

# COLLABORATIVE GIVING DAY WORKPLAN!



## 8 Week Workplan for a Successful Giving Day

An interactive workbook to help you create, plan and implement your 8-week Giving Day campaign.

## BEST PRACTICE #1 SOCIAL MEDIA

For an online event, social media plays a huge role. Even if you are new to this way of communicating, Giving Day is the time to dive in and get your feet wet! Utilizing Facebook and other platforms will help you communicate to your current and future donors pre-event, during and long after the event.

### Questions

1. What social media platforms will you use for Giving Day?

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2. What are the key messages you will convey on these platforms?

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3. Do you have a staffing plan? Who will run your social media campaign?

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4. What other tools/resources do you need to implement?

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### Notes:

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## **BEST PRACTICES #2 BOARD ENGAGEMENT**

Board participation is a crucial element for success on your giving day. How will you engage your board and activate them as **Ambassadors, Advocates** and/or **Askers** to assist with your Giving Day campaign?

### Questions

1. What will be your goal for board giving? (100%, increase from last giving day, etc.)

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2. What donor engagement strategies will your board employ?

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3. What social media activity will you ask of your board?

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4. What other communication/marketing activities will your board engage in?

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5. What other tasks or strategies will you ask your board to participate in?

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### Notes:

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## BEST PRACTICE #3 DONOR ENGAGEMENT

Engaging your donors before, during and after Giving Day drives home the importance of donor stewardship, cultivation and keeping them aligned with your organization for continued engagement, support and gifts.

### Questions

1. How will you outreach to and engage your current donor base?

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2. How will you outreach to and engage **new** donors?

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3. How will you thank your donors **during** Giving Day?

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4. What is your plan to thank your donors **after** the Giving Day?

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5. What tools/resources do you need to implement?

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### Notes:

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## **BEST PRACTICE #4 DONOR ENGAGEMENT – KNOW YOUR AUDIENCE**

To craft the right and most effective message, you need to know your audience. Who are they? How can you find them and how can they be your best ambassadors?

### Questions

1. Who are your current audiences?

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2. Who do you want to target? (prioritize them)

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3. How will you find them?

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4. Your Message: How is the world different because you exist? What stories of impact can you share?

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5. What tools/resources do you need to prepare and develop to implement?

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### Notes:

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## BEST PRACTICE #5 GOAL SETTING

Goals for Giving Day are more than financial. Manage your expectations for setting your overall philanthropic goals: new donors, visibility, marketing, social media.

### Questions

1. What is your financial goal for Giving Day? Do you have a match component?

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2. What is your donor goal (number of donors/donations)?

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3. What are your other goals?

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4. How do you plan on measuring these goals?

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5. What tools/resources/staff do you need to implement?

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### Notes:

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## **BEST PRACTICE #6 MAXIMIZE COMMUNICATION TOOLS**

Once you've defined your audience, crafted your message, and set your goals, maximize the right communication tools available to you.

### Questions

1. What communication tools are you already using in your organization?

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2. What tools are you not currently using that you would like to incorporate into your campaign?

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3. Where can you add Giving Day messaging in your current marketing collateral?

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4. What tools/resources do you need to implement?

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### Notes:

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## DEVELOP AND EXECUTE YOUR PLAN

Using your notes from the best practices, you are now ready to put it all together. Use the template below to create your 8-week workplan.

Keep in mind that the first 4 weeks of your plan should be dedicated to planning and preparation. The 2<sup>nd</sup> half of your plan should be implementing, starting with soft marketing, then transitioning into heavy marketing at the 2 week mark.

### **Giving Day Goals:**

Dollar Goal: \_\_\_\_\_

Match Goal: \_\_\_\_\_

Donor Goal: \_\_\_\_\_

New Donor Goal: \_\_\_\_\_

Other goals:

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**Eight Weeks before Giving Day Campaign: Meet, Plan, Discuss**

Checklist

- \_\_\_ Set weekly meetings with your staff or volunteers who will be assisting with your campaign
- \_\_\_ Meet and complete this workplan
- \_\_\_ If you are creating special printed materials, begin design & production
- \_\_\_ Finalize donor email/contact lists and make sure all information is ready to use
- \_\_\_ Create outreach strategy for current donors
- \_\_\_ Decide on communication tools
- \_\_\_ Determine who will run your social media campaign (staff, hired consultant, volunteer, etc.)

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				

**Seven Weeks before Giving Day Campaign: Teasers and Preparations**

Checklist

- \_\_\_ Begin outreach to local businesses to form partnerships and support
- \_\_\_ Add a teaser or save the date block to your website and outgoing e-newsletters
- \_\_\_ Give Giving Day updates at your monthly or quarterly board meeting
- \_\_\_ Send a newsletter to your database announcing that you will be participating in Giving Day
- \_\_\_ Film a short video and share it across all social channels challenging them to get involved
- \_\_\_ Make sure you have completed all checklist items from the previous week!

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Six Weeks before Giving Day Campaign: Preparing for Your Soft Marketing Launch!**

Checklist

- \_\_\_ Decide if your organization will host an event during your giving day
- \_\_\_ Create staffing plan for Giving Day
- \_\_\_ Post promotional images, photos and stories
- \_\_\_ Share participating organizations' posts
- \_\_\_ Continue to implement your social media plan

	Task	Staff	Status	Notes
Planning				
Communication				
Donor Engagement				
Board Engagement				
Other				

**Five Weeks before Giving Day Campaign: Soft Marketing Launch**

Checklist

- \_\_\_ If you are using printed materials, drop them in the mail no later than next week
- \_\_\_ Start changing your social media badges (this is the perfect week to work out any issues)
- \_\_\_ Change banners on your Facebook page
- \_\_\_ Add a Giving Day logo to your email signature, change profile icons and announce your involvement
- \_\_\_ Download digital assets from the Marketing Toolkit
- \_\_\_ Work on your “thank you” plan for donors for day-of and post-giving day
- \_\_\_ Boast about your Nonprofit Central profile! Use it to help promote your participation!
- \_\_\_ Do a check and make sure you have completed all previous checklist steps
- \_\_\_ Implement current donor outreach plan
- \_\_\_ Send a newsletter to your database giving them details about your organization’s campaign
- \_\_\_ Continue to implement your social media plan

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

**Four Weeks before Giving Day Campaign: Continue Soft Marketing**

Checklist

- \_\_\_ Create board task list and assign to members
- \_\_\_ Send invites to day-of events (if having one)
- \_\_\_ Schedule key meetings with donors (pre-commitments)
- \_\_\_ Begin talking about your involvement in Giving Day at meetings and events. Bring postcards with you and leave in office lobbies, coffee shops, etc.
- \_\_\_ Continue to implement your communications plan (emails, social media posts, etc.)

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

**Three Weeks before Giving Day Campaign: Prepare for 2-week Marketing Blitz**

Checklist

- \_\_\_ Customize email templates from toolkit and schedule e-blasts to go out for the day-of event
- \_\_\_ Finalize social media schedule and content for the day of
- \_\_\_ Schedule key meetings with donors (pre-commitments)
- \_\_\_ Finalize partnerships with businesses and other nonprofits
- \_\_\_ Record and share a video on your social platforms

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

**Two Weeks before Giving Day Campaign: 2-week Heavy Marketing Begins**

Checklist

- \_\_\_ Amp up social media posts – add Giving Day graphics to Facebook and Twitter
- \_\_\_ Make targeted phone calls to donors
- \_\_\_ Have a kickoff event and talk to donors about Giving Day (suggested)
- \_\_\_ Post flyers at businesses in your area
- \_\_\_ Continue to implement social media plan, increasing your use of toolkit graphics and increasing number of posts

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				

**Week before Giving Day Campaign: Heavy Marketing Continues**

Checklist

- \_\_\_ Make sure you have your giving day fundraising page finalized and link available to send out
- \_\_\_ Continue heavy social media presence
- \_\_\_ Remind board of roles (outreach, sending emails, etc.)
- \_\_\_ Finalize day-of event plans if having one
- \_\_\_ Finalize day-of roles and staffing plan
- \_\_\_ Schedule and send reminder newsletters to your database letting them know that it is time to give!
- \_\_\_ Schedule social media posts before going to bed

	Task	Staff	Status	Notes
Planning				
Communications				
Donor Engagement				
Board Engagement				
Other				



**Giving Day Campaign**

Checklist

- \_\_\_ Kick off at midnight with a bang! Ensure at least 10 donors give early
- \_\_\_ Pound the pavement! Get out into the community.
- \_\_\_ Check in with all board members and make sure they are ready to implement your plan.
- \_\_\_ Be active all day on social media.
- \_\_\_ Check your donor report often and make sure you are thanking donors in real time either on social media or email.

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				

**Post Giving Day – Day After and Beyond!**

After Giving Day Checklist

- \_\_\_ Get some rest!
- \_\_\_ Continue your social media plan for thanking all donors
- \_\_\_ Implement donor thank you plans. (i.e. who will receive calls, send personal letters, thank you cards, emails, etc. (check your staff role list)
- \_\_\_ Send thank yous to businesses and other NPOs you partnered with
- \_\_\_ Send an update to your board, staff, volunteers, networks and donors list on your results!
- \_\_\_ Decide if you will have a post-event thank you reception/event

	Task	Staff	Status	Notes
Communications				
Donor Engagement				
Board Engagement				
Other				