



The Big Payback Strategy Checklist

“Hope is not a strategy.”

—Vince Lombardi

STEP #1: What are your Goals?

ANALYZE YOUR DATA TO DEFINE YOUR GOALS:

- Analyze your current donor database to discover new opportunities and develop the best approach.
- Establish your overall fundraising goal based on insights from your data.
- Determine the number of new donors and total participants you want to reach.
- Set segmented participation goals (young donors, lapsed donors, etc.).
- Determine in advance how you are going to measure your goals.

STEP #2: What's your Story?

HOW ARE YOU GOING TO ENGAGE YOUR DONORS?:

- Create a compelling case for support. Consider tying your campaign to a challenge fund, matching gift, or specific program.
- Create a multi-channel experience. Be sure to coordinate your communication efforts across every channel (web, print, social media, direct mail) and don't forget mobile.
- Be intentional with your email strategy. Start early, but beware of donor fatigue.
- Consider segmenting donors and tailor messages to reach them. Target donors with relevant content and contextualized asks.
- Personalize your communications. People give to people. Create a personal experience that resonates with each individual donor.
- Optimize your website. Consider launching a homepage takeover. Redirect your donate button to your The Big Payback page on May 2nd.
- Equip social ambassadors (especially those setting up Individual Fundraising Campaigns!) with social content and images for your campaign.
- Create templated emails for your key influencers and board members to share.
- Think about what would encourage your supporters to share their campaigns and recruit donors. Let them know you are grateful for their help in telling your story.



The Big Payback Strategy Checklist

STEP #3: Build Your Team

WHO IS GOING TO HELP YOU MAKE THE BIG PAYBACK A SUCCESS?

- Analyze who in your internal organization could best help you achieve your goal for The Big Payback.
- Who are the board members that would best help spread your message? (More helpful hints on Board Engagement at “Motivate Your Board Toolkit”)
- Think about current donors or volunteers who would be great ambassadors for your organization.

STEP #4: How will you follow up?

BE INTENTIONAL WITH FOLLOW UP

- Create a simple thank you video in advance.
- Thank immediately—via email, phone call, or text. (Your donor report provides live donation data!)
- Develop a specific follow-up campaign to steward donors and create a transformational experience.

Did you know ... 18,806 donors have self-reported making a gift through The Big Payback to a nonprofit they had not previously supported?



THE FRIST FOUNDATION

TheBigPayback.org #BigPayback



Presented by *The Community Foundation of Middle Tennessee*

Build Your Strategy Worksheet

STEP 1: What are your Goals?

GOAL:
WHY?

GOAL:
WHY?

GOAL:
WHY?

STEP 1: What is your story?

WHAT IS YOUR STORY FOR NEW DONORS?

WHAT IS YOUR STORY FOR REPEAT DONORS?
--

WHAT PLATFORM WILL YOU USE TO SHARE YOUR STORY?
--

Build Your Strategy Worksheet

STEP 3: Who is on your team?

INTERNAL SUPPORT AND ROLES

BOARD MEMEBERS AND ROLES

EXTERNAL SUPPORT AND ROLES

STEP 4: How will you follow up?

HOW ARE YOU THANKING YOUR DONORS AND HELPING
TURN ONE DAY DONORS INTO LIFETIME DONORS?



The Big Payback 1:1 Matching Funds

What are matching funds?

Matching funds are additional funds contributed directly to a nonprofit from a donor (or donors) to help encourage donations to your nonprofit. This year matching funds should be 1:1 matches. This will allow each donor to say their donation will be DOUBLED! Your matching funds will be counted down on your nonprofit donation page.

Who are potential matching fund donors?

START WITH YOUR INNER CIRCLE:

- Board Members
- Major donors to previous Giving Days
- Donors who give large donations annually
- A group of donors or anyone who loves your nonprofit

REACH OUT TO BUSINESS IN YOUR COMMUNITY:

- That you have partnered with before
- That can really SHARE THE NEWS about your organization with their customers
- Broaden the nonprofit's giving base
- Make a large impact with one gift

IS MATCHING FUND MONEY ELIGIBLE FOR PRIZES?

Yes and no. Matching fund money could be eligible for prizes if the donor processes the match by credit card once the dollars for that match has been raised on the day of the event. Some nonprofits and donors may decide that it works in the best interest of their organization to receive this donation by check directly from the donor, as this allows for the money to be distributed to the nonprofit without fees and immediate instead of at The Big Payback's ACH distribution date of **June 30, 2018**.

ARE MATCHING FUNDS A DOLLAR FOR DOLLAR MATCH?

Yes, matching funds must be a dollar for dollar.

WILL MY MATCHING FUNDS APPEAR ON MY NONPROFIT PROFILE?

Yes, your match amount will be listed on your profile page. As you raise money on #BigPayback, your match amount will count down until your match is met.



THE FRIST FOUNDATION

TheBigPayback.org

#BigPayback



Presented by *The Community Foundation of Middle Tennessee*

Matching Fund Worksheet

Brainstorm how to acquire Matching Funds

WHO ARE THE BOARD MEMBERS YOU COULD REACH OUT TO?

WHO ARE THE DONORS YOU COULD REACH OUT TO?

WHO ARE THE COMPANIES OR NEIGHBORHOOD BUSINESSES THAT YOU COULD PARTNER WITH?



Matching Funds Template

Can be used for email or direct mail

The following example offers ideas and language you can use as part of your outreach for possible The Big Payback matching funds donors.

Feel free to copy, paste, and adjust as you see fit for your organization.

Dear **[Donor Name]**,

This year, on Wednesday, May 2nd, 2018, **[ORGANIZATION NAME]** is participating in The Big Payback, a 24-hour, online giving event created to increase philanthropy in the 40 counties of Middle Tennessee. Our organization provides **[core mission constituency, e.g. homeless youth, children with cancer, collies and dachshunds]**, and The Big Payback helps us to provide even more services to Middle Tennesseans.

In its four years, we were part of the success of The Big Payback as The Community Foundation of Middle Tennessee brought together more than 750 organizations raising over \$9.3 million. Since 2014, The Big Payback has inspired giving from around the world, resulting in increased donations and services provided in Middle Tennessee. We invite you to join the movement and help us reach our goal of **[\$XX,XXX]** on May 2.

We're currently looking for sponsors who would be willing to help us reach this goal. Can we count on your help in sponsoring a 1 to 1 matching fund? Your sponsorship of a matching fund will help encourage donors to donate to our organization on May 2nd.

For more information on The Big Payback, visit **TheBigPayback.org!** To discuss being a matching fund sponsor, please contact **[contact information]**!

Thanks,

[NAME]

[Title (Executive Director, Board Chair, Volunteer)]