Your Giving Tuesday Master Checklist

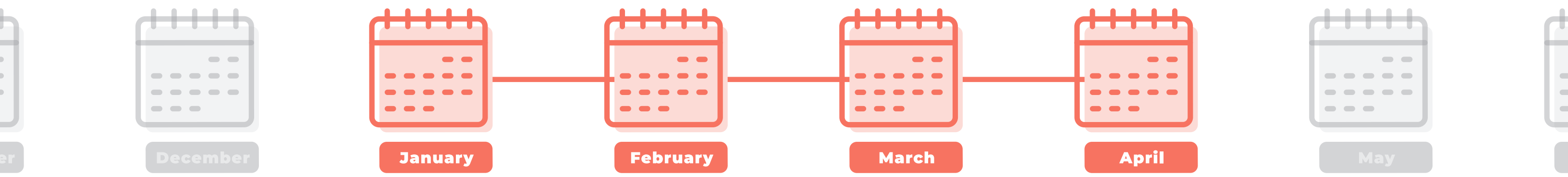
If you're able to begin planning your Giving Tuesday campaign as early as January, and continually take small actions throughout the year, you can give yourself a sizable runway to ideate and design a truly creative campaign. To help set you up for success, this checklist outlines the necessary steps you can take throughout the months to stay on target.

Even if you can't plan your Giving Tuesday year-round, use this checklist as a solid reference point for the action items that will help align your team, strengthen your efforts, and get your campaign moving—no matter when you start. Feel free to use it as is or adapt it to your own timeline.

Section 1: Plan

To start, focus on the follow-through from your previous Giving Tuesday campaign. In this phase of your planning, you'll want to kick off an internal meeting for your team to hold a campaign retrospective, brainstorm new ideas, and decide the elements you'll be using to achieve success.

Suggested Timeframe for Early Planners: January through April



SECURE SPONSORSHIPS

- ☐ Begin your hunt for sponsors
    - ☐ Identify a pipeline of sponsors for cold outreach
    - ☐ Identify warm leads based on connections from staff, board, or volunteers
    - ☐ Create a full menu of sponsorship opportunities

> You need to start hunting for sponsors as early in the year as possible. That's because the end-goal with a sponsor is to eventually secure a dollar-for-dollar match on your campaign. Giving Tuesday is the most competitive day of the year, and a sponsor can help you be top choice for donors over other nonprofits. Start your relationships as early as possible to ensure you have something ready to go for Giving Tuesday.

FOLLOW THROUGH FROM LAST YEAR

- ☐ Hold a campaign retrospective that shows the outcome of each separate effort
    - ☐ Invite team members and/or key stakeholders to your meeting
        - ☐ Campaign lead
        - ☐ Fundraising lead
        - ☐ Content creator
        - ☐ Designer
        - ☐ Communications lead

- ☐ Capture everyone's insights
    - ☐ Campaign goals and performance
    - ☐ Timeline
    - ☐ Press mentions
    - ☐ Performance of key partners or sponsors
    - ☐ Matching gift results
    - ☐ Qualitative feedback from your audience
    - ☐ Quantitative results
- ☐ Drill down further into the team level
    - ☐ Successes and challenges for each functional group
    - ☐ Success metrics in each area
    - ☐ How to achieve similar results in the future
    - ☐ How to avoid similar struggles in the future

☐ Develop and nurture relationships with your Giving Tuesday supporters

- ☐ Identify the supporters who engaged with your campaign throughout the season
    - ☐ Compile a list of new donors
    - ☐ Compile a list of return donors
    - ☐ Compile a list of major donors
    - ☐ Compile a list of peer-to-peer fundraisers, if you did a peer-to-peer campaign

- ☐ For all groups
    - ☐ Thank them for their support
    - ☐ Share the results of your campaign
    - ☐ Show them the impact of their donations
- ☐ For new donors
    - ☐ Introduce them to your nonprofit and mission
    - ☐ Explain your goals from Giving Tuesday and how you were successful
    - ☐ Show them different ways they can get involved throughout the year

BEGIN INTERNAL PLANNING

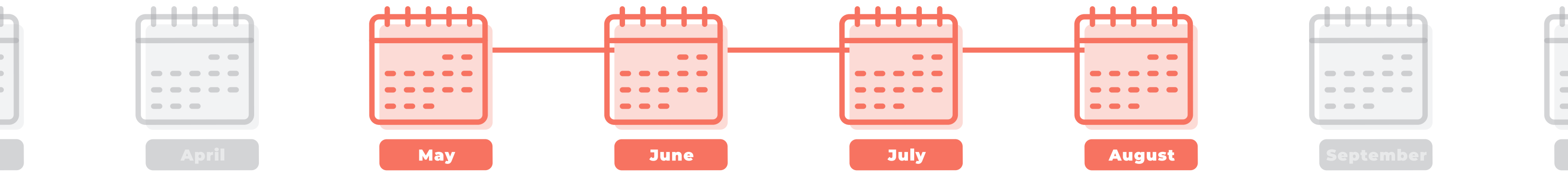
- ☐ Turn your gaze from last year to the upcoming Giving Tuesday
    - ☐ After your campaign retrospective, regroup and internalize the results
        - ☐ Determine your new "North Star" goal, or recommit to last year's goal
        - ☐ Set your campaign budget
        - ☐ Prepare a "source of truth" document where everything related to your Giving Tuesday lives
        - ☐ Ask teams to prepare pitches for the upcoming campaign brainstorm

- ☐ Kick off your creative brainstorm
    - ☐ Send your team the “source of truth” document
        - ☐ Email it to them one week before your meeting, and ask them to read it and become familiar with the campaign direction
    - ☐ Hold the meeting
        - ☐ As a team, examine and discuss your ideas
        - ☐ Ask specific questions to your team, like:
            - ☐ How can we differentiate ourselves from other nonprofits?
            - ☐ Do we need to update any of our branding?
            - ☐ Are we providing a user experience that stewards people to complete their donations?
        - ☐ Ask functional teams to pitch their tactics or ideas for promoting the new campaign
    - ☐ Revisit elements that worked in your last campaign
        - ☐ Pick and choose what you want to carry forward based on your new goals and outlook
        - ☐ Discuss new ideas if you’re going in a different direction
        - ☐ Evaluate how you can double down on efforts that worked last year if you’re going in the same direction
        - ☐ Discuss new ideas if you’re going in a different direction

Section 2: Execute

In the next phase of your Giving Tuesday planning, you and your team will begin executing your new campaign direction, create your fundraising page, and begin outlining your communications.

Suggested Timeframe for Early Planners: May through August



DEFINE YOUR CAMPAIGN NARRATIVE

- ☐ Write a creative brief to make sure your team is on the same page
    - ☐ Define what the story will be on your new campaign page
    - ☐ Determine your campaign name
    - ☐ Determine branding elements and colors you will use
    - ☐ Collect design assets for the page

PLAN YOUR COMMUNICATIONS STRATEGY

- ☐ Plan your social media strategy
    - ☐ Identify the platforms you will use
    - ☐ Determine when you will begin promoting your campaign on social media
    - ☐ Determine how many posts you will create
    - ☐ Determine when you will post them
    - ☐ Determine if you will need any design assets for social media
    - ☐ For timely and authentic posts, prepare to write your social copy closer to Giving Tuesday
        - ☐ Get your free Giving Tuesday social media templates

- ☐ Plan your email strategy
    - ☐ Segment your lists
    - ☐ Determine when you will start sending emails regarding your campaign
    - ☐ Determine the frequency of emails in the time leading up to Giving Tuesday
    - ☐ Determine if you need any design assets for your emails
    - ☐ Begin preparing ideas for your email messages
    - ☐ Start writing your email copy
        - ☐ Get your free Giving Tuesday email templates

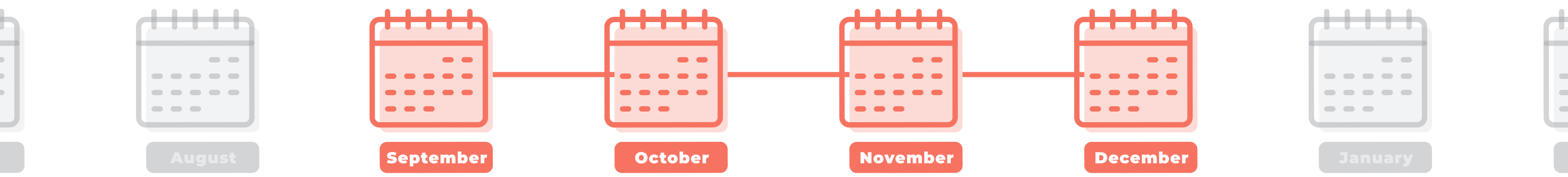
BUILD YOUR FUNDRAISING PAGE

- ☐ Create a new campaign, or duplicate last year's campaign in Classy
    - ☐ Prepare your content and assets for the page
        - ☐ Campaign name
        - ☐ Fundraising goal
        - ☐ Featured media
        - ☐ Videos
        - ☐ Images
        - ☐ Logo
        - ☐ Text for buttons
        - ☐ Text for "About" section
    - ☐ Submit your page to your team for feedback
- ☐ Test everything
    - ☐ Links
    - ☐ Emails
    - ☐ Social posts

Section 3: Launch

You're in the home stretch now. During the final phase of planning, you will soft and hard launch your campaign, draft all social media copy, have your Giving Tuesday, and then transition your campaign to year-end.

Suggested Timeframe for Early Planners: September through December



SOFT LAUNCH YOUR CAMPAIGN

- ☐ Determine who you will soft launch to, like:
    - ☐ Top tier donors
    - ☐ Repeat donors
    - ☐ Powerhouse fundraisers
    - ☐ Your dedicated volunteers
    - ☐ Board
    - ☐ Staff
- ☐ Send your soft launch group a notification about your upcoming campaign
    - ☐ Include a few specific asks to build social proof, such as:
        - ☐ Consider donating early
        - ☐ Share with their close networks
        - ☐ Put your official campaign launch date on their calendar
            - ☐ Download a free Giving Tuesday postcard template to send a message that will keep your campaign top of mind

DRAFT YOUR SOCIAL MEDIA CONTENT

- ☐ Revisit your social media strategy
    - ☐ Begin writing copy
        - ☐ Tailor your content for specific social media platforms
        - ☐ Include copy that engages your supporters into year-end and beyond
    - ☐ If applicable, schedule certain posts in advance, like:
        - ☐ Early morning kickoff
        - ☐ Inspiration posts
        - ☐ Beneficiary stories
    - ☐ Determine if you need any graphics for social media posts

PLAN YOUR WAR ROOM

- ☐ Designate a common area for in-the-moment strategy on Giving Tuesday
    - ☐ Assemble your team
        - ☐ Inform them you will all be in the room for the entirety of Giving Tuesday
    - ☐ Consider logistics
        - ☐ Set a defined time to start and end
        - ☐ Coordinate meals and snacks for the team
        - ☐ Equip the room with laptops, monitors, whiteboards, pens and notepads

- ☐ Assign responsibilities
  - ☐ Social media posting
  - ☐ Last-minute design assets
  - ☐ Phone duty
  - ☐ Email support
  - ☐ Progress updates

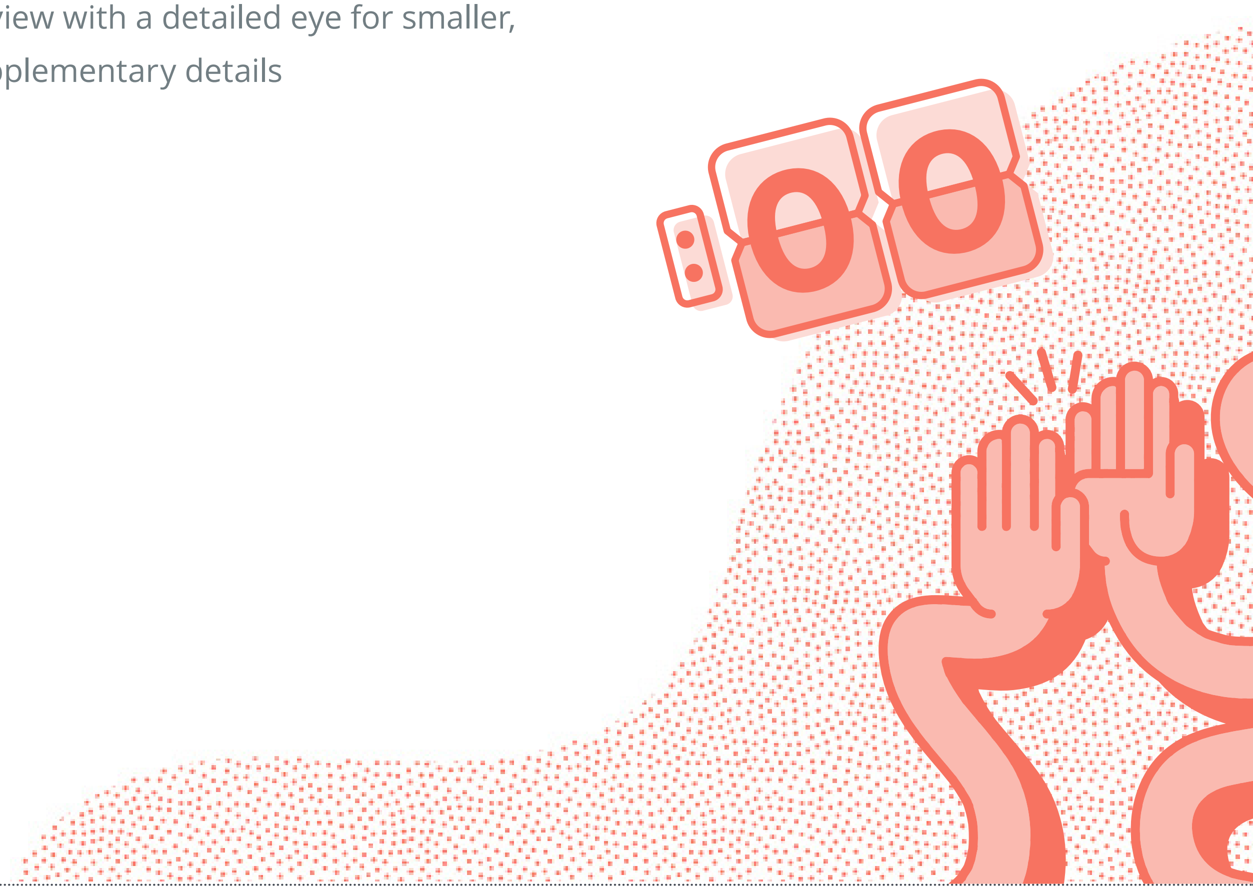
HARD LAUNCH YOUR CAMPAIGN

- ☐ Notify your entire community that your Giving Tuesday campaign is live
  - ☐ Inform them of details around your launch
    - ☐ Your fundraising goal
    - ☐ Impact of the goal
    - ☐ Any matching gift periods
    - ☐ Special incentives
    - ☐ Important sponsors

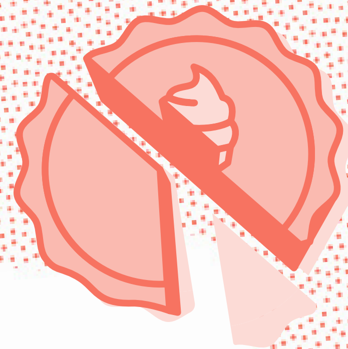
GIVING TUESDAY

- [ ] Make any last-minute adjustments needed for your campaign
    - [ ] Final updates to:
        - [ ] Copy
        - [ ] Design assets
        - [ ] Email automation
        - [ ] Featured media

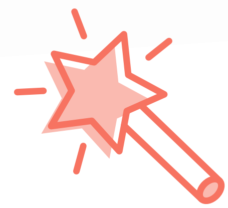
- [ ] Gather assets and prepare to “flip” your Giving Tuesday campaign to a year-end campaign
    - [ ] New hero image
    - [ ] Replacements for Giving Tuesday-specific media
    - [ ] Adjustments to copy on campaign page and donation form
    - [ ] Review with a detailed eye for smaller, supplementary details



AFTER GIVING TUESDAY



- ☐ Celebrate your Giving Tuesday success
    - ☐ Party
    - ☐ Have some champagne
    - ☐ Eat a cake
    - ☐ High five your team
    - ☐ Let them know exactly what all their hard work made possible
- ☐ Communicate back to your supporters
    - ☐ Thank donors for their gifts
    - ☐ Share financial results of Giving Tuesday
    - ☐ Share the impact of your results
    - ☐ Make a hard ask to recommit for your year-end campaign



- ☐ Officially flip your campaign to year-end

WASH, RINSE, REPEAT

- ☐ After your year-end campaign closes, go back to step one and prepare for next year!

Want more? Download our Giving Tuesday resources.

GET MORE RESOURCES