

Marketing for Nonprofits — Workbook

This workbook turns the course into a working marketing program for your own nonprofit. Move through one section per module: set your strategy and baseline numbers, stand up free reach through the Google Ad Grant and a leak-free donation page, write a real donor-centered appeal and email series, then build the retention and reporting habits that keep donors and earn funding. Fill the worksheets and templates with your own data, and leave every total, rate, score, and calculated cell blank until you work it out yourself.

Foundations of Donor-Centered Nonprofit Marketing

Get clear on who you are talking to, set two or three real goals, and baseline the few numbers that prove your work before you spend or write anything.

Exercise: Rewrite an organization-centered message as donor-centered

Find one recent piece of your own copy (a homepage line, email, or social post) that talks about your organization. Rewrite it so the donor is the hero and your nonprofit is the guide that turns their gift into change. Keep both versions side by side so you can feel the difference.

- Paste the original. Where does it talk about the organization instead of the donor or the person served?

- Who is the donor here, and what specific good thing does their gift make happen?

- Rewrite it as: a problem with stakes, the donor's role, what their money does, a clear ask. Paste the new version.

- Which version would make a stranger feel that they personally mattered, and why?

Worksheet: Audience persona builder

Sketch one persona for each audience you market to, grounded in real supporters you can picture. Complete one row per persona; add rows as needed.

Audience type (donor / volunteer / beneficiary-as-storyteller / funder)

Name and one-line description (age, role, what they care about)

Where they found you / which channel reaches them

Their current relationship (prospect / first-time / repeat / major / lapsed)

The single job to be done (e.g. convert to second gift, recruit to volunteer)

The one message that would move them

Worksheet: SMART goals and baseline

Turn vague wishes into two or three SMART goals and record today's baseline so December has something to beat. Leave the baseline and target cells for you to fill from your own records.

Goal stated as Specific + Measurable + Time-bound

Metric it moves (dollars / donors / recurring / retention)

Baseline today (fill in)

Target by the deadline (fill in)

Owner

First action to start it

Checklist: Strategy foundations in place

- I have a named persona for each audience I actually market to
- I understand where my donors sit on the giving pyramid
- I have written two or three SMART goals for the year
- I have recorded a baseline for each metric I will report
- My dashboard is five metrics or fewer and includes retention and cost per dollar raised
- Every planned activity maps to one of my goals

Free and Low-Cost Reach: Google Ad Grants and Owned Channels

Qualify for and structure the \$10,000 per month Ad Grant, then close the silent leaks on the donation page where most giving is won or lost.

Checklist: Google Ad Grant eligibility and setup

- We hold valid charity status (e.g. 501(c)(3) or CRA registered) and are not an excluded type (government, hospital, most schools)
- We have a validation token from TechSoup or our regional partner
- Our website is on our own domain, uses HTTPS, and clearly describes the mission
- We have enrolled in Google for Nonprofits and verified the organization
- The account has 2+ ad groups per campaign, 2+ ads each, and 2 sitelink extensions
- Geo-targeting and conversion tracking (donation / signup / email) are configured
- We have a plan to hold the required 5% monthly click-through rate

Worksheet: Ad Grant campaign and keyword plan

Plan compliant campaigns organized around what searchers want, not your org chart. Use long-tail, intent-rich phrases; avoid single words and banned generic terms. Complete one row per ad group.

Campaign (intent theme: donate / volunteer / get help / learn)

Ad group (single tight theme)

3+ long-tail keywords (3 words or more)

Match type (phrase / exact)

Negative keywords to block

Landing page URL (specific, not the homepage)

Conversion this ad group should drive

Exercise: Audit your donation page for leaks

Open your live donation page on a phone, not a desktop, and walk through it as a first-time donor would. Note every point of friction. Make one improvement this week and watch your completion rate.

- How many form fields are required, and which could you remove without losing what you truly need?
 - Does the page load fast and look clean on mobile, where most traffic now lands?
 - Is recurring monthly giving a prominent one-tap option, or buried?
 - Is there social proof (donor count, testimonial, thermometer) beside the ask, and which one will you add first?
-

Checklist: Leak-free donation page

- The form asks only for what we genuinely need
 - Suggested amounts appear with impact labels (e.g. \$25 feeds a family for a day)
 - Monthly recurring giving is a clear, prominent option
 - The page is fast and clean on mobile
 - Apple Pay, Google Pay, or PayPal reduce payment friction
 - Our logo and colors stay consistent so donors feel they are still with us
 - At least one testimonial or beneficiary quote sits beside the donate button
-

Storytelling and Email Fundraising That Converts

Write one donor-as-hero story, then turn it into a welcome series and a year-end appeal email that converts.

Exercise: Write a donor-as-hero story

Choose one real, consented beneficiary story and draft it using the hero's-journey structure with the donor as hero. Lead with one named person; mention the larger numbers only briefly.

- Who is the one person at the center, and what specific, sensory moment opens the story?
 - What is the problem with stakes, and what exact role does the donor's gift play?
 - What does the money do (the plan), and what is the single, specific call to action with an amount?
 - What hopeful outcome did the donor make possible, and where does the supporting statistic go?
-

Checklist: Ethical storytelling and consent

- I secured informed consent before using this person's story or photo
- Identifying details are changed where needed for the person's safety
- The story shows the person with dignity and agency, not as a helpless object of pity
- I avoided degrading or hopeless imagery (no poverty pornography)
- The person in the story would feel respected if they read it
- One person leads the story; statistics support but do not bury it

Worksheet: Three-email welcome series planner

Plan the automated sequence that greets every new subscriber or first-time donor while their interest is highest. Draft the purpose, story, and ask for each email.

Email 1 (sent immediately) — welcome message and one impact story

Email 1 subject line

Email 2 (2-3 days later) — how our work happens / trust-building voice

Email 2 subject line

Email 3 (about a week later) — specific modest ask, amount, and need

Email 3 subject line

Tool used to automate (e.g. Mailchimp nonprofit, MailerLite, CRM email)

Exercise: Draft a year-end appeal email

Using your hero story, draft one appeal email with the proven anatomy. You will reuse this as the spine of the year-end sequence in the campaign tracker template.

- What subject line creates curiosity or urgency without clickbait?
 - Where is the single ask, and is it repeated at least twice with a prominent button?
 - What suggested amounts with impact labels will you offer?
 - What does your P.S. say, restating the ask, the impact, and any deadline or match?
-

Amplification, Retention, and Measuring Impact

Multiply reach through supporters and partners, keep the donors you won with a stewardship habit, and report impact in numbers funders trust.

Exercise: Launch one peer-to-peer or partnership play

Pick a single amplification tactic you can start this month and give your supporters everything they need to act. The easier you make the ask, the more it spreads.

- Which tactic will you run first: birthday/event fundraisers, user-generated content, a local business partnership, or a joint campaign?
 - What ready-made toolkit will you give supporters (sample message, photos, one impact statistic)?
 - Which local business or partner organization will you approach, and what is the mutual benefit?
 - How will you recognize and thank the supporters or partners who take part?
-

Worksheet: Stewardship cycle planner

Design the four-move stewardship cycle you will run for every donor so they feel valued and give again. Fill in your actual cadence and owners.

Thank-you: how and within what timeframe (target 48 hours)

Impact report: what you will show and how often (target quarterly)

Between-ask touch: stories, surveys, or behind-the-scenes updates

Re-ask and upgrade: when, and how you invite monthly giving

Lapsed-donor win-back: trigger and message

Owner for each move

Checklist: Retention and stewardship in place

- Every gift triggers a prompt, personal thank-you that is more than a receipt
- We send at least one impact report per quarter showing what gifts did
- A monthly giving program exists and one-time donors are asked to convert
- We have a win-back plan for lapsed donors before writing them off
- We track retention every year and treat a falling number as urgent

Worksheet: Impact report outline for the board

Draft a one-page report that shows outcomes and efficiency, not activity. Leave the metric values blank to fill from your dashboard.

Headline outcome in one sentence (before vs after)

Dollars raised this period (fill in)

Donor retention rate (fill in)

Cost per dollar raised (fill in)

Recurring donor count, start and end (fill in)

What worked and what we will stop doing next period

Your Action Plan

1. Write two or three SMART goals with baselines and pick a five-metric dashboard led by retention and cost per dollar raised
2. Build a named persona for each audience and rewrite one organization-centered message as donor-centered
3. Confirm Ad Grant eligibility, secure a TechSoup token, and enroll in Google for Nonprofits
4. Stand up a compliant Ad Grant account (2+ ad groups, 2+ ads, 2 sitelinks, conversion tracking) around searcher intent
5. Audit your donation page on mobile and ship one leak fix (fewer fields, prominent monthly option, or social proof)
6. Document one consented donor-as-hero story and add it to a small reusable story bank
7. Set up the automated three-email welcome series and turn it on
8. Plan and schedule the year-end and #GivingTuesday sequence on one calendar, securing a matching gift if possible
9. Launch one peer-to-peer or local-partnership play with a ready-made supporter toolkit
10. Automate a 48-hour thank-you and a quarterly impact report, then run a monthly dashboard review and cut what does not serve a goal

