Bonterra™

GUIDE

YOUR STEP-BY-STEP GIVINGTUESDAY CAMPAIGN CHECKLIST

GivingTuesday is one of the most exciting days of the year for many nonprofits. Use this step-by-step checklist to plan, carry out, and analyze this year's campaign.

PLAN YOUR CAMPAIGN

- [ ] **Develop** a campaign with a unifying theme that represents your organization's mission and year-end focus.
- [ ] **Set** a concrete giving day goal. If you're running a volunteer opportunity, set a goal for your event and identify how many volunteers you'll need to fulfill it.
- [ ] **Plan** a multi-channel approach to meet your goal. Decide what role each channel will play, from email and direct mail to mobile messaging and social media to video messages and events.

TRY THIS WITH QUE

Bonterra Que is your AI fundraising assistant, built to help small teams do more in less time. Ask it to build your multi-channel plan and segment your donors for you:

- "Draft a GivingTuesday plan across email, text, and social with a send schedule for each"
- "Find donors who gave last GivingTuesday but haven't given since"
- "Group my donors by giving level so I can tailor the ask"

One executive director at a three-person nonprofit used Que to generate a segmented donor list, build a giving page, and draft a personalized appeal in under an hour — work that used to take over a week — and saw a 15% lift in response.

- [ ] **Assemble** the team and assign roles.
- [ ] **Line up** your peer-to-peer campaign leaders to expand your outreach. If you're running a peer-to-peer push, DonorDrive makes it easy for supporters to fundraise on your behalf.
- [ ] **Finalize** your matching gift donors.
- [ ] **Recruit** a team of board members, loyal donors, and volunteers to act as your ambassadors who will donate as soon as your campaign launches and help build early word of mouth.

TIPS

If this is your first GivingTuesday, check your constituent relationship management (CRM) platform and set a realistic goal based on amounts you've been able to raise through other campaigns. If you've participated in GivingTuesday before, try setting a stretch goal this year.

Set up, deploy, and track all your communications through your fundraising software, so you can see all response rates for channels like email, social media, and text messaging in one place. Plus, you can use pre-built templates and automation tools to save time. If direct mail is part of your strategy, plan for it to hit mailboxes prior to Thanksgiving.

Network for Good features a year-end toolkit with scripts, templates, and stewardship assignments to support your team of ambassadors.

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CREATE GIVINGTUESDAY ASSETS

- [ ] **Design** your GivingTuesday messaging materials, including your unique logo, tagline, and hashtag. Incorporate the GivingTuesday logo for instant recognition.
- [ ] **Create** a special GivingTuesday donation page that all messages for that day will link to. If your fundraising software offers a pre-built template, use it to save time and ensure you're following best practices.
- [ ] **Build** a homepage pop-up or lightbox for your website so all visitors will immediately see your GivingTuesday message and call to action.
- [ ] **Prepare** your impact stories from people who have benefited from your programs and mission.
- [ ] **Draft** your social media posts, texts, and emails in advance.

TIPS

Use the digital templates in your CRM to make it easy to create shareable assets, so your supporters can forward your messages to friends and family.

TRY THIS WITH QUE

Let Que write the first draft of every asset on this list.

Try: "Write the donation page copy for our GivingTuesday campaign," "Draft a series of three save-the-date emails," or "Write five social posts and two text messages for GivingTuesday in our brand voice." You can also ask it to "Write an appeal email built around this impact story" and paste in your story; then you're editing instead of starting from a blank page.

- [ ] **Create** messaging, logos, and images for your ambassadors to share on their social media.
- [ ] **Prepare** the mobile giving pieces of your campaign.
- [ ] **Test** your emails and donation page across desktops, laptops, and mobile devices.
- [ ] **Don't forget** to create your follow-up communications, press release, and thank-you emails and letters in advance!

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BUILD EXCITEMENT

- [ ] **Roll out** a series of save-the-date communications to excite your donors in the weeks prior to GivingTuesday.
- [ ] **Feature** GivingTuesday in your newsletters and send dedicated email blasts highlighting the impact of your work and the difference your donors make.
- [ ] **Remind** your social media followers that your GivingTuesday campaign is approaching.
- [ ] **Contact** your ambassadors and peer-to-peer team the day before for one last pep talk!
- [ ] **Test** your giving page and email blast one last time prior to launching.

TRY THIS WITH QUE

Turn Que loose on your day-of send schedule.

Ask: "Write a good-morning launch email with an impact story and an ask," "Write a midday progress update," and "Write an evening last-chance message that mentions how close we are to goal." Que powers the Optimized Ask feature, dynamically adjusting donation amounts based on each supporter's giving history. For donation asks, be sure to suppress all donors who have already given. Ask Que to "Refresh my suppression list and remove anyone who's already given today" so you don't re-ask supporters who've already stepped up.

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THE BIG DAY IS HERE!

- **Launch** your unique, GivingTuesday-branded online donation page, thank-you page, homepage pop-up, and social media imagery. If you're hosting a giving-day event, OneCause helps you keep registration, donations, and the live experience connected.
- **Feature** your donation button prominently on your website and link directly to your GivingTuesday-branded donation page.
- **Display** any GivingTuesday-related volunteer opportunities prominently on your website.
- **Make sure** your messages are automatically deployed on schedule. Yours might look something like this:
  - **Early morning (around 7:00 a.m.):** Send a "good morning" message and let your audience know how important it is to support your organization today. Include an impact story and an ask amount to maximize engagement.
  - **Noon:** Catch your contacts on their lunch break with an update on your progress and encourage them to give by the end of the day.
  - **Early evening (around 7:00 p.m.):** Remind supporters that time is running out. Announce how close you are to your goal and emphasize that there's still time to give. Include a progress thermometer or another graphic that highlights your goal.
- **Send** a personal email to your ambassadors and peer-to-peer leaders to check in, thank them for participating, and offer encouragement to finish out the day strong.
- **Inspire** donors and volunteers to offer support throughout the day by regularly posting impact stories and updates on social media as you reach special milestones.
- **Include** a link to your GivingTuesday donation page and/or your volunteer registration page in your email signature. Encourage your staff and board to do the same.

TIPS

Get even more pointers for updating your website for the busy GivingTuesday and year-end season.

Don't forget to keep posting after 5:00 p.m. and even after the day is over. In past years, we've seen the evening hours be especially popular times for donors to give on GivingTuesday, as well as spikes in volunteer sign-ups around Black Friday. Don't miss opportunities to connect!

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SHOW (AND TELL) YOUR GRATITUDE

- [ ] **Thank** supporters on social media regularly throughout the day. If you have permission to do so, tag them in your acknowledgment along with your GivingTuesday hashtag.
- [ ] **Send** your thank-you emails and/or letters promptly.
- [ ] **Call** volunteer leaders and donors who make significant gifts to say thank you.

TRY THIS WITH QUE

Make sure no supporter gets left behind by asking Que to draft your thank-yous at scale: "Write personalized thank-you emails for everyone who gave today, grouped by gift size." For your major donors, try "Flag any $1,000+ donors I haven't contacted in 90 days and draft a thank-you with talking points from their giving history." One executive director did exactly this on GivingTuesday and renewed two major gifts within the week.

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KEEP THE MOMENTUM GOING THROUGH DECEMBER 31 AND BEYOND

- [ ] **Run** reports in your CRM to measure how your campaign went. Every organization is different, but you'll probably want to be able to answer these essential questions:
  - How much did you raise?
  - How many donors gave gifts?
  - What was your average gift size?
  - Which methods did donors use to make gifts?
  - How many of those donors were new? How many were returning?
  - If you ran a volunteer event, how many volunteers attended a shift?
  - What were the engagement rates on your various communication channels, like opens and clicks in email and mobile messaging?
  - Which channels led to the most donations?
- [ ] **Launch** your press release, follow-up communications, and social media posts to share the results of your GivingTuesday campaign with your community.
- [ ] **Celebrate** with your supporters! Post a thank-you banner on your website for gifts received on GivingTuesday.
- [ ] **Welcome** new contacts from GivingTuesday with a personalized message, and continue engaging with relevant outreach to build lasting relationships.
- [ ] **Build** on the excitement and joy of GivingTuesday throughout your year-end campaign by referencing your results where appropriate. Continuing to leverage your success metrics will help carry that momentum into the new year.

TIPS

Make sure your year-end campaign branding looks different from your GivingTuesday branding. This helps supporters differentiate and can help you encourage GivingTuesday supporters to donate or volunteer again before the calendar flips.

Use a survey to ask supporters what inspired their gift of money or time, as well as their communication preferences for the future. Capture those details in your CRM so you can give them a smooth experience that boosts retention.

TRY THIS WITH QUE

Use your new GivingTuesday donors as a springboard for recurring gifts.

Ask Que to "Find first-time GivingTuesday donors who gave small amounts and are good candidates for monthly giving," then "Draft an email, text, and giving page inviting them to become sustainers." One volunteer-run nonprofit used Que to spot 42 repeat small-dollar donors and convert 30% of them to recurring gifts within four weeks.

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EASILY ENGAGE DONORS AND VOLUNTEERS WITH BONTERRA.

Ready to see how the right tools can make your GivingTuesday and end-of-year campaigns a success?

LEARN MORE ABOUT OUR FUNDRAISING SOFTWARE

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