

# Get Ready for #GivingTuesday

A step-by-step workbook to  
help you build a great  
#GivingTuesday campaign

#GIINGTUESDAY™

# Ready to inspire generosity across your community? We're here to help.

EVERYDAY, THE SOCIAL SECTOR IS ON THE FRONT LINES, BUILDING STRONGER, HEALTHIER, SMARTER, FAIRER COMMUNITIES. THE SECTOR NEEDS NEW APPROACHES TO KEEP UP WITH THE NEED - AND THE DIGITAL WORLD. #GIVINGTUESDAY IS A DAY TO TEST, LEARN, ENGAGE, AND FUNDRAISE.

## #GIVINGTUESDAY™

#GivingTuesday is a global giving movement with local impact.

Founded by the team in the Belfer Center for Innovation & Social Impact at 92nd Street Y, #GivingTuesday is a global giving movement being celebrated in more than 190 countries across the globe, and 100 local community campaigns in the US. #GivingTuesday harnesses the collective power of a unique blend of partners to transform how people think about, talk about, and participate in the giving season. It inspires people to take collective action to improve their communities, give back in better, smarter ways to the charities and causes they believe in, and help create a better world.

#GivingTuesday demonstrates how every act of generosity counts, and that they mean even more when we give together.

### **Get ready!**

In this workbook, you'll tap into the collective experience of #GivingTuesday leaders to learn how to:

- Plan your campaign and recruit a team
- Tell your story so that it inspires support
- Create timelines to organize your planning

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# Approach it like a Party!

How do you shift the tone of your #GivingTuesday campaign from obligation to opportunity? Make it fun. Try new things. Invite new people. Whoop it up. Celebrate.

When done well, #GivingTuesday doesn't feel like another fundraising campaign. We call it #GivingTuesday - not fundraising Tuesday - for a reason. It's a day to inspire generosity in all forms, a day for people to generously share whatever they can, whether it is their time, skills, voice, or money.

And if you think about it more like a generosity party, your supporters and potential supporters will feel it too. Not to overstate the analogy, but like a good party, these are a few parallels to consider:

- People **want** to be invited to a great party.
- A unifying theme creates excitement and engagement, and a framework for decisions (You won't decorate for a St. Patrick's day party with sombreros and pinatas!)
- It's more fun with old and new friends
- Games and activities can make a big difference
- Sharing memories - stories, pictures - after the party keeps the good feeling going, and builds excitement for next year.

So put your party hat on and let's get planning!



# Using this workbook...

Capture your notes from the workshop in this workbook, and share your learnings and ideas with your #GivingTuesday team.

Before we get started, take a moment to reflect on the following:

## What do you want to learn today?

Take a minute (now) to record what you want to learn during the kick off meeting. If you don't hear the answer, bring it up.

## Creative ideas!

Use this space to record creative ideas you hear during this workshop that you want to take back to your team.

## Plan for action in the next three days.

Complete the workbook as we go, and decide on a few actions you can take in the NEXT THREE DAYS. Taking action right away will build momentum and help you immediately see the impact of your efforts.

Action 1

Action 2

Action 3

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# Set your campaign goal.

Your campaign goal serves as the campaign framework. Your goal should reflect your team's priorities. It's a great time to experiment with new strategies.

Set a #GivingTuesday goal that is ambitious enough that your team will be motivated to achieve it.

Goals can be about a lot more than money. Here are some possibilities.

## Potential Goals

<b>Dollars</b>	<b>Donors</b>	<b>New Donors</b>
<b>Young Donors</b>	<b>Monthly Donors</b>	<b>Event Attendees</b>
<b>Participation</b>	<b>Collaborations</b>	<b>Social Followers</b>
<b>Volunteers</b>	<b>Activity attendance</b>	<b>Thank yous</b>

### Write down some ideas for campaign goals here.

What goal?

How many?

What event?

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# Set an activity timeline and meeting schedule

Planning will keep your team aligned, your campaign organized for maximum impact, and momentum high.

Action	By When?	Done?
Determine team members		
Set a kickoff meeting date		
Agree on goal		
Divide team into task groups		
Create campaign brand		
Build communications timeline		
Recruit ambassadors		
Recruit merchants/small businesses		
Reach out to longtime donors for matching funds		
Assemble campaign stories and create outreach		
Consider event or activity for supporters		
Plan day-of "war room"		
Plan thanking and stewardship approach		

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# Build a campaign brand for #GivingTuesday

Make #GivingTuesday your own! Design a brand - name, logo, tagline - that will unify your campaign and elevate your marketing.

## Name

Write down some ideas for a campaign name.

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## Visuals

Write down ideas for brand visuals

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## Tagline

Write down ideas for a campaign tagline.

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# Develop Campaign Narrative



## Narrative checklist

- Specific program, project, or type of giving
- Iconic story of client, staff person, volunteer
- Supporting data
- Incorporate matching challenge
- Tie to year-end appeal

Story Idea 1

Story Idea 2

Story Idea 3

# Gather inspiring, authentic visual assets.

Visual assets are at the heart of great communications. The logo, color palette, photos, and videos will provide the personality for the campaign and the authentic connection to your work. They don't have to be perfect!



# Make an inspiring ask.

**Use the Belief Statement + You Statement + Opportunity Statement to pull a compelling call-to-action all together.**

Example: School that is raising funds to build a food pantry for students. campaign will begin with a story of a student who was hungry. Then...

**Belief statement:** We believe that no student should have to choose between food and learning.

**You Statement:** You can help us stock the pantry so that no CCBC student has to make that choice/goes hungry.

**Opportunity statement:** Are you with us?

## Belief statement ideas

*Answer here*

## You statement ideas

*Answer here*

## Opportunity statement ideas

*Answer here*

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# Organize your campaign team.

A great campaign will inspire lots of folks to jump on board. Organize your team so that everyone involved knows what's expected and feels great about participating. Make a list of the people you hope to include in your campaign. When they say yes, check them off.

## Staff/Board

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Givers/Volunteers

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Ambassadors

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Community partners (small businesses, PR, marketing)

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Identify campaign ambassadors

**Campaign ambassadors believe in you and are big, credible voices that can amplify your campaign reach.**

There are three key steps to a successful ambassador program:

1. Identify ambassadors representing different communities of supporters
2. Engage ambassadors by setting aside a day to reach out and then hosting an ambassador kickoff
3. Resource ambassadors with engaging, easy-to-share content on a consistent schedule.

## Staff and Board

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Civic Leaders

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Donors/volunteers

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Celebs/athletes

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Who will be responsible for creating content and communicating with ambassadors?

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# Do a tech check!

Make sure that your tech delights your donors.

*Pro-tip: Go through your donors' experience on computer, tablet and phone. Start with email/social, click to website, make an online gift, and review the thank yous. Would your donors be delighted by the experience?*

Note any fixes you need to make in the boxes below.

Website, marketing, and donation processing should be reviewed and optimized for #GivingTuesday. All should be simple, intuitive, and welcoming.

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## Website

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## Online Giving

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## Marketing and Outreach, Social Channels

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# Spur participation with challenges and matching funds

**Contests, challenges, matching funds and other "gamification" are fun, engaging and make a big difference on #GivingTuesday**

Matching Funds: Identify generous donors who can provide funds to spur generosity and progress toward campaign goals. Ask them to consider giving their year-end gift early to support challenges and spur participation. List here:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Challenges and contests create energy and excitement. List challenge and contest ideas here:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Plan a robust marketing and communications strategy

Develop a plan to build excitement for your campaign. Consider mail, email, social media, and events. Create exciting, original content and communicate consistently through all of your outreach channels and to your campaign ambassadors.

The plan should be designed around your goals and brand so that all elements of your outreach reinforce each other.

Your marketing can start months before #GivingTuesday, but at a minimum, consider the following elements:

## LEAD UP:

**4 weeks out: Email and Social Media Postings 1. Announce Campaign**

**3 weeks out: Email and Social Media Postings 2. Updates on the Campaign**

**2 weeks out: Email and Social Media Postings 3. Updates on Campaign**

**1 week out: Email and Social Media Postings 4. Updates on the Campaign and Goal - countdown is on!**

**24 hours: Email and Social Media Postings 5. Remind your supporters of challenges and inspire their participation.**

**#GivingTuesday: Email and Social Media Postings 6. Today's the day! Rally your supporters and remind them they will see updates throughout the day.**

## DAY OF:

**30% of Goal: Email and Social Media Postings 7 announcing milestone.**

**60% of Goal: Email and Social Media Postings 8 announcing milestone.**

**80% of Goal: Email and Social Media Postings 9 announcing milestone and encouraging final push.**

**90% of Goal: Email and Social Media Postings 10 announcing milestone and final push to get over the top.**

**100% of Goal: Email and Social Media Postings 11 celebrating the achievement!**

**24 hours after #GT: Email and Social Media Postings 12 thanking supporters and community. his Special Day!**

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# We're here to help.

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