



An interactive workbook to help you  
create, plan and implement your  
8-week day of giving

<https://rvgives.givebig.org>

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## BEST PRACTICE #1 SOCIAL MEDIA

For an online event, social media plays a huge role. Even if you are new to this way of communicating, ROANOKE VALLEY GIVES is the time to dive in and get your feet wet! Utilizing Facebook and other platforms will help you communicate to your current and future donors pre-event, during and long after the event.

### Questions

1. What social media platforms will you use for the ROANOKE VALLEY GIVES?

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2. What are the key messages you will convey on these platforms?

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3. Which social media prize challenges will you attempt to win?

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4. Do you have a staffing plan? Who will run your social media campaign?

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5. What other tools/resources do you need to implement this practice?

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### Notes:

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## BEST PRACTICES #2 BOARD ENGAGEMENT

Board participation is a crucial element for success on March 15. How will you engage your board and activate them to assist with your Roanoke Valley Gives campaign?

### Questions

1. What will be your goal for board giving? (A percentage of board members or a dollar amount?)

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2. What prize challenges will you and your board work on together?

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3. What donor engagement strategies will your board employ?

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4. What social media activity will you ask of your board?

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5. What other communication/marketing activities will your board engage in?

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6. What other tasks or strategies will you ask your board to participate in?

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Notes: \_\_\_\_\_

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## BEST PRACTICE #3 DONOR ENGAGEMENT

Engaging your donors before, during, and after the Roanoke Valley Gives drives home the importance of donor stewardship, cultivation and keeping them aligned with your organization for continued engagement, support and gifts.

### Questions

1. How will you engage your current donor base?

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2. Will you ask your current donors to participate in Roanoke Valley Gives by creating a “Fundraiser Page”? (*Refer to Attachment A*)

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3. If so, how will you determine which donors to ask to become “Fundraisers”?

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4. Have you updated your Roanoke Valley Gives profile page to “Allow Fundraisers”?

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5. How and when do you plan to share the “How to Become a Fundraiser” document provided to you in the Nonprofit Toolkit? (*Refer to Attachment A*)

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### Notes:

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## BEST PRACTICE #3 DONOR ENGAGEMENT CONTINUED

6. How will you engage your current donor base?

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7. How will you thank your donors during March 15?

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8. What is your plan to thank your donors and “Fundraisers” after March 15?

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9. How will you engage new donors?

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10. What tools/resources do you need to implement this practice?

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Notes:

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## BEST PRACTICE #4 DONOR ENGAGEMENT – KNOW YOUR AUDIENCE

To craft the right and most effective message, you need to know your audience. Who are they? How can you find them and how can they be your best ambassadors?

### Questions

1. Who are your current audiences?

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2. Who do you want to target? (prioritize them)

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3. How will you find them?

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4. Your Message: How is the community different because you exist? What stories of impact can you share?

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5. What tools/resources do you need to implement this practice?

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### Notes:

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## BEST PRACTICE #5 GOAL SETTING

Goals for the Roanoke Valley Gives are more than financial. Manage your expectations for setting your overall philanthropic goals: new donors, visibility, marketing, social media.

### Questions

1. What is your financial goal for Roanoke Valley Gives?

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2. What is your donor goal?

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3. What are your other goals? (i.e. increase number of Facebook “likes”)

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4. How do you plan on measuring these goals?

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5. What tools/resources/staff do you need to implement this practice?

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### Notes:

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## BEST PRACTICE #6 MAXIMIZE COMMUNICATION TOOLS

Once you've defined your audience, crafted your message, and set your goals, maximize the right communication tools available to you. Use what works best for you!

### Questions

1. What communication tools are you already using in your organization?

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2. What tools are you not currently using that you would like to incorporate into your campaign?

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3. What current marketing collateral can you add a Roanoke Valley Gives message to?

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4. What tools/resources do you need to implement this practice?

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Additional tools available for little to no cost:

[www.canva.com](http://www.canva.com) - Canva can be used to design almost anything: presentations, posters, blog content, cards, online marketing materials, invitations, flyers and so much more.

[www.animoto.com](http://www.animoto.com) - Animoto helps you make great videos, easily. Turn ordinary photos into stunning HD videos with Animoto's online video maker. Add music, text, and video clips and have your nonprofit tell its own story!

[www.picmonkey.com](http://www.picmonkey.com) - PicMonkey makes creative tools for photo editing and graphic design.

Notes:



## DEVELOP AND EXECUTE YOUR PLAN

Using your notes from the best practices, you are now ready to put it all together. Use the template below to create your 8-week workplan.

Keep in mind that the first 4 weeks of your plan should be dedicated to planning and preparation. The 2<sup>nd</sup> half of your plan should be implementing, starting with soft marketing, then transitioning into heavy marketing at the 2 week mark.

### **Roanoke Valley Gives Goals:**

Dollar Goal: \_\_\_\_\_

Donor Goal: \_\_\_\_\_

New Donor Goal: \_\_\_\_\_

We will compete for the following prize challenges:

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Other Goals:

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**Week Eight (January 18 – 24) Meet, Plan, Discuss**

Checklist:

- \_\_\_ Set weekly meetings with your staff or volunteers who will be assisting with your campaign
- \_\_\_ Meet and complete this workplan
- \_\_\_ If you are creating special printed materials, decide what those will be and begin design & production
- \_\_\_ Decide on what and how many prize challenges you will attempt to win
- \_\_\_ Finalize donor email/contact lists and make sure all information is ready to use
- \_\_\_ Create outreach strategy for current donors (including recruitment of “Fundraisers” – see page 4)
- \_\_\_ Assign a staff person to be the point of contact for all “Fundraisers”

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				

**Week Seven (January 25 - 31) Teasers and Preparations**

Checklist:

- \_\_\_ Review and download (if necessary) all items from the Nonprofit Toolkit
- \_\_\_ Begin outreach to local businesses to form partnerships and support
- \_\_\_ Add a Roanoke Valley Gives logo to your email signature
- \_\_\_ Add a teaser or save the date block to your website and outgoing newsletters
- \_\_\_ Give Roanoke Valley Gives updates at your monthly or quarterly board meeting
- \_\_\_ Make sure you have completed all checklist items from the previous week!

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Week Six (February 1 – 7) Preparing for Your Soft Marketing Launch!**

Checklist:

- Decide on communication tools
- Determine who will run your social media campaign (staff, hired consultant, volunteer, etc.)
- Decide if your organization will attend or host an event on March 15
- Reach out to other NPOs in your sector and see if there are some ways you can partner
- Reach out to donors who may be interested in creating a “Fundraiser Page” for your organization on March 15
- Create staffing plan for March 15

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Week Five (February 8 – 14) Soft Marketing Launch**

Checklist:

- \_\_\_ If you are using printed materials, drop them in the mail no later than next week
- \_\_\_ Work on your “thank you” plan for donors for day-of and post-March 15
- \_\_\_ Boast about your Roanoke Valley Gives profile! Use it to help promote your participation!
- \_\_\_ Do a check and make sure you have completed all previous checklist steps
- \_\_\_ Implement current donor outreach plan.
- \_\_\_ Follow-up with potential “fundraisers” and confirm who is interested in creating a “Fundraiser Page”

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Week Four (February 15 – 21) Continue Soft Marketing**

Checklist:

- \_\_\_ Create board task list and assign to members
- \_\_\_ Send invites to day-of events (if having one)
- \_\_\_ Schedule key meetings with donors (pre-commitments – if necessary)
- \_\_\_ Begin talking about your involvement in Roanoke Valley Gives at meetings and events
- \_\_\_ Continue to implement your communications plan (emails, social media posts, etc.)
- \_\_\_ Provide a copy of Attachment B to all donors interested in creating a “Fundraiser Page.”

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Week Three (February 22 – 28) Prepare for 2-week Marketing Blitz**

Checklist:

- \_\_\_ Customize email templates from toolkit and schedule eblasts to go out
- \_\_\_ Finalize social media schedule and content
- \_\_\_ Schedule key meetings with donors (pre-commitments – If necessary)
- \_\_\_ Finalize partnerships with businesses and other nonprofits
- \_\_\_ Contact local media (press release/events)
- \_\_\_ Refer to “Be a Champion” (Attachment B) and create a similar template to be used by your “Fundraisers”

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Week Two (March 1 – 7) 2-week Heavy Marketing Begins**

Checklist:

- \_\_\_ Amp up social media posts – add Roanoke Valley Gives graphics to Facebook & Twitter
- \_\_\_ Begin sending emails
- \_\_\_ Make targeted phone calls to donors
- \_\_\_ Have a kickoff event and talk to donors about Roanoke Valley Gives
- \_\_\_ Share a customized “Be a CHAMPION” document with all “Fundraisers”
- \_\_\_ Encourage “Fundraisers” to begin marketing their respective “Fundraiser Page”

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				



**Week One (March 8 – March 14) Heavy Marketing Continues**

Checklist:

- Make sure you are familiar with Click & Pledge donor reporting and know how to access donor information
- Continue heavy social media presence
- Remind board of roles (outreach, sending emails, etc.)
- Utilize Roanoke Valley Gives PSA's and instructional videos – share on social media
- Finalize day-of event plans – finalize day-of roles and staffing plan
- Schedule social media posts before going to bed
- Encourage “Fundraisers” to continue marketing their respective “Fundraiser Page”

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

### March 16 – BIG Day of Giving

Checklist:

- \_\_\_ Kick off at midnight with a bang! Ensure at least 10 donors give at midnight or during the first hour of giving
- \_\_\_ Pound the pavement! Get out into the community. Attend events – if available.
- \_\_\_ Check in with all board members and make sure they are ready to implement your plan.
- \_\_\_ Be active all day on social media.
- \_\_\_ Check your donor reports every hour and make sure you are thanking donors in real time either on social media or by email.

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Post Roanoke Valley Gives – Day After and Beyond!**

Checklist:

- \_\_\_ Get some rest!!
- \_\_\_ Continue your plan of thanking all donors.
- \_\_\_ Implement donor thank-you plans (i.e. who will receive calls, send personal letters, thank you cards, emails, etc. (check your staff role list)
- \_\_\_ Send thank-you’s to businesses, “Fundraisers” and other NPOs you partnered with. (if necessary)
- \_\_\_ Send an update to your board, staff, volunteers, networks and donors list on your results!
- \_\_\_ Decide if you will have a post-event thank-you reception/event.
- \_\_\_ Attend Roanoke Valley Gives Awards Breakfast. More information to follow!

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

## Staff Assignment Worksheet

Name of Staff/Volunteer	Assignment/Role	Tasks
<p><i>(example)</i> John Smith</p>	<p><i>(example)</i> Social Media</p>	<p><i>(example)</i> Create editorial calendar, schedule posts, day-of posting</p>

# ATTACHMENT A: How to Become a Fundraiser

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## Want to help a cause you believe in?

### It is EASY

1. Choose an Organization, Fund or Program, and click the 'Become a Fundraiser' button
2. Create your own fundraiser page
3. Share your page with friends and family through email, social networks and more

## To Get Started

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**Step 1:** Find an Organization, Fund or program you wish to support by using the search fields on the right side of the home page.

**Step 2:** Once you find your cause click on the 'Become a Fundraiser' button. Note: A nonprofit or an organization may choose not to accept fundraisers. If this is the case, the 'Become a Fundraiser' button will not be visible.

**Step 3:** Enter your name and email to register. *If the organization or program is set up to automatically accept fundraisers you will see a page to complete your registration. If the organization or program manually accepts fundraisers, you will see a note stating that you will receive an email when your registration is approved. In both cases, you will receive an email to complete your registration.*

**Step 4:** Check your email. You will be sent an email from Roanoke Valley Gives with a verification code to complete your registration. Use the link on the email to complete your registration.

**Step 5:** Once you enter your code, you will be prompted to create a Profile Name (max: 50 characters) and Password (min:6 Characters). The text you provide for your Profile Name will be added to the organization link to create your unique web address. Please select this name carefully as you won't be able to change it once submitted.

**Step 6:** Once completed, click on 'Setting' to create your fundraising page.

## Customize Your Page

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**Login:** Go to the Roanoke Valley Gives website (<https://rvgives.givebig.org>)

- Click on the white circle in the upper right corner to go to the login screen
- Click on **Fundraisers Sign In** and enter your email and password

**Profile:** Once logged in, click on "Setting" button. Enter your fundraising target and use the text editor to provide information about your cause and why you are fundraising for it.

*(Note: Copying text from applications such as MS-Word will include a large amount of hidden formatting tags which will add to the word count and size. If copying and pasting, we recommend pasting your content into WordPad or Notepad and copying from there.)*

**Images:** Include images by selecting the image icon from the text editor menu bar (top row, far right). Click on the 'Upload' tab, choose your image, click 'Send it to the Server', then 'OK'.

*(Note: Avoid large images - Recommendation: 72 dpi or less- large images will take longer to load and may slow your page down.)*

**Videos:** Videos such as the ones on YouTube and Vimeo can be added by copying and pasting the embedded code into the "Source Code" on your Description area (using the source code icon). To do this find the video's embedded code and copy it. Go to your Description area and click 'Source' button. Select the area you wish to place the video and paste the code there. Click 'Source' again to exit the source editor.

**Avatar:** Upload an image for your profile at the bottom of the profile page under the "Avatar" title. This image will appear as your profile image above your name on the upper right side of the page. Please note the size and format requirements for your image.

**Social Media:** Click on Social Network tab to customize your social networking message.

**Save:** Save your information every time you make a change. You can login to your profile page at any time and make edits by clicking 'Setting.'

## Tell Your Friends

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To share your fundraising page with others you can either use your unique link or you can post your Social Network message using the Facebook, Twitter, Pinterest, and Google+ icons on your fundraising page.

1. So to send your fundraising page link, just copy and paste the link from your page and send it out in emails and or add to your social networks.
2. To send out the Social Network message you created within your profile, simply click on the social network icon, log into that social network account, and share it.

For more information and to view a video tutorial, please visit:

<http://help.clickandpledge.com/customer/en/portal/articles/1649097-give-big-how-to-create-a-personal-fundraiser-page>

# ATTACHMENT B: BE A CHAMION

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This is a sample document to be customized for your organization and its Roanoke Valley Gives profile page.

Hello supporters, partners, and sponsors! Be our "CHAMPION" and help us spread the word about Roanoke Valley Gives day! Let's talk this up!

## Give Where You Live!

**Roanoke Valley Gives 03.15.17 | 12:00 AM – 11:59 PM**

**An initiative of Foundation for Roanoke Valley**

## Stay Connected!

Foundation for Roanoke Valley will be posting updates about Roanoke Valley Gives on its Facebook page and Twitter page. Be sure to "Like" and "Follow" FRV to get the latest news!

**Website:** <https://rvgives.givebig.org>

**Social media accounts:** Twitter: @RVGives | Facebook: /foundationforroanokevalley

**Hashtag:** #rvgives17

## How Can You Promote Roanoke Valley Gives?

Use the Roanoke Valley Gives logo via email, Facebook, Twitter, Instagram, Pinterest, etc. All marketing channels can utilize the elements provided in our [press kit](#).

## Facebook Posts:

Join us in being a part of the movement to raise significant unrestricted dollars for Roanoke Valley nonprofits in 24 hours! Check out <https://rvgives.givebig.org>!

24 hours to give where you live! Let's come together as a community to reach our goal of raising over \$500,000! Go to <https://rvgives.givebig.org>. POINT-CLICK-GIVE!

The countdown is on for Roanoke Valley Gives! Mark your calendars for March 15 and help make this day a big success for the nonprofit community! #RVGives

## 1 Day Out

Tomorrow!! We're only 24 hours from the biggest day of local giving! Help raise funds for your favorite nonprofits at [rvgives.givebig.org](https://rvgives.givebig.org)! #RVGives

## Event Day

Support the local nonprofit community today at [rvgives.givebig.org](https://rvgives.givebig.org). Be a part of the biggest day of local giving! #RVGives

Roanoke Valley Gives is happening right now!! Please show your support at [rvgives.givebig.org](https://rvgives.givebig.org)! #RVGives

## **Tweets:**

Join us on 3.15.17 @RVGives! Support your favorite #rke cause or charity!

Give where you live on 3.15.17 @RVGives! Check it out!

Less than 2 weeks from #RVGives17! Are you ready to take part in the biggest day of giving?  
Rvgives.givebig.org

What are you doing March 15? Plan to #givewhereyoulive! @RVGives

Don't forget to check out rvgives.givebig.org tomorrow to support your favorite nonprofits! #RVGives17  
@RVGives

## **Event Day**

#RVGives17 is here! Help us raise <insert \$> by donating at rvgives.givebig.org! #RVGives17

## **Post Event**

THANK YOU for supporting #RVGives17! The community raised <insert \$>!! What a day! @RVGives

## **Email:**

Place a Roanoke Valley Gives badge in your e-mail signature.

## **Sample Email or Letter:**

Subject: Support your community on March 15!

Dear (insert name),

On March 15, 2017, from 12:00 a.m. to 11:59 p.m. over 130 nonprofits from across the Roanoke Valley will come together for the second annual valley wide day of giving – Roanoke Valley Gives! Roanoke Valley Gives is a fantastic opportunity to support your favorite causes and charities by helping to raise significant funds for participating organizations.

Go ahead and mark your calendar for March 15. It's easy to participate! Just visit rvgives.givebig.org, search for your favorite nonprofit and click "Donate." Your donation, along with hundreds of others, will help meet the day's goal of \$500,000! We need your help!

Please do not hesitate to contact me if you have any questions.

Sincerely,

*Your Name*

*Insert tagline –*

Give Where You Live!

Roanoke Valley Gives

March 15 @ rvgives.givebig.org