



#GivingTuesday Checklist

A Step-by-Step Approach to Making the Most of the Annual Day of Online Giving

1 Start now.

- a. **Planning is important.**
 - i. Pick a fearless and inspiring leader.
 - ii. Build a passionate team.
 - iii. Create your vision.
- b. **Set your goals.**
 - i. Monetary goals?
 - ii. Goals for recurring donors?
 - iii. Goals for new donors?
- c. **Start spreading the word.**
 - i. Plant the seed in your monthly newsletter.
 - ii. Choose a rock-solid call to action.

2 Create a #GivingTuesday donation form on your website.

- a. **Keep the form simple, clean, and easy for donors to complete.**
- b. **Include a meter to track progress toward your goals.**
- c. **Use bigger buttons for easy mobile donating.**

3 Identify your target audience.

- a. **Segment your audience by:**
 - i. Recurring donors
 - ii. New donors
 - iii. Current donors
 - iv. Major donors
 - v. Lapsed donors
- b. **Adjust your messaging to speak to the different audiences.**

4 Create a #GivingTuesday email campaign.

- a. **Build and schedule your emails ahead of time.**
 - i. Suggested timeline:
 1. November 16: #GivingTuesday email teaser
 2. November 30: Pre-#GivingTuesday email
 3. December 1: #GivingTuesday update emails, social media posts
 4. December 2: Post-#GivingTuesday emails, thank-you emails, social media posts
- b. **Test your emails and donation forms on multiple devices.**

5 Prepare your thank-you plan.

- a. **Have a thank-you letter ready to send to all #GivingTuesday donors.**
 - i. Communicate if you hit a goal, came close, or blew it out of the water.
- b. **Have a welcome email for any new donors acquired.**

Additional Resource: [#GivingTuesday Trends Report](#)