

CHECKLIST

Pre-Planning

1-3 Months Before Giving Day

Determine Your Main Point of Contact

- Identify your group's point of contact who will be the primary contact to receive detailed information and resources and be responsible for communicating this information to your team, members, or group.

Complete the Giving Day 2026 Participation Form by March 25, 2026

- Please have your group point of contact officially complete the [Giving Day 2026 Participation Form](#) to register your cause for Giving Day 2026. Once submitted, the group point of contact will receive detailed information and resources to help you make the most of this dynamic day of giving. Note: Every year, you must renew your registration, even if you participated in previous years' Giving Days.

Submit Photo(s) for the Giving Day Website

- Please email your cause's image(s) for the Giving Day website to givingday@sonoma.edu right after the participation form is completed. Please note the minimum image size needed is 500 pixels by 500 pixels.

Set a Fundraising Goal

- Define goal(s) for the amount you want to raise (we recommend setting a minimum goal of \$1,000 per cause).

Identify Your Contacts

- Review the Find Your People document in the toolkit for ideas of who to contact.
- Then, create a list of who to contact with their first and last name, preferred first and last name, email, and phone number. Feel free to ask your team, members, or group to add ideas too!
 - If your cause participated in Giving Day last year and you need access to your previous donor list, please email givingday@sonoma.edu to request a copy by April 9, 2026.

CHECKLIST

Marketing and Communications

Planning: February & March

Review Toolkit

- Review all Toolkit resources on the Giving Day website.

Marketing and Communications Plan

- Create a marketing and communications plan. Review the recommended marketing and communications plan below and make a copy (file > make a copy) of the checklist document so you can add your own dates, details, reminders, and check off tasks as you go!

Media Assets

- Select the media assets you want to use and develop any additional graphics with the social media templates. Review the media assets for inspiration.

Website

- Write website copy. Review the website text document for inspiration.
- Create a webpage on your cause's existing website (if applicable).

Emails

- Draft emails. Review the email text document for inspiration.

Social Media

- Identify the social media platforms your cause will use to promote Giving Day and/or team or members will use personally to help promote.
 - Draft social media posts. Review the social media text document for inspiration.

Text Messages

- Draft text messages. Review the text message document for inspiration.



CHECKLIST

Awareness Campaign: March & April

Early March

- Social media post(s) to announce save the date.

Mid-March

- Social media post(s) to share the Giving Day promotional video.
- Update your email signature line to the Giving Day signature and ask your team, members, or group to do the same. Review the email signature line document.

March 23 (One Month Before Giving Day)

- Social media post(s) to share one month out reminder.
- Send save the date email.

Beginning of April

- Call previous donors and contacts to let them know about Giving Day. Review the phone call script document.

April 9 (Two Weeks Before Giving Day)

- Social media post(s) to share two weeks out reminder.
- Send a save the date text message to your contacts.

April 16 (One Week Before Giving Day)

- Social media post(s) to share one week out reminder.
- Send one week out email.

April 22 (Day Before Giving Day)

- Social media post(s) to share one day out.
- Send the day before email.
- Send a text message to your contacts.



CHECKLIST

Participation Campaign: Giving Day!

April 23:

- Send an early morning email.
- Social media early morning post(s) to announce the kickoff.
- Send a text message early in the morning to your contacts.
- Update your email signature line to the I Gave signature and ask your team, members, or group to do the same. Review the email signature line document.
- Send an afternoon email.
- Social media afternoon post(s) to share progress, reminders, and challenges.
- Send a text message to your contacts in the afternoon or early evening.
- Send an early evening email.
- Social media post(s) to share the last chance and create urgency to give now.

Post Giving Day

Gratitude Campaign: 1 week - 1 month after

Thank Donors

- Send personalized thank you messages and share the impact by email, handwritten note, phone call, and/or text message. We recommend saying thank you in at least two different ways, such as a handwritten thank you card and email, or email and a phone call.
- Social media post(s) to share thank you and the impact.

Evaluate Campaign & Plan for the Future

- Analyze metrics of donations.
- Gather feedback from your team and identify strengths and areas for improvement.
- Document lessons learned and create lists for planning purposes for the next Giving Day.

Celebrate Success

- Share final totals and thank your team and donors!