Bonterra™

CSR READINESS CHECKLIST

THE 30 DAYS BEFORE GIVINGTUESDAY

INTRODUCTION

GivingTuesday lands on Dec. 1 this year, and the 30 days prior determine whether your campaign spikes for a day then fades or builds participation your team can carry into next year. **Though it's a short runway, 30 days is still enough time to prepare for giving season success.** What separates the two outcomes isn't always budget or headcount. It is sequence: what you lock first, what you leave flexible, and what you set up before you need it.

Use the checklist below to work backward from Dec. 1. Each section covers a window in the countdown, and the items within are ordered the way most CSR teams run them. If you are already inside of 30 days, start at the top anyway.

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DAYS 30 TO 25

LOCK IN YOUR ARCHITECTURE

- [ ] Confirm your participation goal and last year's baseline, broken out by program type: donations, volunteering, and matching.
- [ ] Get your match ratio, budget cap, and approval confirmed in writing with finance, including what happens if you hit the cap early.
- [ ] Vet and finalize your featured causes and nonprofit partners, including eligibility, payment readiness, and any international organizations that need extra lead time.
- [ ] Build the campaign in your platform and test it end to end: the employee-facing flow, the approval workflow, and the payment path.
- [ ] Confirm who on your team can change campaign settings mid-campaign without opening an IT ticket.

If any item here requires a vendor request or a configuration ticket to complete, add a week to your timeline now rather than discovering it on Nov. 28.

DAYS 24 TO 19

DESIGN FOR EVERY PERSONA

- [ ] Segment your employee base into three groups: consistent participants, occasional participants, and never-engaged.
- [ ] Pressure-test your communications plan against the occasional and never-engaged groups, not just your reliable openers.
- [ ] Confirm deskless, frontline, and remote employees can find and complete an action without a company email address or a desktop.
- [ ] Time the mobile experience yourself. If giving or signing up for a shift takes more than a minute on a phone, fix the friction before you promote it.
- [ ] Give never-engaged employees a low-cost entry point, such as a company-funded donation they get to direct, a one-hour virtual shift, or a skills-based micro-opportunity.
- [ ] Confirm language, currency, and local nonprofit options for every region you are asking to participate.

Pull your participation rate by business unit from last year. The units at the bottom may be the ones your campaign was hardest to reach from.

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DAYS 18 TO 13

BRIEF AND ACTIVATE YOUR EMPLOYEE RESOURCE GROUPS (ERGS)

- [ ] Ask each ERG to nominate its own featured nonprofit organization, and build in review time for vetting.
- [ ] Send a simple toolkit: dates, direct links, three prewritten messages, and one graphic they can post as is.
- [ ] Design at least one inter-group challenge scored on participation rate rather than total dollars, so a 40-person group can beat a 400-person one.
- [ ] Name one point of contact per group and get a verbal commitment on what they will send and when.
- [ ] Line up two or three executive sponsors to participate visibly in the first 24 hours, and tell them exactly what to post.

ERGs tend to be the highest-leverage distribution channel most CSR teams underuse. Be sure to give them ownership, rather than what feels like assignments.

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DAYS 12 TO 6

BUILD YOUR CADENCE AND MATCHING MOMENTS

- [ ] Draft the full sequence now: teaser, launch, build, peak, and sustain.
- [ ] Load and schedule every send, including day-of messages, so nothing is being written the morning of.
- [ ] Schedule time-boxed matching moments, such as a double match in the first two hours or a bonus unlocked at a participation threshold, and confirm the mechanics work in-platform.
- [ ] Plan the week after: a thank-you message, early results, and one story from a funded nonprofit.
- [ ] Name who owns real-time monitoring on Dec. 1, what they are watching, and what they are authorized to change without approval.

Matching moments only work if you can see participation in real time and act on it the same hour. If your reporting refreshes overnight, design your moments around fixed times instead of live thresholds.

DAYS 5 TO 1

SET UP MEASUREMENT BEFORE YOU NEED IT

- [ ] Assign one reporting owner, and make sure that person has access to every system holding campaign data.
- [ ] Define your metrics now: participation rate, repeat participation, total dollars including match, volunteer hours, nonprofit organizations supported, and reach by region and business unit.
- [ ] Format last year's baseline the same way so the comparison is ready to run, not rebuilt.
- [ ] Write the headline you want your executive summary to carry, then confirm you can source every number in it.
- [ ] Agree in advance on the one question you will answer after the campaign: what will you do differently next year.

If assembling the full picture means exporting from three systems and reconciling in a spreadsheet, your reporting timeline is a data problem, not a bandwidth problem.

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THIRTY DAYS IS ENOUGH

Thirty days is a real constraint, but **it is a workable one when you have the right strategy**. Lock your architecture early, design for the employees you usually miss, hand your ERGs something they can run with, schedule your cadence before the week of, and define measurement while you can still build for it.

READY TO GO DEEPER?

The CSR Leader's GivingTuesday Playbook expands each of these five phases into a full framework, with campaign templates, communication sequences, and the reporting structure that turns one day into a year-round participation strategy.

Get the playbook

Or see how **Bonterra Deed** connects employee giving, volunteering, and grantmaking in one platform, so participation, funding, and outcomes live in a single view instead of five spreadsheets.

Explore Bonterra Deed

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