Assessing Your Campaign, Planning for Next Year or “That’s a Wrap…”

In This Chapter

- Using your metrics and goals to build next year’s program
- Assessing your Annual giving program focus and setting priorities for the future
- Integrating stewardship into your annual giving program
- Annual giving as a springboard to a major gifts campaign

Steps included:
Step 1 — Assess your program on quantitative measures
Step 2 — Assess your face-to-face solicitation program
Step 3 — Review engagement opportunities
Step 4 — Assess your direct mail and email appeals
Step 5 — Assess Your Special Events
Step 6 — Assess Your Online Outreach
Step 7 — Assess Your Stewardship Program
Overview

Read this chapter as you finish creating your plan and put it into action and then return to this chapter when you have about six weeks left in the fiscal year to start thinking about how to assess your results from the past annual giving program and begin planning for next year’s campaign. Just as you have been tracking throughout the year, your final assessment of your campaign successes will start with your results against the metrics you set at the beginning of the year.

To measure your program quantitatively return to the baseline data you developed at the beginning of the year to build your goals. How did you do against each of these? If this is the first year you were tracking goals at this level of detail, give yourself some leeway for over- or under-estimating what would be possible to accomplish in the next year.

- Did you anticipate that you’d be able to increase donor retention by 10% but it was closer to 4%? Use that information to build a more realistic goal for next year.
- Had you hoped that leadership giving would move from 43% of your total annual giving goal to 50% in the first year? Go back to your name-by-name projections and look at where you have overestimated with some potential donors, consider what you can do next year to further increase their giving and how you can continue to build a stronger giving relationship with leadership donors.

The step-by-step instructions below will guide you through revisiting each of your goals and how you use those results to continue building next year’s plan.

REALITY CHECK:

What do I do if my numbers were way off? Isn’t everyone going to flip out? This is why I didn’t want to get these goals and publicize them in the first place.

At this point, no one should be flipping out because you should be reporting on goals, sharing your progress and making joint plans to achieve those goals throughout the year. Mid-year, if it looks like your overall goal may be way off, then you need to have a serious conversation about the budget implications of this. If, at the end of the year your retention, upgrade or other goals were off, then chalk it up to the fact that this was the first time you set these goals in this was and use a more educated baseline for setting next year’s goal. You should have a post-mortem on what went well and what stood in your way to reaching any other goal that you didn’t reach, but this shouldn’t turn into a finger-pointing or guilt-riddled conversation. Dare to do things, make mistakes, assess the situation and move on.

These quantitative measures—your metrics, goals and progress toward Best Practices benchmarks—are important measures of your Annual giving program’s short-term and long-term growth, but it is not the only measure of success. At year-end, you also should spend time reflecting, and checking in with staff and volunteers on the qualitative measures of success: the relationships built, the engagement with your program, the quality of your case for support and your special events, for example.
The top priorities on which to continue to focus and build out your program over time are:

- **Continuously strengthening** the quantity and quality of your face-to-face relationships and solicitations. Deepening your comfort, confidence and skills in this area, developing broader and broader capacity to maintain deep and meaningful relationships with your Critical Few and expanding the number of other people—staff and volunteers—who are also charged with building relationships between your program and your top donors is the single most important marker of success, not only in annual giving but throughout Fund Development.

- **Delivering top-quality** stewardship to all of your annual giving program donors and volunteers. Your annual giving donors and volunteers should receive:
  - Accountability of the use of their gifts
  - Timely and personal acknowledgement of their gifts (time and money)
  - Appropriate and meaningful recognition
  - The opportunity to experience the impact and outcomes of their giving, with more tailored and personalized opportunities available to the Critical Few.

- **Adding infrastructure** to support a robust, sophisticated annual giving program. Investing in staff positions, paying attention to documenting practices and protocols and acquiring or enhancing your data management capacity will not only make greater refinement in your annual giving program possible, but you will also be able to use your time more wisely and will be putting in the place the building blocks necessary for long-term development success in major gifts, planned giving and endowment or building campaign.

- **Building the culture** of yearlong, comprehensive annual giving practices. Strong volunteer support of this approach and their active, joyful engagement in the work of annual giving sets a powerful precedent for a shift in thinking—raising sights about what is possible—throughout fund development. An Annual giving program that has the active involvement of others—board members and other volunteers—will not only be more successful in its own right but will position you for success into the future.

The third dimension of your year-end assessment should include some narrative and documentation on the “Why’s” behind your annual giving program successes or challenges:

- If a certain appeal segment seemed to flounder or flourish, to what do you attribute that? Right or wrong message? Timing? Other factors?
- If you had success in bringing some volunteers on as solicitors, what worked well?
- What kept your event or your website or any other goals from working as well as you had hoped?
This commentary—in the form of notes, a formal report or checklist attached to the final version of your annual giving program plan—can form the basis for an end-of-year report to the team, to guide next year’s planning. Your analysis will provide you or others with a useful record of what has been tried, what factors have been important to your program, how the campaign has grown over time to create institutional memory for the protocols and practices you are building now.

A powerful, comprehensive, sophisticated annual giving program is the springboard to an ongoing major gifts program and to a successful campaign for your program. Campaign readiness is measured against these factors—notice how many factors the Annual giving program practices contained in this guide are helping you to establish or build:

- Nearly every single one! Not only is a strong Annual giving program a marker of your ability to sustain and grow your programs year-to-year, it is a vital, capacity-building approach to fund development.

### Critical Factors
- Vision & Strategic Plan
- Agreement on Campaign priorities
- Priorities & costs
- Case for support
- Board ability & willingness to give
- Institutional will to dedicate time, confidence in success
- Enough engaged prospective donors
- History of annual giving
- Volunteer leadership

### Necessary Factors
- Strong image in the community
- Donor identification & research
- Major gift program
- Communications plan
- System, infrastructure

### Important Factors
- Campaign plan
- Campaign financing
- Volunteers trained/experienced
- Counsel in place

### Step-by-Step Actions

Sound analysis of the data and practices you’ve implemented this year will make crafting next year’s plan, building on all you’ve accomplished this year, a snap! These steps should be conducted at the end of your fiscal year, as your final results have been compiled.

#### Step One—Assess Your Program on Quantitative Measures

1. **Overall goal**—Did you reach your goal for the year?
   - Hopefully, you will have exceeded your goal for the year. Next year’s goal should build from this total, not from your projected goal.
   - Were you close to your goal, but didn’t quite make it? If you off by only a couple of percentage points, again use the total that you ultimately raised to set your new goal. As you build capacity and new practices, consider setting a goal that is closer to 3% growth than 5% growth.
   - Were you a significant distance from your goal? If there was a major deficit in what you thought you would do and what you ultimately achieved, it is time to go back to the drawing board with your projections and look more closely at where you were off and what action plans contributed to that. For example, if you anticipated more leadership giving than you achieved:
     - Was that because a few donors you thought would give in a big way fell through? Factor that in as you develop your name-by-name projections next year and be much more conservative.
     - Was that because you were not able to make as many face-to-face visits as you wanted? Examine how you were using your time, what was keeping you in the office and adjust what you say yes to and what you say no to next year.
2. **Leadership giving goal**—How much did you raise from donors of $1,000 or more? What percentage was that of your total? From whom did you raise the funds (individuals, corporations and foundations)?

- Take a look at whether you were off in your projections with a few or a lot of donors. If you were working from a base without deep relationships with most of your top potential donors, that result is not surprising and you’ll do better this year, now that you have relationships with so many more donors.

- If the percentage of your total is still well below 60% and not moving toward that goal assertively, the problem is either:
  - That your projections were way off and you were not successful in closing leadership gifts in the way you wanted—a skills issue or a knowledge of capacity issue
  - That your base of potential donors at this level is simply too small—a filling the pipeline issue to continue to focus on incrementally over the next few years. This needs to be priority number one.

- Since hopefully the majority of your Annual giving program will be coming from leadership level giving, this is the area where the greatest impact on creating a balanced portfolio can be achieved. Did you move incrementally toward the kind of balance suggested in chapter 2? Do you need to focus more attention on continuing to build out your pool of potential donors in certain areas—among individuals, with companies or foundations.

3. **Retention goal**—What did you achieve in the area of retention? Among your leadership donors, longer and longest-term donors, first year donors? This is the area where implementing a universal, tailored stewardship program will make the biggest impact.

4. **Reactivation goal**—How many lapsed donors did you pull back into your donor community? If this was an issue and you didn’t segment this group in your appeals, consider adding that next year. If there was a major issue in the history of your program, that caused a number of donors to exit from giving, recognize that those relationships that can be repaired will take time to repair and will happen best when you make personal contact. Try to find a champion among this group whom you can persuade to get re-connected and then ask for help in reconnecting others.

5. **Upgrade goal**—what percentage of your donors increased their giving this year? Asking in the right way for the right outcome as personally as possible and for a specific amount is the beginning, middle and end of success in this area.
Step Two—Assess Your Face-to-Face Solicitation Program

1. Did you achieve the goal of around 8 to 10 visits per month? Did you find that you were able to be out of the office, making visits for a part of most weeks each month? If not, use the Spending Time Wisely tool to diagnose both how you are allocating time around key fund development activities and how much time you want to be spending. Just like creating a financial budget, the first step is to know where your time is going, then make a plan for how you will adjust your “spending” to make a change in your behavior.

2. Did you have success in closing gifts? Or was it more difficult than you wished to ask for and close gifts at the leadership level? Everyone—from the most seasoned to the newest—benefits from additional skill building. Visit the Fundraising Toolkit for more on visit skills and keep talking with National 4-H Council about what else you need from fundraising skills workshops.

3. Did you get more volunteers involved in engaging and asking for gifts? For some, this work is organized by and focused around the board or Fund Development Committee; for others, a more informal network of volunteers works just fine. Some offer regular, formal training and check-in meetings to support and inspire their volunteer solicitors, others rely on one-on-one coaching and connection with staff to keep their volunteers active. Assess what worked and what didn’t with your community; talk to key volunteers to seek their input on what is needed and continue building in this area.

4. Check out the Leadership Giving Assessment included with this chapter for a top-to-bottom analysis of your program.

Step Three—Review Engagement Opportunities

1. Did you have enough engagement opportunities and were there sufficient variety to meet your needs? Or did you find yourself on visits, wishing for another way for this potential donor to get to see your programs in action, to volunteer for you or provide service to your program, before asking for the gift?

2. Everyone every year should pull together their cabinet of program leaders, board members, best volunteers—and some of your youth leaders—to continue to develop, refine and identify new ways that donor-volunteers can come in contact with the power of the things your program accomplishes.
You’re right, of course: life is going to happen in your programs and those “aha!” moments will occur that you wish you had a donor on site to witness. Some way to capture and share those moments include:

- Keep a camera on hand—make photography and note taking to capture the wonderful moments in your program a part of your culture. This is a powerful and meaningful way that every program staff member can be a part of your fund development team.
- Be watching for opportunities that you can anticipate and include them in your engagement opportunities inventory. If you’ve got a great group who come together for a program once a week, make sure you’re scheduling tours to overlap with their visit as often as possible.
- And keep a “Bright Ideas” folder for not only engagement possibilities that pop up during the year, but also all the little tweaks, observations, and challenges that you notice during the year. Pulling out this folder as you develop your plan for the next year provides an invaluable resource for easing planning time.

**Step Four—Assess Your Direct Mail and Email Appeals**

1. If you segmented your appeal, take a look at each segment individually. Did they give more this year than last? Was the average gift higher? If segmenting made no difference in giving, then perhaps you can make things simpler and un-segment next year. If a group did much better—gave more or had a higher average gift—then clearly the message was right. If giving went down significantly (don’t be thrown by little variations year-to-year), yikes! Examine your message and whether anything went awry during the year—did the mail house deliver the letters? Was there a mistake in the appeal?

2. Also consider the communication calendar. As you were in the midst of the mailings, did the timing work right? Were the mailings too close to planning for other events, or get mixed up with other mailings or events in your community. Adjust as needed in your plan for the next year.

**Step Five—Assess Your Special Events**

1. Special events not only need to hit their financial goals, but also the other quantitative and qualitative goals you set. Was your message effective? Did you test it by visiting with special event donors after the event to seek their feedback? Did you have the audience there that you sought?

2. Did you meet the “cost per dollar raised” goals for the event? If not, where can you seek greater underwriting or more donations for the event? Or is this event simply too costly to continue hosting each year? The Special Events Assessment also included with this chapter will guide you through analyzing your whole slate of events to build stronger events in the future.
3. Ultimately the success of any special events program is how many relationships they yield, that continue through the year. Take a look at your special events donors from this year—how many have made an additional, outright gift to you? Volunteered or inquired about volunteering? Come to a subsequent engagement opportunity or asked for more information from you?

Step Six—Assess Your Online Outreach

1. Have you built a stronger presence for Health Rocks! on your website—is there a strong case for support, photos and testimonials, opportunities to get involved? To give online? And are you working with social networking tools—posting a blog, “tweeting” about what is happening in Health Rocks state-wide, building a Facebook following?

2. Have you integrated the collection of email addresses into all that you’re doing throughout the year: on you mail appeals, through your newsletter, on your web page, at every event?

Step Seven—Assess Your Stewardship Program

1. And, of course, assess your stewardship program and make plans for incremental growth next year until all donors and all volunteers are hearing from you on the impact of their giving throughout the year.

2. Stewardship is a part of your culture—and if it doesn’t already exist, it will take a culture shift to integrate it into your team. Identify areas where you can lead and seek others to help you in building a commitment to stewardship throughout your staff, throughout your volunteers and with the families in your program.

3. At minimum you should be delivering:
   - Accountability messages to all donors
   - Timely and accurate acknowledgement of all gifts, and personalized acknowledgements for the Critical Few
   - Meaningful and appropriate recognition—at events, through a donor listing on your website or in your newsletter
   - An account—through a letter, postcard, online—on the impact and outcomes of giving to all donors at least once during the year
   - Tailored, personalized outreach on the impact of giving—delivered face-to-face, through the mail or at an event—to the Critical Few

4. The Stewardship Assessment tool included with this chapter will help you identify what you’ve done well and where you need to grow next year.
Guide Summary

Fundamental to any organization’s year-to-year financial health, the ability to serve more youth in their community, and eventually move toward major and campaign giving, is a diversified, yearlong annual giving program. By committing to building a robust, sophisticated and comprehensive annual giving program you are serving as a leader throughout 4-H in creating a change critical to our success as an organization. Thank you for your dedication to be a driver for this change.

Focus your work on the activities that create the greatest short-term and long-term return on your investment: create personal relationships with your Critical Few, engage them in the power of your work and deliver world-class stewardship to everyone in your donor and volunteer community.

Make annual giving something that you do all year long, not just in short bursts around special events. This is important enough to dedicate time to creating sustained, incremental growth over time.

Invest in the resources need to do this well: if you don’t already have dedicated fund development staff, create a plan to invest in that area as soon as possible. If technology is an issue for you, invest the time and resources needed to build your infrastructure in this critical area.

Tools, Templates and Samples

<table>
<thead>
<tr>
<th>Assessing Your Program</th>
<th>Spending Time Wisely: Time Management Worksheet</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Leadership Giving Assessment</td>
</tr>
</tbody>
</table>

Thank you for all you do to “make the best better” nationwide!