The Ultimate Checklist for Giving Tuesday

Giving Tuesday presents a powerful opportunity for your school to engage the community and drive philanthropic support. In a landscape of competing priorities, a well-executed Giving Tuesday strategy is essential to stand out and inspire generosity.

This checklist will serve as your roadmap, and we'll guide you through each stage of the process - from defining your goals and crafting compelling messaging, to optimizing your donation process and cultivating lasting donor relationships.

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PHASE 1: LAYING THE FOUNDATION

Every successful Giving Tuesday campaign begins with a strong foundation. In this initial phase, which should take place approximately three months before the event, you should focus on the essential groundwork that will set the stage for a compelling and impactful campaign.

Phase 1: Laying the Foundation (cont.)

Define Your "Why"

Giving Tuesday is a global event, but your institution's "why" or the reason you are asking for donations should be uniquely yours.

It's essential to go beyond generic appeals and truly articulate what sets your school apart. This is your chance to connect with donors on a deeper level, showcasing the core purpose of your institution and the impact it has on the world.

In other words, vague and non-specific asks won't inspire your target audience to generosity.

So, how do you best achieve this?

Connect Giving Tuesday to a specific initiative

Many organizations reach out to your potential donors asking them for gifts, so you need to compete for their attention. The best way to get them to listen to and hear your message is by making your appeal more tangible and engaging.

Let them know where their money will go — to student scholarships, research funding, a new facility, or a specific program. This can help donors visualize the impact of their contribution and feel more connected to your cause.

Clearly articulate the impact of donations

Apart from talking about specific initiatives, it's also important to illustrate how donations will make things better. Such an approach will help you create an emotional connection with your donors and encourage them to be a part of the positive change.

For example, you could share compelling stories about lives that were changed by scholarships.

It's also a good idea to tailor your messages to specific audience segments by taking their interests and priorities into consideration. Alumni may be more interested in stories about student success, while major donors may be more drawn to research initiatives.

Finally, don't limit your impact statements and stories to a single web page. It's much more powerful to weave it throughout your campaign materials. Incorporate your stories and messages into your emails, social media posts, and other communication channel narratives.

Phase 1: Laying the Foundation (cont.)

Set SMART Goals

Enthusiasm and a worthy cause are essential ingredients for a successful Giving Tuesday campaign, but they're not enough on their own. To truly maximize your impact, you need a clear roadmap and measurable objectives.

SMART goals provide the framework for a focused and effective Giving Tuesday strategy, as they allow you to track progress and achievements along the way.

Think beyond the dollar sign

While raising funds is the ultimate objective, don't limit your goals to just a dollar amount. Think about the bigger picture. Some of these goals might include increasing the number of donors who participate, engaging more young alumni, or attracting first-time donors.

By setting goals for donor participation, especially from key segments of your audience, you can build a broader donor base and help future-proof your program.

Measure what matters

How will you know if your Giving Tuesday campaign is successful?

By tracking key metrics, of course!

Borrow a page from marketing teams, and keep a close eye on website traffic to your donation page, social media engagement (likes, shares, and comments), and email open rates.

These metrics will give you valuable insights into what's working, and more importantly, what's not so that you can tweak your strategy in real time.

Be ambitious, but realistic

It's great to aim high, but it's equally important to set realistic goals that are achievable within the context of your institution and the current economic climate. Factors like inflation, economic uncertainty, or personal circumstances can influence donor behavior, so be mindful of these factors when setting your targets.

Phase 1: Laying the Foundation (cont.)

The SMART framework provides the right structure for setting goals. Your goals should be:

- **Specific** — Instead of a general goal like "raise money," get specific. For example, "Increase the number of young alumni donors by 15% compared to last year."
- **Measurable** — Make sure your goals are quantifiable. "Generate 500 new followers on Instagram during the Giving Tuesday campaign," is much better than "Increase the Instagram following."
- **Achievable** — Set challenging yet attainable goals. Consider your past Giving Tuesday performance and your current resources, and based on these parameters plan something that will promote growth but is still grounded in reality and within your reach.
- **Relevant** — Ensure your goals align with your institution's overall fundraising strategy and priorities.
- **Time-Bound** — Give your goals a clear timeframe. An example could be, "Achieve a 20% increase in online donations on Giving Tuesday."

Identify your audience

The one-size-fits-all approach doesn't work when planning your fundraising activities for Giving Tuesday.

Before you can create compelling messages for your campaign, you need to understand who you're talking to. Identifying your audience and pinpointing their interests and preferences will allow you to tailor your messaging in a manner that resonates with them.

Here's how you can do that.

Segment your donor base

Think of your audience as different groups with unique characteristics and needs. You have your long-time supporters, recent graduates, and those who have shown interest but haven't yet given. Use your donor engagement software to segment your audience based on factors such as:

- **Giving history** — Identify your most loyal donors, those who give consistently, and those who have given to specific initiatives in the past.
- **Graduation year** — Tailor your messaging to different generations of alumni, recognizing their unique experiences and connection to your institution.
- **Engagement level** — Identify those who are actively engaged with your institution (attending events, participating in your other initiatives, or volunteering) versus those who may need a re-introduction.
- **Interests** — If you have data on donor interests such as specific academic programs, research areas, or sports, use it to personalize your appeals.

Phase 1: Laying the Foundation (cont.)

Prioritize your most engaged supporters

While you want to engage your entire community, focus your efforts on those most likely to give. If you spread yourself too thin, you can potentially miss opportunities to connect with your most fervent supporters. Some of them might be:

- **Giving history** — Cultivate relationships with recent graduates early on to build a pipeline of future support. They're still very much engaged with their alma mater and may be more inclined to make their first gift, even if it's a small one.
- **Past Giving Tuesday donors** — These people have already demonstrated their commitment to your cause and their generosity, which makes them likely candidates to contribute again.
- **Donors who advocate your cause** — People who consistently interact with your content, share your social media posts, and actively promote your mission are invaluable assets.

Personalize your outreach

For potential major donors, consider a more personalized approach.

Research their interests and giving history, and tailor your communication accordingly. A personal touch can make a significant difference in building relationships and securing major gifts.

Assemble and train your team

Giving Tuesday is a campus-wide endeavor, and it takes **a dedicated team** to make it a success. Just like any successful project, you need a group of individuals with diverse skills and a shared passion for your institution's mission.

Think beyond your core advancement team. Include student fundraisers, full-time staff from various departments, and enthusiastic volunteers. Each group brings unique strengths to the table. For example, student fundraisers have a personal connection to the student experience, while full-time staffers from across the campus can provide diverse perspectives, expertise, and connections.

Involve staff from different departments to foster a sense of shared ownership and generate campus-wide buy-in. This not only expands your reach but also strengthens internal relationships and builds a culture of philanthropy.

Once you've assembled your team, it's crucial to equip them with the knowledge and resources they need to succeed. Provide comprehensive training on Giving Tuesday best practices, including:

- **Crafting compelling messages** — Teach your team how to tell your institution's story in a way that resonates with donors.
- **Utilizing communication channels** — Train them on using various communication channels effectively, from email and social media to phone calls and personal outreach.
- **Understanding donor motivations** — Help them understand what motivates donors to give and how to personalize their approach.

PHASE 2: CRAFTING YOUR CAMPAIGN

With your foundation firmly in place, it's time to start building the heart of your Giving Tuesday campaign.

Phase 2: Crafting Your Campaign (cont.)

Develop a multi-channel strategy

Your audience is interacting with your institution in a variety of ways — by reading updates sent via email, checking posts on social media, and browsing your website, to name just a few.

Therefore, to connect with them effectively, you need a multi-channel strategy that delivers a consistent and engaging message across all platforms. Remember, **donor-centricity** makes all the difference. By diversifying your outreach and messaging, you'll be able to meet your donors where they are and allow them to choose their preferred communication channel.

Here are some tips for developing an effective multi-channel approach:

- **Create a content calendar**

  A content calendar is like your Giving Tuesday playbook. It outlines your messaging across email, social media, your website, and any **phone outreach**. This keeps your team organized and ensures a consistent narrative.

- **Use a mix of channels**

  Don't just rely on one or two channels. Use email to share heartwarming stories, social media to generate excitement and encourage sharing, and your website to provide detailed information and a user-friendly donation experience. Personal phone calls are at the core of a successful campaign. Don't neglect traditional offline marketing tactics like printed brochures, campus events, or local media outreach to further expand your reach and reinforce your message.

- **Find the right balance**

  Consistency is key, but don't overwhelm your audience. Find the sweet spot between staying top-of-mind and **avoiding donor fatigue**.

- **Streamline your activities**

  Use a donor engagement platform like VanillaSoft to segment your audience, automate your processes, and make it easier for your student agents to stay on top of their tasks. With so many channels, different activities, and potential donors to contact, things can get complex, so it's best to have a tool that will allow you to organize all your donor data and keep track of everything.

Optimize your donation page

Your donation page serves as your Giving Tuesday storefront. It's where donors take that final step and make their gift. To make this process as smooth and enjoyable as possible, you need a donation page that instills trust and is easy to navigate.

Here are some tips to help you optimize your donation page:

- **Mobile friendliness is a must**

  With [55% of website traffic]() coming from mobile devices, your donation page must be optimized for smartphones and tablets. Donors should be able to easily navigate your page, enter their information, and make a gift without any frustrating pinch-and-zoom maneuvers and fat-finger issues.

- **Clear and simple navigation**

  Don't make donors hunt for the donate button. Make it prominent and easy to find. The donation process should be intuitive and straightforward, with minimal clicks and distractions.

- **Guide with suggested amounts**

  Offering suggested donation amounts can help donors decide how much to give. Provide a range of options to accommodate different giving levels, and consider highlighting a "most popular" amount.

- **Compelling visuals and stories**

  Use images and stories to remind donors why their gifts matter. Showcase the impact of their generosity with photos of students, faculty, or programs that will benefit from their support. Avoid using stock photos as they come off as artificial and won't result in genuine engagement. People can spot a stock photo a mile away, and it can make your institution seem less authentic and relatable.

- **Strong call to action**

  Use clear and concise language to encourage donors to complete their gifts. "Give Now", "Support Our Students", or "Make a Difference Today" are all effective calls to action.

- **Build trust and security**

  Display security badges and reassure donors that their information is safe. This particularly applies to their credit card information, as donors need to feel confident that their financial details are protected from any unauthorized access or fraudulent activity. Transparency is key to building trust.

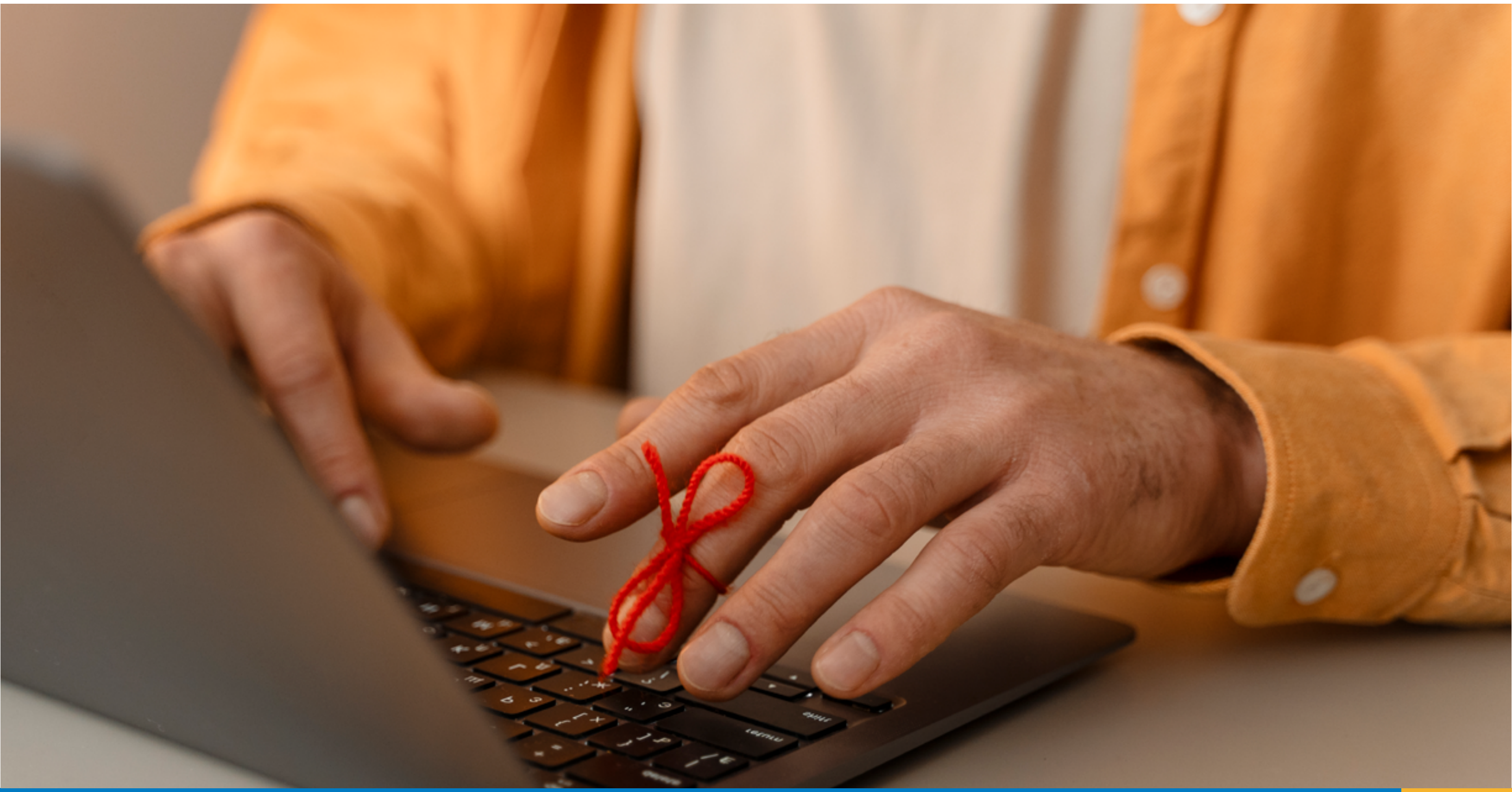
Secure matching gifts

Matching gifts are a fantastic way to significantly increase the impact of your donors' contributions. Through corporate matching gift programs, you can effectively double or even triple your fundraising revenue.

To make the most of matching gifts, start by exploring which companies are known for their generous programs. Ask your donors and board members if their employers offer matching gifts - they might be able to provide valuable insights or even have some influence.

The next step is to spread the word about your matching gift program by mentioning this awesome opportunity to multiply donations on your website, in brochures, on donation forms, and across your social media channels. Use eye-catching visuals and compelling language to emphasize how donors can double or even triple the impact of their gift.

Additionally, to make things super easy, provide clear step-by-step instructions on how to submit a matching gift request, and include links to any necessary forms or resources. Sharing inspiring success stories about past matching gifts can also encourage others to join in.



PHASE 3: BUILDING MOMENTUM

With the initial stages of your fundraising plan in motion, it's time to focus on building momentum.

This phase involves expanding your reach, strengthening your connections with supporters, and generating increased interest in your cause. You'll be nurturing relationships and finding creative ways to amplify your message and inspire others to get involved.

Phase 3: Building Momentum (cont.)

Generate excitement

In the weeks leading up to the big day, it's essential to build up excitement and create a sense of urgency with your audience. The following tips will help you generate buzz and keep potential supporters and fundraisers alike actively engaged and ready to participate.

Early bird promotion

Begin promoting Giving Tuesday weeks ahead of time. Announce your participation and highlight your fundraising goals across all communication channels.

Creative teasers

Use engaging visuals, short videos, and intriguing messages to pique interest and create a sense of anticipation. Think countdowns, behind-the-scenes glimpses of projects your fundraising will support, or sneak peeks into special Giving Tuesday initiatives.

Inspiring stories

Don't forget to keep on sharing heartfelt success stories and testimonials from students, faculty, and alumni who have benefited from your institution or similar initiatives in the past. Highlight the impact of past donations and how Giving Tuesday contributions will make a difference.

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Interactive content

You don't want your audience to be passive recipients of your messages. Encourage engagement by posing questions, running polls, and hosting contests on social media. This keeps your audience involved and invested in your Giving Tuesday campaign.

Partnerships and challenges

Collaborate with local businesses or community organizations to create joint Giving Tuesday campaigns or challenges. This can expand your reach and generate even more excitement.

Activate your Engagement Center

Giving Tuesday is a busy time for your **Engagement Center**, with student fundraisers working hard to connect with donors and secure vital support. To ensure they can make the biggest impact possible, it's important to provide them with the resources and encouragement they need.

Staff up

Giving Tuesday requires all hands on deck. Organize additional shifts for your student fundraisers to ensure adequate coverage throughout the day and evening. Consider extending calling hours to accommodate different time zones and donor availability.

Equip and empower

Provide your fundraisers with the tools and training they need to succeed. Start with a quick refresher training session to review call scripts, go over key talking points, and make sure they're ready to answer common questions. Make it easy for them to access donor profiles and giving history so they can personalize their conversations. And, of course, double-check that all the tech is working smoothly — phones, software, internet — and provide tech support throughout the day just in case any issues arise. A donor engagement platform can facilitate the entire process as it houses all the donor information, provides dynamic scripts, and enables automated dialing.

Motivate and incentivize

Keep your team motivated with incentives and recognition. Inject some friendly competition into the mix by introducing fun challenges with prizes for top performers. Who can make the most calls? Secure the largest donation? A little healthy competition can go a long way. Beyond the numbers, foster a strong sense of camaraderie. Hold team huddles to share updates and keep spirits high, enjoy a meal together, and offer words of encouragement throughout the day. Remember to publicly acknowledge achievements, both big and small, to celebrate individual and team successes. This creates a supportive and motivating atmosphere where everyone feels valued and appreciated.

Phase 3: Building Momentum (cont.)

Refine your messaging

Words matter, especially when it comes to inspiring generosity. To maximize the impact of your Giving Tuesday campaign, take the time to refine your messaging and ensure it resonates with your audience.

Craft compelling subject lines and social media captions

Your email subject lines and social media captions are your first impression, so every letter counts. Use powerful action words, create a sense of urgency, and personalize whenever possible. For example, instead of “Giving Tuesday is Coming”, try “Unlock [Match Amount]! Your Gift Makes Double the Impact on Giving Tuesday.”

A/B test your messages

Don’t assume you know what works best. A/B test different email subject lines, social media captions, and even email body copy to see what gains the most traction. Track open rates, click-through rates, and donation conversions to optimize your messaging for maximum impact. The numbers you collect will also come in handy for informing your future fundraising efforts.

PHASE 4: GIVING TUESDAY GAME DAY

After weeks of preparation, Giving Tuesday is finally here.

It's time to put your plans into motion and watch your hard work come to fruition. Today is all about connecting with your community and inspiring them to support your cause.

Phase 4: Giving Tuesday Game Day (cont.)

Kick off your multi-channel strategy

Coordinate your communications

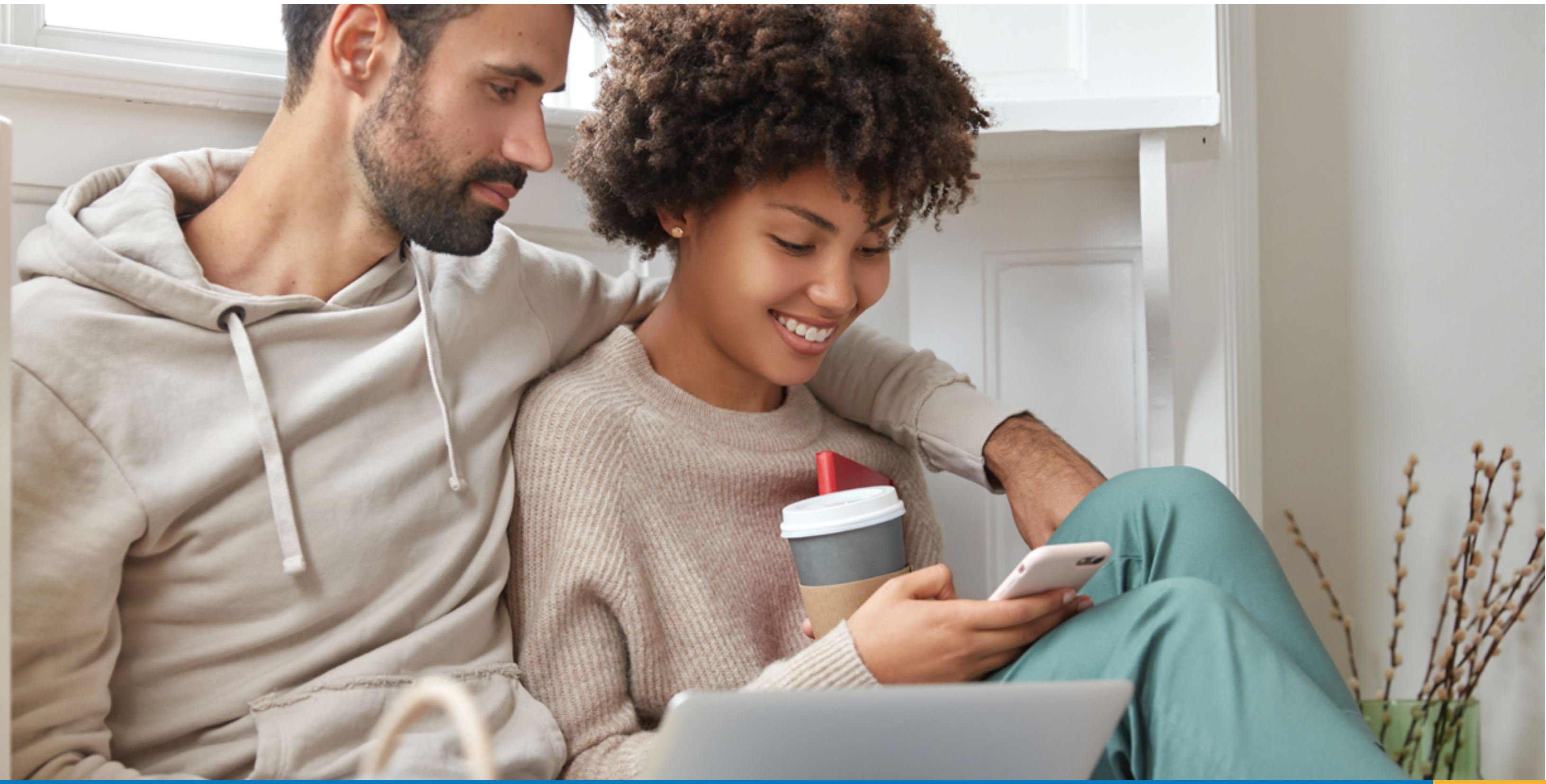
Roll out your multi-channel communication strategy across email, social media, your website, phone, and text messaging. Ensure your messaging is consistent and reinforces your Giving Tuesday "why".

Schedule posts strategically

Time your social media posts and emails for maximum visibility. Consider when your audience is most active online and schedule accordingly. You can find this information on existing donors in your database.

Don't forget your website

Update your website with a prominent Giving Tuesday banner, donation button, and section with relevant and relatable stories that showcase the impact of giving.



Phase 4: Giving Tuesday Game Day (cont.)

Maximize engagement

Give live shout-outs

Acknowledge donors in real time with personalized thank-you messages on social media. This public recognition can encourage others to give.

Livestream your progress

Host a livestream to share campaign updates, showcase your team's efforts, and connect with your audience in a dynamic way.

Create a sharing squad

Recruit a team of enthusiastic supporters to amplify your message on social media. Their task should be sharing your posts, creating their own content, and spreading the word about your Giving Tuesday campaign.

Stay flexible

Adapt as needed

Be prepared to adjust your strategy throughout the day based on real-time results and engagement. If certain messages or channels are performing better than others, optimize your approach accordingly.

Address challenges

Unexpected challenges may arise. Have a contingency plan in place to address technical difficulties, staffing issues, or any other unforeseen circumstances.

PHASE 5: CULTIVATING LASTING RELATIONSHIPS

Giving Tuesday may be over, but the journey of building relationships with your supporters continues. This phase focuses on stewardship — deepening your connection with donors and building a strong foundation for future support.

Phase 5: Cultivating Lasting Relationships (cont.)

Express gratitude

A prompt and heartfelt thank-you can do wonders for building strong donor relationships.

- **Personalized thank-you notes**

  Within 48 hours of receiving a donation, send a personalized thank-you message. Mention the donor's name, the amount donated, and how their gift will make a difference.

- **Utilize your EC**

  Leverage your Engagement Center to make personal connections. Have student fundraisers call or text donors to express gratitude, or send personalized video messages for a special touch.

- **Share an impact report**

  After Giving Tuesday, share a report that highlights the collective impact of all donations received. Show donors how their contributions made a difference and fueled progress towards your goals.

Engage your donors

Stewardship is all about continuous engagement and staying in touch with your donors, even when you're not running fundraising campaigns.

- **Provide regular updates**

  Share updates on your programs, projects, and the impact of their donations. Use newsletters, blog posts, social media, and email to keep them informed and invested in your cause.

- **Offer opportunities to connect**

  Invite donors to participate in surveys, webinars, events, or volunteer opportunities. These interactions strengthen their connection to your organization and deepen their commitment.

- **Focus on new donors**

  Pay special attention to cultivating relationships with first-time donors. Welcome them to your community and provide opportunities for them to learn more about your work. This can help turn them into recurring supporters and significantly increase your donor retention rates.

Phase 5: Cultivating Lasting Relationships (cont.)

Analyze and Improve

Giving Tuesday offers valuable insights into your fundraising strategies. Tap into the power of data you've collected to assess your approach and identify areas for growth.

Review your results

Analyze your Giving Tuesday results to identify what worked well and where you can improve. Crunch the numbers by looking at metrics like website traffic, donation volume, social media engagement, and Engagement Center activity.

Analyze donor behavior

Examine data on donor behavior and giving patterns. What channels did donors use to give? What messages resonated most effectively? These insights can help you improve future campaigns and pinpoint new strategies to implement. Use your analysis to refine your fundraising strategies for future Giving Tuesdays and other campaigns throughout the year.

ABOUT VANILLASOFT

VanillaSoft, the industry's most successful sales engagement platform, empowers sales teams to respond to leads faster, interact more consistently, and generate more qualified sales opportunities. Thousands of users employ VanillaSoft's sales cadence automation to drive speed-to-lead, persistency, productivity, and revenue-per-rep. VanillaSoft is a privately held company based in Plano, Texas, USA.

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