

# DINNER, GALA AND LUNCHEONS

Recommended timeline

#### 2-3 Months

before campaign

#### 1-2 Months

before campaign

**1-7 Days** before campaign

## **Live** day of campaign

**1-3 Days** after campaign

### **1-2 Weeks** after campaign

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#### Set-up

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#### **Promote**

#### Remind

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#### Inspire

#### Thank

#### **Engage**

- RSVP/ticketing form
- Donation page for day-of and out-of-town gifts
- Raffle ticket purchase form
- Text-to keywords and shortlinks for social sharing
- Email tax receipt
- Email ticket delivery
- Fundraising thermometer
- Mobile number verification

- Videos, photos, and testimonials showcasing your upcoming event in order to promote fundraising forms across channels
- Send invitations via direct mail, text message, email and social media
- Speakers, sponsors and performers on collateral across channels
- Sign-up and donation forms via social ambassadors

- RSVP deadline
- Number of tickets remaining
- O Date, time, and location (week before, day before, and day of reminders) via text and email
- Out-of-towner donation option with text-to-give keyword and shortlink
- Rehearse live
   call-to-action and
   test text-to-give and
   donation callouts

- Showcase the impact of giving with videos, photos, and testimonials
- Show people how to make a donation and provide multiple ways to give
- Recognize donors on-screen until the goal is reached
- Seed totals with ticket sales, out-of-town gifts, auction sales, and sponsorships

- Send thank you videos via text, email, and social
- Share goal totals and highlight key donors and sponsors
- Share photos, videos, and highlight reels
- Post personal thank yous on the social media walls of donors

- Announce

   upcoming campaign
   dates and details
   with supporters
- Share the different ways donors can get involved
- Plan an internal recap to discuss improvements needed for next campaign



"At the emotional peak of your event ask, display your live fundraising thermometer seeded with all revenue totals from before and during your event to compel your audience to make donations to reach your goal."



# **TV AND RADIO**

Recommended timeline

#### 2-3 Weeks

before broadcast

#### **2-7 Days** before broadcast

**1-7 Days** before broadcast

#### Live

day of broadcast

### 1-3 Days

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1-2 Weeks after broadcast

after broadcast



**Engage** 

# **APPEARANCES**

#### Set-up

- Confirm time slot and station details
- O Confirm your call-to-action window
- Confirm with station if donor names can be shouted out
- Text-to-give keyword with corresponding donation page and thermometer
- Email tax receipt

#### **Promote**

- Promote the dates and times of your appearance(s) via social media. email and text
- Rehearse your call-to-action: instruct supporters to text your keyword or go to your website to donate
- O Do a trial run to practice shouting out names of donors as they appear on screen

#### Remind

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- Ensure that the donate button on your website links to the same page as your keyword
- Send a reminder text message and email asking people to give during the broadcast
- Provide a link to your fundraising thermometer on your website so supporters can see the action live

#### Inspire

- Make a clear call-to-action for donations of any amount
- Shout out donor names as they appear on the fundraising thermometer
- Promote an incentive for individuals who donate during the live broadcast

#### **Thank**

- Send thank you videos, via text. email, and social
- Share goal totals and thank the radio/television station that provided the opportunity
- O Post personal thank yous on social media and tag your donors

- Announce upcoming campaign dates and details with supporters
- Share the different ways donors can get involved
- Plan an internal recap to discuss improvements needed for your next campaign



"During the broadcast, link your website DONATE button and the link in your text-to-give keyword reply message to the same donation page. Be sure to shout out donor names as the donations roll in!"



### RUNS, WALKS, SWIMS, AND RIDES

Recommended timeline

#### 2-3 Months

before active event

#### 4-5 Weeks

before active event

**1-7 Days** before active event

#### Live

day of active event

#### 1-3 Days after active event

1-2 Weeks after active event



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#### Set-up

- Participant, team, and sponsor sign-up forms
- O Peer-to-peer fundraising sign-up form
- Mobile number verification
- Text-to keywords and shortlinks for social sharing
- Participant & donor email confirmations
- Instructions for fundraisers (toolkit)
- Campaign #hashtag

#### **Promote**

- Invitations via direct mail, text message, email and social media
- Videos, photos, and #hashtag to showcase your campaign and help your participants promote their fundraising pages
- Featured teams and participants
- Sign-up and donation forms via team captains

#### Remind

- Participant sign-up deadline
- How many have signed up so far
- Top fundraisers and teams so far
- How much left to reach goal
- O Date, time, and location of event via text and email (ongoing updates)
- Tips for training
- Out-of-towner donation option with keyword and shortlink

### Inspire

- Send any special instructions to captains day-of
- Encourage participants via text all day long
- Send fundraising goal results via text and email
- Instruct everyone to post photos and videos to social throughout the day with event #hashtag
- Show thermometer with all revenue totals and make asks to reach goal

### **Thank**

- Send thank you videos via text. email, and social
- Share goal totals and highlight key teams, donors and sponsors
- Share photos, videos, and highlight reels
- Post personal thank yous on social media for captains, donors, and fundraising participants

Announce

upcoming campaign

dates and details

**Engage** 

- Share the different ways participants and donors can get involved
- Plan an internal recap to discuss improvements needed for your next campaign



"Integrate your event registration form and your crowdfunding sign-up page to ensure that every participant has their own peer-to-peer fundraising page. Create a toolkit to help fundraisers promote their pages."



### GOLF TOURNAMENT

Recommended timeline

#### 2-3 Months

before tournament

#### 1-2 Months **1-7 Days** before tournament before tournament

Live

day of tournament

### 1-3 Days

1-2 Weeks

after tournament



## after tournament

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#### Set-up

#### **Promote**

#### Remind

#### Inspire

#### **Thank**

#### **Engage**

- Participant sign-up form (golfer/guest)
- Payment form(s) for auction items
- Payment form(s) for mulligans
- O Donation page for out-of-town gifts
- Text-to keywords, shortlinks and fundraising thermometer
- Email receipt with tee time and confirmations
- Mobile number verification

- Videos, photos, and testimonials showcasing your upcoming event
- Videos, photos, and testimonials showcasing your upcoming event in order to promote fundraising pages across channels
- The golf course, dinner menu, and sponsors
- Sign up and out-of-town donation forms via social ambassadors

- Sign-up deadline
- Number of spots remaining
- O Date, time, and location via text and email (ongoing updates)
- Out-of-towner donation option with text-to-give keyword and shortlink

- Send live updates (longest drive, closest to the pin) via text message
- Instruct everyone to post photos and videos to social with your #hashtag
- Use mulligan payment form for golfers to buy extra strokes
- Use auction payment form for winning bids
- Show thermometer with all revenues and ask for final donation

- Send thank you videos via text. email, and social
- Share goal totals and highlight key donors and sponsors
- Share photos, videos, and highlight reels
- Post personal thank yous on social media and tag participants and donors

- Announce upcoming campaign dates and details to attendees
- Share the different ways participants and donors can get involved
- Plan an internal recap to discuss improvements needed for your next campaign



"Make it easy for golfers and dinner guests to sign up and make donations leading up to and on the day of your tournament. Make a final ask at dinner to ensure you reach your goal."



#### CAMP, TRIPS, AND RETREATS

Recommended timeline

#### 2-3 Months

before trip

#### 1-2 Months before trip

**1-7 Days** before trip

#### Trip day of trip

1-3 Days after trip

#### 1-2 Weeks after trip



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#### Set-up

#### **Promote**

#### Remind

#### Inspire

#### **Thank**

#### **Engage**

- Trip sign-up form
- Peer-to-peer fundraising sign-up form
- Scholarship application form
- Text-to keywords and shortlinks for promotion
- Customized email confirmations
- Instructions for fundraisers (toolkit)
- Email tax receipt

- Invitations via direct mail, text message, email and social media
- Videos, photos, and #hashtag to showcase your campaign and help your participants promote their fundraising pages
- Sign-up and donation forms via trip leaders

- Trip sign-up and payment deadline
- How many participants and number of spots remaining
- Ongoing trip details and updates via text and email
- Send payment forms via text and email for trip balance payments

- Encourage participants all trip long via text
- Send special instructions to trip leaders via text
- Instruct everyone to post photos and videos to social all trip long with #hashtag
- Send thank you videos via text. email, and social to participants and donors
- Share trip photos, videos, and highlight reels
- Post personal thank yous on the social media walls of trip leaders, participants, and donors

- Announce upcoming campaign dates and details to supporters
- Share the different ways participants and donors can get involved
- Plan an internal recap to discuss improvements needed for your next campaign



"Digitizing your sign-up, payment, and fundraising forms makes it simple to track participants and collect payments. Plus it's the easiest way to get all demographics of supporters involved!"



# DAYS OF GIVING AND #GIVINGTUESDAY

Recommended timeline

#### 2-3 Months

before day(s) of giving

**0-2 Months** before day(s) of giving

### **1-7 Days** before day(s) of giving

### **Live** day(s) of giving

### **1-3 Days** after day(s) of giving

## **1-2 Weeks** after day(s) of giving



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#### Set-up

- Day(s) of giving donation form
- Ambassador sign-up form
- Instructions for ambassadors (toolkit)
- Recruit ambassadors
- Real-time fundraising thermometer
- Email tax receipt
- Mobile number verification

#### **Promote**

- Videos, photos, and testimonials showcasing your day(s) of giving that ambassadors will use to promote the campaign
- Ambassador signup form via text messaging, email and social media
- Day(s) of giving date(s) and goals via social media ambassadors

#### Remind

- Ensure that the
   donate button on
   your website links to
   the same page as
   your day of giving
   keyword
- Send reminder texts and emails and make social posts encouraging people to give during the day(s) of giving
- Link to your fundraising thermometer on your website

#### Inspire

- Repeat your call-to-action via all communication channels until your goal is surpassed
- Recognize donors in real-time on a thermometer and share ongoing campaign results
- Promote a special incentive (like a match) to help reach your goal

#### Thank

- Send thank you videos via text, email, and social
- Share campaign totals and highlight key donors and sponsors across channels
- Share photos,videos, and highlightreels
- O Post personal thank yous on social media recognizing donors and ambassadors

- **Engage**
- Announce

   upcoming campaign
   dates and details to
   new donors and
   supporters
- Share the different ways donors can get involved
- Plan an internal recap to discuss improvements needed for your next campaign



"Encourage all donors, ambassadors, family, and friends to share the same donation link and post campaign updates across all channels all day long. This is the one day of the year you can't ask too much!"



#### YEAR-END GIVING

Recommended timeline

#### 2-3 Months

before year-end

#### 1 Month

before year-end

**1-3 Days** before year-end

#### Dec 31

year-end

**1-3 Days** after year-end

### 1-2 Weeks

rear-end after year-end













**Engage** 

#### Set-up

- Lists of all donors, ambassadors, volunteers, participants and sponsors from the last year for segmentation
- Create year-end giving donation form and set goal
- Text-to keywords and shortlinks for promotion and social sharing
- Email tax receipt
- Mobile number verification

#### **Promote**

- Videos, photos, and testimonials showcasing what donations have accomplished in the last year
- Send texts, emails and make social posts encouraging people to make a year-end gift
- Ensure that the
   donate button on
   your website links
   to the same page
   as your year-end
   giving keyword

#### Remind

- Send a personal appeal from your director asking for a final donation across all channels
- Promote a special incentive (like a match) to help reach your goal

#### **Inspire**

- Send a last-minute text and email encouraging donors to make a final gift to ensure your goal is reached
- Send thank you videos via text, email, and social
- Share year-end totals and highlight key donors, ambassadors, volunteers, and participants
- Share photos,videos, and highlightreels of the pastyear
- Post personal thank yous across channels

- Thank
  - Announce upcoming campaign dates and details to new donors
  - Share the different ways donors can get involved
  - Plan an internal recap to discuss improvements needed for your next campaign



"Ask every donor in your database to make a final donation in the month of December. On the morning of the 31st send a text message letting them know how much you have left to reach your goal and ask them for a final push."



# VOLUNTEER, PETITION, AND MEMBERSHIP DRIVE

Recommended timeline

#### 2-3 Months

1-2 Months

**1-7 Days** before campaign ends

**Deadline**day campaign ends

1-3 Days after campaign

**1-2 Weeks** after campaign



before campaign ends before campaign ends





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#### Set-up

- Mobile-friendly online forms (with payment options where applicable)
- Text-to keywords and shortlinks for promotion and social sharing
- Email confirmations (with tax receipt where applicable)
- Mobile number verification
- Identify ambassadors and create a toolkit to spread the word

Form links via direct

**Promote** 

- mail, text
  messaging, email
  and social media
- Videos, photos, and testimonials showcasing your upcoming event to promote involvement
- Social ambassadors share toolkit links and promote participation

### Remind

- Campaign progress
- How many volunteers, signatures, memberships, needed to reach goal
- Ongoing campaign updates via text and email
- Send links directly to previous year participants via text and email

#### Inspire

- For in-person opportunities, communicate any last-minute updates by text message
- Send campaign notification when you reach your goal
- Instruct everyone to post "we did it" photos and videos with #hashtag

- Thank
- Send thank you videos via text, email, and social to all participants
- Share campaign photos, videos, and highlight reels
- O Post personal thank yous on social media, recognizing ambassadors, members and volunteers

Announce upcoming campaign

dates and details

**Engage** 

- Share the different ways participants can get involved
- Plan an internal recap to discuss improvements needed for your next campaign



"Make it quick and easy for all ages of people to sign up, participate, and join from anywhere on any device with mobile-friendly online forms and text message updates.