The Giving Tuesday Cheat Sheet

Presented By: Julia Gackenbach & Kelly Ramage, DonorPerfect

Wednesday, October 12, 2022 | 2:00 – 3:00 p.m. EDT

A little housekeeping…

We're recording this webinar!

All registrants will receive an email containing a link to the recorded webinar AND a ton of other resources!

Feel free to ask questions!
Use the Questions chat box to ask your questions.
We will have a Q&A session at the end of the presentation.

FUNDRAISING TECH

Made for you

Designed with you in mind
Designed for fundraisers by fundraisers through customer-led development input

Time saving data tools
Save time, attract and retain donors, and raise more money with all of your fundraising data in one place

Powerful integrations
Easily integrate with your third-party CRM, email provider, and accounting software

CRM INTEGRATIONS

DONATION FORMS

PEER-TO-PEER FUNDRAISING

EMAIL INTEGRATIONS

EVENT MANAGEMENT

YOUR ORGANIZATION

TEXT FUNDRAISING

GIVI APP

AUCTION EVENTS

OTHER INTEGRATIONS

We know the value of relationships and are proud to connect you with DonorPerfect, a member of our partner network.

Powerful Fundraising Technology + A Comprehensive Solution for Donor Management

Raise More, Manage Less

**Donation Forms | Event Registration
Text Fundraising | Peer-to-Peer |
Auctions
Integrations & Data**

Save time, raise money, and inspire donors with DonorPerfect.

Meet the Speakers

Julia Gackenbach
Communications Manager, DonorPerfect

Kelly Ramage
Lead Training Specialist, DonorPerfect

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☐ Your 2022

Giving Tuesday Cheat Sheet

☑

☑

Hello!

I'm Julia Gackenbach

Communications Manager at DonorPerfect & former nonprofit Development Director

Let's take the Giving Tuesday journey together, in three bite-sized pieces - planning, writing, and stewarding.

Thanks for joining us!

I'm Kelly Ramage

Training Manager at DonorPerfect

I'm here to answer your fundraising database questions around Giving Tuesday!

Campaign phases

Phase 1
Research &
Goal Setting

Phase 2
Writing &
Repurposing

Phase 3
Executing &
Stewarding

Data preparation	Email marketing	Reporting
Segmentation	Form building	Goal updates
Tools & integrations	Impact stories	Thank-yous

Campaign roles

Suggests your campaign goals & how the funds should be used

Strategist
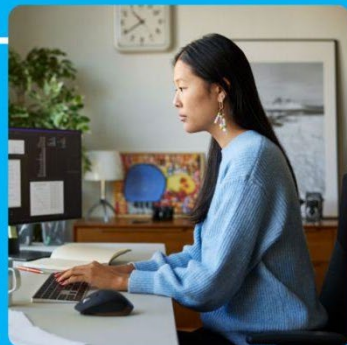
Prepares your data & maintains your system during the campaign process

Administrator

Develops the messaging, tone, and personalization of your outreach

Communicator

Leverages their connections to get the campaign in front of the right people

Networker

PHASE 1

Setting Giving Tuesday Goals & Planning Your Campaign

Time to get your hands dirty! You'll be digging through data and picking brains in this phase.

Engaged roles

Strategist

Suggests your campaign goals & how the funds should be used

Administrator

Prepares data & maintains your system during the campaign process

STRATEGIST

☐ Analyze previous data & annual goals

Annual Fundraising Goal — by 7/31/2021

Raised $167,101 — Goal $160,000
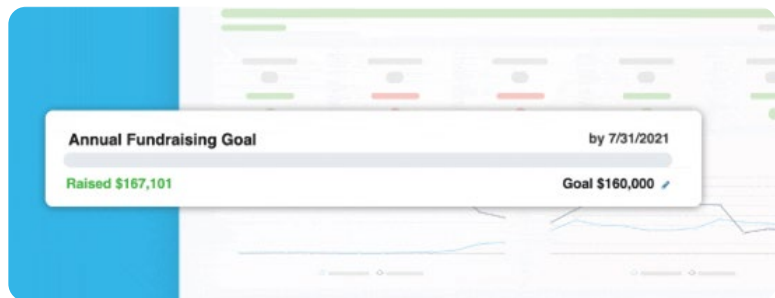
ADMINISTRATOR

☐ Determine target segments

☐ Pull reports to support your reasoning

☐ Set goals - use target amounts or percent increases

☐ Create an infrastructure to measure goals

Annual Fund
January 1, 2022 to December 31, 2022

$8,284

55% $15,000

5 gifts from **3** donors
2 new donors to the organization

Raise the Roof
April 1, 2022 to December 31, 2022

$925

18% $5,000

17 gifts from **9** donors
7 new donors to the organization

Giving Tuesday
November 1, 2022 to December 31, 2022

$1,080

22% $5,000

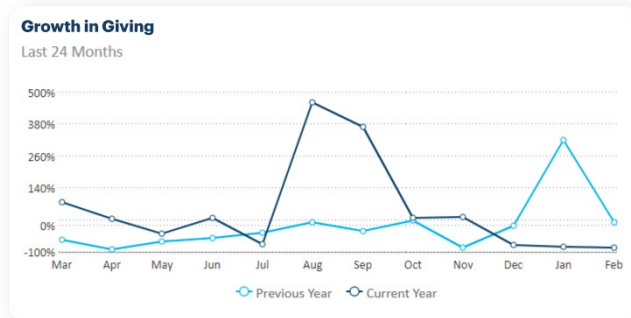**7** gifts from **2** donors
2 new donors to the organization

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☐ Develop a theme and story that match your cause

paws + claws

Provide medical care to an animal in need
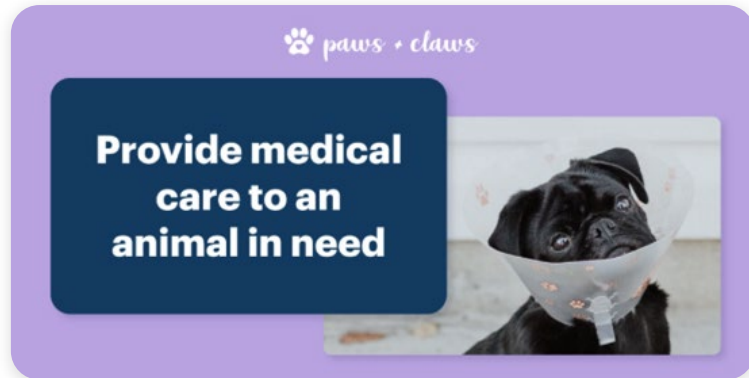
☐ Determine viable avenues to share the story

SUBMIT YOUR CLIP

Step 4: Lean on your network
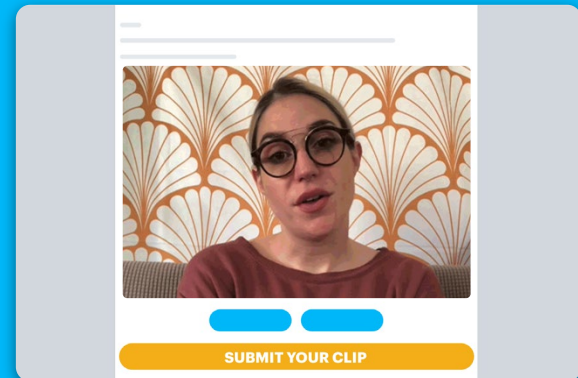
- ☐ Ask for feedback
- ☐ Schedule reports to align your team

- ☐ Discuss content needs for your donation page

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☐ Delegate tasks
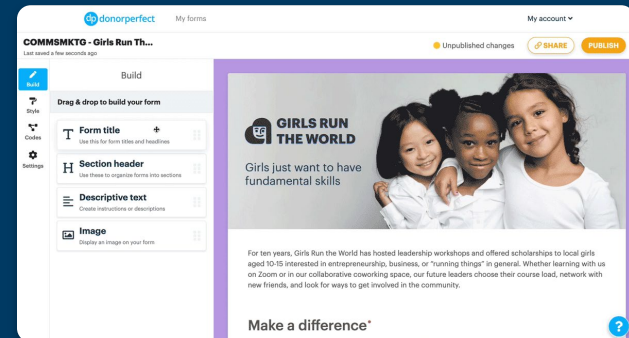
☐ Prepare all campaign tools and resources

Scheduled Donor Outreach
Contacts assigned to you that are past due, for today, or due in 7 days

Today

Jul 19   **Edward Vo**
          DP Video Out view details

Jul 19   **Maricela Benavidez**
          Email Out view details

Alerts & Reminders
Make sure to take care of these routine, but important, tasks.

2 monthly gifts are ready to be processed.

There are **10 outstanding gifts** - 3 emails, 7 letters. Thank your donors & increase their likelihood to give again.

2 credit cards will **expire this month.** Contact the donors.

2 online donations are ready to be imported.

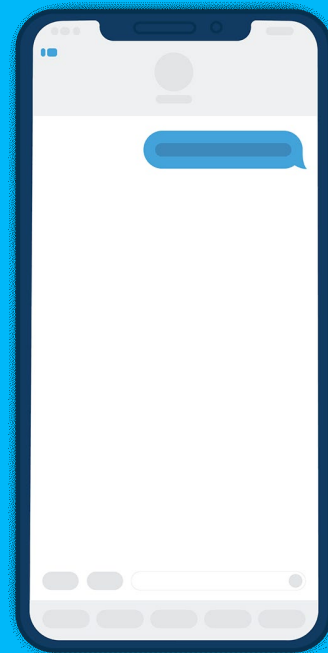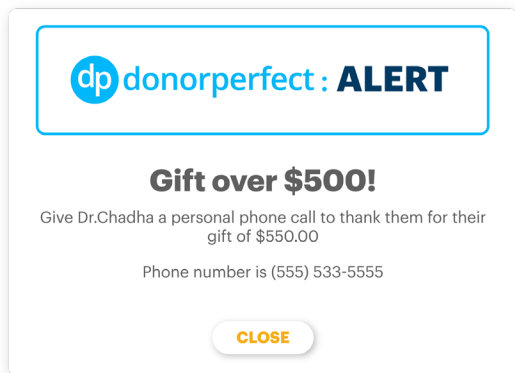| Automatic Processing	Run a one-time batch	Reminders

🕐 **Automatic processing is** On

✓ Payments process on their scheduled due date

✓ Daily confirmation emails are sent to 1 recipient

📄 **Automatic receipts is** On

✓ Email receipts are sent after each successful batch.

✓ Visit Email Receipt History to track your Automatic receipts.

✏ Edit settings

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☐ Develop a plan to acquire and retain donors

dp donorperfect : ALERT

Gift over $500!

Give Dr.Chadha a personal phone call to thank them for their gift of $550.00

Phone number is (555) 533-5555

CLOSE

18

PHASE 2

Creating Actionable Giving Tuesday Communications

You now have a solid plan in place, and plenty of tools that will protect you from burnout!

Engaged roles
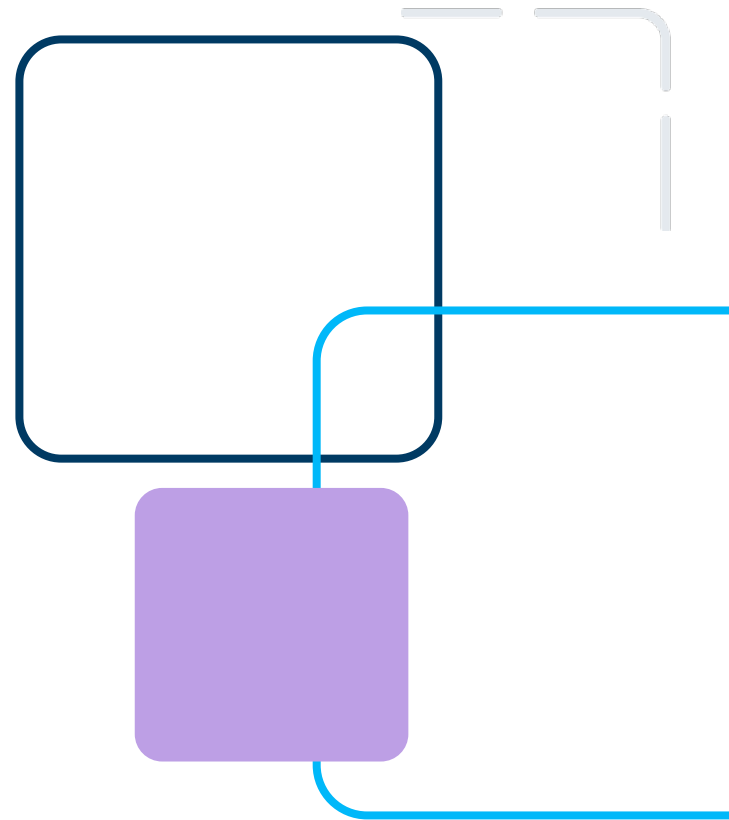
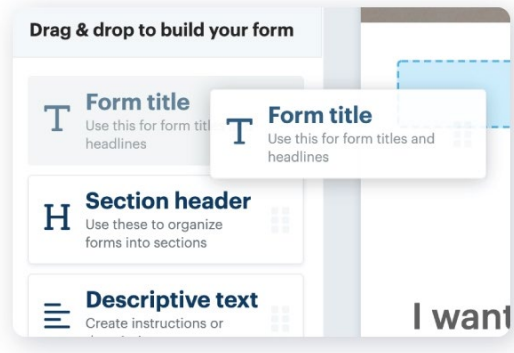**Communicator**

Develops the messaging, tone, and personalization of your outreach

Networker

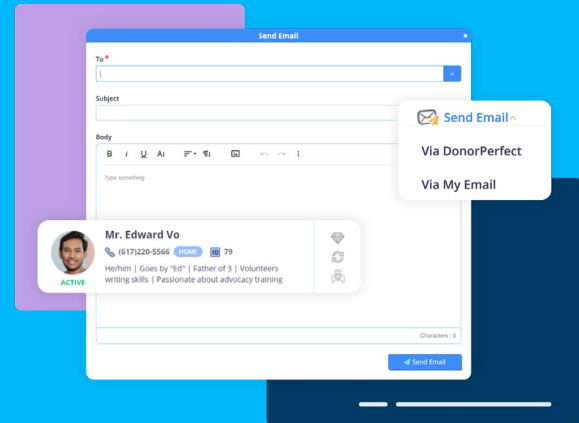Leverages their connections to get the campaign in front of the right people

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COMMUNICATOR

☐ Create donation page content

NETWORKER

☐ Spread the word

You've already made it *halfway* through your Giving Tuesday tasks!

☐ Write or repurpose short, shareable impact stories that match your Giving Tuesday theme

Think of the stories that motivate your nonprofit to keep pushing. Speak with your beneficiaries about their experience.

☐ Share stories with your network
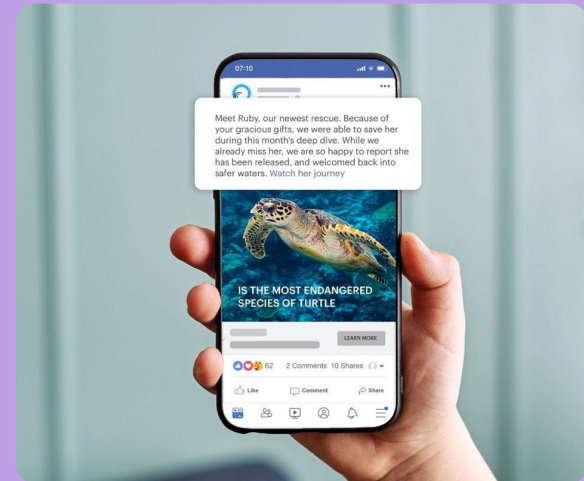
☐ Create tailored reminders for each donor segment

☐ Send reminders to promote the campaign

EARLY NOVEMBER
Campaign reveal email

MID NOVEMBER
Reminder email

DAY BEFORE GIVING TUESDAY
Reminder email

DAY OF GIVING TUESDAY
"It's here" email

☐ Develop content for goal updates

GIVING TUESDAY 🐾 paws • claws

We have raised 80% of our goal.

Can *you* help us reach it?

☐ Develop a plan to make each donor group feel special and engaged

Ms. Nia K. Nocito

HOME (215) 628-0400

WORK nnocito@donorperfect.c...

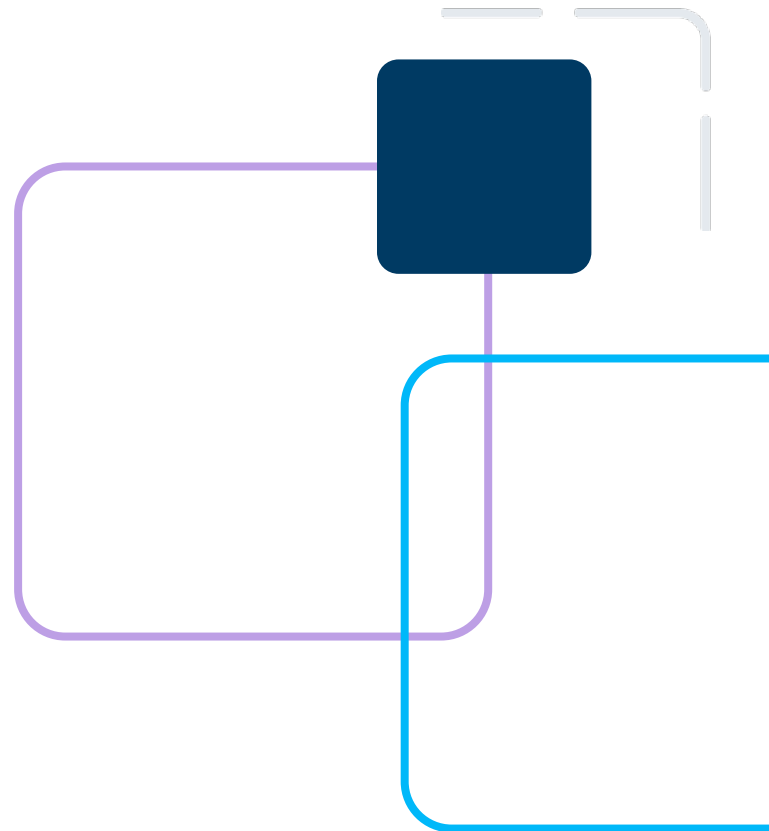Offered to lead a virtual workout class as a fundraiser. Will follow up...

ACTIVE

View More
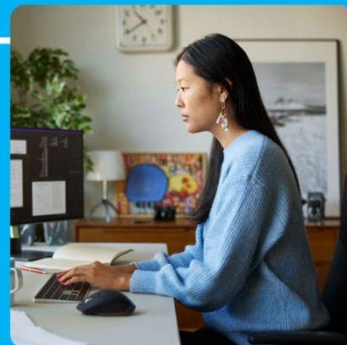
PHASE 3

Tips for Successful Giving Tuesday Stewardship

Take a deep breath. The bulk of the work is over! Now all you have to do is press play.

Engaged roles

Suggests your campaign goals & how the funds should be used

Strategist

Prepares your data & maintains your system during the campaign process

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Networker

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COMMUNICATOR

☐ Write goal updates

NETWORKER

☐ Share goal updates

8:00 - 10:00 AM
Today's the day

12:00 - 2:00 PM
Goal update

4:00 - 6:00 PM
Goal update

8:00 - 10:00 PM
Last Call

ADMINISTRATOR

☐ Report on your success within each target segment

COMMUNICATOR

☐ Determine the statistics or wins you'd like to share with donors

Total Donors	Average Gift	Donor Retention	Donor Lifetime Value
243	**642.20**	**57.14%**	**18,574.19**
−37.00% YoY ↓	98.81% YoY ↑	−35.39% YoY ↓	101.95% YoY ↑

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ADMINISTRATOR

☐ Create mail merge templates and dynamic fields for sending mass thank-yous
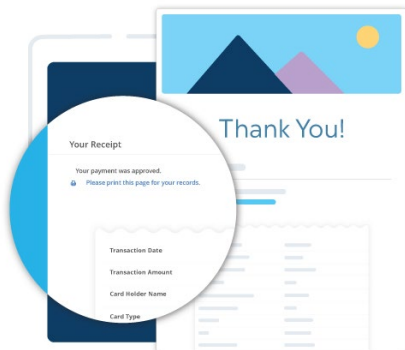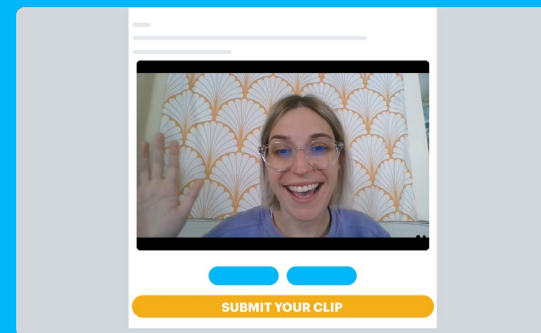
STRATEGIST

☐ Plan post-GT stewardship
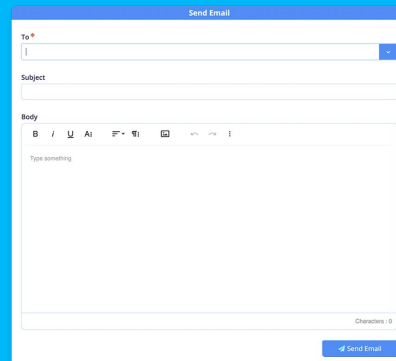
COMMUNICATOR

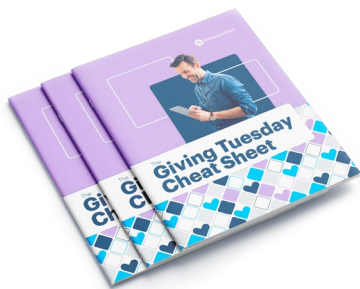☐ Tailor thank yous to each donor group

NETWORKER

☐ Reach out to major donors

Thank you!

Your Giving Tuesday Cheat Sheet download includes an online guide with helpful links *and* a print-out checklist!

Questions?

This webinar program qualifies for 1 point of continuing education toward maintaining the Certified Fundraising Executive Management (CFRE) credential.

Thank you for joining!

For more information on Qgiv's fundraising platform, contact:

contactus@qgiv.com | 888-855-9595

For more information on DonorPerfect, contact:

info@donorperfect.com | www.donorperfect.com