



EVENT PLANNING MASTER CHECKLIST

hello@txt2give.co

888-604-6536

Introduction



If you're able to, begin planning your campaign as early as January. This will give you plenty of time and allow you to take small actions throughout the year to design a truly creative campaign.

Even if you can't plan your Event all year, you can still have a very successful campaign! We have put together this comprehensive checklist of easy things to implement that will help save you tons of time and make the planning part easy.



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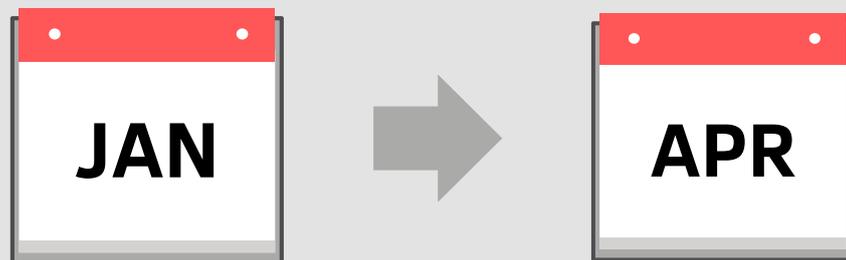
Plan

To start, focus on the follow-through from your previous Event campaign.

In this phase of your planning, you'll want to kick off an internal meeting for your team to hold a campaign retrospective, brainstorm new ideas, and decide the elements you'll be using to achieve a successful campaign.



Suggested Timeframe for Early Planners:



SECURE SPONSORSHIPS

- Begin your hunt for sponsors
- Identify a pipeline of sponsors for cold outreach
- Identify warm leads based on connections from staff, board, or volunteers
- Create a full menu of sponsorship opportunities



FOLLOW UP FROM LAST YEAR

- Look back at last year's campaign. What worked and what didn't work?
- Invite team members and/or key stakeholders to your meeting, such as
 - Campaign lead
 - Fundraising lead
 - Content creator
 - Designer
 - Communications lead
- Get everyone's feedback on:
 - Campaign goals and performance
 - Timeline
 - Press mentions
 - Quantitative results
 - How did key partners or sponsors perform last year
 - Matching gift results
 - Feedback from your audience



- () Go down further into the team level
 - () Successes and challenges for each group
 - () Success metrics in each area
 - () How to achieve similar successful results in this year's campaign
 - () How to avoid similar struggles in this year's campaign
- () Develop and nurture relationships with your past and present supporters
 - () What supporters engaged with your campaign throughout the season
 - () Make a list of new donors
 - () Make a list of return donors
 - () Make a list of major donors
 - () Make a list of peer-to-peer fundraisers (if you did a peer-to-peer campaign)



- () For all groups
 - () Thank them for their support.
 - () Share the results of your campaign via email, personal note, social media, etc
 - () Show them the impact of their donations by showcasing specific stories of how their donations helped. If willing, interview recipients of the help received
- () For new donors
 - () Make sure you introduce them to your nonprofit and your mission
 - () Explain your goals and how you were successful
 - () Show them different ways they can get involved throughout the year



BEGIN INTERNAL PLANNING

- () Shift your focus from last year to the upcoming campaign
 - () Determine your new goal, or recommit to last year's goal
 - () Set your campaign budget
 - () Prepare a "master" document where everything related to your Event is kept
 - () Ask teams to brainstorm and prepare pitches for the upcoming campaign
- () Kick off your creative brainstorm
 - () Email the team the "master" document one week before your meeting, and ask them to read it and become familiar with the campaign direction



- () Hold the meeting
 - () How can we differentiate ourselves from other nonprofits?
 - () Does branding need to be updated?
 - () Is our user experience one that people will complete their donations?
 - () What are ideas to promote the new campaign?
 - () Revisit what worked in your last campaign
 - () Pick and choose what you want to carry forward based on your new goals and outlook
 - () Discuss new ideas if you're going in a different direction
 - () Evaluate how you can double down on efforts that worked last year if you're going in the same direction
 - () Discuss new ideas if you're going in a different direction

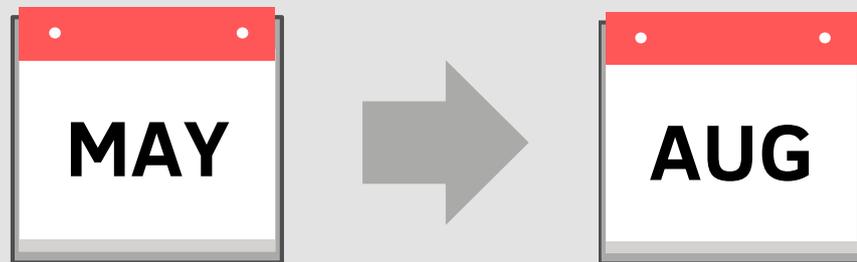
Execute



In the next phase of your Event planning, you and your team will begin executing your new campaign direction, create your fundraising page, and begin outlining your communications.



Suggested Timeframe for Early Planners:



DEFINE YOUR CAMPAIGN NARRATIVE

- () Define what the story will be on your new campaign page. Mission? Past Beneficiaries?
- () Determine your campaign name
- () Determine branding elements and colors you will use
- () Collect design assets for the page (images, testimonials, videos, etc)



YOUR COMMUNICATIONS STRATEGY

- Plan your social media strategy
 - Identify the platforms you will use during your campaign
 - Decide when you will begin promoting your campaign on those platforms
 - Decide how many posts you will create
 - Decide when you will post them
 - Decide if you will need any design assets for the platforms
- Plan your email strategy
 - Segment your lists
 - Determine when you will start sending emails regarding your campaign
 - Determine the frequency of emails in the time leading up to your Event
 - Determine if you need any design assets for your emails
 - Begin preparing ideas for your email messages
 - Start writing your email copy



BUILD YOUR FUNDRAISING PAGE

- Create a new campaign (or duplicate last year's campaign) and prepare your content for the page
 - Campaign name
 - Fundraising goal
 - Featured media
 - Videos
 - Images
 - Logo
 - Text for buttons
 - Text for "About" section
- Test Everything!
 - Links
 - Emails
 - Social posts

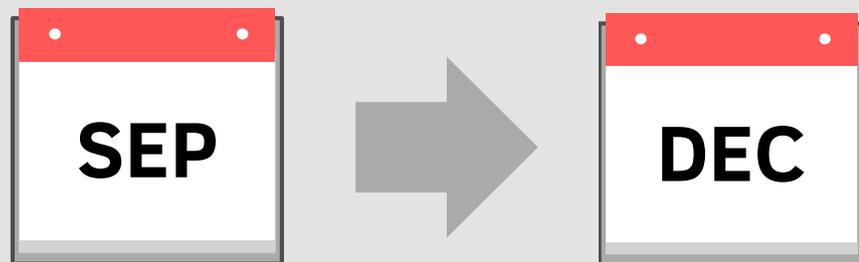
Launch



During the final phase of planning, you will soft and hard launch your campaign, draft all social media copy, have your Event, and then transition your campaign to year-round support.



Suggested Timeframe for Early Planners:



SOFT LAUNCH YOUR CAMPAIGN

- Determine who you will soft launch to
 - Top tier donors
 - Repeat donors
 - Powerhouse fundraisers
 - Your dedicated volunteers
 - Board
 - Staff



- () Send your soft launch group a notification about your upcoming campaign. Include a few specific asks, such as:
 - () Consider donating early
 - () Share with their close networks
 - () Put your official campaign launch date on their calendar

DRAFT YOUR SOCIAL MEDIA CONTENT

- () Revisit your social media strategy
 - () Tailor content copy for specific social media platforms so it engages your supporters into year-end and beyond
 - () Schedule certain posts in advance, (early morning kickoff, inspiration posts, beneficiary stories).
 - () Determine if you need any graphics for social media posts



- () Make any last-minute adjustments needed for your campaign
 - () Copy
 - () Design assets
 - () Email automation
 - () Featured media
- () “Flip” your Event campaign to a year-round campaign
 - () New hero image
 - () Replacements for Event specific media
 - () Adjustments to copy on campaign page and donation form



HARD LAUNCH YOUR CAMPAIGN

- Assign responsibilities
- Notify your entire community that your Event campaign is live
 - Inform them of details around your launch
 - Your fundraising goal
 - Impact of the goal
 - Any matching gift periods
 - Special incentives
 - Important sponsors



AFTER YOUR EVENT

- Celebrate your Event's success
 - Party
 - Have some champagne
 - Eat a cake
 - High five your team
 - Let them know exactly what all their hard work made possible
- Communicate back to your supporters
 - Thank donors for their gifts
 - Share financial results of your Event
 - Share the impact of your results
 - Make a hard ask to recommit for your year-round campaign
- Officially flip your campaign to year-round