AN ALL IN ONE NONPROFIT GUIDE

Giving Tuesday Planning Pages

Every worksheet, timeline, checklist and the run sheet from *The All In One Guide to Giving Tuesday*, ready to print and fill in.

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The one-sentence goal worksheet (Chapter 2)

Fill in each line, then combine them.

1. Our goal on the day: $_____ (the number we announce). The number we will be glad to reach: $_____.
2. What one unit of the money does: $_____ provides _____.
3. Our story: _____ (name, with permission), who _____ (what changed).
4. Our match: _____ will double gifts up to $_____ (Chapter 4).
5. Our sentence: "This Giving Tuesday, help us _____, and every gift is _____ up to $_____."
6. What it will cost to run: $_____.
7. Other measures of success: first-time donors _____; new monthly donors _____; board members taking part _____.

The segment table (Chapter 3)

For each group, note how many people are in it, what they will hear first and who contacts them.

1. Monthly donors. How many: _____. First line: thank you, your monthly gift is already working. Ask: add a one-time gift or share. Contact: email from the executive director.
2. Last year's donors. How many: _____. First line: what last year's gift did. Ask: give again today, doubled. Contact: email, plus a call for the top givers.
3. Donors who stopped. How many: _____. First line: we have missed you. Ask: come back on the day. Contact: email.
4. Major donors. How many: _____. First line: personal note. Ask: the match, or an advance gift. Contact: call from the executive director or board chair.
5. Board, staff and volunteers. How many: _____. First line: thank you for all you do. Ask: give early, then share. Contact: personal message.
6. Everyone else. How many: _____. First line: the story and the match. Ask: give today, doubled. Contact: email and social.

The giving page checklist (Chapter 5)

1. The form asks only for amount, name, email and payment details.
2. The page works and loads quickly on a phone.
3. The match and the story appear above the form, in three lines.
4. Three or four suggested amounts, each with what it does.
5. A monthly option on the same page.
6. An optional fee-cover, with the amount shown.
7. A wallet button such as Apple Pay or Google Pay, tested.
8. Your name, logo, tax-exempt status and any required state disclosure.
9. A thank-you page and a thank-you email within minutes, by name.
10. A campaign name on every gift, and a separate link for each channel if you can.
11. Tested from a phone, a computer and a wallet a week before and the day before.

The timelines (Appendix A)

Six weeks or more

- [ ] Six weeks out: decide the goal, the story and the sentence (Chapter 2). Ask for the story person's permission. Start asking for a match (Chapter 4).
- [ ] Five weeks out: pull and clean your lists, and divide them into groups (Chapter 3). Recruit ambassadors (Chapter 6).
- [ ] Four weeks out: confirm the match in writing. Fix and test the giving page (Chapter 5). Ask every board member to give early and send three messages.
- [ ] Three weeks out: write all nine emails (Chapter 7) and all eleven posts (Chapter 8). Collect a photo or a short video.
- [ ] Two weeks out: send the ambassador kit. Plan the personal calls to major donors.
- [ ] Ten days out: Email 1, save the date.
- [ ] Five days out: Email 2, what your gift will do.
- [ ] Two days out: Email 3, the match.
- [ ] The day before: schedule everything, test the giving page, make the calls, print the run sheet (Chapter 9).
- [ ] The day: follow the run sheet.
- [ ] The next two days: thank everyone (Chapter 10).
- [ ] Ten days after: Email 9, what it made possible.
- [ ] Within two weeks: fill in the results worksheet (Chapter 12).
- [ ] Within thirty days: a welcome series for first-time donors, and an invitation to give monthly.

About four weeks

- [ ] Four weeks out: goal, story and sentence; ask for a match; ask the board.
- [ ] Three weeks out: clean and divide your lists; fix and test the giving page; recruit a few ambassadors.
- [ ] Two weeks out: write the emails and posts; send the ambassador kit.
- [ ] From ten days out: follow the six-week timeline from Email 1 onward.

Two weeks or less

- [ ] Follow the day-by-day plan in Chapter 11.

The run sheet for the day (Chapter 9)

The day before

- [ ] Read every scheduled email and post on a phone.
- [ ] Give a small gift on the giving page, check the receipt, refund it.
- [ ] Send the ambassador kit reminder.
- [ ] Executive director or board calls major donors and long-time monthly donors.
- [ ] Print this run sheet and the list of who does what.

7:30 AM. Team check-in: who is doing what, the backup link, the match terms.

8:00 AM. Email 4 goes out. Morning post. Morning text, if you use texts.

8:30 AM. Text to ambassadors: "It's today. Here is your link."

9:00 AM. First check of the giving page, the payment account and the receipts.

10:30 AM. Email 5 goes out, one version for each group. Mid-morning post (the story).

11:00 AM. Board members make their three calls or send their three messages.

12:00 PM. Update the progress image. Email 6 with the real number. Noon post. Note to ambassadors with their totals.

1:00 PM. Post thanking the match giver.

3:00 PM. Check the total against the payment account. Late afternoon post (an ambassador).

5:30 PM. Email 7 goes out. Evening post. Final-hours text.

8:00 PM. Last note to ambassadors: "Last push."

9:00 PM. Check the total against the payment account again. Update the progress image.

11:59 PM. The day closes. Post the total and a thank-you, now or first thing in the morning.

The next morning. Email 8 (thank you) to every donor. Thank the match giver and the ambassadors personally.

The thank-you plan (Chapter 10)

Within forty-eight hours

1. Email 8 to every donor, by name, with the amount.
2. A handwritten card for every gift of $[amount] or more.
3. A board member's call to every first-time donor who gave $[amount] or more.
4. A personal thank-you to the match giver and to each ambassador.
5. Every acknowledgment checked: amount, and whether anything was given in return.

Within ten days

1. Email 9 with the first result and a photo.
2. A welcome series begins for first-time donors.
3. The year-end appeal is written in versions, with a thank-you opening for Giving Tuesday donors.

Within thirty days

1. An invitation to give monthly, to one-time donors.
2. A second update on what the money did.
3. The results worksheet (Chapter 12) is filled in and filed.

The results worksheet (Chapter 12)

Fill this in within two weeks of the day, and file it where you will find it next October.

1. Goal: $_____. Raised on the day (including the match and offline gifts): $_____.
2. Cost of the campaign: $_____. Raised after costs: $_____.
3. Number of gifts: _____. Number of donors: _____.
4. First-time donors: _____. Lapsed donors who came back: _____. Monthly donors who added a gift: _____.
5. Average gift: $_____. Our usual average gift: $_____.
6. Gifts by channel: email _____; social _____; text _____; ambassadors and board _____; other _____.
7. The best single message (subject line and time sent): _____.
8. New monthly donors, on the day and in the following month: _____.
9. Match: amount $_____, filled at _____ (time), match givers thanked on _____ (date).
10. First-time donors who gave again by the end of December: _____. By March: _____ (fill in later).
11. What worked best: _____.
12. What we would drop: _____.
13. What we will do differently next year: _____.

Every checklist in one place (Appendix B)

Before you start (Chapter 1)

1. Last year's Giving Tuesday gifts counted, and how many gave again.
2. A gift tested on your giving page.
3. An owner for the campaign, and helpers for the day.
4. A decision: full, small or not this year.

The plan (Chapters 2 to 4)

1. One goal, a quieter target and the cost.
2. One story, with written permission.
3. One sentence, used everywhere.
4. Lists divided into groups, cleaned of duplicates and of people who asked not to be contacted.
5. A match, confirmed in writing.

The giving page (Chapter 5)

1. Amount, name, email and payment only.
2. Works and loads quickly on a phone.
3. The match and the story above the form.
4. Suggested amounts with what they do, and a monthly option.
5. Optional fee-cover and a wallet button, tested.
6. Your name, tax-exempt status and any required state disclosure.
7. A thank-you page and email within minutes.
8. A campaign name on every gift.

People (Chapters 6 and 8)

1. Every board member has given and will send three messages.
2. Five to fifteen ambassadors, each with a kit and a link.
3. Major donors called the day before.

Messages (Chapters 7 and 8)

1. Nine emails written, scheduled and read on a phone.
2. Eleven posts written and scheduled, with one progress image.
3. Texts only to people who agreed to them.

The day (Chapter 9)

1. A name next to every job.
2. A backup link ready.
3. Totals checked against the payment account at midday and in the evening.

After (Chapters 10 and 12)

1. Every donor thanked within forty-eight hours.
2. Every acknowledgment correct for gifts of $250 or more.
3. A results report sent about ten days after.
4. A welcome series for first-time donors, and an invitation to give monthly.
5. The match giver and the ambassadors thanked with their results.
6. The results worksheet filled in and filed.