



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 2.
- 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.



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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? (Find more helpful hints on Board Engagement in “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 ... 24,716 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?

<p>GOAL:</p>
<p>WHY?</p>

<p>GOAL:</p>
<p>WHY?</p>

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<p>WHY?</p>

STEP 2: What's your story?

<p>WHAT IS YOUR STORY FOR NEW DONORS?</p>

<p>WHAT IS YOUR STORY FOR REPEAT DONORS?</p>
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<p>WHAT PLATFORM WILL YOU USE TO SHARE YOUR STORY?</p>
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Build Your Strategy Worksheet

STEP 3: Build Your Team

INTERNAL SUPPORT AND ROLES

BOARD MEMBERS 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?