



Running a Micro-Campaign or Gives Day: 60-90 Day Planning Checklist

Step 1 Preparation: Analyze Past Results

Timing: 14 days

If you participated in a giving day or conducted a micro campaign in the past, it's critical to examine those results so you can leverage previous donors, apply lessons learned, and improve on your campaign results.

LOOK AT LAST YEAR'S RESULTS

Analyze results from last year and include team members and/or key stakeholders.

- ☐ Identify what worked and what did not
 - ☐ Campaign goal(s)
 - ☐ Timeline execution
 - ☐ Press Coverage
 - ☐ Social media results
 - ☐ Google grants / advertising
 - ☐ Website / giving page traffic
 - ☐ Email open & CTR
 - ☐ Matching gift results
 - ☐ Campaign committee or key volunteers

ANALYZE AND SEGMENT PAST CAMPAIGN DONORS

Take a look at the types and level of giving that occurred on last year's giving day.

- ☐ Determine the level of donor engagement from last year
 - ☐ Number of new donors and the list
 - ☐ Number of current donors and the list
 - ☐ Number of gifts over \$1,000 and the list
 - ☐ Number of volunteers and the list



Step 2 Planning: Finalize Plan for the Campaign

Timing: 14 days

Having a solid action plan is critical to success. You need to understand what you can and cannot accomplish in the 30-day period. Based on past results, set goals and plan outreach activities.

DETERMINE FUNDING DESIGNATIONS & MESSAGES

Your campaign should be based on funding a specific area, program, or service. It's important to have a designated fund that is impactful and tangible.

- ☐ Develop the overall campaign case for support
- ☐ Finalize 1-2 opportunities for donors to give to
- ☐ Utilize video
- ☐ Donor testimonials and testimonials from those served
- ☐ Can you tell the case through a story of someone served?

SET FUNDRAISING GOALS

How much can you realistically raise? Take a conservative approach utilizing historical data, economic conditions, and current fundraising trends.

- ☐ Analyze the current state of fundraising for your organization
- ☐ Determine counting - what counts as a gift to this campaign?
- ☐ Participation goal - number of donors
- ☐ Cash goal

CREATE GIVING PAGE

- ☐ Determine the platform
- ☐ Testimonials
- ☐ Tell the story of the impact of your funding designation
- ☐ Make it easy to give
- ☐ Share buttons
- ☐ Images
- ☐ Logo
- ☐ Use videos



ITERATE AND IMPROVE FROM YOUR LAST CAMPAIGN

- ☐ Determine which channels worked best and spend the most time promoting through those channels
- ☐ Examine new approaches and strategies for connecting with your donor base
- ☐ Connect with donors that gave the most

DEVELOP COMMUNICATIONS STRATEGY

- ☐ Plan your social media strategy
 - ☐ On which platforms do you have the most followers?
 - ☐ Determine number of posts per week
 - ☐ Promote sharing
 - ☐ Advertising - amount and target audience
- ☐ Email Cadence
 - ☐ Determine number of emails to be sent for the campaign (7-10 for a 30-day period)
 - ☐ Develop messages
 - ☐ Create templates
 - ☐ Do you have stories you can promote?
 - ☐ Send emails from different people within your organization
 - ☐ Segment lists - current and past donors, newsletter subscribers
- ☐ Personal Calls
 - ☐ To top donors
- ☐ Letter / Mail Piece
- ☐ Automated Voicemail
- ☐ Google grant advertising

TRACK VISIT RATES & DONOR ENGAGEMENTS

- ☐ Monitor visits and abandonments
- ☐ When people give - take them out of the queue
- ☐ Thank donors within 24 hours



Step 3: Launch and Implement Campaign

Timing: 30-60 Days

You've analyzed, planned, and put the right elements into place. Now it's time to launch and raise funds.

PRE-LAUNCH

Prepare key audiences/stakeholders for your launch a week out

- ☐ Ask them to make a gift so when you launch you have some funds in the door and can show progress toward your goal
- ☐ Ask them to share and like your initial social posts
- ☐ Ask them to forward email to their network

LAUNCH YOUR CAMPAIGN

Launch with a lot of fanfare, don't be shy. There is no reason to drip it out.

- ☐ Segment email messaging to board, volunteers, and past donors
- ☐ When you post on social media, make sure you have stakeholders ready to like and share
- ☐ Utilize video in messaging
- ☐ Is there a press opportunity?
- ☐ Do you have influencers that can help you promote?
- ☐ Drop the postal mail piece
- ☐ Mention your goal and deadline in all correspondence

KEEP THE MOMENTUM GOING

- ☐ Make at least 2-3 social posts per week
- ☐ Send email once a week
- ☐ Highlight the campaign in your newsletter
- ☐ Start social advertising
- ☐ Encourage board/volunteer involvement to share social media and email networks
- ☐ Utilize matching gifts
- ☐ Utilize any live events/ meetings or seminars



- ☐ Highlight on your website homepage
- ☐ Tell stories of impact
- ☐ Offer challenges or prizes for giving
- ☐ Create special days or hours to incentivize giving
- ☐ Ask sponsors or corporate partners to share with their networks

LAST WEEK PUSH

- ☐ Automated voicemail
- ☐ Text-to-give (a reminder text directing to the giving page)
- ☐ Daily social post
 - ☐ Pitch from an influencer
- ☐ Daily emails
- ☐ Adjust goals if needed
- ☐ Utilize incentives for the last day

STEWARDSHIP

- ☐ Traditional thank you email right after gift is made
- ☐ Thank you letter in the mail
- ☐ Listing on the giving page
- ☐ Video thank you email from influencer
- ☐ Send follow up email post-event about impact and dollars raised
- ☐ Send giving update via email or mail six months after gift
- ☐ Choose random donors for social media shout outs
- ☐ Select a random donor for a special item/prize

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