

GivingTuesday 2023 Checklist

With this comprehensive checklist, you'll break these three categories down and hone in on the key tasks you need to complete for GivingTuesday. And not just on the day itself! Everything from the lead-up, to stewarding new donors, to applying this year's learnings to next year's campaign.

Planning

Goals and Objectives

- ☒ You're off to a great start by reading "Your GivingTuesday Checklist"!
- ☐ Set simple, measurable, and attainable goals.
- ☐ Create a budget and identify the resources you need for the campaign.

Audience

- ☐ Define who your audience is and what motivates them to give.
- ☐ Determine how they can best be reached.

GivingTuesday Team

- ☐ Assemble your in-house GivingTuesday team.
- ☐ Reach out to your Board Members, loyal volunteers, and passionate colleagues to recruit them.
- ☐ Set up meetings and working sessions with key stakeholders to lay out your plan and ensure everyone knows what their role is in supporting the campaign.
- ☐ Consider engaging influencers, partners, and sponsors to boost your campaign.

Craft Your Message

- ☐ Craft your message, including a compelling impact statement or story that will matter to your donors.
- ☐ Share with staff, volunteers, and select donors to get feedback.

Communication Channels, Collateral, and Calls-to-Action (CTA)

- ☐ Identify all of your communication channels (i.e. website, paid media, earned media, social posts, and in-person activations).
- ☐ Create all of your content assets (i.e. landing pages, social media copy, graphics, blog posts, photos, videos, media releases, etc.).
- ☐ Plan and schedule your communications and tasks.
- ☐ Make sure your CTAs are clear and simple.
- ☐ Set up any tracking so you can easily measure your success.
- ☐ Proofread and test everything—at least twice!

Execution

Two Weeks Away

- ☐ Meet with your GivingTuesday team to go through a dry-run practice of the day.
- ☐ Confirm all marketing collateral is finalized, proofread, and tested.

One Week Away

- ☐ Send out teaser emails or social media posts to prime your audience for GivingTuesday proper.
- ☐ Reach out to local media to let them know about your GivingTuesday campaign.

The Day Before

- ☐ Follow up with your team to make sure they're ready to go.
- ☐ Do a final check that all marketing collateral and assets are ready for day-of distribution.
- ☐ Schedule your emails and social media posts for the big day.

On GivingTuesday

- ☐ Check to see if your morning email and social media posts resulted in any early engagement.
- ☐ Amplify your online presence by tagging and mentioning everyone involved on social media.
- ☐ Every time your supporters post about your campaign, make sure to like and repost! And always, always thank them!
- ☐ Keep your supporters engaged with live updates about your campaign as the day goes on.
- ☐ Send a final reminder email in the evening to capture last-minute activity.

Follow-up & Evaluation

On Wednesday

- ☐ You did it! High-five your team and take a break to celebrate!
- ☐ Take a look at your early results.

On Thursday

- ☐ Recognize your team! Send thank-you notes to everyone.
- ☐ Don't forget to thank your donors, too! Include some quick highlights about how your GivingTuesday campaign or activity went.
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One Week Later

- ☐ Collect and review campaign data (i.e. web, email, social media, and any word-of-mouth feedback).

Two-to-Three Weeks Later

- ☐ Hold a post-campaign session with relevant staff and partners to review everything, from planning to execution.
- ☐ Be sure to share the results and key metrics—such as open rates, impressions, engagements, donations, site visits, etc.—with your stakeholders.
- ☐ Consolidate feedback in a report that can be used to discuss opportunities for next year.
- ☐ Send an impact update to your donors.

Preparing for Next Year

- ☐ Save the date for the next GivingTuesday and block off key dates in your calendar as a planning reminder.
- ☐ Start thinking about your next GivingTuesday campaign! You're a pro now.

All that's left is getting started.

Need help setting up your GivingTuesday campaign?

Book some time in with our team to find out how CanadaHelps' online fundraising tools can make it easier for you to raise donations!

Book a Demo



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