

# GIVING DAY PLAYBOOK

Knight Foundation, 2013



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# Introduction:

## So You Want to Plan a Giving Day

This playbook is Knight Foundation's effort to support all community foundations interested in planning a Giving Day. It includes best practices, examples and templates from Giving Day organizers across the country in one easy-to-use guide.

The playbook is divided into four sections: Planning, Outreach, Day-Of Logistics, and Follow-Up and Assessment.

The Planning section helps you set goals, define a target audience, and create a timeline, staffing plan and budget.

The Outreach section lays out, step-by-step, what you will need to do to promote the Giving Day among nonprofits, donors, matching funders, community partners, and the media.

The Day-Of Logistics section walks you through what to expect on the big day and how to spend your time during those critical 24 hours.

The Follow-Up and Assessment section provides a blueprint for collecting qualitative and quantitative data to assess your impact and learn from your experience.

We hope you find this information useful when planning your Giving Day.

Good luck!

# Phase 1: Planning

*Giving Days are the culmination of hard work, partnerships between a number of stakeholders and a big, coordinated outreach effort.*

This section lays out in detail what your community foundation needs to do to begin planning for your Giving Day. We recommend that you start the process six months in advance.

Giving Days require detailed planning upfront. The greatest difference between successful and unsuccessful Giving Days is the time and thought that goes into planning. Everyone and everything moving in concert on the big day is more likely with detailed strategic planning at the outset.

## What is a Giving Day?

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A Giving Day is a powerful 24-hour online fundraising competition that unites a community around local causes. Hosted by the area's community foundation, the Giving Day raises money through a single online donation platform. A Giving Day is a great way to build community, connect donors to local nonprofits, teach organizations to use digital tools and generate excitement about your community foundation.

Here are the seven most important things you need to do well to ensure a successful Giving Day:

1. **Set explicit, measurable goals and define your target audience(s), so you know what success looks like.**
2. **Select a donation platform that is secure and user-friendly.**
3. **Create prize and match opportunities to build excitement and incentivize desired actions by donors and nonprofits.**
4. **Reach out to nonprofits to explain the Giving Day, assist them in signing up, and train them on social media, online fundraising, media outreach and other Giving Day elements.**
5. **Reach out to potential donors directly, through participating nonprofits and through the media to encourage them to contribute.**
6. **Create a Giving Day "headquarters" to manage the big day.**
7. **Follow up with nonprofits, donors, sponsors and other community partners after the Giving Day to say thank you and evaluate their experience.**

For an in-depth look at how to run a successful Giving Day, check out this Case Foundation report on ["How Giving Contests Can Strengthen Nonprofits and Communities."](#)

## Setting Goals

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The most important first step is to articulate your goals for the Giving Day. Explicit, measurable goals provide strategic clarity about what you are trying to achieve. Goal setting will also enable you to determine whether your Giving Day is meeting your expectations.

### **1. What do you want to accomplish?**

Goal setting should be tailored to your community foundation's circumstances. The money raised

from a Giving Day is important, but it may not be the only goal you set for yourself. Below are five sample goal frameworks to consider, depending on your overall Giving Day objectives.

If your general goal is to:	An explicit, measurable goal might be:
Grow community giving	Increase total amount donated on Giving Day by 25%
Democratize community giving	Engage 500+ donors to make a contribution on the Giving Day
Engage a donor segment that is new to the community foundation	Engage 50+ members of new donor segment to make a contribution on the Giving Day
Expand public profile of community foundation	Generate 25+ media mentions about the community foundation
Support nonprofit capacity-building	75% of participating nonprofits reporting that they built capacity through Giving Day trainings and experience

Here are four examples of Giving Days that were successful at achieving diverse goals:

- The Seattle Foundation’s [GiveBIG](#) campaign grew community giving to \$11.1 million in 2013, up 50% from the \$7.4 million raised by GiveBIG in 2012.
- The 2011 Greater Washington [Give to the Max Day](#) successfully built nonprofit capacity, with 84% of nonprofit survey respondents reporting that the trainings increased their ability to interact and fundraise online.
- The Miami Foundation’s 2012 [Give Miami Day](#) raised awareness about its new Nonprofit Central platform in the nonprofit community, with more than 260 organizations now registered on the site.
- The Park City Community Foundation’s [Live PC Give PC](#) campaign has created ongoing engagement between the foundation and the community by participating in local events and remaining active on social media.

## 2. What structure makes the most sense given your goal?

Giving Days can have a variety of structures. Some are not single days but are multi-day, -week or -month campaigns. Here are other ways in which Giving Day structures often differ:

- Some are “stand-alone” efforts, while others are connected to statewide or national campaigns.
- Some are open to the entire nonprofit community, while others are intended for a certain segment of nonprofits only.
- Some charge nonprofits to sign up, while most allow nonprofits to participate for free.
- Most focus on online profiles of nonprofits, while others integrate printed giving guides.
- Some solicit contributions from a broad cross-section of donors, while others focus on specific donor segments.
- Some community foundations cover donation processing fees, while others essentially pass those costs on to the nonprofits.

Another major distinction to keep in mind is that if you are using Razoo, all contributions made on

the Giving Day website will run through the Razoo Foundation, which will in turn send checks to the intended nonprofits. If you are using another platform, you will need to determine whether contribution processing will be done by the platform or by the community foundation.

There is no single ideal structure for a Giving Day. Rather, the proper structure is a function of your goals. For instance:

If your goal is to:	You might:
Increase the total number of Giving Day donors	Choose a structure that provides few barriers to nonprofit or donor participation
Support nonprofit capacity-building	Limit participation to nonprofits that most need the help and/or place a large emphasis on training and support
Expand the community foundation's profile by maximizing media attention	Want the buzz of a one day campaign rather than a longer campaign - and prefer to benefit from the broader awareness of a statewide or national campaign

### 3. Who is your target audience?

You may think that your target audience is "everyone." However, many Giving Days smartly narrow the focus to certain nonprofit and/or donor segments. Nonprofit segments might include organizations with budgets under a certain size, groups working on certain issues or groups located in a particular part of your community. Donor segments might include young donors, donors with a certain capacity level or donors with a history of supporting a particular issue.

Even if your Giving Day is open to everyone, fundraising and marketing research demonstrates that specifically targeting who you are going after - and tailoring your messaging to those audiences - is generally more effective at motivating desired behaviors than mass communications and outreach. Again, your target audience(s) should be dictated by your Giving Day's goals. For instance:

If your goal is to:	You might:
Increase giving to nonprofits from new donors	Encourage nonprofit participants to focus their outreach on donors who have not previously given to them
Raise money for basic social services in the community	Narrow your nonprofit participants to organizations that provide such services

[Click here](#) to learn more about targeting nonprofits. [Click here](#) to learn more about targeting donors.

### 4. How can you use the Giving Day to benefit your community foundation?

Giving Days can provide a series of benefits to the broader community, but explicitly considering how the campaign will benefit the community foundation is important. Here are some possible approaches:

- **Raise awareness about the community foundation among target audiences by putting your brand and a simple message about the community foundation on the Giving Day website and in every Giving Day communication.**

- **Build new relationships with major funders in the community through Giving Day sponsorship outreach.**
- **Find prospective new donor advised fund holders by following up with donors who demonstrate the needed capacity on the Giving Day (i.e. if your DAF minimum is \$5,000, reach out to donors who give a total of \$5,000 or more on the Giving Day).**
- **Position the community foundation as a capacity-builder for nonprofits by providing them robust training and support in preparation for the Giving Day.**
- **Use the Giving Day to incentivize desired actions by nonprofits. For instance, if you have a DonorEdge or Nonprofit Central database, you might utilize the Giving Day to encourage nonprofits to complete their profiles.**
- **Create other innovative programs to engage Giving Day donors in between the annual Giving Days.**

You might also consider focusing your Giving Day around raising money for a specific community foundation fund or listing a fund as one of the projects that donors could support during the Giving Day. If you pursue the latter, just remember that it would require the community foundation to compete for funds with participating nonprofits, which may cause some sensitivities. You would also need to follow your own advice to participating nonprofits about how to build excitement and effectively raise money on the Giving Day.

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## Staffing

Giving Days require significant staff time and energy. How you staff your Giving Day, however, will depend a great deal on the size and scope of what you are planning. You should expect two-five staff members to each devote about 10-15 hours per week to Giving Day preparation in the six months leading up to the big day, with that number doubling to 20-30 hours per week about two weeks out. In the final two-three days before the Giving Day and on the day itself, you should expect these staff members to devote all of their time to the Giving Day. We have created this [Staffing Plan Template](#) to help you plan appropriately.

Your board members can also be valuable resources by getting the word out, recruiting donors or doing TV and radio interviews on the Giving Day.

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## Timeline

Creating a timeline will help you stay on track with the major tasks that need to be completed for the Giving Day. Here is a [Sample Six-Month Planning Timeline](#) to help you get started. You can also use these checklists for what to do [six months out](#), [five months out](#), [four months out](#), [three months out](#), [two months out](#), [one month out](#), and one [week out](#) from the Giving Day.

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## Workplan

Creating a detailed workplan can help you align your staffing plan with your timeline. Here is a [Sample Workplan](#) from GiveMN that you can use as an example.

## Budget

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Establish a budget early in the planning process to understand how much the Giving Day will cost and how you will allocate your resources. Your budget will likely range from approximately \$12,000 on the low end to \$75,000 on the high end, not including staff salaries or credit card fees (which some community foundations choose to cover). The biggest variable will be your prize and match pool, which can be as little as \$5,000 or as high as \$50,000 (or more). This [Sample Budget Template](#) provides a more detailed expense breakdown and can be used as a template to start your Giving Day budget.

In running your Giving Day you will incur expenses that will likely make the campaign a net loss from a pure dollars and cents perspective. While we think there are strong benefits to the Giving Day beyond just the money, there are a few things you might do to ensure that the Giving Day is revenue-neutral or -positive for future years (aside from the staff time you invest). For example, you can:

- **Secure sponsors, like local banks and companies, to help cover the costs of donation processing fees.**
- **Secure pro bono PR and/or media support to reduce or eliminate those costs from your budget.**
- **Ask donors, when they are making their donations online, to consider adding a few more dollars to cover the costs of donation processing fees, which your community foundation might otherwise have to absorb.**

## Technology

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There are a variety of online fundraising platforms you can use to support your Giving Day. Each of them varies in their user interface, pricing and customer service. We use [Razoo](#) as the primary donation platform example throughout this playbook. Razoo's platform and support services are effective and user-friendly, and [this helpful video](#) will provide you an introduction to the platform. Be sure to watch the video so you are familiar with how Razoo works and understand how to resolve any problems that might arise.

If you are using another provider or are developing your own proprietary platform, be sure to familiarize yourself with how it operates.

## Matching Funds and Prizes

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Prize and match incentives build excitement and can be used to encourage particular actions by donors and nonprofits. This [Prize and Match Incentive Options Table](#) explains different prize and match incentive options, their pros and cons and which Giving Day goals they align with. Here is an example of an award structure used by another community foundation: [Sample Awards Structure \(Give to the Max Day: Greater Washington\)](#). To help you identify potential sponsors of prize and match funds, use this [Finding Prize and Match Funders Template](#).

# Communications

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Effective communications will drive donor and nonprofit participation in the campaign. Start your communications planning early so that you are able to attract attention and build excitement around your Giving Day. Below are some questions you will want to address while planning.

- Who are the **target audiences** for your communications?
- What are your **key messages**?
- What **communications channels** will you use?
- What communications assets do you currently have (e.g. media relationships, existing collateral, etc.)?
- Do you plan to hire a public relations firm, communications consultant or ad agency to assist with media outreach, messaging or branding?
- What is the timeline for your communications?

We have created this [Communications Calendar Template](#) to help you strategically prepare and schedule your Giving Day communications. Here are two examples of communications calendars from other Giving Days:

- [Sample Communications Calendar \(GiveMN\)](#)
- [Sample Communications Calendar \(The Miami Foundation\)](#)

# Metrics

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Tracking metrics will enable you to judge the success of your Giving Day. Determine what metrics you will track - and how - during the planning phase so that your evaluation plan is built into your Giving Day from the start. Use this [Metrics Tracking Overview](#) to determine which metrics your community foundation should track on the Giving Day. Analyze these metrics in the context of your **goals** and **target audience(s)** to understand how successful your Giving Day was.

# Resource Bank and Checklists

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- [How Giving Contests Can Strengthen Nonprofits and Communities](#) (Case Foundation)
- [Sample Six-Month Planning Timeline](#) (original)
- [Staffing Plan Template](#) (original)
- [Sample Workplan](#) (GiveMN)
- [Sample Budget Template](#) (original)
- Introduction to Razoo Video (Razoo)\*
- Razoo Giving Day Playbook (Razoo)\*
- [Prize and Match Incentive Options Table](#) (original)
- [Sample Awards Structure](#) (Give to the Max Day: Greater Washington)
- [Finding Prize and Match Funders Template](#) (original)
- [Communications Calendar Template](#) (original)
- [Sample Communications Calendar](#) (GiveMN)
- [Sample Communications Calendar](#) (The Miami Foundation)
- [Metrics Tracking Overview](#) (original)

# Planning Checklists

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- [\*\*Giving Day Planning Checklist\*\*](#)
- [\*\*6 Months Out Checklist\*\*](#)
- [\*\*5 Months Out Checklist\*\*](#)
- [\*\*4 Months Out Checklist\*\*](#)
- [\*\*3 Months Out Checklist\*\*](#)
- [\*\*2 Months Out Checklist\*\*](#)
- [\*\*1 Months Out Checklist\*\*](#)
- [\*\*1 Week Out Checklist\*\*](#)



# Phase 2: Outreach

*Once you have started planning your Giving Day, it is time to work on outreach.*

Engaging your community of nonprofits, donors, matching funders, strategic partners and media partners will allow you to start building momentum. Each of these stakeholder groups will help you spread the word and get the entire community excited and primed to participate in the Giving Day.

## Nonprofits

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### Articulating the Value Proposition

While some nonprofits may be eager to jump on the bandwagon and immediately sign up to participate in your Giving Day, there are others that will need some convincing. When doing your initial outreach to nonprofits here are a few talking points that can help make the case for their participation:

- Online giving is increasing in popularity with [year over year increases of around 13%](#). In fact, since 2009 most of the nonprofit sector has seen double-digit growth in online fundraising. Giving Days help introduce and reinforce new giving behaviors that can help lead to greater year-round giving.
- 
- Although [online giving only accounts for about 8% of total giving](#) it's an important channel for more than just raising funds. The social web is a great way to raise awareness and grow a network of supporters.
- 
- Reaching younger donors can be difficult. However, younger donors will be more likely to give during a Giving Day if they know their smaller dollars will be matched and lead toward greater impact.
- Giving Days capitalize on a moment in time (a day, a week, a month) and bring energy and momentum to a particular cause or organization. The competitive nature of a Giving Day also empowers individuals to use their peer influence to engage other donors who may not already know about an organization's work.
- Participating in a Giving Day can raise a nonprofit's public image considerably and expand its circle of supporters beyond the usual suspects.
- No matter an organization's size or budget, an online Giving Day levels the playing field by giving organizations of all shapes and sizes the ability to compete.
- For an even more detailed assessment of how one Giving Day helped strengthen the nonprofit community in Washington, DC, check out the Case Foundation's report profiling Give to the Max DC, [How Giving Contests Can Strengthen Nonprofits and Communities](#).

## Getting the Word Out

You need strong nonprofit participation in your Giving Day for the effort to be successful. What follows are some tips and resources to help you engage nonprofits and invite them into your foundation's Giving Day.

### 1) Make Participation Easy, Simple and Fun

Having a clear, direct call to action for nonprofit organizations is important. Remember, many nonprofits will be well into their fundraising year, and if they don't see their participation as an easy lift, they won't be likely to invest their energy, time and resources into the Giving Day.

### 2) Be Clear About the Incentives

While incentives for participation in a Giving Day will vary, gathering momentum early and explaining the benefits for the nonprofit are important. Are you planning to match donations dollar for dollar? Are you incentivizing organizations based on the number of donors rather than the dollars raised? Do you have other daily or hourly challenges you hope to embed into the Giving Day? Whatever the case, make the incentives clear and easy to understand. The Seattle Foundation's [Give Big provides a screencast](#) that details their "stretch pool" incentive fund, and you can learn more about matching options in the playbook [here](#) and [here](#).

### 3) Be Transparent About How You Will Track Success

Make the Giving Day as open and transparent a process as possible. If you are going to provide incentives to the top three organizations who raise the most or have the most individual donors, make sure that nonprofits can track their standings in real time throughout the Giving Day through a leaderboard or other similar system.

## Setting Expectations and Getting Started

Nonprofits should ask themselves a few key questions before entering a Giving Day. You may wish to pose the following questions to nonprofits at the outset:

- **What does Giving Day success look like for your organization? Is it about raising dollars, cultivating new donors or some combination of the two?**
- Do you have the bandwidth (staff time and resources) to compete right now?
- Do you have enough community members who will volunteer to reach out to their friends and family?
- Will your participation in the Giving Day help you grow a network of people who you can educate and engage about your issues after the Giving Day is over?
- How does the Giving Day fit into your overall fundraising plan for the year?

You should meaningfully engage nonprofits from the outset. They should understand the full breadth of the Giving Day, including what's expected of them as well as what they can expect of you as the convener of the Giving Day. The Idaho Community Foundation created this [Memorandum Of Understanding Between the Community Foundation and Participating Nonprofits](#) that identifies the roles and responsibilities of both parties and could be a good model to incorporate into your own practice. We've also tried to pull out some of the key responsibilities that you and your nonprofit partners should consider:

### Responsibilities of Community Foundation

- Seek sponsors for grants and prizes
- Create a common message and brand for your Giving Day
- Provide a Nonprofit Toolkit with resources for nonprofits

- Provide training sessions to prepare nonprofits for the Giving Day
- Serve as the liaison between nonprofits and the donation platform (Razoo)
- Raise awareness in the community and generate media buzz about the event
- Work with local media and businesses to get the word out
- Inform donors via ongoing correspondence (newsletters, events, social media, etc.)
- Highlight participating nonprofits on Facebook and Twitter
- Use websites to spread the word about the Giving Day
- Offer ongoing support to nonprofits through open office hours or other email/phone technical assistance

### **Responsibilities of participating nonprofits**

- Attend training sessions
- Create a profile page for your organization on the Giving Day website
- Post Giving Day link on your website
- Set a fundraising goal and publicize that goal to your stakeholders
- Seek out matching grant funds
- Identify a volunteer, board member or supporter to be a fundraiser for your organization
- Broadcast news about the Giving Day using existing communication vehicles
- Use social media to publicize your participation in the Giving Day
- Send thank you notes to your donors

Once you have a basic understanding of one another's role, it's time to help your nonprofit partners sign up and get started. Here are a few easy ways to do that:

1. **Explain how a nonprofit should register its organization on your donation platform. Razoo has created a [Step-By-Step Guide to Help Nonprofits Register](#).**
2. **If you plan to certify the nonprofits as participants in your Giving Day, note that during the registration process, so that they know when they can expect to hear back that they have been approved to participate.**
3. **Once an organization is in the system, it needs to understand how to set up and claim its profile. Again, Razoo provides some helpful advice in its [Step-By-Step Guide to Help Nonprofits Register](#).**

### **Training**

Once nonprofits have registered to participate, you can provide them with the necessary tools for success. For many nonprofits, this may be their first foray into structured or competitive online giving, so for them, the Giving Day may be as much about introducing and experimenting with new social platforms as it is about raising money and awareness.

Put yourself in the shoes of the nonprofit and think about the key elements that would help prepare you to participate in the Giving Day. Many community foundations have found that developing webinars, in-person trainings and other toolkits and resources go a long way in supporting their nonprofit partners. Here are some possible avenues for providing Giving Day learning and training to participating nonprofits:

- **Host in-person training events leading up to the day**
- **Schedule a series of webinars to dive deeper into content and platform**
- **Send weekly emails to participating nonprofits with updates about the Giving Day along with new tips and tools**
- **Maintain a blog with informational updates and educational material**

**Training Resources and Templates.** There's no shortage of nonprofit toolkits out there that will help set up your nonprofit partners for Giving Day success. Here are a few such toolkits that will help serve as a content guide as you begin to develop your own.

- [Nonprofit Toolkit](#) (GiveMN)
- [Nonprofit Toolkit](#) (Kentucky Gives)
- [Nonprofit Toolkit](#) (Colorado Gives)

Here are a few things you may want to cover as you develop your training:

- **Staffing.** Nonprofits should select a staff member or volunteer as point person for the entirety of the challenge who has strong leadership and organizational skills and can commit to the entire campaign timeline and process. The time required to do this job well will vary significantly depending on how the nonprofit plans on approaching the Giving Day. You can forward this [Nonprofit Staffing Plan Template](#) to help nonprofits determine their staffing needs.
- **Using Technology.** As mentioned earlier in [Registration and Profile Setup](#) there are some easy steps to help nonprofits use the Razoo platform, but many will want some additional guidance on online communication and outreach, especially with regard to social media strategy.
- **Strategies for Matching Funds.** In addition to match incentives for all participating nonprofits, Razoo enables individual nonprofits to implement a match incentive for donations to their organization. Current major donors are the best place for a nonprofit to start looking for a funder to provide a matching grant. Make sure that your nonprofit partners know this is an option and encourage them to reach out to board members, annual fund supporters or even businesses that love their cause. Razoo has step-by-step directions here on [how to incorporate a match into a Giving Day](#).
- **Marketing to Potential Donors.** Getting the word out in a clear and compelling way to potential donors is crucial to the success of the Giving Day. Make sure you equip nonprofits with all of the [tools and messaging](#) they will need to get this right.

## Providing Collateral Materials and Other Resources

In addition to the nonprofit trainings and webinars, you may want to consider supporting participating nonprofits by:

- **Building a brand.** Provide organizations with downloadable icons, banners and other images that can be shared on their websites and campaign materials so that the Giving Day brand is getting out to the community in every way possible. Take a look at how some other organizations like [DoMore24](#), [GiveMN](#), and [North Texas Giving Day](#) have done this.
- **Providing customizable emails, letters to the editor and other communications.** The Community Foundation of North Florida created some great [Customizable Messaging for their Find. Learn. Give. Campaign](#), and much more can be found here in the **Media Outreach** [INTERNAL LINK TO OUTREACH/MEDIA] section of this playbook. Here are some helpful sample outreach emails from nonprofits to donors:
  - [Email Template](#) (GiveMN)
  - [Email Template](#) (Give BIG Lexington)
  - [Email Template](#) (Live PC Give PC)
- **Creating videos.** This North Texas Giving Day [promotional video](#) and [Buckner International's video](#) are great examples of how community foundations and nonprofits can use video to strengthen their Giving Day marketing.
- **Using Social Media.** Help organizations understand how to leverage all of their social

media assets. Here are some good sample social media resources from [Georgia Gives Day](#), [Colorado Gives](#), and the [Kentucky Gives Day](#).

## **Nonprofit Outreach Resource Bank**

- [How Giving Contests Can Strengthen Nonprofits and Communities](#) (The Case Foundation)
- [Screencast Explaining Matching and Prize Pool](#) (GiveBIG: The Seattle Foundation)
- [Memorandum Of Understanding Between the Community Foundation and Participating Nonprofits](#) (Idaho Gives)
- [Step-By-Step Guide to Help Nonprofits Register](#) (Razoo)
- [Nonprofit Staffing Plan Template](#) (original)
- [Incorporating Matching Grants](#) (Razoo)
- [Nonprofit Toolkit](#) (GiveMN)
- [Nonprofit Toolkit](#) (Kentucky Gives)
- [Nonprofit Toolkit](#) (Colorado Gives)
- [Nonprofit Toolkit](#) (Give BIG Lexington)
- [Getting Started For Nonprofits](#) (GiveMN)
- [Brand Kit](#) (DoMore24)
- [Brand Kit](#) (GiveMN)
- [Brand Kit](#) (North Texas Community Foundation)
- [Customizable Messaging to Nonprofits](#) (Community Foundation of North Florida)
- [Email Template](#) (GiveMN)
- [Email Template](#) (Give BIG Lexington)
- [Email Template](#) (Live PC Give PC)
- [Three Reasons Why Storytelling is So Powerfully Persuasive](#) (Razoo)
- [Sample Community Foundation Giving Day Promotional Video](#) (North Texas Community Foundation)
- [Sample Community Foundation Giving Day Promotional Video](#) (GiveMN)
- [Sample Community Foundation Giving Day Promotional Video](#) (Colorado Gives Day)
- [Giving Day Public Service Announcement Video](#) (GiveMN)
- [Sample Nonprofit Promotional Video](#) (Buckner International)
- [Social Media Toolkit](#) (Georgia Gives Day)
- [Social Media Toolkit](#) (Colorado Gives Day)
- [Social Media Toolkit](#) (Kentucky Gives Day)
- [16 Tips for a Successful Giving Day](#) (The Case Foundation)
- [The Amazing Raise Strategies for Success](#) (GiveRichmond)

## **Nonprofit Outreach Checklist**

- [Nonprofit Outreach Checklist](#)

## **Donor, Matching Funder, and Community Partner Resource Bank**

- [Prize and Matching Incentive Table](#) (original)
- [Team Fundraising on Razoo FAQ](#) (Razoo)
- [Internet and Multichannel Giving Benchmarking Report](#) (Blackbaud)
- [Nonprofit Staffing Plan Template](#) (original)\*
- [Making the Most of your Online Event Fundraising](#) (Blackbaud)
- [Understanding Online Donors](#) (First Giving)
- [Millennial Impact Report - How Millennials Connect, Involve, Give](#) (Achieve)
- [How Nonprofit Fundraising Performed in 2012](#) (Blackbaud)
- [Instructions for Nonprofits Promoting Matching Funds](#) (original)

- [Business Partner Checklist](#) (Idaho Gives)
- [Sample Email to Community Partners](#) (Georgia Gives Day)

## General Outreach Resource Bank

- [Media Outreach Template](#) (original)
- [Sample Media Toolkit](#) (Greater Washington: Give to the Max Day)
- [Sample Media Toolkit](#) (Idaho Gives)
- [Sample Press Kit](#) (Georgia Gives Day)
- [Sample Press Outreach Email](#) (Georgia Gives Day)
- [8 Tips for Writing a Great Press Release](#) (Huffington Post)
- [Sample Press Release: Announcing Day](#) (Chattahoochee Valley)
- [Sample Press Release: Announcing Day](#) (GiveMN)
- [Press Release Template for Nonprofits](#) (Colorado Gives)
- [Tips for Op-Ed Writing](#) (The Op-Ed Project)
- [Sample Op-Ed \(Blue Grass Community Foundation\)](#)
- [Sample Letter to the Editor](#) (Blue Grass Community Foundation)
- [Letter to the Editor Template](#) (GiveMN)
- [Letter to the Editor Template](#) (Live PC Give PC)
- [How to Chose an Advertising Agency](#) (Inc.com)
- [Newsletter Template](#) (Live PC Give PC)
- [Sample Public Service Announcement Video](#) (GiveMN)
- [Sample Public Service Announcement Video](#) (Give Miami Day)
- [Sample Public Service Announcement Video](#) (North Texas Giving Day)
- [Public Service Announcement Template](#) (GiveMN)
- [Sample Giving Day Website: Give to the Max Day](#) (GiveMN)
- [Sample Giving Day Website: Give Miami Day](#) (The Miami Foundation)
- [Sample Giving Day Website: Colorado Gives Day](#) (Colorado Gives)
- [Sample FAQs](#) (Give BIG Lexington)
- [Sample FAQs](#) (Georgia Gives Day)
- [Sample FAQs](#) (Idaho Gives)
- [Sample Donor FAQs](#) (Colorado Gives)
- [Sample Nonprofit FAQs](#) (Colorado Gives)
- [Donor FAQ Template](#) (original)
- [Nonprofit FAQ Template](#) (original)
- [Blog Content Calendar Template](#) (original)
- [Sample Giving Day Blog: Colorado Gives Day](#) (Colorado Gives)
- [Sample Giving Day Blog: Give to the Max Day](#) (GiveMN)
- [Tips for Building Community Through Social Media](#) (Razoo)
- [Using Social Media to Get the Most Out of the Giving Day](#) (Colorado Gives)
- [Using Social Media to Raise More Money](#) (GiveMN)
- [Sample Facebook Page: GiveBIG](#) (The Seattle Foundation)
- [Sample Facebook Page: Give to the Max Day](#) (Greater Washington)
- [How Nonprofits Can Maximize Engagement on Facebook](#) (Mashable)
- [Sample Twitter Profile: Give to the Max Day](#) (GiveMN)
- [Sample Twitter Profile: GiveBIG](#) (The Seattle Foundation)
- [Sample Twitter Profile: Colorado Gives Day](#) (Colorado Gives)
- [Twenty Tips for Using Twitter as Part of Your Community Engagement Process](#) (Bang the Table)
- [Storytelling and Social Fundraising](#) (Razoo)
- [Social Media Tips](#) (DoMore24)

- [Getting Started and Using Facebook](#) (Give BIG Lexington)
- [Getting Started and Using Twitter](#) (Give BIG Lexington)
- [Social Media Guidelines and Sample Copy](#) (Colorado Gives)
- [Sample Social Media Content Calendar](#) (DoMore24)
- [Social Media Content Calendar Template](#) (original)

## Donors

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A Giving Day affords you an opportunity to expand your outreach to the entire community of potential donors. Each donor will come to the Giving Day with different interests and motivations, but past Giving Days have been successful connecting with donors by pitching the Giving Day as a way for donors to:

- **Make their community a better place and make a local investment**
- **Find nonprofits that are making a difference in their community**
- **Leverage their donation to increase the impact of their gift**

### Whom to Target

Think about all of the potential donors who are already a part of your network. They might include existing fund holders, prospective fund holders and people on your general outreach and mailing list. A Giving Day is about building community, and encouraging everyone across the community to see themselves as individual philanthropists in this effort is important.

Given your stated Giving Day [goal](#), you want to target a specific donor demographic. For instance, if your goal is to grow your community's young donor base, you should target your marketing (messaging, channels, etc.) to reach and engage next gen donors.

### How to Give

Getting engaged and giving to a cause they care about must be easy for potential donors. Donors will fall into two categories. The first are those who come to the Giving Day site with a specific organization they'd like to support. The second type of donor will come without a specific organization in mind but likely an issue or area of focus about which they are passionate.

Navigating to a cause they want to support should be easy for donors. Here are the five steps that donors should be able to easily take in order to make a donation on the Giving Day:

1. **Search for a nonprofit (or a specific issue) they want to support**
2. **Enter their profile information and payment preference**
3. **Choose their level of support (dollar amount)**
4. **Press submit and receive payment confirmation**
5. **Have the option to share with their network (via email, Twitter, Facebook or other social media). Remember to have these messages ready to send in the moment. Encourage donors to customize their message(s) to their network. Remember, people give to people, so this personalization can make a real difference.**

## Communicating Fees

Running a Giving Day costs money. Communication of donation processing fees associated with running a Giving Day should be transparent and forthcoming about what the fees are and how they are being used. Clear explanations should be included in the [Nonprofit FAQs](#) and [Donor FAQs](#). Given that nonprofits will often be the primary point of communication about the Giving Day to donors, you should work directly with participating nonprofits so they are able to explain the fees to their network.

Some community foundations provide donors an option to give an additional sum to cover the donation processing fees. Many donors are willing to cover these costs if they understand why the fees exist and how they are assessed.

## Communicating Prize and Match Incentives

Many donors choose to give during a Giving Day because they are influenced by the presence of prize and matching funds. Be clear about how much in prize and matching dollars will be available and how these funds will be awarded. Descriptions of the most common prizes and matches can be found in the [Prize and Matching Incentive Table](#).

## Team Fundraising

Some nonprofits find that creating a team giving site is an even more compelling way to bring a lot of individual donors into the action. Razoo makes team fundraising easy and helps nonprofits stay organized even when there are a number of individuals collectively fundraising for their organization. If you want to learn more, check out this [FAQ on Team Fundraising on Razoo](#).

## General Online Giving Tips

There's a lot of great information out there about trends and best practices in online giving. To make your life a bit easier, we've compiled some of the best resources:

- [Making the Most of your Online Event Fundraising](#) (Blackbaud)
- [Understanding Online Donors](#) (First Giving)
- [Millennial Impact Report - How Millennials Connect, Involve, Give](#) (Achieve)
- [How Nonprofit Fundraising Performed in 2012](#) (Blackbaud)

## Prize and Match Funders

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Prizes and matching funds are key to the success of a Giving Day. One of the most common reasons that individuals choose to participate in a Giving Day is because they know that a prize or match will enable their contributions to go further. Therefore, lining up prize and match funders early in the planning process is central to a Giving Day's overall success.

Once you've decided on your [prize or match incentive structure](#), look to find prize and match sponsors with a shared vision of promoting philanthropy in your community. Other Giving Days have found support from:

- **Local banks and the local business community**
- **Local United Way Chapters**
- **Local private foundations**
- **Local experts who are willing to donate training or services**

### **How to set up a prize or matching fund:**

- **Start by talking with prize and match sponsors as early as possible**
- **Work with prize and match sponsors to create a prize that appeals to their audience**
- **Once you have an agreement, make sure to refine messaging to clearly communicate the prize or match to donors**

As the Giving Day organizer, you should develop the initial prize or matching fund pool to incentivize nonprofit participation. In addition, you should also encourage participating nonprofits to solicit matching funds for their own organizations, to increase the incentive for their donors to give on the Giving Day. Some nonprofits have had great Giving Day success by finding a major donor or donors willing to match donations to their specific organization on the Giving Day 1:1, distinct from community foundation-raised match funds that apply to all donations on the Giving Day platform.

Nonprofits that successfully recruit a matching donor for the Giving Day should promote the match through your donation platform. If you are using Razoo, you should have the nonprofit [follow these instructions](#).

## **Engaging Community Partners**

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Think about the diverse makeup of your community – who are the community leaders and influencers who can help spread the word?

If you can figure out appropriate ways to engage those members of your community with significant networks (on and offline), you can significantly amplify your message. Partners and influencers can help you reach more people because of the trusted relationships they have already built.

Here are some tips for engaging potential community partners:

**1. Get the right champions on board!** Here are some of the people you should try to reach, but get creative.

- **Mayors and other elected officials**
- **College and university presidents**
- **Business and civic leaders with high profiles**
- **Local celebrities (chefs, musicians, everyone’s favorite barista)**
- **Local TV, radio or other media personalities**

Once you’ve identified who you want to invite to participate, connect with them in person, by email or through social channels. Here’s an example of an [outreach email](#) that Georgia Gives Day used to recruit potential community partners.

**2. Once you get their attention, give them something to do.** This could be as simple as leveraging their existing social media networks by providing some short messages and content they can help push out or inviting them to record a promotional video for the campaign. Idaho Gives provided a terrific [Business Partner Checklist](#) with ideas for participation from local private sector companies. This could include anything from setting up a giving station in their stores for customers to donate on the Giving Day to challenging another local business to raise more money.

**3. Give them the tools to make getting involved easy.** Compile and share a simple packet of

materials about your Giving Day with your local champions. You should include a variety of content, including a one-page overview of the Giving Day, descriptions of any prizes/matches to be awarded on the Giving Day, a list (and profiles) of participating nonprofits and any other compelling information that these influencers might find useful when spreading the word about the Giving Day.

**4. Follow up, follow up, follow up.** Your outreach doesn't end once you have them on board. Continue to follow up with these influencers as the Giving Day gets closer. Depending on the degree of their expressed interest, you should consider contacting them one month, one week and two days out from the event. The purpose of this contact is to remind them about the Giving Day, answer any questions they have, volunteer to help with any requests for information and to see if you can provide any additional materials.

## Communications and Media

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Leveraging your networks is absolutely necessary to build momentum for your Giving Day. The broadest buzz and general community excitement, however, will result from a comprehensive and effective media strategy. You'll need to engage the community through social media, reach out to and partner with local media, distribute compelling content that will generate earned media and possibly even consider a paid media campaign.

### Online and Social Media

The most common (and potentially effective) method of communication for your Giving Day is online and social media. If used correctly, your website, blog, Facebook page and Twitter account have the potential to reach a large population, circulate dynamic content and engage the community in meaningful dialogue to help build your Giving Day.

**Website:** In general, you want to keep your Giving Day website simple and user-friendly. Important components include a clear call to action (i.e., "Give now"), an easy way to learn more about the day in general and information about participating nonprofits (search functionality is important). Including a countdown clock prior to the Giving Day and a progress tracker once the Giving Day begins is a great way to build and demonstrate momentum. Targeted multimedia, including a short video and a few compelling pictures, can substantially increase user engagement. If you are using Razoo, you will be able to use its established web template, which includes all of the recommended components. To get an idea of how to set up your Giving Day website, check out the following examples:

- [GiveMN: Give to the Max Day](#)
- [The Miami Foundation: Give Miami Day](#)
- [Colorado Gives: Colorado Gives Day](#)

**FAQs:** Creating a Frequently Asked Questions document is a great way to provide answers to common nonprofit and donor questions. These should be readily accessible through your Giving Day website. To get started, use the [Donor FAQ Template](#) and [Nonprofit FAQ Template](#) and add additional questions and answers as you spend more time with various constituencies and hear their concerns. Here are some good FAQ examples:

- [Give BIG Lexington FAQs](#)
- [Georgia Gives Day](#)
- [Idaho Gives](#)

- [Colorado Gives \(donors\)](#)
- [Colorado Gives \(nonprofits\)](#)

**Blog:** Some community foundations have used their existing blog or created a specific blog to promote their Giving Day and highlight interesting participating nonprofits and projects. This can be a great way to generate new content to share with the community.

Possible blog post topics include:

- **Reflection on the success of the previous year's Giving Day**
- **Challenging the community to meet a certain Giving Day goal**
- **What you can learn from other cities' Giving Day successes**
- **How to promote your nonprofit in preparation for the Giving Day**
- **How the community foundation can support your nonprofit in preparing for the Giving Day**

Sample Giving Day blogs:

- [Colorado Gives: Colorado Gives Day](#)
- [GiveMN: Give to the Max Day](#)
- 

Two points of caution: 1) blogs can take a lot of time to maintain and keep fresh, and a stale, out-of-date blog can negatively impact public perception and excitement; and 2) blog readership is rarely generated simply from good content. If you are going to promote the Giving Day through a blog, make sure you can commit sufficient staff time to maintain the blog and have a strategy for promoting the blog through strategic distribution partners and social channels.

Use the [Blog Content Calendar Template](#) to develop a content strategy ahead of launching the blog. Make sure to space out blog posts and target specific audiences through the posts.

**Social Media:** Regardless of your previous experience with social media, you can and should strategically utilize Facebook, Twitter and, where appropriate, other social media channels to spread the word about your Giving Day. Getting started on social media can be intimidating, but with a little practice you can be up and running in no time. This [general social media webinar](#) and this [Giving Day-specific social media webinar](#) are great places to begin. For more targeted tips on how to raise money using social media, watch this [webinar from GiveMN](#).

Facebook and Twitter are the two most used social sites for Giving Days. Both are simple and straightforward to use, but the two networks operate with important differences.

Your Facebook audience is likely comprised of people with whom you have some offline relationship. This means that Facebook posts tend to carry more weight and can be used to strengthen the core community and deepen community excitement. Before getting started, check out some sample Giving Day Facebook pages:

- [The Seattle Foundation: Give Big](#)
- [Greater Washington: Give to the Max Day](#)

Read this article for some general tips about [how to use Facebook as a community engagement tool](#). Here are some Giving-Day specific tips for [Getting Started and Using Facebook](#).

Your Twitter audience, on the other hand, tends to be people interested in the content of your posts.

Given this substantive relationship, you should use Twitter to grow your community, provide basic information and engage in the general community-wide discussion about the Giving Day and related topics. Actively following users tweeting about relevant topics and following hashtag conversations are great ways to broaden your community and engage in the larger conversation. Before getting started, check out some sample Giving Day Twitter profiles:

- [GiveMN: Give to the Max Day](#)
- [The Seattle Foundation: GiveBig](#)
- [Colorado Gives](#)

Check out this article for some general tips about [how to use Twitter as a community engagement tool](#). Here are some Giving Day-specific tips for [Getting Started and Using Twitter](#).

If you're looking for guidance on social media content, here are some [sample Facebook posts and tweets](#). You can also schedule your posts and tweets by downloading the [Social Media Calendar Content Template](#).

## Earned Media

If you're like most community foundations, financial resources are scarce. Earning media attention before and during the event allows you to promote your Giving Day and grow your community foundation's brand for free. A little investment of time, energy and creativity has the potential to lead to substantial attention and increased community excitement about your upcoming Giving Day.

Earned media is the result of good outreach and working relationships with the local media and compelling content.

## Media Outreach

Media outreach isn't rocket science. Here are a few simple guidelines for local media outreach and relationship building:

- 1) Use the [Media Outreach Template](#) to make a list of the mainstream and alternative media outlets that might be interested in covering the Giving Day. Think about daily and weekly print newspapers, magazines, radio stations and TV stations. Also consider new media sources such as online newspapers, blogs, and social media outlets. (four-six months out)
- 2) Identify the journalists at each media source who report on philanthropy, nonprofits, civic engagement and/or local events. Capture their contact information on the [Media Outreach Template](#). (four-six months out)
- 3) Create a Media Toolkit with information about the Giving Day. This Toolkit can be repurposed from the packet compiled for [community partners](#). These sample media toolkits from [Give to the Max Day](#) and [Idaho Gives](#) should help you get started. (three-four months out)
- 4) Send an email to each reporter, introducing yourself and pitching the Giving Day (or a specific component of the Giving Day if you think the reporter will be more interested in a particular aspect). Keep the email short and to the point and be sure to offer to meet with the reporter in person or by phone to provide more details about the Giving Day. Attach the Giving Day Media Toolkit to the email. See this [Sample Media Outreach Email](#) for sample text.
- 5) Continue to follow up with the media as the Giving Day gets closer. Depending on your relationship with the media outlet and the degree of its expressed interest, you should consider contacting it one month, one week and two days out from the event. The purpose of this contact is to remind them about the Giving Day, volunteer to help with any requests

for information and to see if you can help connect them with interview subjects.

## Creating Compelling Content

Reporters are busy and are being pulled in numerous directions at any given time, so providing them with clear, compelling content is important. Here are a few easy ways to get the word out:

- **Press releases** should be used to convey the simple, newsworthy Giving Day messages that will get the attention of a reporter. For instance, press releases work well to launch the Giving Day, announce the commitment of major partners and publicly report outcomes. Check out [this article](#) for tips on how to craft a strong press release.
- **Op-eds** should be used by thought leaders, such as your community foundation CEO, to offer his or her persuasive Giving Day perspective. This can be a great way to challenge the community to meet an audacious goal. Check out [this post](#) for tips on how to compose a compelling op-ed.
- **Letters to the editor** should be used by community members to comment on the Giving Day. You can be particularly effective at mobilizing targeted communities by soliciting specific community leaders to send letters to the editor calling for participation in the Giving Day. GiveMN produced [this resource](#) with advice about how to write letters to the editor in support of Give to the Max Day.

Some community foundations choose to hire a communications consultant or PR firm - or manage to bring them on pro bono - to help with earned media strategy and outreach.

## Paid Media

If earning media attention is difficult or insufficient, you may want to consider budgeting for a paid media campaign. Most community foundations have opted not to invest in paid media for two reasons: 1) their Giving Day budgets are too small to make a meaningful investment; or 2) their time and energy are better spent building buzz through their networks and/or generating earned media.

If you choose to invest in a media buy, consider partnering with an ad agency to develop compelling advertisements geared to your target demographic and place the ads in the spots with the highest return on investment. While more expensive, this professional support should make the media buy far more effective. Check out this article for tips on [selecting an ad agency](#).

As with other external technical experts, explore the possibility of working with an ad agency pro bono. By offering sponsorship recognition or other non-monetary benefits, you may be able to partner with an ad agency without breaking the bank.

Remember, developing and implementing a marketing campaign takes time, so make sure to start these conversations at least four months in advance of the Giving Day.

## Resource Bank and Checklists

### Nonprofit Outreach Resource Bank

- [How Giving Contests Can Strengthen Nonprofits and Communities](#) (The Case Foundation)
- [Screencast Explaining Matching and Prize Pool](#) (GiveBIG: The Seattle Foundation)
- [Memorandum Of Understanding Between the Community Foundation and Participating Nonprofits](#) (Idaho Gives)
- [Step-By-Step Guide to Help Nonprofits Register](#) (Razoo)
- [Nonprofit Staffing Plan Template](#) (original)
- [Incorporating Matching Grants](#) (Razoo)
- [Nonprofit Toolkit](#) (GiveMN)
- [Nonprofit Toolkit](#) (Kentucky Gives)
- [Nonprofit Toolkit](#) (Colorado Gives)
- [Nonprofit Toolkit](#) (Give BIG Lexington)
- [Getting Started For Nonprofits](#) (GiveMN)
- [Brand Kit](#) (DoMore24)
- [Brand Kit](#) (GiveMN)
- [Brand Kit](#) (North Texas Community Foundation)
- [Customizable Messaging to Nonprofits](#) (Community Foundation of North Florida)
- [Email Template](#) (GiveMN)
- [Email Template](#) (Give BIG Lexington)
- [Email Template](#) (Live PC Give PC)
- [Three Reasons Why Storytelling is So Powerfully Persuasive](#) (Razoo)
- [Sample Community Foundation Giving Day Promotional Video](#) (North Texas Community Foundation)
- [Sample Community Foundation Giving Day Promotional Video](#) (GiveMN)
- [Sample Community Foundation Giving Day Promotional Video](#) (Colorado Gives Day)
- [Giving Day Public Service Announcement Video](#) (GiveMN)
- [Sample Nonprofit Promotional Video](#) (Buckner International)
- [Social Media Toolkit](#) (Georgia Gives Day)
- [Social Media Toolkit](#) (Colorado Gives Day)
- [Social Media Toolkit](#) (Kentucky Gives Day)
- [16 Tips for a Successful Giving Day](#) (The Case Foundation)
- [The Amazing Raise Strategies for Success](#) (GiveRichmond)

### Nonprofit Outreach Checklist

- [Nonprofit Outreach Checklist](#)

### Donor, Matching Funder, and Community Partner Resource Bank

- [Prize and Matching Incentive Table](#) (original)
- [Team Fundraising on Razoo FAQ](#) (Razoo)
- [Internet and Multichannel Giving Benchmarking Report](#) (Blackbaud)
- [Nonprofit Staffing Plan Template](#) (original)\*
- [Making the Most of your Online Event Fundraising](#) (Blackbaud)
- [Understanding Online Donors](#) (First Giving)
- [Millennial Impact Report - How Millennials Connect, Involve, Give](#) (Achieve)
- [How Nonprofit Fundraising Performed in 2012](#) (Blackbaud)
- [Instructions for Nonprofits Promoting Matching Funds](#) (original)
- [Business Partner Checklist](#) (Idaho Gives)
- [Sample Email to Community Partners](#) (Georgia Gives Day)

## General Outreach Resource Bank

- [Media Outreach Template](#) (original)
- [Sample Media Toolkit](#) (Greater Washington: Give to the Max Day)
- [Sample Media Toolkit](#) (Idaho Gives)
- [Sample Press Kit](#) (Georgia Gives Day)
- [Sample Press Outreach Email](#) (Georgia Gives Day)
- [8 Tips for Writing a Great Press Release](#) (Huffington Post)
- [Sample Press Release: Announcing Day](#) (Chattahoochee Valley)
- [Sample Press Release: Announcing Day](#) (GiveMN)
- [Press Release Template for Nonprofits](#) (Colorado Gives)
- [Tips for Op-Ed Writing](#) (The Op-Ed Project)
- [Sample Op-Ed \(Blue Grass Community Foundation\)](#)
- [Sample Letter to the Editor](#) (Blue Grass Community Foundation)
- [Letter to the Editor Template](#) (GiveMN)
- [Letter to the Editor Template](#) (Live PC Give PC)
- [How to Chose an Advertising Agency](#) (Inc.com)
- [Newsletter Template](#) (Live PC Give PC)
- [Sample Public Service Announcement Video](#) (GiveMN)
- [Sample Public Service Announcement Video](#) (Give Miami Day)
- [Sample Public Service Announcement Video](#) (North Texas Giving Day)
- [Public Service Announcement Template](#) (GiveMN)
- [Sample Giving Day Website: Give to the Max Day](#) (GiveMN)
- [Sample Giving Day Website: Give Miami Day](#) (The Miami Foundation)
- [Sample Giving Day Website: Colorado Gives Day](#) (Colorado Gives)
- [Sample FAQs](#) (Give BIG Lexington)
- [Sample FAQs](#) (Georgia Gives Day)
- [Sample FAQs](#) (Idaho Gives)
- [Sample Donor FAQs](#) (Colorado Gives)
- [Sample Nonprofit FAQs](#) (Colorado Gives)
- [Donor FAQ Template](#) (original)
- [Nonprofit FAQ Template](#) (original)
- [Blog Content Calendar Template](#) (original)
- [Sample Giving Day Blog: Colorado Gives Day](#) (Colorado Gives)
- [Sample Giving Day Blog: Give to the Max Day](#) (GiveMN)
- [Tips for Building Community Through Social Media](#) (Razoo)
- [Using Social Media to Get the Most Out of the Giving Day](#) (Colorado Gives)
- [Using Social Media to Raise More Money](#) (GiveMN)
- [Sample Facebook Page: GiveBIG](#) (The Seattle Foundation)
- [Sample Facebook Page: Give to the Max Day](#) (Greater Washington)
- [How Nonprofits Can Maximize Engagement on Facebook](#) (Mashable)
- [Sample Twitter Profile: Give to the Max Day](#) (GiveMN)
- [Sample Twitter Profile: GiveBIG](#) (The Seattle Foundation)
- [Sample Twitter Profile: Colorado Gives Day](#) (Colorado Gives)
- [Twenty Tips for Using Twitter as Part of Your Community Engagement Process](#) (Bang the Table)
- [Storytelling and Social Fundraising](#) (Razoo)
- [Social Media Tips](#) (DoMore24)
- [Getting Started and Using Facebook](#) (Give BIG Lexington)
- [Getting Started and Using Twitter](#) (Give BIG Lexington)
- [Social Media Guidelines and Sample Copy](#) (Colorado Gives)
- [Sample Social Media Content Calendar](#) (DoMore24)
- [Social Media Content Calendar Template](#) (original)



# Phase 3: Day-Of Logistics

*When the Giving Day arrives, be prepared for a thrilling, chaotic and memorable day!*

This section guides you through what to expect on the big day and how to spend your time during those critical 24 hours.

## What to Expect

The Giving Day will be fast-paced, frenzied and exciting. Even though much of the action will be happening virtually, your job is to operate the command center that enables everything to run smoothly.

Your main objectives throughout the day are to promote the Giving Day relentlessly on all channels, reach out to key partners (e.g. community partners and select nonprofits), track data to understand what is happening on the site, respond to questions and deal with issues as they arise and recognize participants (e.g. prize winners) through social media.

Because you are working online, some things will inevitably go wrong. Review these common [technology issues](#) and [payment processing issues](#) in advance so you're prepared in the event of a problem. Talk to your donation platform ahead of time about a contingency plan in case the site goes down. Have a representative from the platform in the office with you throughout much of the Giving Day.

Here is a [24-Hour Timeline](#) to help you plan for the big day.

## Building Excitement

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Here are some strategies for building excitement on the Giving Day:

### **Strategies for Building Buzz**

You have been building buzz for the Giving Day over many months, but the final days - and the Giving Day itself - matter most. Here are three strategies for building buzz on the big day:

- **Local media.** Giving Day leaders (i.e. community foundation leaders, sponsors, community partners and key nonprofit leaders) should do interviews on TV and radio during prime time. Get yourself out there early and often!
- **Events.** Build excitement among donors and nonprofits by hosting or having Giving Day leaders show up at events throughout the Giving Day, such as a happy hour celebration with prize drawings for donors, a lunch or tour at a participating nonprofit or a toast at the community foundation during the final minutes of the day. Don't try to throw a big gala - low-budget events that require minimal staff time can be quite successful. See [Live PC Give PC's Hosting a Party Tips](#) for ideas on how to throw an effective event.
- **Social media.** Use social media to push out key messages (e.g. reminders to participate, reminders about prize and match incentives), recognize prize winners and thank donors.
- **Social sharing.** Include social media links on the Giving Day site to allow people to share information easily. Donors should also be prompted to promote the Giving Day to their social networks after making a donation, with pre-populated but customizable language they can use to email, Tweet or post on Facebook. This social sharing functionality is built

into Razoo, but you will need to create the messaging for it.

### **Strategies for Engaging Partners**

Your Giving Day partners (including media partners, sponsors, community partners and participating nonprofits) are an important way to spread the word virally about the Giving Day. Be sure to remind them what you need them to do:

- **One week out:** Send list of day-of promotional activities they can engage in, ensure that all partners have key talking points and messaging and encourage all partners to highlight the Giving Day on their websites.
- **One-two days out:** Call your highest-priority partners to talk through how the Giving Day will work one final time and to remind them to promote it.
- **Day-of:** Send an email first thing in the morning to all partners with a final reminder, an inspirational message and a name/phone number/email address for the person they should call with any questions.

## **Staff Roles**

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You will need staff coverage for the entire 24-hour period, starting at midnight, so your Day-Of staff plan should have your team working in shifts during the off-peak hours; during the peak hours of 8 a.m.-6 p.m., your whole team should be in the office. You can also bring in board members and other volunteers to help out. Make sure to have coffee, water and food on hand to keep the team replenished (ordering a few pizzas for lunch couldn't hurt!).

All of your staff members should change their voicemails to direct callers to the FAQs on the website. Staff members should be able to answer general questions about the Giving Day, but you should divide certain tasks among different staff members.

### **Receptionists**

All incoming calls should be routed through a central line so that individual phones are not ringing off the hook. One or two people should serve as receptionists, fielding incoming calls and referring them to the appropriate staff or directing callers to the FAQs on the website.

### **Donor Support**

Your donor support staff will be responsible for:

- **Responding to questions from donors by phone and email, including those routed through nonprofits**
- **Referring technical questions or issues to the appropriate staff or donation platform representative and ensuring responsiveness to inquiring donors**
- **Providing responses to donor inquiries referred by communications staff**
- **Communicating with donors to let them know when their donation wins a prize for the nonprofit they supported**
- **Responding to donor refund requests**

See the [Sample Donor FAQs](#) for frequent donor questions and check out the common [technology issues](#) and [payment processing issues](#) to better understand the challenges donors may run into on the Giving Day.

### **Nonprofit Support**

Your nonprofit support staff will be responsible for:

- Responding to questions from nonprofits by phone and email
- Referring donor-initiated nonprofit questions to the Donor Support staff
- Referring technical questions or issues to the appropriate staff or vendor and ensuring responsiveness to inquiring nonprofits
- Providing responses to nonprofit inquiries referred by communications staff
- Tracking prize winners and communicating with winning organizations

See the [Sample Nonprofit FAQs](#) for frequent donor questions and check out the common [technology issues](#) and [payment processing issues](#) to better understand the challenges nonprofits may run into on the Giving Day.

### **Community Outreach**

Your community outreach staff will be responsible for:

- **Checking in with key partners throughout the day to answer questions, get a feel for what is happening on the ground and encourage continued promotion**
- **Referring questions or issues from media partners to communications staff**

### **Communications**

Your communications staff, communications consultant and/or PR firm will be responsible for:

- **Sending emails to general email list and media outreach list announcing the start of the Giving Day**
- **Sending an update email to media outreach list late in the Giving Day**
- **Coordinating media appearances for Giving Day leaders**
- **Promoting Giving Day events to local media**
- **Responding to questions or issues from media partners**
- **Responding to media inquiries**
- **Promoting the Giving Day on social media, recognizing prize winners and thanking donors on social media**
- **Referring donor inquiries to Donor Support staff and nonprofit inquiries to Nonprofit Support staff**
- **Ensuring community foundation website reflects that the Giving Day is live**

### **Tech Support**

Most donation platforms such as Razoo have support staff on call to directly address technical issues that donors and nonprofits run into, so you don't need to assign someone to this task. But have a representative from the platform in the office with you throughout much of the Giving Day to ensure speedy resolution of issues that arise. If you are using a platform that does not provide direct assistance to donors and nonprofits, you will need to assign two staff members to monitor site data to identify potential issues, field questions and issues referred by donor and nonprofit support staff and to liaise with the donation platform to resolve problems.

## Technology Issues

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Regardless of the donation platform, certain technology issues are common on Giving Days due to the nature of working online. Recognizing them in advance will help you better prepare to deal with them when they arise. These issues include:

- **Site crashing: Heavy site traffic can often overwhelm servers.**
- **Payment processing: Donations sometimes fail or do not seem to go through.**
- **Bad hyperlinks: Given the number of links on a website, some are bound to be broken or take people to the wrong pages.**
- **Leaderboard delay: Donations do not always show up immediately in leaderboard calculations.**
- **Registration bugs: On platforms where donors can or must create an account, they sometimes have issues registering on the site. Nonprofits also frequently have difficulty registering in the lead-up to the Giving Day.**

If one of these issues arises, do not panic. Be sure to immediately contact your tech support, who should be on standby all day. Again, have a representative from the platform in the office with you throughout much of the Giving Day, as he/she should be able to fix each of these problems. If you are managing your Giving Day site internally, make sure you have a staff member with the technical skill to handle such issues. The objective is to be timely and courteous in dealing with technology issues, particularly since this is a prime moment of direct interaction between the community foundation and the donors.

Talk to your donation platform ahead of time about a contingency plan in case the site goes down. If your site crashes, send a pre-drafted email to participating nonprofits alerting them the site is down and saying that it will be fixed quickly. You should also update your social media accounts to inform the broader community. When your site is back up, use email and social media to announce that people can start donating again.

## Communications

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The overwhelming majority of your energy on the actual Giving Day should be used to get your community engaged. You should be diligent about staying on top of your day-of communications to-do list. This [Day-Of Communications Checklist](#) provides a list of earned media, social media and community engagement tasks that you should do on the Giving Day.

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# Processing Payments

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## **Common Issues**

During payment processing, the issues that arise are technical and non-technical. Here are some common issues:

- **Donors are sometimes confused about where to make their contributions, particularly if they are not used to giving online**
- **Donors often accidentally contribute the wrong amount and seek a refund**
- **Donations sometimes fail or do not seem to go through**
- **Donations do not always show up immediately in leaderboard calculations**

If one of these issues arises, do not panic. Your donor support staff should be prepared to help resolve the donor's problem or to refer technical issues to your donation platform representative. Review the [Donor FAQ Template](#) for information on common issues and other questions that may arise.

## **Accounting**

If you are using a donation platform such as Razoo, all contribution accounting will be automatically tracked by the platform, which should be able to give you real-time updates and/or read-only access to an administrative portion of the website. This information will enable you to see data on each contribution, aggregate donation levels, a donation list for each nonprofit, a donation list for each donor and a list of prize and match winners. If you are managing your Giving Day site internally, make sure you are able to track the necessary information about Giving Day contributions, including name, amount, recipient nonprofit and time of each donation.

## **Reporting**

If you are using a donation platform such as Razoo, all of the contribution reporting will be done automatically. Each donor will receive an automatically generated receipt to the email address entered during the transactions process. Talk to Razoo ahead of time to discuss the text for the automatically generated email and ensure that it informs donors how the contribution will appear on their credit card. (This receipt does not preclude the community foundation and participating nonprofits from thanking donors for their gifts. See [Thanking Donors](#)).

## **Sending Checks to Nonprofits**

Depending on the platform you have chosen, responsibility for sending checks to nonprofits will rest either with the platform or with your community foundation.

- **For instance, if you are using Razoo, donations made on the Giving Day site are technically contributions to the Razoo Foundation, a registered 501(c)(3) public charity that operates a donor advised fund, which in turn sends checks to the intended nonprofits. Donations are re-granted by Razoo Foundation around the 10th of each month. Nonprofits will receive one check for all contributions made on the Giving Day, minus the 4.9% transaction fees.**
- **Some platforms, including custom-built ones, enable Giving Day contributions to flow through the community foundation - meaning that donations made on the Giving Day are technically contributions to the community foundation, which in turn sends checks to the intended nonprofits. If your community foundation is re-granting the funds, be sure to communicate with participating nonprofits about when they should expect to receive the donations, how many checks they should expect to receive and any transaction fees that will be deducted from their winnings.**

# Reporting Progress

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An important way to continue the excitement and generate more donations throughout the Giving Day is to report regularly - to participating nonprofits, donors, Giving Day partners and sponsors, the media and the community at large - on the Giving Day's progress.

## **Tracking Data**

If you are using a donation platform such as Razoo, all relevant data will be tracked by the platform. Participating nonprofits will be able to see a list of their donations when they log in to their account, and this information should update in real-time (see [Razoo How To: Tracking Donations](#)). If you are managing your Giving Day site internally, make sure you are able to track the necessary data about Giving Day contributions.

## **Talking Points**

Below are some suggested topics that your Giving Day progress reporting might cover throughout the day to build momentum and excitement. Make sure all of your updates are enthusiastic!

- Report how much has been raised
- Report how many donors are participating
- Recognize prize winners and highlight upcoming prizes
- Do a mini-feature on a participating nonprofit, explaining its work and how contributions to it will make an impact
- Do a mini-feature on a participating donor, explaining his or her motivation for giving

## **Strategies for Disseminating Progress Updates Through Earned Media**

- Do interviews on TV and radio during afternoon rush hour and evening prime time
- Host and/or attend creative events throughout the day to garner media attention
- Send an update email to your media outreach list late in the Giving Day (e.g. around 5 or 6 p.m.)
- Send a press release to media list at the end of the day (see [Seattle Foundation Give Big Press Release](#)). While this may not impact the Giving Day itself, it will help continue the energy and excitement about the day and set it up for further success in future years

## **Strategies for Disseminating Progress Updates Through Social Media**

- Promote key messages throughout the day on all social media channels
- Share pictures from Giving Day events and participating nonprofits
- Share infographics picturing Giving Day results
- Share complimentary quotes from donors
- Share thank you messages from participating nonprofits
- Report how much has been raised
  - Sample Tweet: [GiveBIG \(Seattle Foundation\)](#)
  - Sample Facebook Post: [Georgia Gives Day](#)
- Report how many donors are participating
  - Sample Tweet: [GiveOUT Day](#)
  - Sample Facebook Post: [Give Local Now](#)
- Recognize prize winners
  - Sample Tweet: [Idaho Gives](#)
  - Sample Facebook Post: [GiveMN](#)

# Thanking Donors

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Thanking donors promptly is crucial because it displays gratitude, continues donors' positive association with the Giving Day and is the first step in building long-term relationships.

## **Thanking Individual Donors**

Participating nonprofits should thank by email every donor who contributes to them and should also venture to thank as many donors as possible through other channels, such as phone and social media.

Community foundations should thank by email every participating donor and should thank a handful of specific donors at random through social media. Community foundations should also thank sponsors by phone, email and social media.

### Messaging

- **Use the donor's name in all thank you communications. This makes the thank you feel personal, and on social media it links your message to their social media profile, meaning that everyone who looks at the donor's Twitter or Facebook will see your message as well**
- **Nonprofits should thank donors for the specific amount of their donation; community foundations should thank donors more broadly for their generosity during the Giving Day**
- **Nonprofits should talk about the work they are empowered to do because of the donor's contribution**
- **Community foundations should put donors' contributions in the context of the Giving Day (e.g. mention the total amount raised)**
- **Nonprofits should outline one or two opportunities for continued engagement with their organization after the Giving Day; community foundations should do the same where appropriate**
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To help you thank your donors, we've provided an [Email Template for Nonprofits to Thank Donors](#) and an [Email Template for Community Foundation to Thank Donors](#). We have also included a [Sample Phone Script for Nonprofits To Thank Donors](#), [Sample Tweets and Facebook Posts](#).

## **Community-Wide Thank You**

A large community participated in your Giving Day and now you should thank them! By saying thanks you are not only showing your gratitude for their donations, but also using the opportunity to promote the success of your Giving Day. This will help continue the excitement surrounding the Giving Day and set the community's expectations for a great event again next year.

### Messaging

- **Thank everyone for participating (donating, volunteering, spreading the word)**
- **Highlight the total amount donated, the number of nonprofits and donors that participated and other metrics that will make a splash**
- **Focus on the impact that the Giving Day will have on your community**

We have provided some [Sample Tweets and Facebook Posts](#) to help you in thanking your entire community.

# Day-Of Logistics Resource Bank

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- [24-Hour Timeline](#) (original)
- [Hosting a Party Tips](#) (Live PC Give PC)
- [Sample Donor FAQs](#) (original)
- [Sample Nonprofit FAQs](#) (original)
- [Razoo How To: Tracking Donations](#) (Razoo)
- [Press Release Reporting Progress](#) (The Seattle Foundation)
- [Email Template for Nonprofits to Thank Donors](#) (original)
- [Email Template for Community Foundation to Thank Donors](#) (original)
- [Sample Phone Script for Nonprofits To Thank Donors](#) (original)
- [Sample Tweets and Facebook Posts To Thank Donors](#) (original)
- [Sample Tweets and Facebook Posts To Thank Community](#) (original)

## Day-Of Logistics Checklists

- [Day-Of Communications Checklist](#)
- [Day-Of Checklist](#)

# Phase 4: Follow-Up and Assessment

*While the heavy lifting for your Giving Day will occur during the run-up to the actual day, your work isn't quite complete.*

In order to build on your momentum, you need to take advantage of the rich data made available by engaging your entire community in the Giving Day. What you learn from analyzing the quantitative data you'll receive through your Giving Day site and the qualitative data you'll receive through surveying participating donors and nonprofits will give you an even stronger platform for launching your next Giving Day.

## Surveying Donors and Nonprofits

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Surveying participating donors and nonprofits is crucial to understanding what about your Giving Day worked and did not work. Collecting data will help you learn from your Giving Day experience and make improvements for next year. To get a sense of how other community foundations have structured their surveys, check out this [Sample Donor Survey](#) and this [Sample Nonprofit Survey](#). To help get you started, we've adapted surveys used by The Miami Foundation to create a [Donor Survey Template](#) and [Nonprofit Survey Template](#). If you opt to create your own survey, be sure to craft the survey in a way that maximizes participation and completion rates while generating useful data. Here are some [tips for crafting user surveys](#).

Host the survey online using [SurveyMonkey](#), [Qualtrics](#) or another online survey tool. You should distribute the survey as widely as possible no later than one week after your Giving Day and leave the survey open for no less than two weeks. Start by emailing all of the Giving Day donors and participating nonprofits (donors should be providing you their email when making a donation, and nonprofits should be providing you their email when registering). Consider asking participating nonprofits to circulate the donor survey to their email list. Post the survey on your website and ask your strategic partners to do the same.

You need to have enough respondents to be able to meaningfully learn from your survey. Here is a basic primer to help you [figure out the correct minimum sample size](#).

## Collecting Metrics Data

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Once the Giving Day is complete you will have the data to analyze the [metrics](#) you decided to track during the planning phase. Razoo can provide you with much of the quantitative data regarding donor demographics, giving trends, website analytics and social sharing metrics. If you are using another platform, make sure that it can provide you with all of the data that you want to analyze. This information will enable you to judge the success of your Giving Day.

## Learning From Data

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After you receive the survey responses and quantitative data, take the time to review the data with your staff. Ask the following questions:

- **What trends do you see?**
- **What worked?**
- **What didn't work as well as you wanted it to work?**
- **How can you improve the Giving Day for next year?**

Make sure to have someone from your staff take notes and save them in a folder where you will remember them when you begin planning your Giving Day the following year.

## Reporting Success Post-Giving Day

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As the Giving Day convener, you should share your success with the broader community. Beyond the day-of status updates, make sure to transparently report what happened on your Giving Day. By closing the loop, you will generate community-wide pride in the accomplishments of the Giving Day and begin building excitement for the next Giving Day.

Reporting success should be done through your social channels, email, website and the press. In reporting to Giving Day participants (nonprofits and donors) and the community-at large, you should create a healthy balance between anecdotes and hard data as your community will want to hear both. Remain professional but make sure to infuse your communications with excitement about what your community just accomplished!

To help guide you in reporting success, check out this [Sample Giving Day Website](#), [Sample Press Release](#), [Sample Facebook Posts](#), and [Sample Tweets](#).

If you are ambitious, we encourage you to provide your community with a more detailed report analyzing the overall efficacy of your Giving Day through a Giving Day Report. Here is a [Sample Giving Day Report](#) that we think is a good model.

### **Extending the Value of the Giving Day**

The benefits you accrued from the Giving Day should not end once the campaign is over. Extend the value of the Giving Day by building on the experience to support your ongoing work. Ask the following questions:

- **What did you learn about social media? Who were your most engaged social media followers and champions, and how can you keep them involved?**
- **What did you learn about your target audience? Did you identify new target audiences for increased future engagement?**
- **What new relationships with nonprofits did you form? Are there opportunities for you to build on the trainings you provided to participating groups?**
- **What media partnerships did you develop? Are there opportunities for you to continue these partnerships beyond the Giving Day?**
- **What new relationships did you form with local businesses, foundations, and other community partners? Are there opportunities for you to continue these partnerships beyond the Giving Day?**
- **What new donors did you identify who have the potential to become donor advised fund holders or major community foundation supporters? How will you follow up with them?**

# Follow Up and Assessment Resource Bank

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- [Sample Donor Survey \(GiveMN\)](#)
- [Sample Nonprofit Survey \(GiveMN\)](#)
- [Donor Survey Template \(original\)](#)
- [Nonprofit Survey Template \(original\)](#)
- [User Surveys: Do It Right or Not At All \(Man With No Blog\)](#)
- [Determining Sample Size \(Qualtrics\)](#)
- [Sample Giving Day Website \(GiveLocalNow\)](#)
- [Sample Press Release Reporting Success \(Georgia Gives Day\)](#)
- [Sample Facebook Post Reporting Success \(GiveMN\)](#)
- [Sample Tweet Reporting Success \(The Seattle Foundation\)](#)
- [Sample Giving Day Report \(GiveMN\)](#)

Follow Up and Assessment Checklist

- [Follow Up and Assessment Checklist](#)

