appeal 2 – Follow Up/Reminder – Dec. 29 or 30
 - Last chance to give in 2011

End of Year Campaign Planning Sheet

- 1) What is the most serious issue/need your organization is currently addressing?

- 2) How will the money raised during the End of Year Campaign be used to tackle that issue/need?

The answers to these first two questions should guide your answers to the questions below.

- 3) What is the overall story of your campaign?
 - a) What current events can you include in the story to show that your issue/need is timely?

 - b) Is there an individual whose story you can share with potential donors to illustrate the issue/need?

- 4) What is your campaign theme?

- a) What are related subject lines you can use for campaign emails?

- 5) What is your campaign title?

Email Templates

Appeal 1 – Campaign Kickoff

(Sent 1st week of December)

Subject: _____

Dear [Prospect's First Name],

[Short description of the issue/need your organization is currently working to address. This is the issue identified in the Campaign Planning Sheet.]

[Simple Call-to-Action: include a link to the donation form on your organization's website.]

[Short paragraph describing the history and/or background of the issue your organization is addressing. Make sure to add a few sentences to make the issue timely and relevant.]

[Provide a description of how donations will be used to address the issue raised above. The more detailed and specific you can be, the better story you will be able to create. Remember to focus on examples or stories of individuals and how their donations will help them.]

[Description of what your organization can accomplish with specific dollar amounts.]

- [have amounts increase over the bullets] \$X will _____
- \$XX pays for _____
- \$XXX supplies 3 children with _____

Thank you in advance for your support!

[Signature]

eCard – For Acknowledgement of Support

(Sent around 3rd week of December, depending on your needs)

For holiday greetings, send during the period most applicable to your donors.

Schedule for 2011 Winter Holidays

Hanukkah	Tuesday, Dec. 20 – Tuesday, Dec. 28
Winter Solstice	Wednesday, Dec. 21
Christmas	Sunday, Dec. 25
Kwanzaa	Monday, Dec. 26 – Sunday, Jan. 1

[General thank you for support during the year and/or holiday greetings.]

[Short message reflecting on the year, thanking them for their support and your hopes for the New Year.]

[Link to Donate]

Appeal 2 – Follow Up/Reminder

(Sent on December 29th or 30th)

Subject: _____

Dear [Prospect's First Name],

Today is your last opportunity to [brief description of the campaign and impact those donations will have on those effected]. Remember, any gift you give today is still tax-deductible for 2011.

[Brief paragraph discussing your organizations accomplishments during the year. A bulleted list of some of those accomplishments works well, and provides another example of what the donors support can help achieve.]

[Brief paragraph discussing the plans for the new year and how their support will help that happen.]

[Call to action – Asking them to give one last gift this year.]

[Closing sentence about the New Year.]

[Signature Name]

[Link to Donate]

Sample Campaign

Example – End of Year Campaign Planning Sheet

(Fictional Organization – Books Change Lives)

1) What is the most serious issue/need your organization is currently addressing?

Low literacy rates in area children.

2) How will the money raised during the End of Year Campaign be used to tackle that issue/need?

Funds will be used to buy engaging books for young children and given to low income families.

The answers to these first two questions should guide your answers to the questions below.

3) What is the overall story of your campaign?

Children who have easy access to books, especially in their homes, are much more likely to become strong readers.

a) What current events can you include in the story to show that your issue/need is timely?

Test scores from area schools were recently released.

b) Is there an individual whose story you can share with potential donors to illustrate the issue/need?

Zachary and his family received several books last year. Both Zachary and his younger brother are now doing better in school, according to Mom. Mom also sought out programs at public library after seeing her sons' enjoyment of books.

4) What is your campaign theme?

Books give children keys to a positive future

a) What are related subject lines you can use for campaign emails?

Change the Future—Help Kids Turn the Page on Illiteracy

5) What is your campaign title?

Giving Books, Growing Readers, Guiding the Future

Example Appeal 1 – Campaign Kickoff

(Fictional Organization – Books Change Lives)

Subject: Giving Books, Growing Readers

Dear [Prospect's First Name],

Opportunities for low-income children to gain access to books have dwindled over the past few years. Continued tough economic times have led to reduced hours or closure of many public and school libraries. Due to limited funds, 80 percent of preschool and after school programs serving low-income children do not have any children's books. And 61 percent of low-income families do not have any books for children in their homes. For many children, books are simply not part of their daily lives.

To ensure that every child has the chance to read, Books Change Lives (BCL) is launching a Holiday Book Drive to help place books in the hands of low-income children. The availability of reading materials in the home is a strong predictor of academic achievement in children—stronger even than socioeconomic status. However, with 42 percent of children growing up in families that lack the income to cover basic needs, such as rent, food, child care, and transportation, purchasing books is beyond the reach of many families.

As you might guess from our name, Books Change Lives believes that books have the ability to transform the lives of children for the better and that all children, regardless of their family's income level, should have access to books.

And you can help. The BCL Holiday Book Drive will be collecting both book and monetary donations, which will then be used to purchase books through special low-cost publisher programs. You can help by donating books or money. You can also help by spreading the word and telling your friends and co-workers about the BCL Holiday Book Drive. A little can go a long way—a donation of just \$3 will provide a child a classic book such as *Where the Wild Things Are* while a donation of \$75 will provide an entire classroom of children with a book of their own.

Imagine children at home for the holidays curled up with their very first book. Think about where a love for reading can take them. Can you think of a better holiday present?

Thank you for your time and your support.

[Signature]

[Link to Donate]

Example eCard – Acknowledgement

(Fictional Organization – Books Change Lives)

“I can no other answer make, but, thanks, and thanks.”

– William Shakespeare

As 2011 draws to a close, we have been reflecting on the impact you and other Books Change Lives donors have made this year. Thanks to your generosity, children across Central Texas now have books of their very own and families have been connected with literacy programs in their neighborhoods. The delighted smiles shown below happened because of your thoughtfulness. Thank you!

[Include photos from book donation with captions identifying donation location.]

[Link to Donate]



Example Appeal 2 – Follow Up/Reminder

(Fictional Organization – Books Change Lives)

Subject: Please support Giving Books, Growing Readers

Dear [Prospect's First Name],

Today is your last opportunity to provide books to low-income children through the Books Change Lives' (BCL) Holiday Book Drive. Remember, any gift you give today is still tax deductible in 2011.

This year Books Change Lives distributed books to over 300 low-income children, none of whom had ever owned a book before. At the distribution events, BCL partnered with literacy groups and connected families to neighborhood programs and services to help the children's love for reading grow even stronger.

In the upcoming year, Books Change Lives has already planned to increase the number of distribution events by 20 percent. With our current partners, BCL will also host two Family Festivals to help caregivers learn how to weave reading into their lives and to expose children to new books. In addition, we have high hopes for a fledgling partnership with the local jail, where incarcerated parents have already begun reading to their children during visits.

We're very excited about our plans for 2012 but first want to make sure that 2011 has a happy ending. Please take a moment to support the BCL Holiday Book Drive in whatever way is best for you. Gifts of books or money are greatly appreciated, as are efforts to spread the word.

Thank you for your support and all the best to you and yours in the New Year,

[Signature]

[Link to Donate]

[Link to Tell a Friend]

Example Thank You/Follow Up Card

While this example was not an email, it is a great example of a thank you/follow up communication and could easily be turned into an email. The card does a great job of thanking the donor for their support as well as tying their donation back to actual individuals who benefited from the gift.

You can view the pdf version of the card at this link, or see screenshots of the card below:

http://supportingadvancement.com/samples/thank_you/mauer_thank_you_card.pdf

Front of Card:



Back of Card:

Thank You!

Because of your annual gift, Hillary, Justin, and Kendra will achieve many scholastic goals this year at Carolina. They, along with their 41,515 fellow students, are able to realize their academic potential, be taught by inspiring faculty, and learn in state-of-the-art classrooms, thanks to annual gifts from alumni and friends.

We hope you'll be able to visit campus soon, interact with today's scholars, and witness the impact of your generosity.

www.sc.edu/giving


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1600 Hampton St., Suite 738
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12301 Research Blvd. | Building IV, Suite 350 | Austin, TX 78759

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