Say Hello!

to your
2024 North Texas Giving Day Toolkit

Last Updated: May 17, 2024

created just for you by

the OLYMPIA COLLECTIVE

generously underwritten by

ARLINGTON TOMORROW FOUNDATION

Dear Reader,

Howdy! It's the end of May 2024, and you just opened this toolkit generously provided to you by the Arlington Tomorrow Foundation. It was written by someone you don't know (that's me, Olympia, CEO of The Olympia Collective) ➡️.

You are a nonprofit Founder/ED/CEO or other senior nonprofit leader, and likely a board member on at least one other nonprofit board in North Texas. Memorial Day is around the corner. School is almost out. It's getting hot. And just when you have a glimpse of a breather, you are reminded that North Texas Giving Day (NTXGD), a gigantic regional fundraising effort, is just around the corner.

As you probably already know, NTXGD is the largest community wide giving event in the nation. Last year alone, it drew almost $64 million in philanthropic dollars to over 3,000 local DFW nonprofits of all shapes and sizes (yours may have been one of them!).

Today I am writing to you, someone I don't know, to tell you that you are not alone if you are looking ahead to NTXGD with a mix of excitement and trepidation. Just thinking about the potential revenue it could bring to your organization is what motivated you to open this toolkit in the first place. Fundraising success stories of your own, real or imagined, motivate you because that means greater impact on the people you serve. You can fulfill your mission with that revenue. I have been in your shoes. And mine are usually boots.

Arlington Tomorrow Foundation asked me to put myself back in my boots and provide some tangible, meaningful, and timely insight for your sector in your very unique city in anticipation of post-summer fundraising efforts. Let's be honest...North Texas Giving Day is nestled among many other efforts that seem to spiral each year just when we think we've (barely) recharged from the last one 🔋 : Back to School/Back to Work, Fall galas, Fall picnics, Giving Tuesday, and the always horribly timed Year End Appeal 😱 are just a few.

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My goal is to streamline your North Texas Giving Day planning. At the end of this document, I have curated my "Greatest Hits" version of resources that already exist on the North Texas Giving Day website. Though they haven't yet been updated for 2024, they are still immensely helpful. I'm hoping those of you that go "all in" for NTXGD will devour them and in turn, they will up your NTXGD game. That said, a packet of extremely well done handouts has never been the actual solution I needed. What I really needed was <u>permission</u>.

I want to grant you permission to step back for a moment, take a breath, and think of the bigger picture. It's like zooming out on your phone camera. Or better yet, putting your phone down altogether, getting up, and taking a walk in the Arlington neighborhood you call home.

It's ALWAYS a good time to back up a few levels and look at the bigger picture. That applies to our nonprofits as much as it does to us as individual, special, precious human beings. You may wonder if and how this pertains to North Texas Giving Day and your likely already overwhelmed brain? It does. It's directly connected.

If there is one thing I could tell myself when I was in your shoes, it would have been to step back a bit and make sure I'm not overcommitting to ANY fundraising effort, given the resources and time that I had. And to commit to only the highest priority initiatives. And to do this in partnership with my boss (which is likely, in your case, to be a board of volunteers, not just one person). To give us all permission to create boundaries and priorities and stick with them.

How would I know how to do this? By using an ingenious tool that dates back 2000 years: the calendar 📅. The answer is so simple it's silly once you realize it. Before deciding when, how, why, what, and who will fundraise this fall and beyond, how about stepping back and outlining a full year for your nonprofit? Usually reserved only for budget time, this exercise is life changing when looked at through a different lens. The lens of your organization's own energy and the natural cadence of when your community needs you to be on your A game.

First, print out a simple twelve-month calendar (**I have conveniently linked one for you here**). Then complete this exercise, ideally with your boss/board, before you decide what else to do this year.

Start with the thing that matters the most: your mission. Place <u>only</u> the events/dates on the calendar that are mission-critical and non-negotiable: board meetings, facilities/campus openings and closures, outreach events, all program offerings to your clients. Busy seasons. Surge times. When does your nonprofit need to be "on" so that your community is taken care of?

Then, add in <u>only</u> your most likely to be successful and already "baked in" fundraising efforts. These should be ones that already work for you, for which you know you have resources and strategies, that you would always build into your budget. The ones you would only give up under duress.

Now, step back. What does your calendar look like? Can the fundraising efforts you already do, if executed perfectly, be done without endangering your mission and programming? Does your fundraising happen with enough lead time to fuel your mission? Are there huge gaps of time where nothing is on the calendar, or is it the opposite — that every week is already filled up?

Seriously, is even this basic calendar a bit overwhelming? What would your budget look like if you <u>only did these things but did them perfectly, on both the mission AND fundraising side</u>? Is there room to improve the foundation of your fundraising and programming efforts on this basic calendar instead of adding more? Creativity can get the best of us, but don't get distracted by bright shiny ideas unless they are in alignment with your mission and you have the resources to make them a priority instead of a source of burnout.

Next, I challenge you to sleep on what you see for a night. Or two. Once you have had a chance to reflect, share your thoughts and discuss this undertaking with your team and leaders. This may mean one or several additional targeted meetings or conversations. How can you maximize just those things on the calendar? How can you space them to avoid burnout? How can you be sure you take care of yourself first so you can take care of others? Adjust all of that first.

Then as you have space (on the calendar and in resources and time), be mindful about what you add. Make sure you include the time and energy costs for yourself, your team, and your board and volunteers in your calculations, especially for incremental fundraising initiatives. I have advised some clients that North Texas Giving Day actually *replace* their Year End appeal (this worked wonders for the clients, BTW). For others, it's the opposite. If your highly successful signature gala is timed within three weeks of NTXGD, I say put all eggs 🥚🥚🥚 in the gala basket 🧺.

I think of fundraising as building a menu. Whataburger is genius at this. It knows its consumers. It delivers consistently. It's SOOO Texas and it lets you know it. It adds new items only when it knows there is demand for them. It knows it isn't McDonald's. But it can compete with it. And it will always win my order. Just like I like it.

With much gratitude and appreciation,

Olympia Ammon
CEO, The Olympia Collective
olympia@theolympiacollective.com | cell: 713.410.4906

P.S. Never Forget the P.S.

Much gratitude is due to Carolyn Mentesana, Executive Director of the Arlington Tomorrow Foundation, for trusting me to compile this toolkit and its prologue, and giving me permission to share my perspective. I am also grateful to several North Texas former clients and colleagues for helping me proofread and refine my message to you (you know who you are, y'all!). I hope after reading this, you have been given well-deserved permission to stop and think. You are pursuing a noble cause in an industry that is thankless, underpaid, and underappreciated. And you matter.

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North Texas Giving Day Resources

Curated just for you from the
North Texas Giving Day 2023
training website
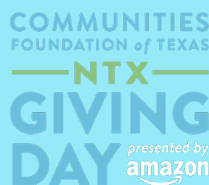
COMMUNITIES
FOUNDATION of TEXAS
—NTX—
GIVING
DAY presented by
amazon

P.S. Please check the North Texas Giving Day site frequently;
the 2024 documents and training session schedule should be coming out any
moment and will be necessary additions to this curated 2023 content!

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- 🔗 [Mightycause Guide to Donor Engagement and Retention](#) (click link to access)
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North Texas Giving Day: Getting Started

Curated just for you from the
North Texas Giving Day 2023
training website

COMMUNITIES
FOUNDATION of TEXAS
— NTX —
GIVING
DAY *presented by*
amazon

P.S. Please check the North Texas Giving Day site frequently;
the 2024 documents and training session schedule should be coming out any
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COMMUNITIES FOUNDATION of TEXAS
NTX
GIVING DAY
presented by **amazon**

NONPROFIT TRAINING FLOWCHART

NorthTexasGivingDay.org

Have you registered for NTX Giving Day? → No → Click here to get started.

Yes

Have you developed your NTX Giving Day strategy? → No → Click here to get started.

Yes

Have you considered securing a matching fund? → No → Click here to get started.

Yes

Have you developed your engagement strategy? → No → Click here to get started.

Yes

Have you developed your stewardship plan? → No → Click here to get started.

Yes

Have you developed a communication plan? → No → Click here to get started.

Yes → **TIME TO EXECUTE!!!**

What is NTX Giving Day?

Communities Foundation of Texas' NTX Giving Day is an annual online giving event designed to empower every person to give back to their community by supporting local nonprofits on one easy-to-use platform! NTX Giving Day is the largest community-wide giving event in the nation and mobilizes nonprofits and givers to create lasting impact in their communities. In 2022, more than $62 million was raised by cause-minded friends in North Texas (and beyond!) for more than 3,300 local nonprofits.

When and where is NTX Giving Day?

The 15th annual NTX Giving Day is Thursday, September 21, from 6 a.m. (CT) through midnight. All the fun happens online at NorthTexasGivingDay.org. Gifts can be made early starting September 1. To participate, nonprofits must register by 11:59 p.m. on Friday, August 18.

How did NTX Giving Day get started?

In 2009, Communities Foundation of Texas (CFT) created NTX Giving Day as a tool to help donors find local nonprofits and give wisely to them. Now, 14 years later, CFT's NTX Giving Day is a model for giving days around the globe. Powering NTX Giving Day is one of the many ways CFT serves as a hub for philanthropy and fulfills its vision of building thriving communities for all. In addition to powering NTX Giving Day, CFT professionally manages more than 1,000 charitable funds for families, companies, foundations, and nonprofits and has awarded more than $2 billion in grants since its founding in 1953.

Why do nonprofits participate in NTX Giving Day?

To raise money efficiently:
In 2021, participating nonprofits raised an average of $19,608. Over one-third of responding nonprofits reported they spent less than 20 hours on their NTX Giving Day campaign. There is a cost to all fundraising efforts, but when you compare the cost per dollar raised for NTX Giving Day to other efforts, it is a highly efficient way to support the bottom line.

To obtain tools for year-round fundraising:
Each year, NTX Giving Day hosts and provides more than a dozen special trainings totaling more than ten hours of content. These sessions are provided to participating nonprofits to help them fully leverage NTX Giving Day. In addition to these recorded sessions, there is a comprehensive online library complete with templates, messaging, and graphics to boost nonprofits' success.

To gain exposure among new audiences:
NTX Giving Day provides the most comprehensive list of local nonprofits and is often accessed year-round by media partners, fund holders, donors, companies, and other entities to find charitable organizations in North Texas. When you're on the NTX Giving Day list, people can find you and can sort by county, city, size, cause areas, and more.

To engage matching fund donors:
NTX Giving Day provides a prime opportunity for organizations to engage matching fund donors. Nonprofits that secure 1:1 matching funds are more successful on NTX Giving Day. Nonprofits that secured and met their match raised 60% more than they did the previous year.

To increase brand visibility:
Each year, Communities Foundation of Texas partners with diverse media outlets (including print, TV, radio, and social) to promote NTX Giving Day, to share nonprofit stories with the public, and to raise their profiles in the community. In 2021, NTX Giving Day secured 955 mentions in articles and stories and had an aggregate readership of 1.5 billion.

To be a part of something bigger:
When you participate, you lift local nonprofits and bring visibility to the entire sector. Nonprofits often share that NTX Giving Day provides a unique opportunity to engage their networks (including staff, volunteers, board members, and donors) to celebrate their mission and be a part of something bigger than themselves.

MAKE NTX GIVING DAY WORK FOR YOU!

No matter what your capacity level is, NTX Giving Day can work for you and add tremendous impact to your organization's goals. **Creating a blueprint will help your organization mobilize around specific goals and provide a dynamic performance map for your NTX Giving Day campaign. Use this guide to help your organization build a clearly defined strategy for your campaign.**

Assess Your Organization's Current State

Develop Your Why

Think about what challenges your organization is currently facing and what has motivated your donors to give in the past. **How can your campaign respond to your organization's challenges and meet donor motivations?**

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Organization Challenges	+	Donor Motivation	=	Targeted Campaign

Build Your Team

Who can you ask to help support your campaign?

☐ Board Members   ☐ Current clients

☐ Volunteers   ☐ Donors

☐ Organization Staff   ☐ Alumni

What pieces of the campaign will they help execute?

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What resources do they need to be successful?

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Determine Your Campaign Goals

Setting achievable goals will help your organization hone in on what you need to drive your campaign. While every organization can use more dollars to make a deeper impact, NTX Giving Day is a perfect opportunity to set additional goals that drive engagement, visibility, and recruitment! Consider things like: **amplifying your social media presence, increasing your donor retention, or engaging a new subset of your network to join your campaign efforts.**

What are your organization's current metrics?

Facebook Followers	Instagram Followers	Twitter Followers	Email Subscribers	Postal Addresses	Phone Numbers

Donors giving between $10 and $99	Donors giving between $100 and $999	Donors giving over $1,000

If you've participated in the past, how did previous campaigns perform? What were your goals for that campaign?

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What are your organization's goals?

Metric	Total Likely	Total Possible	Goal	Priority
Dollars Raised ($)				
Board Participation (%)				
Matching Gifts				
Increased Gifts (#)				
Unique Donors (#)				
Returning Donors (#)				
New Donors (#)				
Social Media Impressions				
Matching Gift Earned (%)				

MAKE NTX GIVING DAY WORK FOR YOU!
(CONTINUED)

Based on the metric goals determined on page 4, write out meaningful, measurable goals for your campaign team (for reporting to your board and sharing externally).

Internal Goal:

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Public Goal:

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Create an Action Plan

Determine Your Audience

Your marketing strategy should be tailored to the audience you are targeting. You know your network best; donors who like to make gifts by mailing a check are probably better reached through traditional mail rather than a targeted social post. Segmenting your network by donor behavior will help you best determine which channels to utilize for your campaign.

What percentage of donors give through an offline method (check, cast, etc.)?	What percentage of donors give online (PayPal, Credit/Debit card, etc.)?

Now, based on the numbers collected above, which communication channels do you think will be the most successful with your donor audience?

- ☐ Phone call
- ☐ Postal mail
- ☐ Virtual/In-Person gatherings
- ☐ Organization's website
- ☐ Email
- ☐ Facebook
- ☐ Twitter
- ☐ Instagram

What resources will help you effectively engage donors through the channels selected above?

- ☐ Photos
- ☐ Testimonials or quotes
- ☐ Video content
- ☐ Trackable links
- ☐ Graphics sized for social media platforms
- ☐ Addresses, phone numbers, and/or email lists from your database

Build Your Story

Now that you've developed your why, built your team, and determined your audience, **it's time to think through your campaign story and how it aligns with your donor motivation.** You've determined the specific challenge your organization is trying to face—now how can your campaign story address the issues and identify the ways your community and donors will play a role in addressing the challenge?

What is the specific challenge, obstacle, or problem your campaign will address?

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What solution is your organization providing for this challenge?

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Why is it important that your organization and donors help you address this challenge?

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Who is the key storyteller for this campaign? Does their story make the reader feel compelled to give?

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Build Your Call-to-Action (CTA)

You've crafted your story. Now it's time to bring your donors alongside your organization and ask them to join you in solving your challenge. A call-to-action is exactly what it sounds like— it should drive your network to take a specific action.

Keep these pointers in mind when building your CTA:

- **Be concise** - Keep it simple and state the necessities in as few words as possible.

- **Talk about the need** - While maintaining succinctness, make sure you're conveying the need. For example: Help us Spay/Neuter 75 dogs & cats. Donate today!

- **State the urgency** - create a sense of urgency to encourage your network to take action immediately. Now and Today are great options to help create that urgency.

- **Be vulnerable** - your organization is making a difference in our community. Authentic impact stories about real people and real needs are most effective in encouraging donor support.

Below are some quick and easy calls-to-action:

FUNDRAISING CTAs

Make a donation today!

Donate to [Organization Name] today

Give to [Organization Name]!

Give [$XX] to help [Organization Name] today!

Click here and donate!

Help support [Organization Name, client base, etc.] today!

INVOLVEMENT CTAs

Join the movement!

Fight [childhood cancer, human trafficking, etc.] now!

Become an ambassador!

Partner with us to support [after-school kids, the LGBTQIA community, etc.]!

Get involved!

Create your own CTA:

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Communicate With Your Network

Plan Your Communication Timeline

The communication you plan for your campaign is important. Equally important is the communication you plan for *after* your campaign. Your communications plan should be the road map for delivering messaging to your audience and ideally, is targeted based on your campaign and audience type.

> To get started planning out your NTX Giving Day communications, use our Nonprofit Communications Guide!

Pro-tip: Plan your communication through the end of September including a plan to follow up with all of your donors. Not sure how to get started showing appreciation to your donors?

> Check out our Donor Appreciation & Retention resources.

For More Resources, Visit
NorthTexasGivingDay.org

NTX GIVING DAY PLANNING TIMELINE

Is this your first time leading a NTX Giving Day campaign? Or perhaps a fundraising campaign in general? Do you need a refresher on campaign basics? Well, this guide is a perfect place to kick off your campaign. **This guide includes a breakdown of the NTX Giving Day campaign and what is key to accomplish in the months ahead.**

Think of NTX Giving Day as a build-your-own campaign. **You can customize your campaign with the approach that makes sense for your organization.** You can be selective about what strategies you apply each year – in fact, we encourage that!

MAY 2023 | KEY ACTIVITIES

☐ **Register for NTX Giving Day**

This is the most critical piece to running your NTX Giving Day campaign. Without registering, your organization will not be listed on the NTX Giving Day site and will not be able to receive donations. To learn more about registration, click here.

☐ **Determine your key goals for NTX Giving Day**

Utilize the strategy pages linked here to help determine what your organization is trying to accomplish with your campaign. If you've participated before, review previous strategies, and discuss what went well and what you'd like to change.

☐ **Identify your team**

For volunteer-led, or organizations with a small staff, it's helpful to have thought partners. Consider recruiting a board member or two or asking an active volunteer to come alongside you and help you run this campaign. NTX Giving Day is a great way to deepen engagement with your stakeholders.

☐ **Choose which a-la-carte campaign items are right for you**

○ *Matching Funds* – Matching funds are additional dollars contributed directly to your organization from a donor (or group of donors) to help encourage gifts. Click here to learn more about Matching Funds and how they can boost your campaign.

○ *Peer-to-Peer Fundraising* – Peer-to-Peer fundraising is a great way to engage your organization's network to help you meet your goals. Peer-to-Peer is an exciting and interactive way to draw extra attention to your organization's campaign. If you are interested in implementing Peer-to-Peer Fundraising in your campaign, click here.

○ *Volunteer Opportunities* – Some organizations need hands-on volunteers, while others do not. If your organization is always looking for volunteers or has upcoming opportunities, the NTX Giving Day site is a great place to display these.

○ *Host an Event* – Consider partnering with other nonprofits or local businesses to help build community awareness.

○ *Early Giving* – Early Giving is a great way to kick start your day-of campaign and activate your audience! Encourage your network to get started early by driving gifts to your organization as early as September 1 at 8:00 am.

JUNE 2023 | KEY ACTIVITIES

☐ **Attend or watch the recording of the Social Media Training**

Social Media is a key component in activating an online campaign. Our friend, Caitlin Mitchell, with the LERMA/ Agency, will walk through how to best activate each of the social media platforms.

☐ **Begin creating a communication plan**

Creating an action plan for your communication will help your nonprofit succeed. Each fundraising campaign will vary in goals, target demographics, and channels utilized.

☐ **Refine your profile page**

Take time to be intentional with your profile page. Your profile page is the hub of your nonprofit presence during NTX Giving Day. This page should be unique to your organization and show the impact your organization has on our North Texas community. Not sure how to enhance your profile page? Click here to get started.

☐ **Focus on your a-la-carte-campaign item(s)**

Utilize the Nonprofit Resources section on the website to help you get started on additional pieces you can leverage to make your campaign a success.

JULY 2023 | KEY ACTIVITIES

☐ **Announce your participation in NTX Giving Day**

Tell your network that you're in! Invite them to add a save-the-date to their calendars. Consider including a calendar plug-in where your stakeholders can add a reminder for September 21 to their personal calendars.

☐ **Create a communication plan**

Consider creating an omnichannel experience. Be sure to coordinate your communication efforts across all channels (web, print, social media, direct mail, and mobile). Creating an action plan for your marketing is key to helping your nonprofit succeed. Click here to get started on your marketing plan.

☐ **Refine your profile page**

Take time to be intentional with your profile page. Your profile page is the hub of your nonprofit presence during NTX Giving Day. This page should be unique to your organization and show the impact your organization has on our North Texas community. Not sure how to enhance your profile page? Click here to get started.

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Utilize the Nonprofit Resources section on the website to help you get started on additional pieces you can leverage to make your campaign a success.

AUGUST 2023 | KEY ACTIVITIES

☐ **Implement your communication plan**

Be intentional with your strategy. Start early but beware of donor fatigue. Consider personalizing your communications. Create a personal experience that resonates with each individual donor. Remember: people give to people!

☐ **Determine how you will thank your donors**

You are working hard to solicit your donors, cultivating the relationship is just as important to your nonprofit's future as is securing the initial donations. How you steward these donors can be key to gaining their lasting support. Click here to read our Donor Appreciation Guide.

☐ **Determine a post-NTX Giving Day celebration**

You've told stories, engaged donors, and hopefully raised much-needed resources for your organization, but what is your strategy for celebrating? You (and your team) worked hard and should be proud of what you accomplished. Be sure to celebrate and recharge after you complete your campaign.

☐ **Get ready to deploy your a-la-carte items**

How are you communicating your matching fund? Have your peer-to-peer fundraisers set up their fundraising pages?

☐ **Create your September execution plan**

Now is the time to assign staff and/or volunteer roles, duties, events, and tasks. September is going to be busy and as you are able, planning ahead will help September feel more fun!
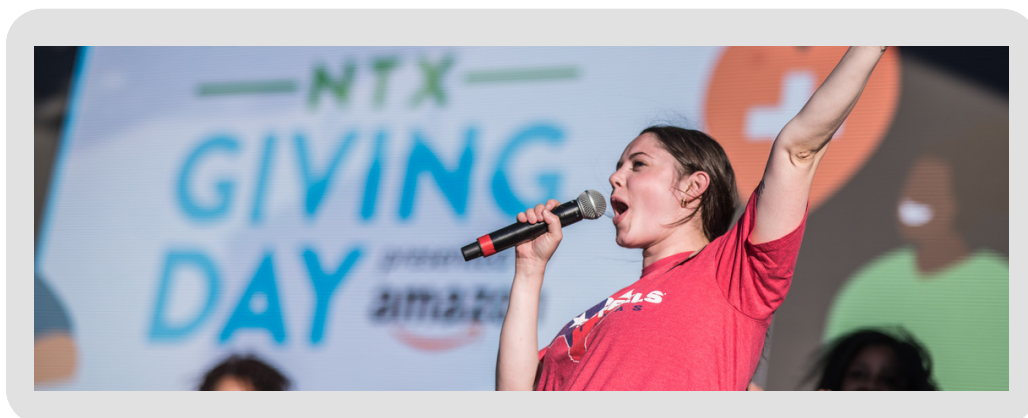
SEPTEMBER 2023 | KEY ACTIVITIES

☐ **Optimize your website.**
Embed a donate button on your organization's website to direct donors to your NTX Giving Day donation page from September 1 – 21.

☐ **Keep your audience updated**
Update your audience and donors on your goal progress throughout NTX Giving Day.

☐ **Thank, thank, thank your donors!**
Be prompt and send out thank-yous in real-time on NTX Giving Day or as soon as possible after NTX Giving Day. Refer to our Donor Appreciation Guide for tips on how to thank your donors!

☐ **Thank your staff and volunteers**
Send meaningful acknowledgements to all who helped execute your NTX Giving Day campaign.

☐ **Cultivate your donors**
Keep new and re-engaged donors in the loop with how their funds are being put to work. You worked hard to activate your donors; don't let them fall through the cracks by not following up with them after they've given. Need help getting started? Click here to learn more about donor stewardship.

☐ **Collect and analyze your results**
Be sure to utilize the dashboard and resources on the NTX Giving Day platform to determine your success metrics, areas for improvement, and how you'll make data-driven decisions for next year's campaign.

For More Resources, Visit
NorthTexasGivingDay.org

Welcome to the Strategy Discussion

The Power of a Strategic Plan

Creating a plan is key to helping your organization mobilize around specific goals and will provide a dynamic performance map for your fundraising campaign.

Organization Challenges + Donor Motivation = Targeted Campaign

Develop Your Why

Think about what challenges your organization is currently facing, what has motivated your donors to give in the past, and what message(s) might motivate them to give again.

How can your campaign respond to your organization's challenges and meet donor motivations?

Establish Your Campaign Goals

Achievable goals are critical to earning donor confidence and puts you on a path to scale that inspires donor generosity. Every organization can use more dollars to make a deeper impact, but North Texas Giving Day is a perfect opportunity to set additional goals to drive engagement and increase visibility.

MAKE NTX GIVING DAY WORK FOR YOU! (CONTINUED)

Determine Your Campaign Goals

Setting achievable goals will help your organization hone in on what you need to drive your campaign. While every organization can use more dollars to make a deeper impact, NTX Giving Day is a perfect opportunity to set additional goals that drive engagement, visibility, and recruitment! Consider things like: **amplifying your social media presence, increasing your donor retention, or engaging a new subset of your network to join your campaign efforts.**

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Determine Your Audience

Your marketing strategy should be tailored to the audience you are targeting. Consider who would make the most responsive target for your campaign.

- Phone Call
- Postal Mail
- Email
- Organization Website
- Facebook
- Twitter
- Instagram

Build Your Story & Call-to-Action

You've determined the specific challenges your organization is trying to address – now it's time to consider how can your campaign story and call to action address these challenges.

MAKE NTX GIVING DAY WORK FOR YOU! (CONTINUED)

Build Your Story

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_____

7

Communicate With Your Network

Now that you've determined your organization's story, make a plan to put your story in front of your network.

Steward Your Supporters

Building on existing relationships is just as important to your nonprofit's future as securing the initial donation. Make a plan for engaging donors.

Question & Answer

How do we build momentum with a first-year push?

- Overcommunicate
- Consider identifying a matching gift or prize challenge to incentivize supporters
- Engage your board
- Use your social media platforms

How do we get new donors for this event?

- Build a robust profile with clear and searchable criteria
- Partner with an ambassador to promote your campaign
- Participate in NTX Giving Day activities and have a clear call to action and plan to follow-up on hand at all events
- Articulate the impact of a $5 - $50 donation clearly on your profile

Do you have strategies on how to maximize presence to out of state donors?

- Search your database for potential ambassadors
- Segment your marketing appeals for instate and out-of-state donors
- Consider a challenge gift specifically for out-of-state donors

How can we better get members of our organization involved?

- Ask early and often
- Identify board and/or non-staff spokespeople who can make an appeal
- Make participation time-limited
- Make rules for engagement simple and clear

How do I put emphasis on this event without taking away from our other large fundraiser?

- Use donor segmentation techniques to identify the ideal campaign for key audiences, recognizing that NTX Giving Day typically appeals to new donors and those that give by credit card

- Space out your campaigns over the calendar year

- Create differentiated messaging, calls to action, etc. for each campaign

How do we get more recurring donations throughout the year?

- Ask for them!!
- Explain the value of budget knowledge
- Thank your donors for EVERY donation, but vary in the way you thank them

What are some commonly missed opportunities?

- Ask for matching funds
- Donors are looking for nonprofits who have matching dollars

Strategy Resources

Strategy

Creating a blueprint will help your organization mobilize around specific goals and provide a dynamic performance map for your NTX Giving Day campaign.

LEARN MORE

Planning Timeline

Not sure where to get started? This planning timeline walks you through the key things to accomplish during the months leading up to NTX Giving Day to help you run a successful campaign.

LEARN MORE

North Texas Giving Day: Marketing and Communications

Curated just for you from the
North Texas Giving Day 2023
training website

P.S. Please check the North Texas Giving Day site frequently;
the 2024 documents and training session schedule should be coming out any
moment and will be necessary additions to this curated 2023 content!

Agenda

- The Power of a Communication Plan
- Creating a Communication Plan
- Components of a Communication Plan
- Join Us for the Social Media Training
- Question & Answer
- Resources Available
- Upcoming Trainings

The Power of a Communication Plan

Creating an action plan for your marketing is key to helping your nonprofit succeed. Each fundraising campaign will vary in goals, target demographics, and channels utilized but a strong campaign has a communication plan in place.
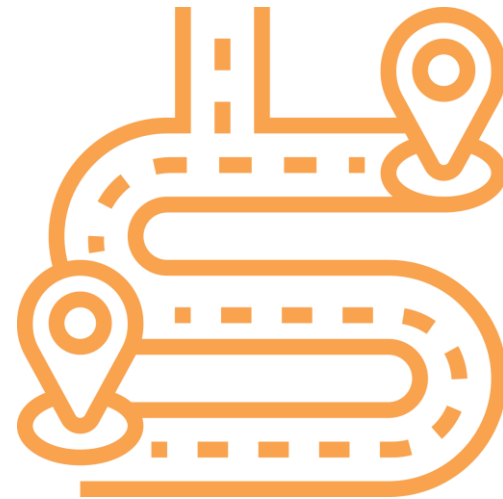
Creating a Communication Plan

NTX Giving Day campaign preparation is a fantastic opportunity to build a strategic and accessible communications plan for your organization. **The plan can be simple and designed to fit the needs and resources of your team** but should include some key outreach activities to ensure that your network is informed, energized, and equipped to help you reach your NTX Giving Day goals.

Components of a Communication Plan: Objective

Before you can produce a step-by-step plan you first need to think through the **what, why, when, and how** of the plan.

WHAT — What are you trying to get your audience to do?

WHY — Why are you trying to get your audience to do it?

WHEN — When do you want your audience to do it?

HOW — How do you want your audience to do it?
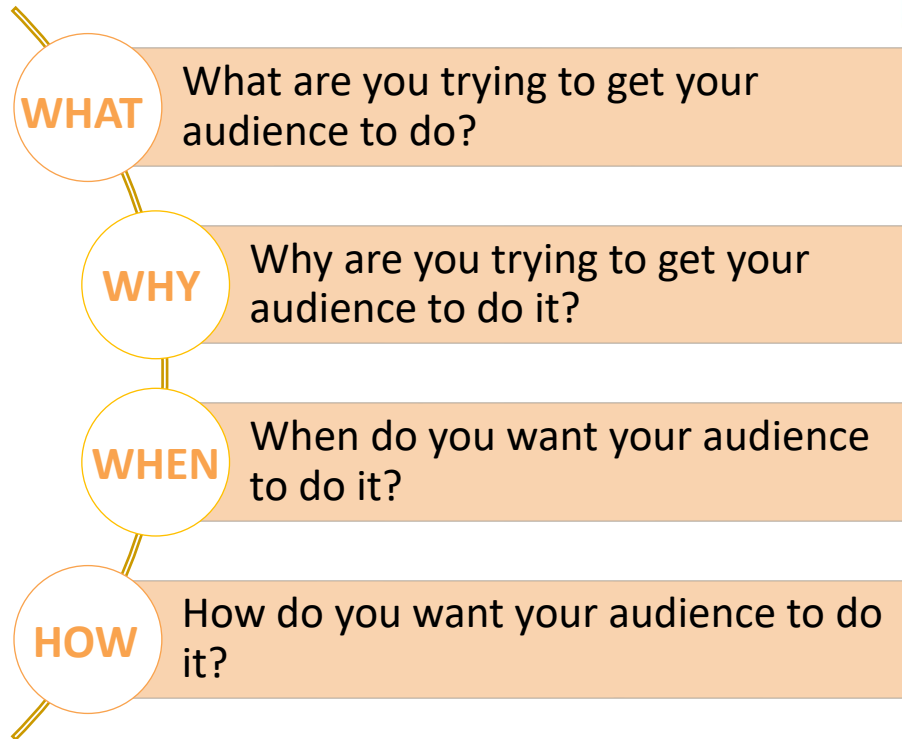
Components of a Communication Plan: Messaging

Your message is what gets people interested in the work you do, inspires them to donate to your cause or get volunteering, and helps keep them invested.

What do you need?

How can your audience support you?

What is your audience's call to action?

Components of a Communication Plan: Audience

Your marketing strategy should be tailored to the audience you are targeting. **Consider who would make the most responsive target** for your campaign.

Phone Call
Postal Mail
Email
Organization Website
Facebook
Twitter
Instagram

Components of a Communication Plan: Channels

You have different options when communicating your message. The channel you choose should **focus on your target audience and aim to reach them**.

Sharing on Social Media

NTX Giving Day is one of the most important, exciting, and visible days in our region. **Leverage your social media channels** with these best practices to ensure that your mission and needs are seen.

2023 SOCIAL SHARING GUIDE

NORTHTEXASGIVINGDAY.ORG
FIND YOUR PASSION
GIVE WITH PURPOSE
9.21.23

COMMUNITIES FOUNDATION of TEXAS
—NTX—
GIVING DAY
9.21.23 presented by amazon

COMMUNITIES FOUNDATION of TEXAS
—NTX—
GIVING DAY presented by amazon

Components of a Communication Plan: Timing

Now that you've determined your organization's story, make a plan to put your story in front of your network. **The timing of your message is important.** You don't want to reach out too early and not have a clear call to action that your network can follow through on.

Nonprofit Communication Guide

In the Nonprofit Communication Guide, you will find some tips for actionable planning and monthly goal setting as you build out a robust marketing campaign.
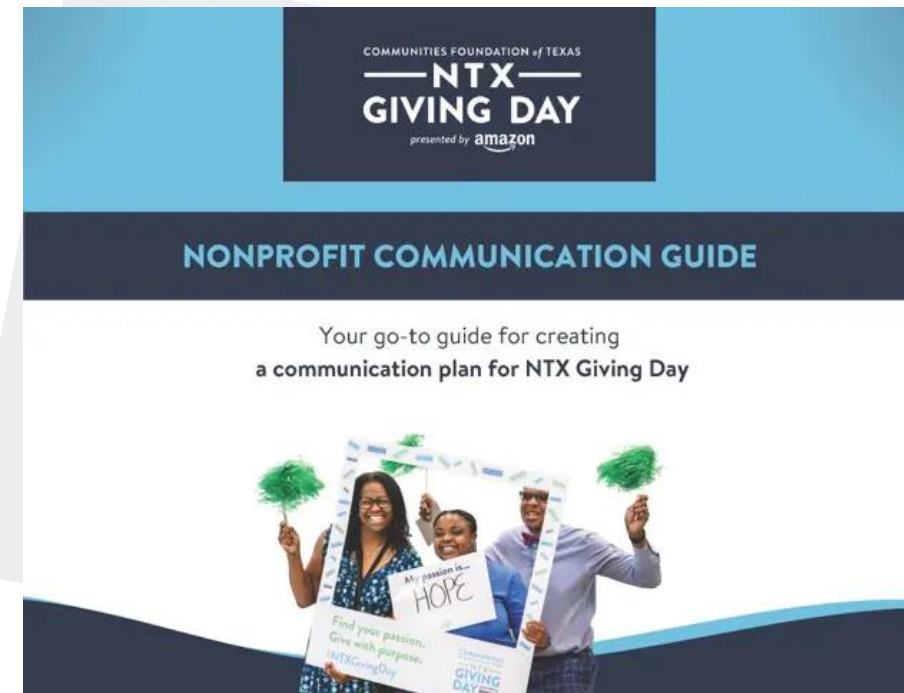
Communicate With Your Network

We have created several templates to help you with your planning and communication outreach.

Save the Date Email Template

Consider sending a save-the-date to your network encouraging them to add a reminder to their calendars for September 21! The sample email template can be adapted for both email and direct mail.

DOWNLOAD TEMPLATE

Early Giving Ask Email Template

Encourage your network to get started early and make their gifts in advance starting on September 1. The sample email template can be adapted for both email and direct mail.

DOWNLOAD TEMPLATE

Day-Of Ask Email Template

September 21 is NTX Giving Day and it's time to call on your network for support. Use the template below to make your day-of ask. The sample email template can be adapted for both email and direct mail.

DOWNLOAD TEMPLATE

Join Us!

We are bringing back the in-person social media training. Join us for one of our most highly requested training sessions. We will be joined by Caitlin Mitchell and Shelby Murphy with LERMA/ to learn best practices and key insights for marketing your campaign through social media. Get registered today, spots are limited!
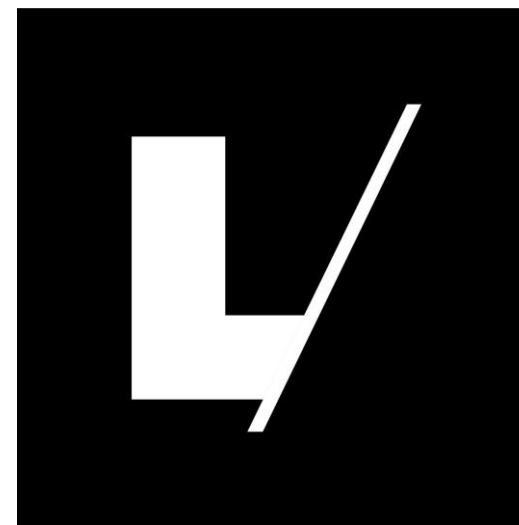
Question & Answer

When is the best time to start marketing for NTX Giving Day?

- Ideally, you should begin promoting your NTX Giving Day participation at the time of registration.

- Organizations can announce their participation and use save-the-date language to begin making their audiences aware that

- For more targeted marketing efforts and promotion specific to your campaign, we suggest a progressive marketing strategy because in June.

What are some marketing must do's?

- **Utilize your online real estate to tell your story and clearly communicate your organization's need.**

- **Include a clear call to action in all of your communication**. You want your audience(s) to know exactly what you're asking them to do.

- **Use visuals in your storytelling.** Help your audience see your work in action and bring your mission to life.

- **Be consistent**. No matter what marketing platform you use, be sure to create a plan so that you maintain momentum in your campaign efforts.

What materials are provided to assist with marketing (digital, print, etc.)?
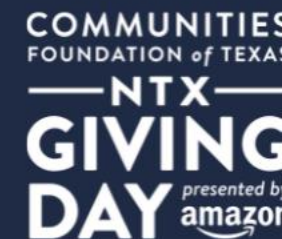
- Marketing toolkit and communications planning timeline

- Branding assets – online and print graphics and templates that you can customize for your organization

- Social media content and framing ideas

- A nimble platform that you can use to tell your organization's story in a streamlined way.

Posters		
	8.5x11 English Poster	https://bit.ly/2023NTXGivingDayEnglishPosterSmall
	8.5x11 Spanish Poster	https://bit.ly/2023NTXGivingDaySpanishPosterSmall
	11x17 English Poster	https://bit.ly/2023NTXGivingDayEnglishPosterLarge
	11x17 Spanish Poster	https://bit.ly/2023NTXGivingDaySpanishPosterLarge
Social Graphics		
Facebook	Facebook Give To...	https://bit.ly/NTXGivingDayFBGiveTo2023
	Facebook My Passion Is...	https://bit.ly/NTXGivingDayFBMyPassionIs2023
	Facebook "I donated!" Photo Overlay	https://bit.ly/NTXGivingDayFBOverlay2023
	Facebook Banner Image	https://bit.ly/NTXGivingDayFBBanner2023
LinkedIn	LinkedIn Give To...	https://bit.ly/NTXGivingDayLinkedInGiveTo2023
	LinkedIn My Passion Is...	https://bit.ly/NTXGivingDayLinkedInMyPassionIs2023
	LinkedIn Banner Image	https://bit.ly/NTXGivingDayLinkedInBanner2023
	LinkedIn Social Post about NTX Giving Day	https://bit.ly/NTXGivingDayLinkedInSocialPost2023
Twitter	Twitter Give To...	https://bit.ly/NTXGivingDayTwitterGiveTo2023
	Twitter My Passion Is...	https://bit.ly/NTXGivingDayTwitterMyPassionIs
	Twitter Banner Image	https://bit.ly/NTXGivingDayTwitterBanner2023
Instagram	IG Give To...	https://bit.ly/NTXGivingDayIGGiveTo2023
	IG My Passion Is...	https://bit.ly/NTXGivingDayIGMyPassionIs2023
Postcards		
	English 5x8 Postcard	https://bit.ly/NTXGivingDayEnglishPostcardSmall2023
	English 4x5 Postcard	https://bit.ly/NTXGivingDayEnglishPostcard4by52023
	Spanish 4x5 Postcard	https://bit.ly/NTXGivingDaySmallSpanishPostcard2023
	Spanish 5x8 Postcard	https://bit.ly/NTXGivingDayLargeSpanishPostcard2023

What is the best frequency to send reminders about NTX Giving Day?

- There is no one-size-fits-all strategy to building a cadence because each donor population is different.

- A few helpful, data-supported statistics:
  - Emails sent on Monday, Tuesday, and Wednesday get the most engagement.
  - Marketing emails sent from 9 a.m. to 12 p.m. on Tuesday garner the most engagement, followed by Monday and Wednesday at the same time.
  - The weekend is a dead zone for engagement — Friday, Saturday, and Sunday have the lowest open and click-through rates.

- We recommended a progressive frequency, with fewer touches in early summer, and increasing in August and September.

Should I target new donors with a different campaign than my loyal network?

- We encourage nonprofits to leverage the energy and heightened exposure during the NTX Giving Day season by customizing language to engage donors who may not have heard of them.

- Create new resources that tell your story in an innovative way

- Host informational events that bring your mission to life

- Partner with companies and organizations to help broaden the reach!

Which platform will yield the best results for marketing our campaign?

- The best platform for YOUR organization will be the one that has data-proven engagement.
- The best way to measure engagement is by creating trackable tools that give you insight to measure where current and prospective donors are most active.
- Create content that makes sense for the platform you're using – one size won't fit all.

What campaigns usually do the best?

- Maximize the NTX Giving Day platform real estate to tell their organization's story

- Use compelling images, video, and stories

- Organizations that secure and promote a matching fund

- Campaigns that leverage the branding tools and cross promote on their social media and organization's websites

- Campaigns that clearly define how donations will support the organization's initiatives and mission

What are some commonly missed marketing opportunities?
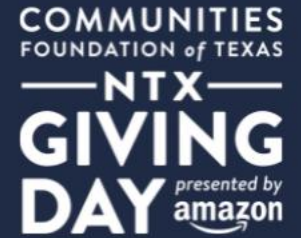
- **Get creative!**
  - Use NTX Giving Day to engage strategies that you may not deploy in your traditional fundraising strategies. Examples: Call banks or video appeals

- **Personalization**
  - Low lift way to let donors know you know who they are

- **Recruiting ambassadors to extend the organization's message and reach.**
  - Recruit: Board members, Organization super fans, Influencers, Clients

How do we keep it exciting and engaging for loyal donors?

- Provide valuable content that doesn't *just* include an ask
- Give them a new experience
- Recognize their loyal support publicly
  - Social media shout outs
  - Personal touches and outreach
- Give them tools to demonstrate their support
  - Social badges
  - Organization merch

Marketing Resources

The Barber Shop Marketing
Paid Social

PRESENTED BY TBS MARKETING AND PROMOTIONS

Paid Social and How to Use it

Key Terms

Copy: The words or caption that go with a post or ad on social media

Creative(s): The graphics, images, and/or video you will use.

Engagement: an umbrella term for actions that reflect and measure how much your audience interacts with your content. Includes comments, shares, likes but varies per platform.

Platform: Instagram, Facebook, LinkedIn (the site you are using to promote)

Reach: a metric that refers to the number of users who have come across a particular content on social platforms.

Social Media Awareness: refers to the knowledge and practical use of social channels for marketing a promoting a brand.

Traffic: consumers coming to your website, mobile site or mobile app from social networks and social media platforms.

There are many more, but these will help to get you started.
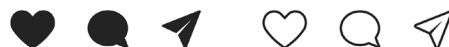
Paid Social

Overview

Social media advertising refers to any paid social media marketing campaign that reaches specific people based on their interests, demographics and behaviors. There are 2 types – *boosts* and *ads*.

Why is it important?

a) It gives your business guaranteed reach and ensures the campaigns you want to run have the potential to be seen. *Essentially you are paying for your audience's attention.*

b) Allows you to target your relevant customers. Paid social campaigns allow you to target consumers who live in a targeted area, came from your website or have a specific income level.

c) Teaches you about your target audience (i.e., which promotions do best, what your demographics look like and how paid performs vs organic).
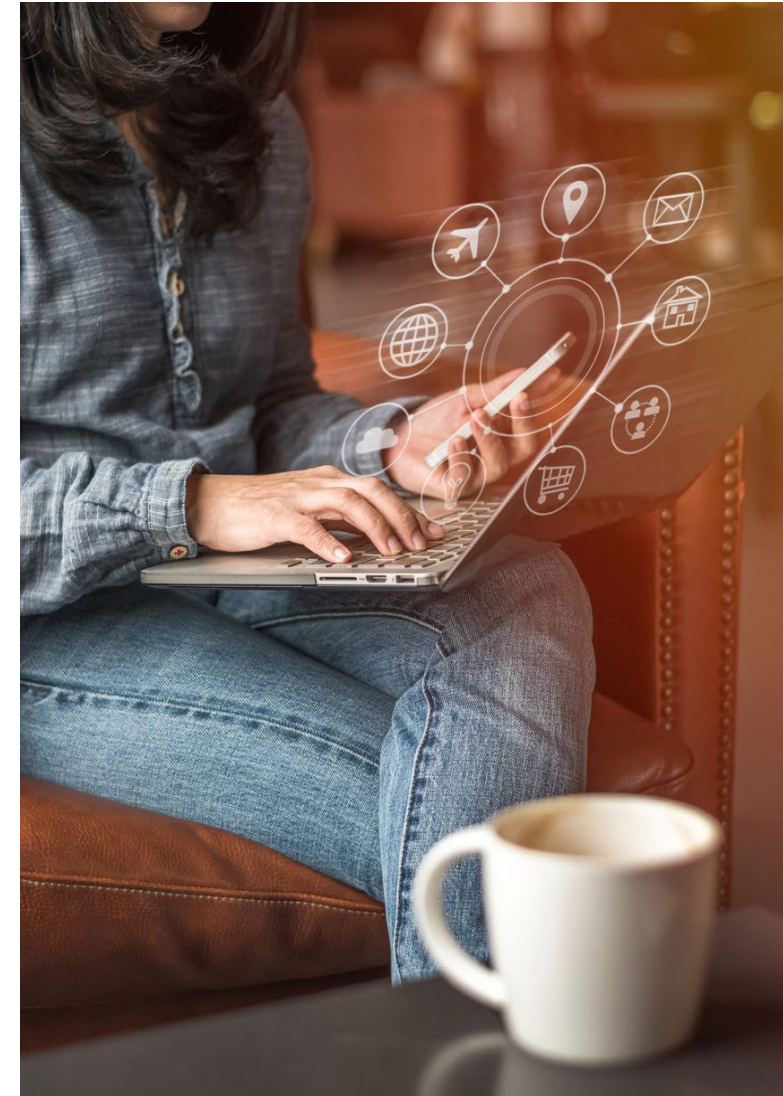
Differences...

While it may be confusing, organic social and paid social are very different. See those differences below:

○ Ads aren't tied to the whims of algorithms. There is a guarantee that people WILL see your ads including people who don't follow you, while organic posts are susceptible to social algorithms and followers.

○ Ads contain specific call-to-actions (show now, learn more) which lead to specific landing pages and desired engagements.

○ Organic social media is ongoing, ads are time-sensitive and set to a pre-determined run-time that you specify.

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Helpful 5 Guide

o Pick the social platform(s) to prioritize - *Invest in platforms you have an audience on and are familiar with. Start with one platform first then branch out from there.*

o Establish Goals - *Each platform allows you to pick a goal whether it be traffic, engagement, video views, reach, awareness. Decide what you are looking for. Boosts are simpler than ads and may work well.*

o Look for Inspiration from Successful Campaigns - *Looking up competing ads is crucial - and not just big companies, but ALL companies. Browse social media and see what you like and what is working for brands in the same space as you.*

o Research Creatives, Copy and Targeting, sizes of normal ads, call-to-action phrases and target audiences

o TRACK YOUR EFFORTS - *Look at the analytics at the end of the campaign and see how it all netted out. Track your performance over time and make tweaks and adjustments as desired.*

How marketers prioritize which social platforms to invest in

%	Platform priority
54%	Potential audience reach
47%	Cost of paid ads
38%	Potential for driving traffic
37%	Potential for lead generation
33%	Social algorithm updates
29%	Demographic makeup of platform users
24%	Targeting options

When should you start?
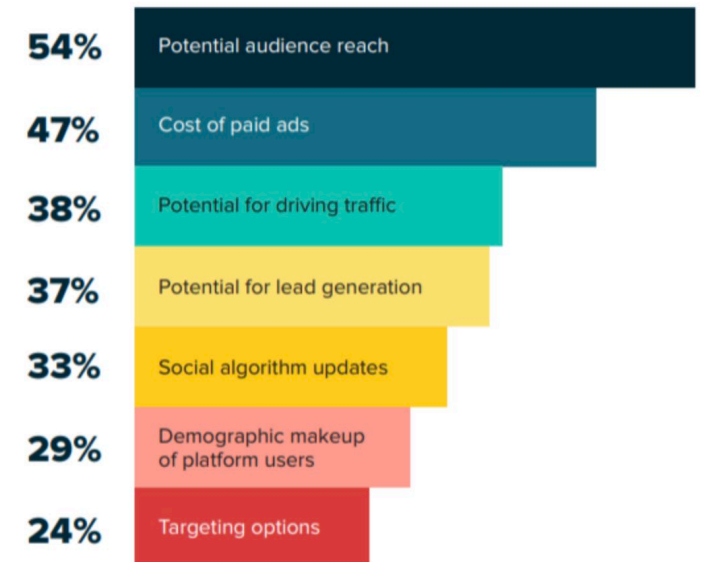
There's No Correct Answer

While there is no perfect formula when to start, it can be helpful to do the below:

o Make sure you **have an established following** and understand the network you are using.

o Allocate an **appropriate budget* for each campaign to ensure results**

o Tie your social campaigns to bigger-picture initiatives (never run ads or boost just because)

*Based on your budget, Facebook will show you the estimated audience size and potential leads.

Audience definition

Your audience is defined.

Specific   Broad

Estimated audience size: 6,300,000 - 7,400,000 ⓘ
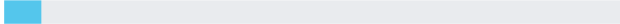
Your criteria is currently set to allow Advantage Detailed Targeting. ⓘ

Estimates may vary significantly over time based on your targeting selections and available data.

Estimated daily results

Reach ⓘ

8.5K - 25K

Leads ⓘ

8 - 24

The accuracy of estimates is based on factors like past campaign data, the budget you entered, market data, targeting criteria and ad placements. Numbers are provided to give you an idea of performance for your budget, but are only estimates and don't guarantee results.

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Boosting 101

Types of Boosting

o **Page Boost** – when boosting a page, it is asking targeted consumers to follow you along with interacting or liking your page

o **Post Boost** – when the specific post leads to something relevant or new. (i.e. a new product on the website, new events, new outreach programs, sales, etc.) It is also useful in expanding engagements, click, and other interactions with better efficiency than organic posting.

o **Event Boost** – this one isn't complicated. Simply post your event listing when there is an event coming up. Then boost the event so it gains traction and interest.

When to do each

o Boost your page when you are looking to **grow your overall audience** and have a consistent message, ask, and budget.

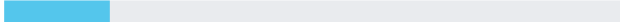o Post boosts are for announcing **major news** that elevates your overall brand. If your organization was featured in Forbes magazine, you have a **new product** or something exciting coming up, that is totally worth putting money behind that post.

o Boosting **an event** begins with creating an event through the FB calendar. This one is the simplest.

*Remember, organic posting aligns with platform algorithms and is important to do multiple times per week.

Ads

Page Name & Logo

Description

Link Description

Display URL

Title

Call to Action

Ads are created through Ads Manager and offer more advanced customization solutions.

- There are many advertising objectives to help you reach your specific business goals and the audiences you care about most.
- Where a boosted post may initially optimize for Page likes, comments, and shares or overall brand awareness, ads can optimize for website conversions, video views, shop orders and more.

Examples of Ads

Facebook Static Ad

Instagram Static Ad

Facebook Video Ad
with moving graphics

Facebook Video Ad
with images

Instagram Carousel Ad

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Ad Sizes

https://blog.hootsuite.com/social-media-image-sizes-guide/

Ads of all sizes vary per platform but it's essential to be able to size your images and videos to best fit each one. Resizing images can be done within the Adobe suite if you have an account or on Canva with a free account.

DO NOT let Facebook resize your ads. Check on multiple devices to see how your ad works (android vs iPhone, mobile vs desktop, etc.)

All About Audiences

Core Audience

When boosting on Facebook or creating ads, it's important to define your core audience. This includes the below:

- Location (specific area where customers live)
- Age (target those in a specific range)
- Interests (example: targeting for an animal shelter it would make sense to target those who are interested in animals, pets, maybe even vegetarians)
- Demographics (this includes income, education level, education)

Edit audience

* Locations

People living in or recently in this location

United States

(36.5979, -99.8438)   + 16 km

Include   Search locations   Browse

Add locations in bulk

Age

18   65+

Gender

All   Men   Women

Languages

Search languages

Estimated audience size:
Below 1,000
Estimates may vary significantly over time based on your targeting selections and available data.

Audience details:
- Location:
  - United States: Latitude 36.60 Longitude -99.84 May (+16 km) Oklahoma
- Age:
  - 18-65+
- People who match:
  - Interests: Organic food
- Advantage detailed targeting:
  - Off

Save as New   Update

CRM Lists, Retargeting, and Look-Alikes

CRM Lists – These are lists of customers (emails, phone numbers, and contact info) that is gathered through your website and CRM that you can download to then upload to your paid social platform that will allow you to target re-target or create look-alike audiences from these lists.

Retargeting – Once you have had customers fill out contact forms and engage with your business, you will want to retarget these individuals with ads and offers to retain them and ensure that they return to your brand soon or in the near future through CRM list data you provide.

Look-Alike Audiences – You can create look-alike audiences from CRM list or your followers. Look-alikes are individuals that social platforms deem as similar in demographics and psychographics to your existing audiences and can be helpful in attracting new business from individuals similar to those that have already converted to your brand.

Create a Lookalike Audience ✕

Select your lookalike source

Select an existing audience or data source

Create new source ▾

Select audience location

🔍 Search for regions or countries   Browse

Select audience size
Number of Lookalike Audiences ⓘ

1 ▾

0%   1%   2%   3%   4%   5%   6%   7%   8%   9%   10%

💡 A 1% lookalike consists of the people most similar to your Lookalike Audience source. Increasing the percentage creates a bigger, broader audience.

❓   Cancel   Create Audience

Campaign vs Ad Set vs Ad

Begin at Campaign level which sets the budget and theme of the campaign, the ad set gets all targeting and parameters set while the final set, the ad, places the creative (video or image) you are using.

Campaign

Ad Set

Ad

This is the full process of creating a campaign within Facebook. It takes practice but once you get the method down, it gets easier!

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Campaign vs Ad Set vs Ad

Campaign
People who love dogs

Ad Set
People who love tiny, purse dogs

Ad
Porgy, the Pomeranian

Campaigns are usually related to your overall business goals. Try to keep consistency with campaigns and then create multiple ad sets and ads. So that the platform and learn. I.e., campaigns for annual fundraising could be separate from a campaign about products you are selling.

What is a pixel?

Think of a pixel as a piece of code for your website that lets you measure, optimize and build audiences for your ad campaigns. You can think of this as an analytics tool that allows you to measure the effectiveness of your advertising by understanding the actions people take on your website.

This tracks leads, clicks and conversions all viewable to you on Facebooks ads manager. You can also benefit from retargeting anyone that visits your website, that way you don't loose visitors.

When placing the pixel code, use a txt. file or you may encounter errors.

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Optimize Your Campaign

How to Optimize for your Campaign

Ad campaign optimization is the process of improving the performance of advertising campaigns by adjusting certain facets to achieve desired business outcomes. It is the process a marketer takes to attempt to increase performance in different digital channels. A few examples of these marketing channels include Google Ads, Facebook Ads, Amazon Ads, etc.

Ways to Optimize:
- Keyword Usage
- Audience Targeting
- Dynamic Search Ads
- Engaging Ad Copy
- Expanding Audience Size
- Duration of Ads (30 days, 60 days, 90 days)
- Leads Forms
- A/B Testing

Lead Forms and A+B Testing

Lead Forms

A lead is any information someone shares that you can use to follow up with them. This includes name, email, occupation, employer, etc. A lead form is a tool you can use on Facebook and Instagram to capture this information.

You can make multiple lead forms per ad and can attach them to multiple ads.

A+B Testing

A/B testing (also known as split testing) applies the scientific method to your marketing strategy. In it, you test small variations in your social media content to find out the content that best reaches your audience.

To perform A/B testing, also known as split testing, you separate your audience into two random groups. Each group is then shown a different variation of the same ad. After that, you compare the responses to determine which variation works better for you. A/B testing is important because it helps you figure out what works for your specific context.

Types of A/B Testing
- Post length (number of characters)
- Post style: a quote versus a key statistic, for example, or a question versus a statement
- Use of emoji
- Use of a digit for posts linking to a numbered list
- Use of punctuation
- Tone of voice: casual versus formal, passive versus active, and so on

But what about TikTok...

All other platforms run similarly, but TikTok is a whole new animal.

For a TikTok campaign to be successful, the criteria below should be met:

- 2-3 months of content
- Established page with frequent content and posting
- Quality videos and relevant content
- Substantial budget
- Again, MORE CONTENT

What TikTok is good for...

- Good for donors to see the organization's activities and involvement.

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Resources + Free Platforms

Free Analytics Platforms

- **Moat:** https://moat.com/creative/
- **Smartlook:** https://www.smartlook.com/
- **Google Analytics:** https://analyctics.google.com/analytics/web/
- **Clicky:** https://clicky.com/
- **Matomo:** https://matomo.org/
- **Hotjar**: https://www.hotjar.com/

Free Task Management Platforms

- **Monday.com:** https://monday.com/
- **Clickup:** https://clickup.com/
- **Asana:** https://asana.com/?noredirect
- **Smartsheet:** https://www.smartsheet.com/work-management-platform-home

Questions?

Thank You!

Contact Us

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Milan@thebarbershopmarketing.com

TheBarberShopMarketing.com

Pay Per Click (PPC)

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PPC and How to Use It

What is PPC?

PPC stands for *pay-per-click*, a model of digital advertising where the advertiser pays a fee each time one of their ads is clicked. Essentially, you're paying for targeted visits to your website (or landing page or app). When PPC is working correctly, the fee is less important because the click can be worth more than what you pay for it. For example, if you pay $3 for a click, but the click results in a $300 sale, then you've made a hefty profit.

PPC ads come in **different shapes and sizes** (literally), and can be made up of text, images, videos, or a combination. They can appear on search engines, websites, YouTube, and anywhere on Google search and display networks.

Where does it run?

Search Engines: Google Ads, Microsoft Advertising, and Yahoo Gemini are popular platforms for PPC advertising in search engine results.

Search and Display Networks: Google's Search and Display Networks, which includes websites, mobile apps, Gmail, and video platforms, allows advertisers to display their ads to a wide audience.

Other Advertising Networks: There are numerous advertising networks, such as Taboola, Outbrain, AdRoll, Shopify, and more that offer advertising opportunities across various websites and platforms.

Google held an **87%** market share of all PPC advertising.

similarweb
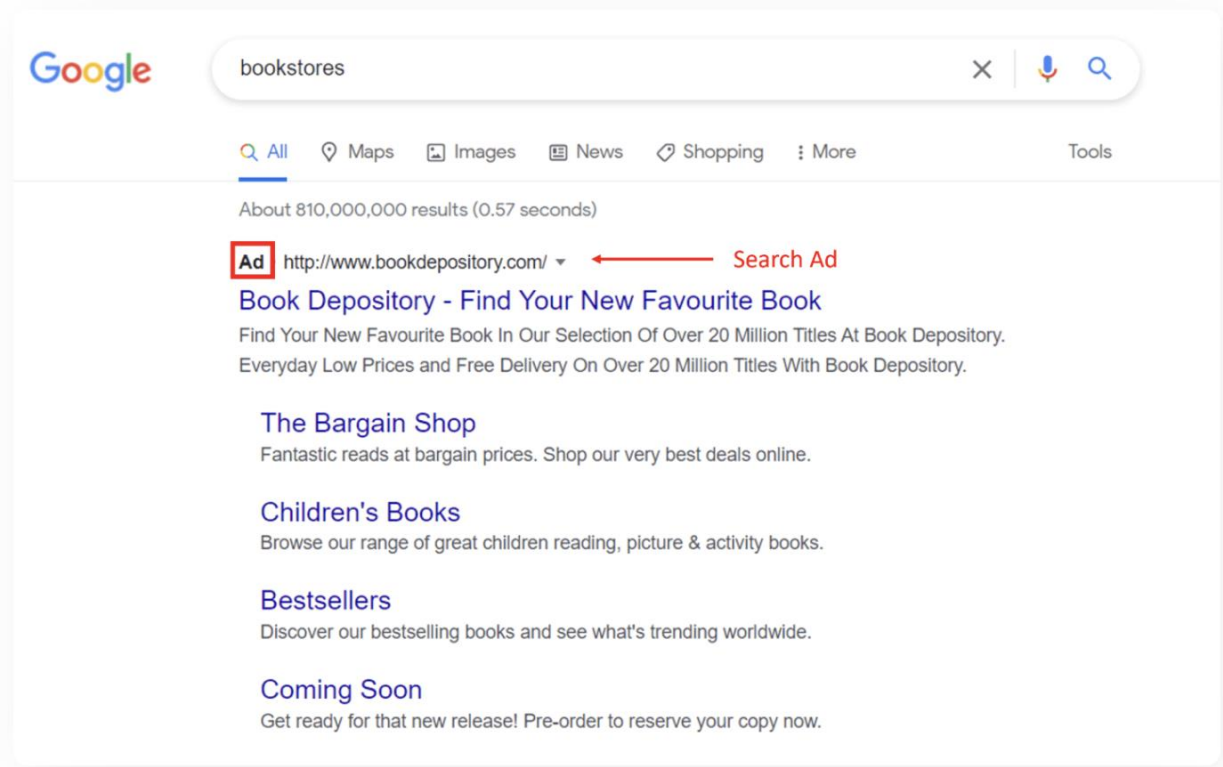
A search for "bookstores" using the Google search engine displays an ad for Book Depository in its Search Engine Results Page (SERP).

PPC Campaign Types

1. **Search Campaigns:** These campaigns focus on displaying text ads in search engine results pages (SERPs) when users search for specific keywords or phrases. Platforms like Google Ads and Microsoft Ads offer search campaign options.

2. **Video Campaigns:** Video campaigns involve displaying video ads on platforms like YouTube. Video ads can appear before, during, or after videos, or as display ads within YouTube search results. These campaigns utilize targeting options to reach specific audiences based on demographics, interests, or remarketing.

3. **Display/Retargeting Campaigns:** Display campaigns focus on displaying image or text ads on websites, mobile apps, or other digital platforms within the display network. Retargeting campaigns specifically target users who have previously visited your website or interacted with your ads, aiming to re-engage and convert them.

4. **Performance Max Campaigns:** Performance Max is a campaign type available on Google Ads that combines various ad formats and bidding strategies to maximize campaign performance. It utilizes machine learning to automate campaign optimization and reach users across different platforms, including search, display, video, and app campaigns.

5. **Google Shopping Ads:** Google Shopping is great for merchants that want to connect buyers directly to the products they sell from a website or retailer. These e-commerce ads can show at the top of SERPs to guide the searcher to the product with useful information such as price and description and a product image at-a-glance.

Keyword Matching & Match Types

Keyword match types in PPC advertising are generally consistent across platforms:

➢ **BROAD MATCH** Ads may show for searches that include variations, synonyms, related searches, or other relevant variations of the keyword.

➢ **PHRASE MATCH** Ads will show for searches that include the keyword in the same order or with additional words before or after it.

➢ **EXACT MATCH** Ads will only show for searches that exactly match the keyword or close variations.

➢ **NEGATIVE KEYWORDS** THESE KEYWORDS CAN BE USED TO DETER KEYWORD MATCHES THAT ARE NOT DESIRED (I.E. JOBS)

BROAD MATCH (max reach, min relevance). Broad match keywords are the ones that enable you to reach the widest audience possible, letting you drive a larger volume of traffic to your website. *EXAMPLES: Broad match keyword: women's hats*

Matching searches:
- Buy ladies hats
- Women's clothing
- Women's scarves
- Winter headwear for women

PHRASE MATCH (medium reach, medium relevance). Phrase match keywords lie somewhere in between: they are more focused than broad match keywords but less so than exact ones. This does provide you with greater flexibility in terms of getting visitors to your website. *EXAMPLES: Phrase match keyword: "women's hats"*

Matching searches:
- Blue women's hats
- Buy hats for women

EXACT MATCH (min reach, max relevance). Exact match keywords are the diametric opposite of broad keywords. As the name clearly states, these keywords are based on exact search queries and terms, down (or almost) to the last detail. *EXAMPLES: Exact match keyword: [women's hats]*

Matching searches:
- Women's hats
- Ladies hats
- Hats for women
- Hats women

Best Practices

Tips for Gathering Keywords

- Describe how your customers think of your product or service category
- Uses the right amount of details
- Use adjectives sparingly
- Use several keywords or keyword phrases about the same topic.
- A keyword and website can provide more relevant keyword ideas
- Include a location in your keywords if your customers aren't in the same location as your service or product

Before you begin picking keywords

- Establish your PPC campaign goals
- Look for keywords with a tool
- Check out keyword metrics
- See what's already working (for you or your competitors)
- Target using your data

Recommended Budgets

Your daily budget will determine how much you are willing to spend for your clicks and conversions. This means you determine is how much to spend daily based on business needs.

Some factors to determine budgets:

- Identify your target keywords
- Identify search volumes
- Estimate your cost per click (CPC)
- Account for seasonality
- Calculate your likely returns from your PPC ad spend (RoAS)
- Sense-check your PPC budget
- Select your target keywords
- Calculate the impact of these changes on search volume and spends

How to Run Strong Ads & Proper Audiences

Write and Utilize Strong Ads

- Update your keyword lists regularly
- Ensure your website is secure and accessible
- Use [Camel Capitalization](#) on headers to stand out more
- Maximize character limits as much as you can – 30 characters per headline and 90 per description
- **Utilize all the potential headers** (up to 15 max) and Descriptions (up to 4 max) that you can in your Responsive Search Ads (RSA's)
- Use ad extensions
- Create localized landing pages
- **Capitalize on FOMO**
- Develop a re-marketing strategy
- **A/B Test** anything you can
- Focus on channels that deliver the most conversions
- Brush up on copywriting skills
- Improve website performance and optimize user experience

How to Reach the Proper Audience:

- Targeting by Topic
- Targeting by Audience
- Targeting by Placement
- Targeting by Keyword
- Remarketing vs. Retargeting
- Don't make location targeting too broad
- Review your search query reports and add new keywords and negative keywords to improve traffic quality

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Setting Conversions

To track performance in PPC advertising, most platforms offer conversion tracking capabilities. Set up conversion tracking by **implementing tracking codes or tags** on your website to measure the **actions users take** after clicking on your ads**.** This data helps evaluate the effectiveness of your campaigns, optimize for better results, and calculate return on ad spend (ROAS).

Conversion tracking can be set up easily by importing goals set up in your Google Analytics or by setting up a tag code from Google Ads that can be added to your Google Tag Manager account.

[The Barber Shop's Guide for a smooth transition to GA4](#)

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Utilizing Ad Extensions + Types

Ad extensions are additional pieces of information that can be added to your ads, increasing their visibility and providing more context to users.

Different types of ad extensions include:

➢ **Sitelink Extensions**: Direct users to specific pages on your website.

➢ **Call Extensions**: Display a phone number that users can click to call directly from the ad.

➢ **Location Extensions**: Show the address and map location of your business.

➢ **Callout Extensions**: Highlight additional benefits or features of your products or services.

➢ **Structured Snippet Extensions**: Display specific aspects of your products or services.

➢ **Offer Extensions**: Display coupon offers and percentage and price discounts.

➢ **Image Extensions:** Attach images to your ads to help draw attention to your services and offerings.

➢ **Lead Form:** Utilize ad extensions to capture lead info without having to visit your site or landing page.

Bidding on Brand and Non-Brand Terms

What is bidding?

Bidding on brand terms helps protect your brand presence and capture relevant traffic.

- **Non-branded terms** allow you to target a broader audience interested in products or services within your industry.

- Competitor term bidding, or **conquesting**, involves bidding on keywords related to your competitors' brand names or products to attract their audiences to you. Conquesting is legal but should be used with caution, since bidding on another competitor's branded terms can carry heavy costs due to low quality score.

- When bidding on **branded terms**, it generally involves bidding on keywords related to your own brand name. Bidding on brand terms can help protect your brand's presence in search results and ensure competitors do not capture traffic specifically searching for your brand. It is recommended **to bid on your brand terms or else someone else might**. Also, branded terms tend to have the lowest costs and the highest conversion rates due to high-quality matching.

- There are various bid types and strategies such as bidding for **conversions**, conversion value, clicks, **impression share**, targeted CPA, targeted RoAS, and more, depending on your focus.

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Quality Score and How Google Works

What is a quality score?

Quality Score is specific to Google Ads and its determination of bid prices in comparison to competitors. In general, PPC advertising, platforms employ various mechanisms to determine bid prices, such as the advertiser's bid amount, ad relevance, click-through rate (CTR), and landing page experience. The bid auction system considers these factors to determine ad placement and cost per click.

Google utilizes a 10-point scale for quality score with 10 being the most related to your business (i.e. your brand name) and 1 being the most unrelated to your business. Search engines utilize the quality score system to prevent someone with an irrelevant service from simply paying more than you for top position and rewards individuals with the most relevancy in their ads, keywords, and landing pages with higher positioning at a reduced cost to their business.

Landing Pages and Matching Keywords

Landing Pages and Matching Keywords

The importance of landing pages matching with keywords and ad copy in PPC advertising is all about the consistency of the message. Landing pages should align with the user's search intent and provide relevant information or solutions. A seamless and consistent experience from ad click to landing page enhances user satisfaction and increases the likelihood of conversions.

Always be sure to display a **business contact number**, **contact forms**, and other related **calls to action (CTA's)** above-the-fold, or prominently at the top of your website in easy view to avoid users having to scroll and search to convert.

Be sure that your **ad copy and landing page copy** are similar with similar types of messaging and keywords, so that Google can reward you for greater relevance in your quality scores.

Targeting Types

Targeting types in PPC advertising may vary based on the platform, but commonly include:

➢ **Demographic Targeting:** Targeting users based on age, gender, location, or other demographic attributes.

➢ **Interest-based Targeting:** Reaching users with specific interests, hobbies, or behaviors.

➢ **Remarketing:** Displaying ads to users who have previously interacted with your website or ads.

➢ **Contextual Targeting:** Showing ads on websites or apps relevant to specific topics or keywords.

➢ **Custom Audiences:** Uploading customer data or using pixel tracking to target specific individuals or similar audiences.

Campaign Optimization

Optimization in PPC advertising involves continuous analysis and improvement of your campaigns. Regular optimization helps maximize the performance and efficiency of your PPC advertising efforts and ensures that your brand and ad copy messaging never go out of style to your audience.

- **Search Term Analysis:** Review the search terms that trigger your ads and add relevant ones as keywords. Identify irrelevant or low-performing search terms and add them as **negative keywords** to prevent your ads from showing for those terms.

- **Campaign Structure:** Organize your campaigns and ad groups based on relevant themes or product categories for better control and optimization.

- **Ad Testing:** Run **A/B tests** to compare different ad variations and optimize for higher click-through rates and conversions.

- **Bid Adjustments:** Analyze performance by device, location, or demographics, and adjust bids accordingly to maximize ROI.

- **Ad Scheduling:** Use dayparting or bid adjustments to optimize bids based on peak performance hours or days.

[Google Ads Preview Tool](#)
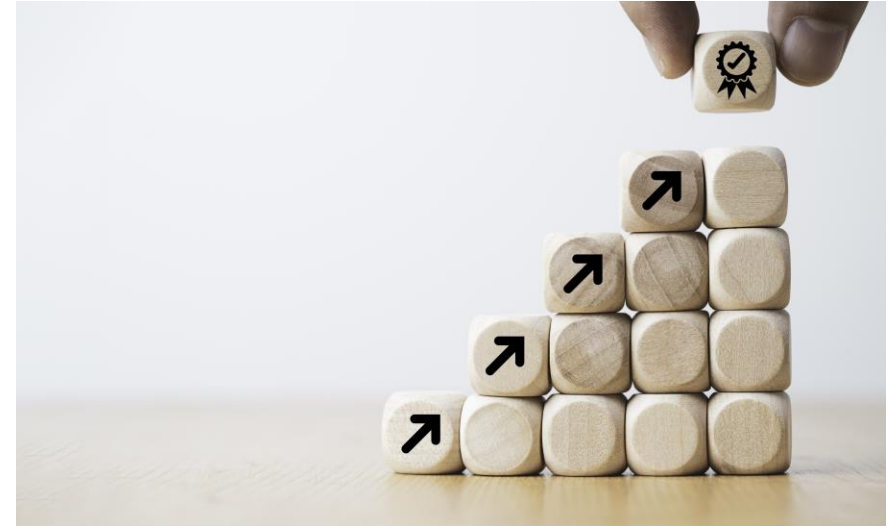
Questions?

Thank You!

Contact Us

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Scott Sanders, Senior Digital Marketing Manager
Scott@thebarbershopmarketing.com

TheBarberShopMarketing.com

North Texas Giving Day: Matching Funds

Curated just for you from the
North Texas Giving Day 2023
training website
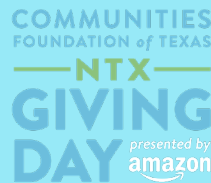
P.S. Please check the North Texas Giving Day site frequently;
the 2024 documents and training session schedule should be coming out any
moment and will be necessary additions to this curated 2023 content!

SECURING YOUR OWN MATCHING FUNDS

What are matching funds?

Matching funds are additional dollars contributed directly to your organization from a donor, company, or community partner (or some combination) to help encourage donations to your nonprofit. Nonprofits who secure 1:1 matching funds are more successful on NTX Giving Day than those who do not secure matching fund donors.

Matching funds are usually a 1:1 match, which allows you to say that your dollar will be doubled. Once secured, you can add your matching fund to appear on your nonprofit profile and it will show in your total amount raised as it is satisfied by donations.

Who are potential matching fund donors?

- Board members who have shown commitment both present and past
- Foundations with whom you have a great relationship
- Individuals who are invested on a heart level (volunteers, previous donors, alumni)
- Vendors with whom you have a longstanding relationship
- Companies who want to give back and who can promote your cause to their customer base

Remember, matching funds do not have to be from just one source! Consider asking a combination of partners to come together to provide a matching fund.

KEY STEPS TO A MATCHING FUND:

Step 1: Determine your prospects

Make a list of potential individuals or groups that could be willing to provide a matching fund for your organization. Here are some questions you should consider before adding someone to this list:

- How is this person connected to your nonprofit?
  - Keep in mind that it's generally best practice to ask someone for a matching fund who is an avid supporter of your organization and understands the importance of your mission.
- Do they have a history of supporting your organization financially?
  - It's certainly okay if they haven't been big in supporting your organization financially, you just need to be prepared to clearly explain how their financial gift could impact your organization.

- Does this prospect seem like someone who could give at a higher level?
  - If this person consistently gives at a lower level, they might not be the right fit for a matching fund. If a prospect consistently jumps donation tiers and is constantly supporting your organization at a greater threshold than the last time, they might be a great fit for a matching fund.
- Has this person supported your NTX Giving Day campaign in the past?
  - This question should certainly not deter you from making a request to a prospect if the answer is 'No', it will just require you to be prepared to share the importance of NTX Giving Day to your organization and what a matching gift from them could do for your campaign.

Step 2: Cultivate your prospects

Your main goal during the cultivation stage is to engage with the prospect. Even if you have a previous relationship with the prospect, you don't want to make them feel like the only time you connect with them is to make a financial request, they should feel a part of your network. Use the cultivation process to learn more about your prospects.

- Ask some qualifying questions to help determine if they would be open to providing a match.
  - How are things going?
  - What is their season of life looking like right now?
  - Are they receptive to hearing from you?

Step 3: Make your ask

You've solidified your prospect list and determined they are receptive to learning more about providing a matching fund but how do you make the ask?

- Make an informed ask – Use the information collected during the prospecting and cultivation process to make an ask that is tailored to the donor, keeping in mind their preferences, capacity, situation, and needs.
  - Use the template provided in the resources section to help craft your ask.
- Play to their interests – Explain the benefits of providing a matching fund. For example, a major donor might appreciate being able to mobilize others but want to do so anonymously. A company might appreciate shoutouts and public recognition. Make sure you tailor the benefits to the specific prospect.
- Be flexible – You want to make an informed ask but be open to other offers, amounts, and ideas.

Keep in mind that every prospect is different. Established donors or sponsors will usually need less time while newer prospects may need some additional time to decide.

SECURING YOUR OWN MATCHING FUNDS

FREQUENTLY ASKED QUESTIONS

Is a matching fund required to participate in NTX Giving Day?
No, a matching fund is not required to participate in NTX Giving Day, however, we highly encourage your organization to try and secure a matching fund to help propel your campaign.

Does the matching fund money get any additional dollars, if available?
No. Matching funds will not be counted toward any bonus dollars. Only the original gift from the donor will be counted for additional dollars (if available).

Do matching funds need to be dollar-for-dollar?
No, matching funds do not need to be dollar-for-dollar. Upon entering your matching fund into the Mightycause system, you will have the opportunity to set a match type which can vary based on percentage, dollar amount, or cumulative threshold. To learn more about each of these options, check out our Entering a Matching Fund Guide.

Will offline donations be included in my match?
Yes! When creating your matching grant, one of the conditions automatically enabled is that offline donations will be included in your match. This means that any offline donations added in the Mightycause will be added towards your match.
Please note: If you do not want this enabled, you can edit your match and unselect this option.

Should I add my matching fund as an offline gift?
No, to ensure that you don't exhaust your match prematurely, we ask that you do not add your matching gift(s) as offline donations.

Does my matching fund count toward my leaderboard totals?
YES! This year the dollar amounts appearing on the leaderboard will feature online donations (via credit/debit, PayPal, or Apple Pay), offline gifts entered by your organization, and matching dollars that have been fulfilled.

Agenda

- Matching Funds Basics
- Securing a Matching Fund
- Question & Answer
- Resources Available
- Upcoming Trainings

Matching Funds Basics

What are matching funds?

Matching funds is a fundraising tool that is used as a donation incentive.

1 DOLLAR DONOR **+** **1** DOLLAR MATCHING **=** **2** IMPACT DOUBLE THE

COMMUNITIES FOUNDATION of TEXAS
NTX GIVING DAY presented by amazon
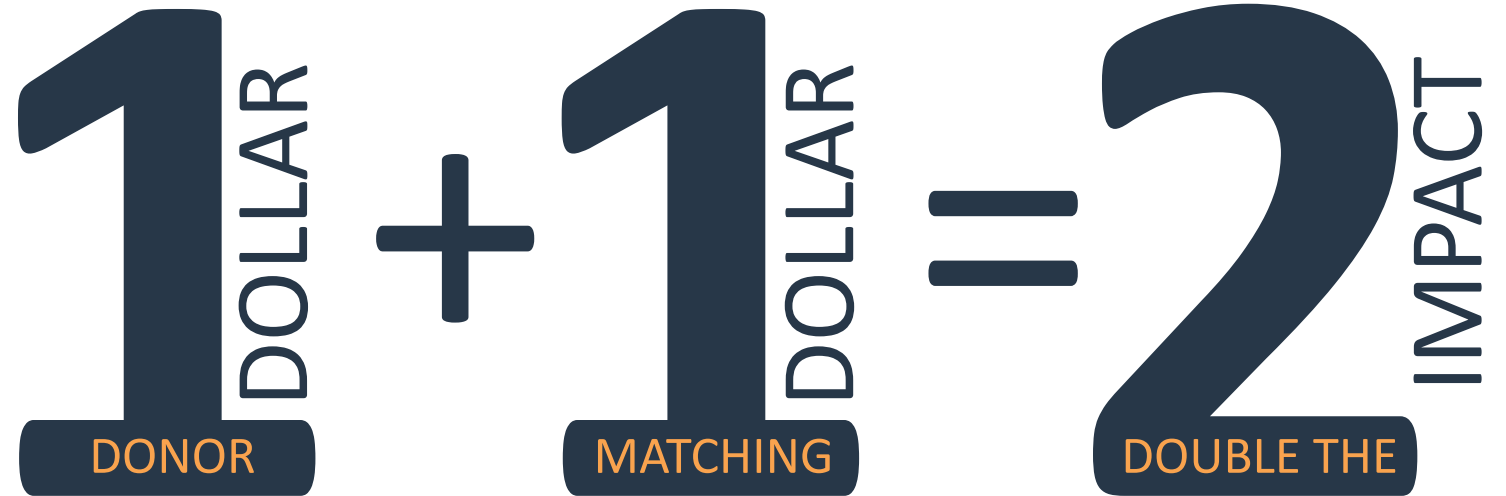
How do matching funds work?

Nonprofit Organization

Your organization goes out and secures a matching fund and promotes that to their network.

Donor

Donor visits the NTX Giving Day website and contributes $50 to the campaign.

Matching Grantor

Matching grantor contributes an additional $50 up to whatever the set amount of the matching fund is.

Why are matching funds important?

Matching funds can help propel your campaign! It is your opportunity to say that **gifts will be doubled** on NTX Giving Day.

Nonprofits who secure and meet their matching fund see an average increase of 60% from what they raised in prior years.

How can matching funds boost your campaign?

Incentive	Urgency	Marketing	Strategic Goals
• By having a matching fund, your donors can help your organization do more with their dollars.	• Matching funds allow you to create urgency to give now instead of waiting. They don't want the match to expire without having donated.	• This is an easy donation appeal! It's a built-in tool to help you market your campaign and grab the attention of donors.	• Matching funds help your organization increase and hopefully meet your funding goals!

Securing a Matching Fund

How to Secure a Matching Fund

Securing a matching fund will help power your campaign but it can feel intimidating especially when you're not sure who to ask.

Step 1: Determining Prospects

Make a list of potential individuals or groups that could be willing to provide a matching fund.

How is this person connected to your nonprofit?

Do they have a history of supporting your organization financially?

Does this prospect seem like someone who could give at a higher level?

Has this person supported your NTX Giving Day campaign in the past?

Step 2: Cultivate Your Prospect

- **Reach out:** Get the conversation started!

- **Get to know them:** at this stage, you should be cultivating the relationship.

- **Ask qualifying questions:** this will help determine if they would be open to providing a match.

- How are things going?
- What is their season looking like?
- Are they receptive to hearing from you?

COMMUNITIES
FOUNDATION of TEXAS
NTX
GIVING
DAY presented by
amazon

Make an
informed ask

You got a YES!

- Be sure to express thanks!

- Hammer out the details

- Talk about involvement

- Ask about recognition

If you get a no..

A no right now is not a no forever. If you continue to cultivate that relationship, it could be a yes in the future!
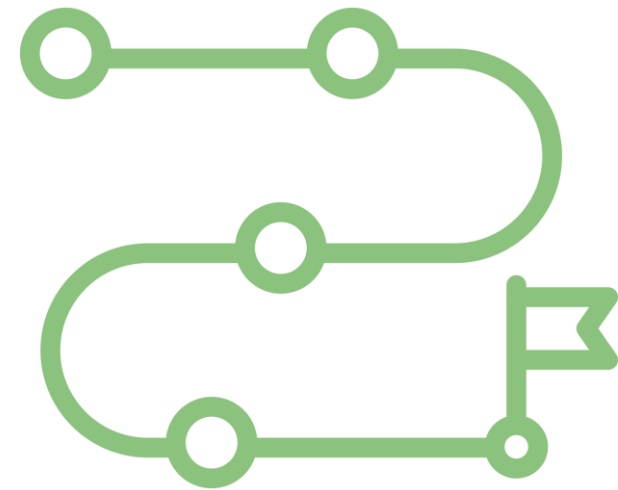
Question & Answer

What are the different types of matching funds?

- **1:1 Match:** Donations are matched dollar-for-dollar

- **Percentage Match:** A portion of each donation is matched

- **Cumulative Threshold Match:** Donations are matched when a fundraising goal has been met

Who can be a matching funds donor?

- Anyone can be a potential matching fund donor for your organization!
- Think about people who interact with your nonprofit regularly, including vendors, volunteers, board members, etc.

INDIVIDUALS

BOARD MEMBERS

FOUNDATIONS

COMPANIES

How do you approach a matching fund donor?

- We have created a template that you can use to make your matching fund ask.

What is the best way to publicize/utilize our matching fund?

- Include your matching fund on your nonprofit profile page on the NTX Giving Day site

- Include your matching funds in your email campaigns

- Include your matching funds on your social media channels to help create hype and promote your matching funds

When should we start publicizing our matching fund?

- This is dependent on when you are activating your matching funds
- You can front-load your matching gifts to start during early giving.
- We have also seen some organizations break up a matching gift to "unlock" during different parts of their campaigns.

How can we utilize our matching funds strategically?

- Create a minimum donation amount before a donation is applied towards the match. For example, every gift of $50 and above will be matched dollar-for-dollar

- Apply the match only once per donor

- Apply the match during a specific time period. Only gifts given during that timeframe will be matched.

Do we get to keep the entire match, even if we don't meet it?

- It depends entirely on your arrangement with your match sponsors!
- Many opt to give the whole match, even if it isn't wholly fulfilled.

the **OLYMPIA COLLECTIVE**

North Texas Giving Day: Activation and Engagement

Curated just for you from the
North Texas Giving Day 2023
training website
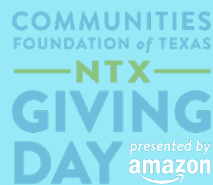
COMMUNITIES
FOUNDATION *of* TEXAS
—— NTX ——
GIVING
DAY *presented by*
amazon

P.S. Please check the North Texas Giving Day site frequently;
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PEER-TO-PEER FUNDRAISING

NTX Giving Day is a perfect opportunity to activate supporters of your mission and fans of your organization. Fundraising pages help make that possible! This tool allows users to create personalized giving pages housed on the NTX Giving Day website.

Your supporters can create customizable pages and share them with their networks, getting your mission and cause in front of new audiences. **This exciting platform feature empowers your super-fans to champion the causes near and dear to their hearts while promoting your NTX Giving Day campaign, helping you reach your fundraising goals.**

What are the benefits of using the peer-to-peer (P2P) model?

- Helps your organization **expand your existing donor base** and gives you access to people who are new to your nonprofit

- **Expands your reach** by getting more people to spread the word about your work and ask for support

- Allows your existing network to **deepen their relationship** with your organization in new and exciting ways

How does peer-to-peer work?

Your organization recruits P2P fundraisers → Fundraisers A / Fundraisers B → Promote to their networks = Dollars towards your organization's mission $
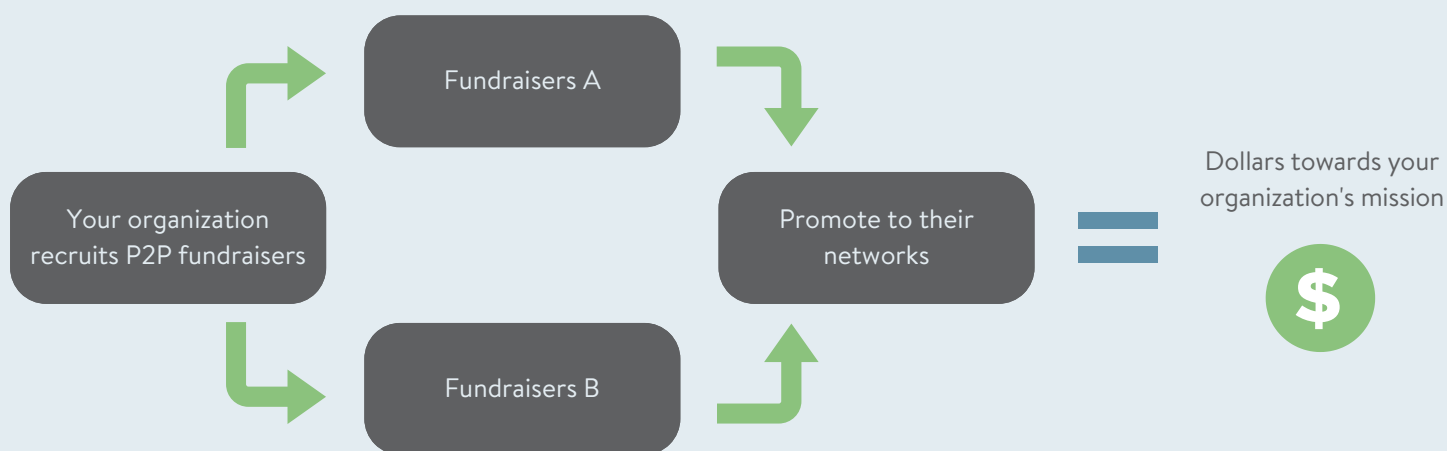
Who can fundraise for your organization?

The short answer – **ANYONE!**

Individual Fundraisers
> A supporter creates a fundraising page that is connected to your nonprofit and uses it to raise awareness and funds toward their own funding goal.

Team Fundraising
> A group of supporters collaborate toward a funding goal as a team. The team has a central page, and each team member directs their networks to give on that page. This is a great option for those who want to support within a community model.

Addressing Common P2P Misconceptions

- *"It is not an effective fundraising method."*

  Fundraisers raise an average of $660 per fundraising page. Imagine having three peer-to-peer pages; that's an average of close to $2,000! Consider what could happen if you scaled this model for your organization! Fundraising pages are not meant to replace your campaign efforts, but they can enhance them and help expand your donor base and revenue.

- *"Our constituents won't understand it. This will just confuse our network and require us to invest a bunch of time helping them figure it out."*

  More than likely, most of your supporters are familiar with peer-to-peer fundraising. **Peer-to-peer fundraising has become a common tool** integrated into social media platforms and various campaigns.

- *"Some of our loyal donors aren't tech-savvy. Members of our network prefer to write checks and don't seem to trust making donations online. They're not going to be interested in promoting an online donation site."*

  According to research, **75% of adults aged 50 and older use social media** on a regular basis including Facebook, YouTube, Instagram, and LinkedIn. In 2021, Pew Research found that only 25% of adults over 65 do not go online regularly. That means 75% do!

- *"Our organization is too small. Our nonprofit has a small network base. We aren't big enough to make peer-to-peer work for us."*

  Peer-to-peer is great for donor acquisition! If you're a small organization, it can help you get more people in the door to learn more about your work. You can ask people in your nonprofit's inner circle: staff members, alumni, volunteers, board members, etc.

- *"We might lose control of our messaging. Our nonprofit is strategic with its communications and key messages. What if they accidentally spread misinformation?"*

  Peer-to-peer will require you to extend trust to your super-fans who create a fundraising page on your behalf. Spend some time creating a mini toolkit that contains talking points, photos, and examples of how you talk about your nonprofit. **Help set them up for success!** You can also consider creating a Fundraiser template that is pre-filled with organization information. This makes it easy for your supporters to set up a page and helps provide your organization with some control.

Addressing Common Misconceptions *(Continued)*

"It's too much to ask of our network. Our network already does so much to support us, it's not fair to ask them to do more."

There is a possibility that this new ask will **re-energize your supporters** with a new way to support. They can use this as a fun opportunity to talk to their personal networks about something they are passionate about.

Set your peer-to-peer fundraisers up for success

- Provide instructions on setting up a fundraising page. Provide individuals with clear instructions on how to set up a fundraising page on the NTX Giving Day site.

- Help them craft their story. Help them communicate why your organization is important to them and why others should join them in supporting your mission.

- Encourage them to create a list. Fundraisers should create a list of their network whom they plan to reach out to and engage with through their fundraising page.

- Encourage them to set a goal. By setting a goal, it will help motivate them to activate their network. Donors have the option to set a goal based on the donor or dollar amount.

- Provide a communication outline. Provide your fundraisers with a communication outline leading up to NTX Giving Day along with a template ask to their networks. Fundraisers can ask their network through social media posts, as well as through direct, personal asks to each person on their list.

The peer-to-peer model and technology is great for deeper cultivation and can add deep value to your organization during the NTX Giving Day season and beyond!

For More Resources, Visit
NorthTexasGivingDay.org

Feeling inspired and want to help make a nonprofit's NTX Giving Day campaign successful? Creating a fundraising page is quick and easy!

By setting up a fundraising page, you're amplifying the message of your favorite nonprofits and increasing their visibility and network of support.

Follow these simple steps to create a Fundraising Page:

Step 1: You can **create a fundraising page for your favorite nonprofit** by going to the nonprofit's page on the NorthTexasGivingDay.org website and clicking the Fundraise button. *Please note: Only gifts given between September 1 and September 21 will count toward the NTX Giving Day campaign.*

Step 2: If you have created a user account on the NTX Giving Day site in the past, you can **log in to your profile**. If you can't remember your password, you can reset it at any time by selecting the *Forgot Password?* button on the login page.

Step 3: Use the *Page Editor* tool on the left side to **adjust your Fundraiser title, goal, and image/video.** You can also add a short story in the description section to tell your audience why you are passionate about this cause.

Step 4: Once you complete all the mandatory sections, click on the rocket ship on the left-hand side which will prompt you to publish your page. Select the green *Publish* button which will **make your page go live**.

Step 5: **Start promoting your fundraising page** to begin raising funds for your chosen nonprofit! Need support with promoting your page? Check out the last page of this guide for some sample posts and copy ideas!

Step 6: **Don't forget to thank your donors!** It is crucial to thank each donor that supports your fundraising campaign, no matter the size of their gift. Be sure to let them know how meaningful their gift is, regardless of the amount. This makes your supporters feel seen and appreciated and helps build a relationship that will encourage them to support your effort again.

Tip: **You can see who has donated to your fundraiser and their email address by:**
- Logging into your fundraiser profile
- Hover over your name in the top right corner and select your fundraising page
- Once on your fundraising page, click on the dollar sign icon and select *Donation Report.*

Sample Email Template: Fundraising Pages

Dear [Superfan Name],

Thank you for your ongoing support of [Organization Name]! Your generosity makes a meaningful difference to [core mission constituency, e.g. homeless youth, seniors, veterans, rescue dogs], as we continue to change lives every day. We couldn't do this work without you!

If you've considered how you can take your support to the next level, here it is: Help us reach more people by creating a fundraising page! This is a wonderful way to express your support and connect with people in your network around what you're passionate about. Creating a fundraising page is quick and easy, and can make a huge impact on our organization.

Last year, a total of 16,432 donors gave more than $2.5 million dollars through these peer-to-peer fundraising pages which benefitted more than 780 nonprofits.

For 2023, we have a goal of raising [$XX,XXX] during NTX Giving Day. Will you help us reach that goal? For more information on how to sign up and what you can do to make your fundraising page successful view our Fundraising Pages toolkit.

We hope that you will join us so that we can make a bigger impact on our North Texas community! For more information on how to sign up and what you can do to make your fundraising page successful view our Fundraising Pages toolkit.

We hope that you will join us so that we can make a bigger impact on our North Texas community!

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

For More Resources, Visit
NorthTexasGivingDay.org

Sample Email Template: Securing Corporate Partners

Dear [Company Name],

Our mission at [Nonprofit Name] is [Mission Statement]. To accomplish this mission, we rely on the support of our community partners.

We understand that [Company Name] has a robust corporate philanthropy program in place and has a shared goal of [Insert shared goal/interest/mission here]. Additionally, we believe that [Nonprofit Name] and [Company Name] share a strong sense of community.

This year, on Thursday, September 21, 2023, [Organization Name] is participating in Communities Foundation of Texas' 15th Annual NTX Giving Day, an online giving extravaganza for the whole region. We believe that partnering together is a great way to inspire your employees to give back to their community and help us reach our goal of [$XX,XXX] on September 21. In exchange, we will highlight and promote [Company Name] on our webpage in addition to our social media content.

Through this partnership, we hope to help [Company Name] advance your corporate philanthropy program and support your company's mission while meeting the needs of our shared community.

We believe that together we can make our shared community a happier, healthier place. Therefore, we would love to continue this conversation. Please reach out to us at [contact information]. We're looking forward to hearing from you.

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

For More Resources, Visit
NorthTexasGivingDay.org

the OLYMPIA COLLECTIVE

North Texas Giving Day: Donor Stewardship

Curated just for you from the
North Texas Giving Day 2023
training website
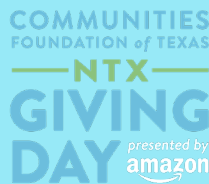
COMMUNITIES
FOUNDATION *of* TEXAS
—— NTX ——
GIVING
DAY *presented by*
amazon

P.S. Please check the North Texas Giving Day site frequently;
the 2024 documents and training session schedule should be coming out any
moment and will be necessary additions to this curated 2023 content!

DONOR APPRECIATION

Donor appreciation is the intentional practice of expressing gratitude to those who have contributed to support your organization's programs and operations.

Donor appreciation is extremely important to help your organization retain donors. Based on nonprofit funding trends, it is common for a majority of a nonprofit's funding to come from a segment of major donors. While every donor matters and deserves to be thanked for their generosity and support, major donors require a more consistent and thoughtful expression. Failing to acknowledge, recognize, and thank your donors for their support might negatively impact the donor relationship, but **an authentic and meaningful expression of gratitude will make your donors feel seen and valued as members of your community.**

What are some of the benefits of focusing on donor appreciation?

1. **Strengthening Donor Relationships**
   Relationships are the heart of effective fundraising. By strengthening your relationship with your donors, it will help build mutual respect which will lead to the support you need to accomplish your organizational goals.

2. **Increasing Donor Retention**
   Donor retention is essential to the success of an organization. Not only do consistent donors provide a strong foundation of support, but it is more expensive to work on acquiring a new donor than to retain an existing one.

3. **Encouraging Donors to Give More and Invite Their Networks**
   Continued and thoughtful donor appreciation can help usher a donor from one level of giving to the next. Donors who feel appreciated are also more likely to invite their networks to join them in supporting your organization.

Showing genuine gratitude is key to making donors feel appreciated and more connected. Alternatively, **there are some things that can damage your relationship with donors.**

Here are a few:

1. **Taking too long to show appreciation:** You risk losing donors by waiting too long to send your thank-yous. While the timeline varies based on the format of your thank you token, each should be sent soon after the gift is received. For example, an email should be sent no later than one week after the donation was made. If you are mailing your donors a thank-you, consider sending it no later than two weeks after receiving a gift.

2. **No personal touch:** Donors generally receive an automated email after the transaction of their gift has been completed. While you might have included a general thank you message in the email, consider sending a personalized note after the transaction. This provides you with an opportunity to share a more detailed explanation of how the gift will be utilized and its impact on your mission.

3. **Failing to use donor-centric language:** In your communication, consider personalizing the content with first names and by addressing donors directly with "you" and "your" language. Donors want to hear how their specific gift will help your organization. For example, consider providing a direct resource correlation to their donation amount (e.g. Your $50 gift will purchase four new books for our students).

4. **Including an additional donation request in your thank you letter:** While organizations utilize every dollar that is sent their way, it is important to properly acknowledge and appreciate each individual gift. Including an additional ask in the thank you letter can make it feel disingenuous. A good rule of thumb is to have three touchpoints before making another donation request.

Donor appreciation should be built into your fundraising strategy.

Meeting your fundraising goals is one measure of success, but it isn't the only one. You use your campaign goals to create momentum, but to maintain that momentum, you'll need to continue nurturing your donor relationships.

You may choose one strategy for all of your donors, or you may **segment your donor base into groups** depending on common characteristics or preferences.

Consider creating a Stewardship Matrix like the one shown below, to help structure and simplify your thank you strategy for donations at every level!

Example Stewardship Matrix:

	Gift Amount: **Less than $99**	Gift Amount: **$100-$499**	Gift Amount: **$500-$999**	Gift Amount: **$1,000-$4,999**	Gift Amount: **Greater than $5,000**
Thank you email within 48 hours	✓	✓	✓	✓	✓
Phone call from board or staff member		✓			
Handwritten letter from staff member			✓		
Recorded video from Executive Director				✓	
Hand written thank you from Executive Director					✓

Creative ways to express donor appreciation

- **Handwritten thank-you letters or notes**
    Handwritten notes make for a nice surprise in an era full of digital communication. Imagine going to your mailbox, seeing your usual stack of ads, bills, solicitations, and an envelope with your name handwritten on it. More than likely, the first one you're going to open is the one personally addressed to you! Consider having clients, board members, volunteers, or staff assist with the writing of the thank-you notes to deepen the importance and impact of their gift. The donor receiving the note will truly feel like they are a part of your community.
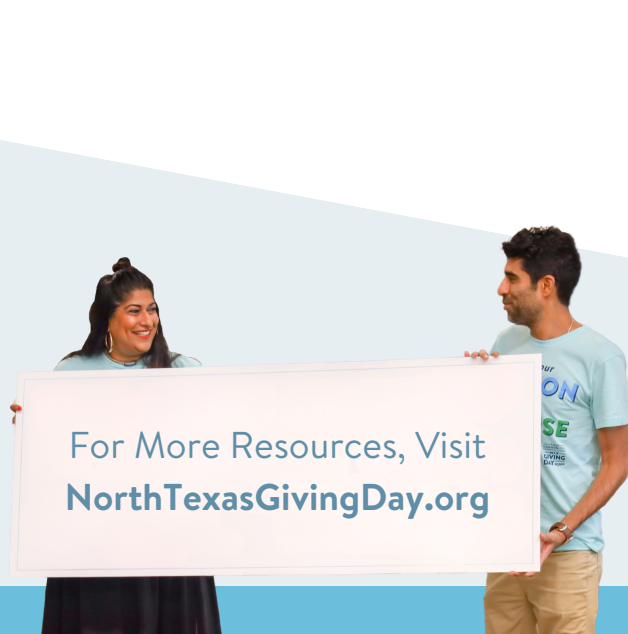
- **Videos**
    Thank-you videos are great ways to thank your donors enthusiastically and genuinely. Thank-you videos have a short appreciation message to donors and can be sent to them in just a few minutes! This is one of the fastest ways to show your appreciation after receiving a gift. Consider personalizing these videos and making them unique to each donor.

- **Personal phone calls**
    By personally calling to thank donors for their support, you can strengthen your relationship with the donor and have a huge impact on how they perceive your organization. Consider having board members assist with these calls, as they are some of your most valuable ambassadors!

As you plan your NTX Giving Day campaign (and beyond!), we encourage you to develop your own appreciation planning as part of your efforts!

Did you know that handwritten mail has an open rate of **99%**?

For More Resources, Visit
NorthTexasGivingDay.org

CHECKOUT CUSTOMIZATION

We want to empower your nonprofit to share your story and all the ways you make an impact in the community. We ALSO want to make it easy for your donors – old and new - to support the causes they care about with a seamless donation process!

Below you will find several ways to help your organization stand out and communicate with donors:

Each of the items mentioned below can be customized from your nonprofit portal. To access these items, please follow the steps below:

1. You can access your organization's profile page by logging in and **selecting the desired organization** from the drop-down menu under your name in the navigation bar.
2. Once you have landed on your organization's Overview page, use the left-hand navigation bar to select the section labeled **Checkout.** From there, you will see tiles for the following: **Donation Form**, **Thank-you Page**, and **Donation Receipt**.

Use the information below to guide you through each of the tiles you see in front of you!

Donation Form: Customize your donation level amounts and provide a description for those amounts.

Donate

You're making a donation to **Jubilee Park & Community Center**

🏛 ORGANIZATION
Jubilee Park & Community Center ✔

○ One-time donation   ○ Monthly donation

$50 could provide a senior with 2 weekly hot meals for 6 weeks	**$100** could provide reading and math curriculum for a student
$250 provide a family with food for 1 month	**$500** could provide emergency financial assistance for a family
$1,250 could provide fitness classes to the community for one month	**$3,000** could sponsor a child in afterschool for an entire year

Donate

You're making a donation to **Dallas Pets Alive!**

🏛 ORGANIZATION
Dallas Pets Alive! ✔

○ One-time donation   ○ Monthly donation

$50 Annual Vaccinations	**$100** Spay/Neuter Procedure
$500 Training for a Week	**$1,000** Major Medical Treatment

Find your passion.
Give with purpose.
#NTXGivingDay

COMMUNITIES FOUNDATION of TEXAS
NTX GIVING DAY
presented by amazon

Thank-you Page: Customize the page donors will see once they've completed a donation. This is your opportunity to share a general thank you and invite them to learn more and join your network. Here are two examples from nonprofits who completed this section of customization.
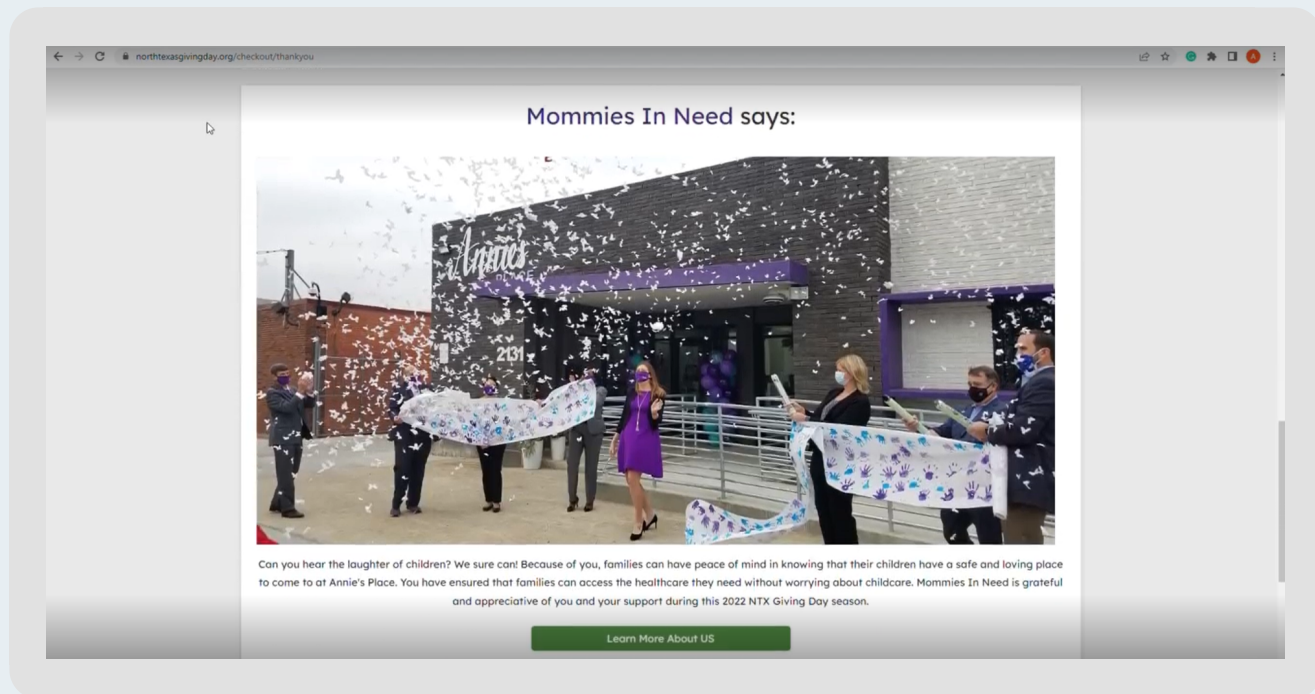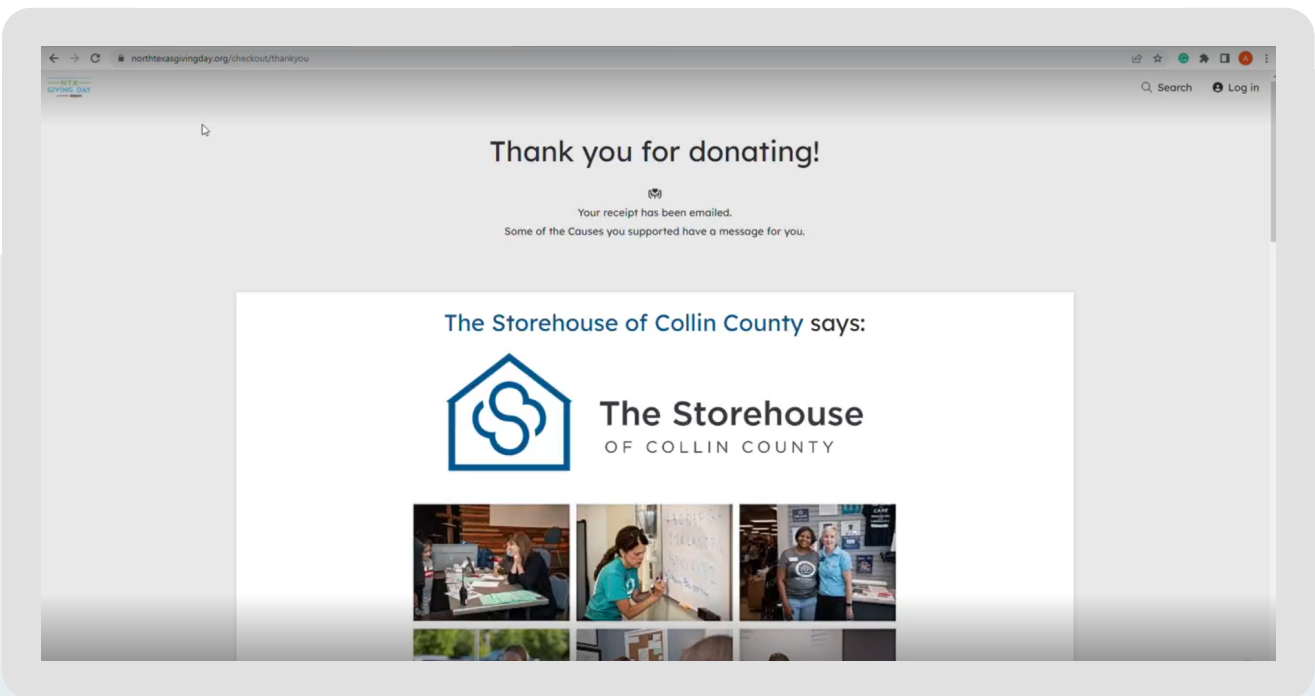
Donation Receipt: Add a general thank-you message to the auto-generated email sent to donors. Use this space to reemphasize how each donation helps advance your mission and express gratitude for their gift.

Donation Receipt

Preview and customize the receipt automatically emailed to donors.

Customize Message

🔗 ¶ ▾ ☰ ▾ ☰ ▾ ☺ <>   Save   Cancel

Thank you for your gift to **ABC Organization**!

We truly couldn't do our work without your generous support. Join our newsletter to see all the exciting work our organization is doing to help the North Texas Community.

Receipt Preview

9.22.22
COMMUNITIES
FOUNDATION of TEXAS
NTX
GIVING
DAY
presented by amazon

Dear Jane Q Example,

Thank you for your donation through NorthTexasGivingDay.org! NTX Giving Day is one of the best ways to deepen your passion and commitment to your favorite nonprofits each year! Your support amplifies the work that thousands of local nonprofits do every day to make our shared community a wonderful place to live and thrive.

Want to win another $100 for your favorite nonprofit? Click here and share your feedback about your NTX Giving Day giving experience and your favorite nonprofit will have a chance to win.

Then take some time to learn more about how Communities Foundation of Texas, which powers NTX Giving Day, can help individuals, families and businesses make North Texas an even stronger and more vibrant community.

On behalf of the thousands of nonprofits working to make North Texas a thriving community for all, THANK YOU!

- The NTX Giving Day Team

P.S. Want to give to more organizations or help support NTX Giving Day operations? Find additional nonprofits and donate today or contribute to the NTX Giving Day Fund to help defray the cost of the day and increase the bonus and prize funds available to all nonprofits.

Please note: NTX Giving Day nonprofit eligibility is based on geographic area and charitable status, and an organization's inclusion on NorthTexasGivingDay.org does not constitute an endorsement by Communities Foundation of Texas. Click here to view our eligibility requirements.

Thank you for your gift to **ABC Organization**!

We truly couldn't do our work without your generous support. Join our newsletter to see all the exciting work our organization is doing to help the North Texas Community.

For More Resources, Visit
NorthTexasGivingDay.org

THANK YOU TEMPLATE

Sample Email Template: Thank You for Donating

Dear [Donor Name],

Thank you for donating to [Organization Name]! Your generous support makes a meaningful difference to [core mission constituency, e.g. homeless youth, seniors, veterans, rescue dogs], as we continue to change lives every day.

Communities Foundation of Texas' NTX Giving Day gives us a chance to introduce our organization to a new audience and raise funds to fuel our mission. Your donation on NTX Giving Day brings us one step closer to reaching our overall fundraising goal for the year!
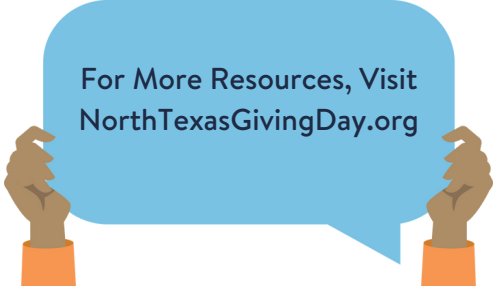
A huge thank you to you and the [number of] people who donated; we raised [$XX,XXX] during the 18 hours of NTX Giving Day! The money raised will help us [what the raised money will help do, e.g., feed so many dogs, provide programming to so many more families]!

Follow us on Facebook/Twitter/Instagram [insert a link to your social media page] to see just how we'll put your donation to work.

Sincerely,

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

For More Resources, Visit
NorthTexasGivingDay.org