



# KEEP UP THE *MOMENTUM*

START PLANNING FOR 2010 SUCCESS

5 Tips to Help You Bring in the New Year

Alan Cooke  
Product Marketing Manager, Convio

Another year is coming to an end. We've weathered the recession, and many of our organizations look a lot different than they did a year ago. We learned how to stretch both dollars and staff to make it happen in 2009. Now, with two months left in the year, it's time to start thinking about 2010.



Today, economic sages claim data shows the recession has hit a bottom and we're on our path to recovery. The road promises to be challenging with high unemployment both boosting demand for services and depressing contributions. My question to nonprofit professionals is: How do you hope to take advantage of new market opportunities in 2010? Without a plan, capitalizing on new opportunities can be difficult. To help you develop a clearly articulated plan, one that can help focus your entire organization, review our five tips to successful planning.

Build your plans now and tweak them when necessary. Who knows, you may even surprise yourself when you see how far you've come by this time next year!

---

“There is a great distance between said and done.” – Proverb

---

# 5 TIPS TO ENSURE YOUR ORGANIZATION IS PLANNING FOR A SUCCESSFUL 2010

A successful plan informs readers on an organization's immediate activities and long-term strategic views. It's also a tool to help build agreement, articulate vision and purpose and communicate expectations. By introducing a plan to your organization, you improve your odds at achieving shared goals.

1. **Build a written plan; don't wing it.** A written plan is a must for both fundraising and development, no matter how succinct. This allows you to convey a clear understanding of external challenges and opportunities framed by your organization's strengths and weaknesses. Understanding what you want to do and what your organization can do allows you to set more achievable goals.
2. **State goals clearly, then measure.** Stating your fundraising goals clearly sounds simple — and it is. But the great virtue of doing this is that simply stating and sharing these goals gives the entire organization something tangible to rally around, and it allows you to assess your performance against those goals regularly throughout the year. Create benchmarks for your organization based on past performance and find creative ways to inspire team members to reach new heights. Make your goals SMART: **S**pecific, **M**easurable, **A**ttainable, **R**ealistic and **T**imely!
3. **Create a timeline.** Divide the year up into manageable chunks (months or quarters) and decide what activities or events you will perform when. You should also designate owners for each activity or event and hold these owners accountable. Don't sweat the small stuff here. You can never plan the whole year out in detail, and your plans are always likely to change; so be flexible and plan to adjust goals accordingly. However, the discipline of building a timeline helps to focus the organization on the right activities and prevents people from getting distracted.
4. **Engage donors creatively.** Most organizations raise the bulk of their individual contributions at year end and then don't hear from donors again until next year. Turning even a modest portion of these year-end donors into year-round or sustaining donors can make a huge difference. Try creating incentives, such as free access to events. You can also market sustaining donor programs by framing them in terms of a tangible monthly goal. For example: "Can you give \$25 a month to provide this family with basic nutrition?" This kind of framing really helps to sell the idea of monthly giving.
5. **Build very specific plans to grow support.** The more specific your organization's fundraising plans are the better. Don't just do what you've been doing for years, but spell out some new tactics that you believe will make an impact — and then execute against them. Some ideas might be:
  - **Build the loyalty of existing supporters.** Don't just thank donors after they make a contribution and leave it at that. Encourage them to take a further action like asking their friends to donate, or perhaps signing an online petition or coming in to volunteer. Donors should be actively engaged to build their loyalty to your organization.
  - **Grow your donor pool.** Include some specific ideas to build new support. These can be pretty simple. For example, optimize your website to encourage people to give you their email address. You should also give people a place to give their email address on direct mail forms, and consider using social media campaigns or Google AdWords.

---

## ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit [www.convio.com](http://www.convio.com).

Austin | Berkeley | Washington, DC

---

888-528-9501 | 512-652-2600 | [info@convio.com](mailto:info@convio.com)  
[www.convio.com](http://www.convio.com)



©Convio, Inc. All rights reserved. Convio, the Convio logo, Go!, TeamRaiser, Constituent360 and Common Ground are trademarks or registered trademarks of Convio, Inc. All other names are trademarks or registered trademarks of their respective owners. V111009