



Giving Day Checklist for Success

This checklist guides you through planning a successful giving day campaign. We estimate that it will take 15-30 hours of staff time to prepare for the event. Following this checklist will help you use that time effectively. More resources can be found in [the Nonprofit Toolkit](#) and on [the Nonprofit Frequently Asked Questions \(FAQs\) page](#).

Start Planning Early

- Mark all calendars with two important dates:** early giving starts June 1 and the giving day begins at noon on Wednesday, June 26 and ends at noon on Thursday, June 27. Then start a project plan schedule.
- Review which types of donations can be counted toward giving day totals.** To count toward your giving day totals, all donations be made/received between June 1 and noon on June 27. Learn more about these rules on [the Nonprofit FAQs page](#). These are the four types of donations that can be counted in your totals:
 - Online donations made through the [givelocalnr.org](#) website.** The website accepts payment via credit and debit cards, PayPal, Venmo, and Google Pay. Additionally, if the donation is \$50 or more, the donor can have the gift deducted from their bank account via ACH.
 - Three types of offline donations: cash, checks, and wire transfers.** To count, these donations must be received by your organization, dated between June 1–27, and added to the system by noon on June 27. Keep copies of all offline donations (the whole front of the check or the wire transfer details.) While donations under \$1,000 are automatically approved, the CFNRV reserves the right to request a copy of any offline donation. Donations over \$1,000 are reviewed by the CFNRV team, so email a copy of the above details to our team for approval. [Follow these steps](#) to add offline donations to the system.
- Select a staff member or volunteer as point person,** who has strong leadership and organizational skills, and can commit to the entire campaign timeline and process.
- Establish success metrics that include more than winning a prize or grant.** Treat the giving day as part of your fundraising plan for the year by considering how it fits into [your annual giving campaign](#). Consider success metrics such as using the event as a capacity building exercise, using it to highlight a program, or to cultivate new donors. Develop and build a plan around these goals vs. only trying to win a grant or prize.
- Identify your top champions and how you want to engage with them.** Who knows your work best? Board members, volunteers, and long-time donors could be on this list. In addition to making a gift for the event, consider other asks you can make. They can be great assets in spreading the word, setting up peer-to-peer fundraising, and assisting with in-person events to celebrate giving day.
- Reach out to major donors and sponsors.** Let them know that you are participating in the giving day this year. Ask them if they would like to make a donation that can serve as a match. Matches as low as \$200 can be compelling to donors. If you have a donor who wants to make a more complex gift such as a gift of stock or a distribution from a retirement account, advise them to initiate that transaction as early as possible and schedule the donation to arrive within the June 1 – 27 timeframe.
- Consider the ways you are already reaching out to supporters.** We recommend capitalizing on what you are already doing vs. creating a bunch of new things. How can you use these tools to engage supporters? Consider

things like email newsletters, social media, website, in-person events or meetings, mailings to supporters, etc.

- ❑ **Do you want to hold an in-person event?** Many nonprofits that participate in GiveLocalNRV find that holding some kind of in-person event is helpful to build excitement during early giving or on the day itself. Events that our partners have had success with include open houses, classes, musical performances, percentage nights or gatherings at local restaurants or breweries. All these options give you the opportunity to share why giving to your organization matters or to show your work in action. Additionally, you can encourage folks to give while they are at your event.
- ❑ **Reach out early and often to the CFNRV team.** We are here to support you! Lindsey Gleason is our main contact for all giving day efforts. Reach out to her at lindseygleason@cfnrv.org or 540-381-8999.

Sign-up by May 15 & set up your organization's page before June 1

- ❑ **Sign-up for the 2024 event opens on February 15 and closes on May 15** at givelocalnrv.org. Organizations, regardless of whether they have participated in the past, must sign up to participate. Click "Sign-up" on the homepage to open the form.
- ❑ **Login to your account.** Once your sign-up is approved, log-in to your account and click "Dashboard" in the dropdown menu on the upper right-hand corner of the page.
- ❑ **Set up your page.** Click on the menu item labeled "Organization Page". This is where you will direct donors to give. At minimum, you will need to add these items to the page: 1) your logo, 2) an image to the top of the page (called a banner image), 3) info about your organization and what you are fundraising for this year.
- ❑ **For step-by-step page set-up instructions, [visit this article on the Mightycause Support site](#).**
- ❑ **Review the "checkout" process.** This is what your donor sees when they click "donate" on your page. You can edit the following items: the donation page itself, the thank you text that gets added to the tax receipts the system automatically sends, and the thank you page that appears after a donation is made. Because you can customize all these places, you can make each step of the checkout process personalized to your organization. Find out how to make updates to these areas via [this article on the Mightycause Support site](#).
- ❑ **Previous giving day participants: review a report of previous donors.** This is a helpful tool to remind you who donated to your organization previously and how much they gave. More information on accessing this information can be found in [this article on the Mightycause Support site](#).
- ❑ **Review the grants and prizes list.** Together with our sponsors, the CFNRV is pleased to be giving out \$20,000 in grants and prizes this year. [Check out the list on this page!](#) *Please note that the Buzz4Good episode and the best short video prize were special 10th anniversary prizes and will not be offered in 2024.*
- ❑ **Register to attend an upcoming training event** that will walk you through creating, sharing, and utilizing the tools on the website and how to run a successful giving day campaign.

Two Months Before GiveLocalNRV

- ❑ **Finalize your fundraising goals.** How much are you aiming to raise? How many donors do you want to give to you? Don't pick random numbers, tie it to something specific and explain what it represents to your nonprofit. The numbers can be a percentage increase over last year (what you raised and/or the number of donors.) The goal can be tied to the cost of equipment, services, or a portion of your budget. Share these goals with donors!

- ❑ **Decide if you want to go after a grant or prize.** You could potentially rally your donors around competing for a specific grant. You could aim for a Power Hour prize and ask all your donors to wait to give during a specific hour. All these tactics can be fun ways to engage your donors. However, if you don't end up winning a grant or prize, that doesn't mean you haven't seen success with the giving day! Consider a grant or prize to be the cherry on top of your efforts, not the main goal of your participation.
- ❑ **Decide whether you will hold an event during GiveLocalNRV.** This can be a simple open house at your office, a meetup at a local coffee shop or restaurant, a percentage night at your favorite brewery, etc. Since this is a primarily online event, this additional in-person engagement can be a great way to rally your supporters. And, you don't have to spend a lot of money to make that engagement happen.
- ❑ **Promote the event** in your newsletter, emails, and on your website. Share that early giving opens on June 1 and the giving day itself will span two days: noon to noon, June 26-27. Update your e-mail signature to include a "coming soon" announcement with the early giving date or the giving day date.
- ❑ **Share the event information with the CFNRV.** We keep a running list of events that we then share on the GiveLocalNRV site, in emails to participating nonprofits, and with the media. Also, our team tries to make it to every giving day event and knowing the details early helps us plan.
- ❑ **Tell engaging stories** on your nonprofit's social media channels and/or blog. Interview volunteers and beneficiaries of the work of your nonprofit. Giving is an emotional activity and these stories help people engage and see how they can play a part in making a difference. These stories and interviews don't have to be long to share your organization's impact and why people should care about it.
- ❑ **Use other tools in [the Nonprofit Toolkit](#):** the toolkit includes email templates, logos, marketing tips, and more.

During June (Early Giving Opens June 1)

- ❑ **Review which donations are allowed to be counted for your giving day totals.** See page 1 of this checklist to remind yourself and your team what donations can be counted for this event.
- ❑ **Plan to email your supporters more than you normally would.** With a giving day event, it's customary to reach out a bit more, but be strategic. Remember to be specific that you are asking for donations and thank you donors often! Consider ideas such as:
 - ❑ Announcing that early giving is open.
 - ❑ Letting donors know when you reach a specific milestone (30% to your goal, halfway there, etc.)
 - ❑ Remind your donors if you have matching donation or a goal to get one of the grants or prizes.
- ❑ **Share the direct link to your organization's page** in all your communications – social media posts, emails, etc. By doing this instead of sending donors to the main GiveLocalNRV page, donors will be able to make a gift faster.
- ❑ **Engage your networks!** Encourage your board members, staff, and volunteers to do one-on-one outreach to their networks to ask for donations.
- ❑ **Add matching donations into the system.** If you have a matching donation this year, add it to your page! [Follow these steps](#) to add the match in the system.
- ❑ **Create excitement on social media.** Share updates on your campaign and reasons to give.
- ❑ **Will your donors be in town?** If donors will be away on the giving day itself, remind them that they can make their donation ahead of time online or via an offline donation.

- ❑ **If you are holding an in-person event**, prepare all necessary materials. Share the event information with the CFNRV team so we can add it to our online list and try to get a team member out to attend your event.
- ❑ **Prepare your team to add offline donations.** Make sure at least two people (volunteers or staff) are trained to add offline donations into the system. [Follow these steps](#) that share how to add offline donations. Review the details on page 1 of this guide that shares details about offline donations.
- ❑ **Prepare communication pieces you plan to send during the giving day.** Leave open spots for real-time information, but creating email and social media templates ahead of time will help you on the day itself.
- ❑ **Pick up giving day t-shirts before the event begins.** The first 50 organizations that sign-up for the giving day are guaranteed two shirts. Additionally, we often have extra shirts to give out. The 2024 shirts will be generic shirts (without dates/sponsors), so we encourage you to wear them year after year!

1–2 Days Before the Giving Day

- ❑ **Send out email reminders to supporters** sharing that the giving day is almost here, the progress you made with early giving, and how they can help you reach your goals.
- ❑ **Confirm volunteers for day of activities.**
- ❑ **Review the process of adding offline donations.** Confirm that at least two people in your organization know how to do this. Review the details on page 1 of this guide that shares details about offline donations.
- ❑ **Continue posting on social media.** Don't just ask for money in your posts. Show donors how your organization makes a difference and how their donation enables you to do even more. Share that because of the grants and prizes offered on giving day, their gift can farther on the giving day than it might other times of the year.

During the Giving Day (noon to noon, June 26–27)

- ❑ **Using the email drafts you've created ahead of time, send at least three emails throughout the 24 hours to supporters.** Include specific actions of what they can do, (ex: donate, like your nonprofit page on Facebook, tell 5 friends to donate, tweet a link to our nonprofit page, etc.)
 - ❑ Remind them of your overall goal and update them on your fundraising progress.
 - ❑ Share if your organization has a match or is going after a specific grant or prize. If you meet your match or if the CFNRV informs you that you've won a prize, let your donors know!
- ❑ **Utilize social media to cheer on and thank donors** with status updates in real-time.
- ❑ **Watch the leaderboards to see how your organization is doing.** If you have a strategy to try to win a power hour, you can let your supporters how many more donations you need to win by looking at who is ahead of you. Or you might unexpectedly find your organization in the running to win something!
- ❑ **Take photos of your team and at events.** We love to see you in your GiveLocalNRV shirts and at your events! Send the photos to the CFNRV and you might see them on our social media pages or in our publications.
- ❑ **Reach out to the CFNRV and Mightycause for assistance.** The team at Mightycause will be monitoring support requests for the full 24 hours of the event and will be the best ones to reach out to about technical issues with the website or donations. But don't hesitate to reach out to the CFNRV team!
- ❑ **Add all offline donations to the system by noon on June 27.** We do not allow any offline donations to be added to the system after this deadline. See page 1 for more details about offline donations.

- ❑ **Wait for the CFNRV to announce the winners of the grants and prizes.** Often the competition for these incentives puts a few organizations in the running to win. Wait to hear from our team before your organization announces that you've won something.

The Day After the Giving Day

- ❑ **Announce your successes** on social media and your website.
 - ❑ After the CFNRV team confirms whether your team has won a grant and/or prizes, let your supporters know if they helped you win something.
 - ❑ Share the number of donors and how much money they helped you raise.
- ❑ **Follow-up via email to announce your successes.** Don't assume your donors will hear the results of your success. Make sure to tell them and thank them for making your success possible.

July Follow-Up Steps

- ❑ **Send personalized thank you notes to donors.** We recommend, at minimum, sending written thank you notes to top donors. However, if you can, we suggest sending a written thank you note to everyone! Have your board members, volunteers, and staff members help with this task.
- ❑ **Stay in touch with your donors.** Add all donors to your database, invite them to cultivation events and/or one-on-one meetings.
- ❑ **Meet with your team to share lessons learned.** While it is fresh, write down what worked well this year, what didn't, and what you might want to do differently next year. If you noticed that something another organization that you really liked, add that to your notes to inspire you for next year!
- ❑ **Share photos from your events with the CFNRV team.** We would love to use them on our social media, our website, or in publications.
- ❑ **Fill out the giving day survey about your experiences,** including your successes, what didn't work well, and any suggestions you have for next year.
- ❑ **Share your success across your communication channels.** Regardless of whether a supporter gave or not, close the storytelling loop by sharing about how much you raised and how many people gave. And remind them once more how those funds will be used!
- ❑ **Keep your eye out for the 2025 giving day!** We will likely open registration in early 2025. The best way to learn details about the giving day is [to sign up for our monthly newsletter here on cfnrv.org](#).