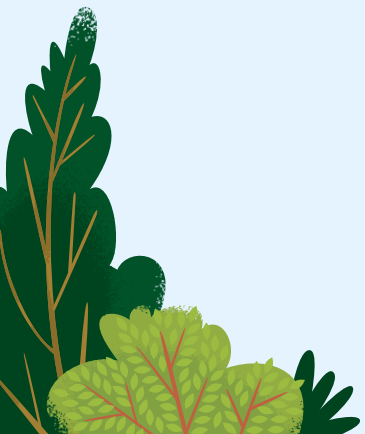




End-of-Year Digital Fundraising and Marketing Workbook 2021



How to Use this Workbook

This workbook is an interactive, editable PDF. You can answer the questions and enter your data by typing directly into the text fields.

Be sure to save a new copy when you are finished.

Contents

Use the check-boxes to mark your progress.

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Introduction

The end-of-year fundraising season is here! For many nonprofits, a large percentage of their annual funds are raised in these last few months of the year. We're here to support you to make this year's fundraising season your best year yet.

In the pages ahead, you'll find a workbook to help you organize what you learned from last year, decide what strategies you want to employ for this year, and set your sights on your goals for the coming months. The ultimate goal is for you to have all you need to fund your mission.



2020 Retrospective

The 2020 End-of-Year Fundraising season was so unique. And yet, there is still plenty to be gleaned from it as we think about this year's fundraising plan.

Were there new strategies you tried as you adopted online-only options that worked better than you thought? Did you try new things that you want to avoid repeating?

Let's capture all of those learnings on the following pages as well as baseline numbers so we can prepare well for this year.



2020 Fundraising Results and 2021 Goals

2020

2021 Goal

Total Amount Raised		
September		
October		
November		
December		
Number of New Donors		
Number of Recurring Donors		
Number of Major Donors		
Number of Sponsors		
Best Performing Campaigns by Funds Raised	<ol style="list-style-type: none"> 1. 2. 3. 	<ol style="list-style-type: none"> 1. 2. 3.



2020 Marketing Metrics and 2021 Goals

2020

2021 Goal

<p>Email Open Rate</p> <p><i>Divide the number of opened emails by the number of delivered emails</i></p>		
Which email campaign had the highest open rate?		
What do you think attributed to the success of this email?		
<p>Email Click Through Rates</p> <p><i>Divide the number of total clicks by the number of delivered emails</i></p>		
Which email campaign had the highest click through rate?		
What do you think attributed to the success of this click through?		
<p>Channel Traffic</p>		
Channel with highest traffic (web, social, email, direct mail)		
Any newly adopted channels		
Types of content per channel (video, images, text)		
<p>Social Engagements</p>		
<p>Post with the most likes</p> <p><i>Fill in the number of likes and a reference to the post</i></p>		
<p>Post with the most comments</p> <p><i>Fill in the number of comments and a reference to the post</i></p>		
<p>Post with the most shares</p> <p><i>Fill in the number of shares and a reference to the post</i></p>		

Fundraising and Marketing Retrospective

What were the strategies that worked really well for you? What new thing did you try that helped you gain momentum?

What didn't work for you? What new thing did you try that was unsuccessful? Why?

What should you do differently this year? What are some ideas to personalize your content for your donors?

How can you share more about the impact you're making on your mission?

What experiences are your supporters looking for?

What new types of donors or types of audiences are you looking to reach?

How can you raise larger amounts from supporters with your campaign?



Setting Up for Success

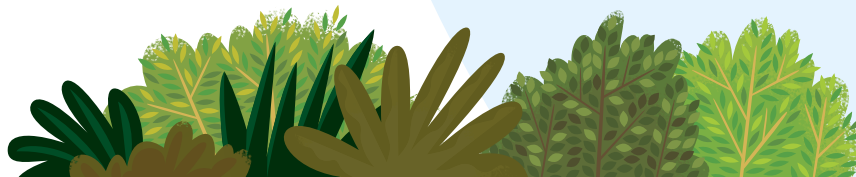
Depending on your organization and the types of fundraising you do, you may be back to “business as usual.” However, for many nonprofits, there’s a new “business as usual” when you consider new best practices to implement after a year of trials and pivots.

In the next few pages, we’ll talk about ways to set-up for success, no matter which channels or strategies you’re using. Then, we’ll start setting goals to make the 2021 End-of-Year Fundraising season a success for your organization.

Clean Data

One of the key goals for optimizing campaigns is to clean up your data and centralize it. Cleaning up data can take many different forms. You can **remove duplicates and fill in misinformation**, and you can also examine data sources and make sure that for each channel you're using — whether it's your website, social media platforms, email or others, the data is flowing in correctly to a single central location.

Centralizing data gives nonprofits a complete view of what's happening across all of their channels. It makes it easier to see where things are doing especially well, and where they're starting to fall behind. If you're losing supporters at any stage in a campaign, looking at this centralized data can also help you identify where the gap is, and take steps to correct it.



WORKBOOK EXERCISE

Clean Data

Let's analyze the data from the channels you're currently using.

Channel	Integration <i>(Manual Upload, Integrated, etc.)</i>	Data Quality <i>(Bad, Good, Unsure)</i>
Email		
Social		
Ads		
Events		
Direct Mail		
Other		

Campaign Structure

Let's take a look at how to use that clean, centralized data in your campaigns. One way to start **building successful campaigns** is to align around campaign taxonomy. What you call things within your campaign is surprisingly important, both for organizing things in a clear way and for allowing other parts of the organization to participate and collaborate effectively.

Start by deciding which variables are most important to track across campaigns through a data hierarchy. Variables could be almost anything you want to track by. Some possible options include device, channel, audience segment, location. From there, it's important to use a naming convention to keep things consistent.



Campaign Taxonomy

Good Example:

`e_ca_gtues_donor_fancy_desktop`

e: it's an email offer

ca: to constituents in California

gtues: about Giving Tuesday

donor: who are previous donors

fancy: promo and creative type is fancy

Useful for A/B testing different types of creative

desktop: this email is intended to be read on desktop

Track as many variables as you can for a successful campaign. What makes both of these good examples is how much data you can read from the taxonomy. It's easy now for us to share that data with other parts of the organization, and we can also tell even more about the effect of these parts of the campaign if we look at the performance of each of these emails.

Bad Example:

`e_nyc_gtues`

e: it went out via email...

nyc: to folks in New York City (but who?)

gtues: about Giving Tuesday

In our bad example, there's a lot less information accessible. We're only tracking a few variables. It's not following our standardized taxonomy because the descriptions are completely different. This means if we filter by any of the variables in the first two examples, we're not necessarily going to find this one. And if we're tracking performance, we could have this data show up in a few places that we don't expect it, or not at all.

Finally, you'll want to make sure you standardize series numbers and hierarchy placement to ensure that the same format is used consistently.

2021 Fundraising & Campaign Goals

A campaign or supporter journey is a series of connected experiences that can span different durations depending on the goal. With most campaigns, you'll set two goals: first, the end action that you want a supporter to take (in this case, fundraising), and second, the performance goal for the overall campaign.

There are as many different types of campaigns as there are different types of organizations, so when choosing what to include in your campaign, the most important element is that it fits your organization's needs.

Many nonprofits create 'Welcome' journeys, designed to educate brand new supporters on the organization's mission and goals. But what about when your supporters have been with you for a while? You can also build journeys that have a purpose beyond education.



Campaign Goals

What's your overall message for EOY 2021?

What campaigns will you have to support your overall message? Do you have a campaign for Giving Tuesday specifically?

Do you have specific fundraising goals for your Giving Tuesday campaign?

What are your acquisition goals and what types of supporters are you looking to meet?

Do you have any "stretch" goals? Maybe trying a new fundraising type, like peer-to-peer?

Build a Campaign

Map out what a potential journey could look like for your organization. Think about what steps you want your supporters to take before taking action. Remember to set both the goal for the campaign and the goal for the performance of the campaign.

Knowing Your Supporters

What does your ideal supporter look like? Describe them! What is their occupation? Do they live in a specific area? How much and how often do they donate to you? What is their family structure like? Do they volunteer with your organization?

Once you've described your ideal supporter, examine the data you have for one of your top supporters. What do you know about them?

Compare and contrast your ideal supporter and your top supporter. What do they have in common? Where are they different?

Now that you know who your best supporter is, decide what channels and tactics you would use to communicate with them. Look at your existing supporters who match your ideal and see what tactics were used to attract them.

Learn More

There is a way to measure your readiness to build more complex campaigns. We call that marketing maturity. If you'd like to determine your marketing maturity, download the [Digital Marketing Self Assessment](#).

Interested in learning how to build different types of campaigns? If you want to see what other types of campaigns you could build, and dive into campaign-building best practices, download [Mapping Nonprofit Constituent Journeys](#).

Check out [3 Things You Can Do Right Now to Prepare for End-of-Year Giving](#) and [5 Ways to Weave Digital Into End-of-Year Giving](#) too, to find more about End-of-Year Fundraising.

Learn more about how to [Optimize the Donation Experience](#) and to [Connect Your Finance systems for End-of-Year accounting](#).

We hope this workbook helps support you in your End-of-Year Fundraising efforts. We can't wait to hear your stories of success!



