



GiveLocalNRV Planning Worksheet

This planning worksheet is a tool to help nonprofits start thinking about goals and fundraising strategies for the GiveLocalNRV giving day.

1. Select a staff member or volunteer as a point person – someone who has strong leadership and organizational skills and can commit to the entire campaign timeline and process. We also recommend having a back-up person who is familiar with the event and things like [adding offline donations to the system](#).

Name of point person: _____

Who is your back-up person? _____

2. How does participating in the giving day plug into your overall fundraising plan for the year?

- It's our only major formal fundraiser for the year.
- We have several fundraisers during the year, including this one, that are part of our annual giving campaign.
- It's one of a couple major formal fundraisers that we have each year.
- We do not have a formal fundraising plan and we are trying something new by participating in the giving day!
- Other: _____

3. Determine the focus of your GiveLocalNRV campaign. Do you have a specific theme, project, or milestone that you will fundraise for?

Focus or theme of campaign: _____

4a. Decide on a monetary goal for your GiveLocalNRV fundraising campaign.

Goal Amount: \$ _____ Is this more or less than last year? _____

Have a purpose behind your goal, don't just pick a number that sounds good. What does your goal represent?

4b. How many donors do you want to give this year? _____

4c. List any other goals: _____

5. What channels will you use to fundraise? Check all that apply.

- Email
- Social media
- 1:1 meetings
- In-person events
- Direct mail
- Other: _____

5. Holding in-person events at your nonprofit or a local business can help drive fundraising success.

If you want to have an event, what kind of event do you want to have? What is your budget?

<i>Where to hold the event?</i>	<i>Type of event?</i>	<i>Budget considerations</i>

6. The most successful organizations enlist fundraisers to help raise awareness and money for their cause. Examples include: board members, donors, volunteers, etc. List five potential fundraisers for your organization:

1. _____ 2. _____ 3. _____

4. _____ 5. _____

7. Engaging your board (as fundraisers or otherwise) is an essential part of fundraising success. What are three ways you can engage your board (i.e. competitions, fundraisers)?

#1: _____

#2: _____

#3: _____

8. Matching grants from individuals or sponsors motivates other donors to give. Who are five people or businesses you can reach out to provide matching grants? A match as low as \$200 can be motivating donors!

1. _____ 2. _____ 3. _____

4. _____ 5. _____

9. In what ways will you thank donors post event? Check all that could work for your organization.

- Email
- Social media
- Handwritten notes
- In-person celebration
- Video message
- Other: _____

10. How will you start to build relationships with any new donors you gain from this event?

- Ask them to follow you on social media
- Ask them to join your email list
- Invite them to get more involved (such as volunteering)
- Invite them to an upcoming event
- Email or call them to ask if they want to get more involved
- Take them to coffee or lunch
- Other: _____