The

Giving Tuesday Cheat Sheet

Hi there! I'm your Giving Tuesday Cheat Sheet, here to save the day.

I was created to guide you through a day-long giving marathon with 35 million annual participants - a campaign process that you would normally spread out over several weeks or months, but have been tasked with accomplishing in one day. You aren't on your own, even if you'll be filling a couple of pairs of shoes.

The beauty of Giving Tuesday - besides worldwide generosity - is that you get to choose what your participation looks like. Since you know your organization's workflow better than anyone, please self-select the Giving Tuesday roles and tasks below that best apply to you.

Phase 1: Planning & Goal-Setting

Suggests your campaign goals & how the funds should be used

Prepares data & maintains your system during the campaign process

Time to get your hands dirty! You'll be digging through data and picking brains in this phase.

Step #1: Review historical data

☐ **Strategist: Compare data from previous campaigns.**

- If available, look at historical data from Giving Tuesdays past. Which communications performed well? Which donor segments responded well? What is your retention rate for first-time Giving Tuesday donors?

☐ **Strategist: Determine how the funds will be used.**

- Review budget requirements and upcoming initiatives.
- Review progress on annual fundraising goals.
- Will the funds raised on Giving Tuesday be operational or goal-specific? Will your solicitations differ between Giving Tuesday and End-of-Year?

☐ **Administrator: Pull donor lists to be used for segmentation and outreach.**

- Based on your available data, determine which donor segments would be best to target this year, and pull the reports that support your reasoning. Ex. People who usually give during the last three months of the year.

Step #2: Determine your need

☐ **Strategist: Pinpoint the reason for your Giving Tuesday campaign.**

- Share what's weighing on your heart right now. Is there a program or aspect of your mission that could use more support? Is there something happening within your community that your team feels strongly about? Is there an exciting opportunity to expand your mission?
  Stuck? Move on to step #4!

☐ **Administrator: Consider what your system will need for a successful campaign.**

- Update addresses and other key donor information. Ex. DP Address Updater, powered by TrueGivers, does this for you overnight to save time!
- Create solicitation codes for your Giving Tuesday cause.
- Ensure all necessary form fields have been created. Does your Giving Tuesday cause require you to collect additional donor data on your form? Ex. Collect tribute data in memory or celebration of loved ones.
- Test your form tool for friction. Is it mobile-responsive? Can it be completed in 1-2 minutes? Is there a monthly giving option? Can donors pay with a mobile wallet?

☐ **Strategist: Create specific, actionable goals with target amounts and percentages.**

- Ex. Raise 20% more than last year, and acquire 50 new donors.

☐ **Administrator: Create an infrastructure to measure your Giving Tuesday goals.**

- Have a plan in place to track progress, and if possible, customize the goal-setting feature in your fundraising system.

Step #3: Go for the story

☐ **Strategist: Develop a theme and story that match your Giving Tuesday cause.**

- Think about how you will spread your theme across all campaign assets (website, donation page, thank-yous, video messages, end-of-year appeals, etc.). How do you want constituents to feel?
- To communicate your theme, tell a story that will move people to give. It could be as simple as the story of how your nonprofit started, or an impact story from a beneficiary.
  Need backup? Go to step #4!

- [ ] **Administrator: Determine viable avenues for sharing the story.**
  - Does your team have the tools to post on social media? Do you have a dedicated team member to help with website changes?
  - Consider integrations that could dramatically increase your story's reach. (Ex. DP Social Campaign allows supporters to add their photo to a digital frame that communicates your mission and brand. DP Video allows your team and board to create personalized video messages. With DP Text, you can send day-of updates straight to your donor's mobile device.)

Step #4: Lean on your network

- [ ] **All roles: Brainstorm with your team, board, and fellow fundraisers.**
  - **Strategist:** Ask for feedback on your campaign strategy. Reinforce your ideas and keep everyone aligned with the scheduled reports you set up in Step #1. Have a backup plan to suggest.
  - **Administrator:** Discuss content needs for your Giving Tuesday form. See what your team comes up with as far as messaging, tone, and imagery - let them know which of their suggestions are possible.

Step #5: Set the stage

- [ ] **Strategist: Delegate preparational tasks to the necessary team members.**
  - Who will determine how you prioritize each donor segment? How many hands will you need on deck to communicate to these segments?
  - Who will develop messaging for your Giving Tuesday donation page?
  - Are there any tech issues for your Administrator to address (i.e. payment processing, integrations)?

- [ ] **Strategist: Develop a plan to capture and keep new donors.**
  - Develop an appropriate ask for new, small, and infrequent donors. If your system has a prospect research feature, use that data to support your acquisition ideas.
  - Invest in building middle donor relationships.
  - Explore opportunities for new major and matching gifts.
  - Consider a giving contest to increase momentum. (Ex. See how a scholarship organization raised $100k in 90 minutes!)
  - Create a plan to increase your rate of second-time gifts.

- [ ] **Administrator: Prepare all resources your team will need for the campaign.**
  - Build and style your Giving Tuesday donation page.
  - If applicable, include a live goal meter to show progress.
  - Set up automated workflows to trigger tasks when a certain gift is entered. Ex. Assign donor outreach when they give a gift larger than $500.
  - If possible, assign tasks to staff through your fundraising system.
  - Reply to general inquiries and process incoming gifts.
  - Set up a mail merge for thank-yous and tax letters.

Phase 2: Writing & Repurposing

Develops the messaging, tone, and personalization of your outreach

Leverages their connections to get the campaign in front of the right people

You now have a solid plan in place, and plenty of tools that will protect you from burnout!

Step #1: Communicate your theme

☐ **Communicator: Create the content that will live on your Giving Tuesday form.**

- Choose a title for your Giving Tuesday form that matches your campaign theme.
- Write a one-paragraph description of your campaign and what it will achieve.
- Consider creating giving levels based on donor size and impact. Ex. “Santa’s helper” level: A $20 donation buys a family’s Christmas tree.
  Use amounts that are appropriate for your small, medium, and large donor levels. If you’re not sure, look at historical data to see how much each group typically gives on Giving Tuesday.
- Consider messaging for tribute donations in memory or celebration of a loved one.
- Choose images or graphics that illustrate your theme and message. Ex. A photo of your staff in action, or a beneficiary receiving love and care.

☐ **Networker: Decide how the Giving Tuesday form will be promoted.**

- Assess matching and major gift interest in the campaign. Determine if a major donor would be willing to partner with you to maximize the impact of smaller gifts.
  Leverage your network - talk to alumni, board members, partner organizations, local government, industry-specific outlets, and friends.
- Consider a giving contest with a goal meter to display progress on Giving Tuesday.
- Consider appointing social media ambassadors to create their own crowdfunding pages on Giving Tuesday.

Major timesaver: Write giving descriptions with AI!

Here are some ideas for how to prompt your generative AI tool...

- Generate a one-paragraph description for your Giving Tuesday donation page by providing your AI tool with context about your goal and its impact.
- Ask your tool to suggest four different giving levels (with titles that describe their impact) that relate to your Giving Tuesday campaign theme.
- Revise your prompt to regenerate the response as needed. For example, ask your tool to make the paragraph shorter or longer, include certain keywords, or suggest additional giving level titles so you can narrow down your favorites.

Never used generative AI before? Learn how with our free guide, AI for Nonprofits!

Step #2: Communicate the impact of your campaign

☐ **Communicator: Create short, shareable impact stories that fit your overall theme.**

- Write or repurpose short descriptions for each giving level - tell them details about their donation amount that will make their heart happy. What will it do?
- Write or repurpose bite-sized impact stories for social media graphics, postcards, and more. Keep it to a few sentences, but include a beginning, middle, and end to bring it full circle. Ex. A beneficiary's success story.

  If you don't have impact stories written, recorded, or in memory, try talking to a few constituents and team members, or ask them to record a video.

☐ **Networker: Share impact stories and campaign goals across your network.**

- Call, text, email, and meet with partners, donors, and community members to explain the urgency, recency, or relevancy of your Giving Tuesday campaign.
- Schedule donor outreach with major players and tag in team members to help.

Major timesaver: Develop impact stories with AI!

Here are some ideas for how to prompt your generative AI tool...

- Using notes from your mission work, or a message from a beneficiary, ask your AI tool to generate a quote or story written from the beneficiary's perspective about how your nonprofit changed their situation. For context, be sure to note how your Giving Tuesday campaign ties in - how does the specific program or fund help?
- Use that quote in a letter or email template to thank donors who contributed to that initiative or gave a significant gift. Use giving history from your CRM to tell them what services their gift(s) allowed you to provide.

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Step #3: Create hype around your campaign

☐ **Communicator: Create Giving Tuesday reminders to promote the campaign.**

• Create tailored messaging for each donor segment you are targeting. Ex. Emails to last year's Giving Tuesday donors will include appreciation for last year's gift.

• Write or repurpose email content for your campaign reminders.

Try to use the same template, but change subject lines and small details within the copy, such as "we're one week away" or "we're one day away" to keep recipients engaged.

☐ **Networker: Send Giving Tuesday reminders to promote the campaign.**

• Share campaign reminders with your network. Let people know they have a very limited amount of time to take action. Highlight ways to get involved.

Be sure to link to your donation page, share photos, and use the #GivingTuesday hashtag, or one that matches your campaign theme.

Recommended touchpoints

Campaign reveal email
Early November

Reminder email
Mid-November

Reminder email
Day before Giving Tuesday

"It's here" email
Day of Giving Tuesday

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Step #4: Plan for updating & stewarding donors

☐ **Communicator: Develop content for Giving Tuesday goal updates.**

• Create goal updates and reminders to use throughout Giving Tuesday.

It doesn't hurt to use a template or to brainstorm subject lines in advance. Ex. "We're $1,000 shy of crushing our Giving Tuesday goal! Can you help?"

☐ **All roles: Determine your plan to make each donor group feel special.**

- Which donors or donor groups will get handwritten notes or personalized videos? Will you be sending thank-yous en masse, individually, or both?
  Again, it doesn't hurt to use a thank-you template that you can quickly customize for different situations when Giving Tuesday is over.

Recommended touchpoints

Today's the day
8:00 - 10:00 am

Goal update
12:00 - 2:00 pm

Goal update
4:00 - 6:00 pm

Last call
8:00 - 10:00 pm

Major timesaver: Develop impact stories with AI!

Here are some ideas for how to prompt your generative AI tool…

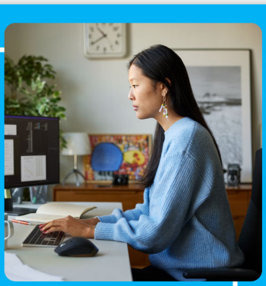
- Generate a text message geared to donors under 25 who donated online last Giving Tuesday inviting them to reply to give $5 toward your current goal.
- Provide your AI tool with details about your goal and how just $5 helps you achieve it. When providing context, stress the convenience of using a digital wallet like PayPal or Venmo to donate (or whatever convenience your online form can offer), allowing donors to complete the entire process from their phone in a few minutes.
- Ask your tool to summarize the appeal in X words or X characters.
- Ask it to provide the option, within its response, for donors to reply to the text message to join your monthly giving program for an additional $5 per month.
- When you're happy with your copy, include a link to your online form!

Never used generative AI before? Learn how with our free guide, [AI for Nonprofits!]

Phase 3: Executing & Stewarding

Suggests your campaign goals & how the funds should be used

Strategist



Prepares your data & maintains your system during the campaign process

Administrator

Develops the messaging, tone, and personalization of your outreach

Communicator

Leverages their connections to get the campaign in front of the right people

Networker

Take a deep breath. The bulk of the work is over! Now all you have to do is press play.

Step #1: Keep supporters in the know

- [ ] **Communicator: Send goal updates at high-traffic intervals.**
  - Plan 2-3 times throughout the day when you can update donors about the progress that has been made toward your goal, or wait until you have an exciting announcement, like a major gift. *DonorPerfect research has shown that the highest volume of Giving Tuesday gifts are processed in the evening at 6:30, 11:00, and 11:59 pm.*
  - If you have the capacity to get creative, lean on integrations to get the word out. Ex. Text messaging and personalized video messages.
- [ ] **Networker: Share goal updates with your network and ask them to step in.**
  - Send personalized updates to middle, large, major, and matching donors, letting them know how they can help you get closer to your goal.

Recommended touchpoints

Today's the day
8:00 - 10:00 am

Goal update
12:00 - 2:00 pm

Goal update
4:00 - 6:00 pm

Last call
8:00 - 10:00 pm

Step #2: Report on your efforts

☐ **Administrator: Pull Giving Tuesday reports for each donor segment.**

- Report on the amount raised and compare it to previous efforts.
  Which email got the best response? Ex. If your CRM integrates with Constant Contact, track email engagements and store analytics in your database!
  Which communication channels worked well? Did you receive more gifts online, offline, or through crowdfunding?
- Report on the amount or percentage of your goal raised to share with supporters.
- Report on donor segments for thank-yous and updates in December.
  Segments could include new donors, new monthly donors, and retained donors. Ex. New donors may get a series of emails welcoming them to the organization. Retained donors may receive a survey.

☐ **Communicator: Determine the statistics or wins you'd like to share with donors.**

- Consider an impact or gratitude report to share with donors.
- Consider including impact information in your tailored thank-yous.

Step #3: Express gratitude

☐ **Administrator: Create mail merge templates and dynamic fields.**

- Pull a list of all gifts from Giving Tuesday and review contact records for donors who gave. Be sure that they haven't already been acknowledged to avoid overlap.
- With your Giving Tuesday list, create a mail merge to send gift acknowledgments.
- Assign personalized thank-you tasks to staff members.

☐ **Strategist: Determine your plan to make each donor group feel special.**

- Which donors or donor groups will get handwritten notes or personalized videos? Will you be sending thank-yous en masse, individually, or both?
- Consider following up with year-end asks.
  It's okay to ask again, and your Giving Tuesday donors have already shown you that they're interested in your cause!
  DonorPerfect research has shown that, in the month of December, the highest volume of gifts were processed on the 1st, 15th, and 31st of the month. Try engaging with your Giving Tuesday donors on these dates, encouraging them to make their last tax-deductible donations of the year, and maximize the impact of their annual contribution.

☐ **Communicator: Develop content & edit templates for individual thank-yous.**

- Write 1-2 sentences for each donor segment you are focusing on that will make their thank you tailored to their Giving Tuesday experience. The rest of your thank-you communication can be the same for all donor groups.
- If you have the capacity to use more than one thank-you channel, consider a more personalized approach for donors who really stepped up. Ex. Try a handwritten thank-you note or a personalized video message.

☐ **Networker: Send a mass thank you and reach out to major donors.**

- Continue to be the face of the campaign by sending out a mass thank-you email to all Giving Tuesday supporters, signed by you. If you plan to reach out to donors individually, your mass thank you could be your gift acknowledgment.
- Consider sending a video so donors can see and feel your gratitude.

I give you major props - you prevailed! Gaining new donors is always great, and so is reaching your goals, but above everything else, I'm so proud of the change you were able to create in just one day.

Let the payoff of your careful planning be your motivation to keep pushing, as there is always more good to be done. And if you need further guidance from DonorPerfect, we're right here with you, through every step of your fundraising journey.

Print Your Cheatsheet

Phase 1: Planning & Goal-Setting

STRATEGIST

- ☐ Analyze previous data.
- ☐ Review budget and annual goals.
- ☐ Determine the reason for your Giving Tuesday funds.
- ☐ Create specific goals with target amounts and percentages.
- ☐ Develop a theme and story that match your Giving Tuesday cause.
- ☐ Ask for feedback on your strategy.
- ☐ Delegate tasks to team members.
- ☐ Develop a plan to capture and keep new donors.

ADMINISTRATOR

- ☐ Pull donor lists for outreach.
- ☐ Consider the tools your system will need for a successful campaign.
- ☐ Create an infrastructure to measure your Giving Tuesday goals.
- ☐ Determine viable avenues for sharing the story.
- ☐ Discuss content needs for your Giving Tuesday form, i.e. messaging, tone, and imagery.
- ☐ Prepare all data resources your team will need for the campaign.

Phase 2: Writing & Repurposing

COMMUNICATOR

- ☐ Create your form content.
- ☐ Create short, shareable impact stories that fit your overall theme.
- ☐ Create Giving Tuesday reminders to promote the campaign.
- ☐ Develop content for goal updates.
- ☐ Determine your plan to make each donor group feel special.

NETWORKER

- ☐ Decide how the Giving Tuesday form will be promoted.
- ☐ Share impact stories and campaign goals across your network.
- ☐ Send Giving Tuesday reminders.
- ☐ Develop content for goal updates.
- ☐ Determine your plan to make each donor group feel special.

Phase 3: Executing & Stewarding

STRATEGIST

- ☐ Determine which donors will receive high-touch follow-up.
- ☐ Consider following up with year-end asks.

ADMINISTRATOR

- ☐ Pull reports for each donor group.
- ☐ Create mail merge templates and dynamic fields.

COMMUNICATOR

- ☐ Send goal updates.
- ☐ Determine the statistics or wins you'd like to share with donors.
- ☐ Develop content & edit templates for individual thank-yous.

NETWORKER

- ☐ Send a mass thank-you email.
- ☐ Reach out to major donors.