

COMPANION WORKBOOK

The Generosity Blueprint: Aligning Storytelling, Data, and AI for GivingTuesday

GivingTuesday Europe & Salesforce · July 7, 2026

A monthly guide to help you move from July to GivingTuesday on December 1, 2026 — one useful step at a time.

JUL

AUG

SEP

OCT

NOV

DEC

The webinar covered the why. This workbook is where you plan, write, and finish your GivingTuesday campaign plan.

The monthly path

A simple route from summer preparation to celebrating on December 1.

Each month has a focus to hold onto. Do as much as feels right for your team. Even one useful step keeps you moving forward.

JULY**Know your community**

Data health check

AUGUST**Tidy + AI-ready**

Clean the basics

SEPTEMBER**Plan your campaign**

Goal, audience, story

OCTOBER**Make generosity visible**

Warm up the room

NOVEMBER**Grow your circle**

Partners + follow-up

DECEMBER**Celebrate, thank, keep close**

Have fun, celebrate on Dec 1

July worksheet: Data health check

Know your community before you invite more people in.

Map who's already close to your campaign and spot the gaps. Get to know who needs a warmer reconnection before you invite new people in.

Know what you have

Where our contact info currently lives

How confident we are in the data (low / medium / high)

Biggest gap in our data right now

Our warmest, most engaged group

People/groups who showed up last GivingTuesday

People/groups to be reconnected

Where to look for contacts checklist

- | | |
|--|--|
| ☐ CRM or donor database: check who's active or lapsed | ☐ Email inbox and sent folders: look for engaged people |
| ☐ Social media followers: note who regularly likes, comments, or shares | ☐ Event sign-up sheets: pull names from past events |
| ☐ Board members: ask who in their own networks might be worth reaching | ☐ Volunteer lists: these are people already engaged |
| ☐ Old spreadsheets: dig up contacts that may not be in your main system | ☐ Partner organisations: ask who they'd be comfortable introducing you to |

Simple signal to track

Not a headcount — how confident we feel in our contact data (low, medium, high), and whether we can already name our warmest group.

August worksheet: Clean up + segment

Tidy the basics so your campaign can move faster later.

Use this month to tidy and group your existing contacts. Do what fits your team's time and capacity, even a partial clean-up or a couple of checklist items make a real difference. The goal is a cleaner, more consistent list so later outreach can feel personal instead of generic.

What getting AI-ready means here

It simply means your information is organised enough that AI tools can help you draft, segment, plan, and personalise more easily later on.

Clean-up checklist

- ☐ Remove duplicate records
- ☐ Use one consistent format for names
- ☐ Bring key information into one place
- ☐ Mark people who need a personal follow-up
- ☐ Fix obvious spelling or email mistakes
- ☐ Use one consistent format for organisations
- ☐ Add simple relationship tags

Supporter segments cheat sheet

Segment	Who belongs here?	How might we invite them in?
Donors		
Volunteers		
Partners		
Schools		
Businesses		
Media		
Community connectors		
Quiet/not recently active		

Bonus tool: Use AI to get a head start

AI can help you build a first draft — you bring the real story, the facts, and the final judgment.

Before using any AI draft, check: does it sound like us, are the facts and numbers correct, is the impact claim honest and not overstated, is the call to action clear, do we have permission to use any story, quote, or photo, have we kept personal or sensitive supporter data out of the tool, and has a person reviewed and approved it before it goes out.

Data health check

AI can help turn messy notes into a simple summary of what you know, what you do not, and what to clean up first.

Supporter segments cheat sheet

AI can help suggest segment names and draft a first pass at what to ask each group, for you to edit.

Campaign canvas

AI can help turn a rough idea into a first-draft goal, audience, and one-line story to react to and adjust.

Story bank

AI can help organize your notes into the table format. The stories, quotes, and permissions stay real and yours.

Partner outreach tracker

AI can help draft a first invitation message you personalize before it goes to a real partner.

Follow-up checklist

AI can help draft thank-you and results messages so you are not starting from a blank page.

September worksheet: Campaign canvas

Move from “we should do something” to “this is our campaign”.

Turn a rough idea into one clear campaign goal, 2–3 audiences, and a simple story line, so everyone on your team is working from the same plan.

Our campaign goal is:

The action we want to invite is:

Our main audience(s):

Our core ask:

Our story in one line:

Channels we will use:

Key dates:

Who owns what:

Success will look like:

Ways people can take part

- ☐ Give money
- ☐ Share skills
- ☐ Thank someone
- ☐ Invite others
- ☐ Share the campaign

- ☐ Give time
- ☐ Start a collection
- ☐ Tell a story
- ☐ Partner with us
- ☐ Join an activity

September bonus: 12-week countdown tracker

Twelve short sprints beat one big scramble.

Use the weekly themes as prompts, not pressure. Each week links to GivingTuesday's official guide on that topic — choose what helps your team move and skip what does not.

September

WEEK 1 • Sep 8

Why GivingTuesday Matters

Share why generosity matters with your team before you plan messaging.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 2 • Sep 15

Know the Facts, Bust the Myths

Clear up common misconceptions with your board and volunteers early.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 3 • Sep 22

5 Essentials to Get Started

Confirm the basics are in place: goal, team, tools, timeline, story.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 4 • Sep 29

Set Your SMART Goals

Turn your goal into specific, measurable, realistic, timely targets.

[Read the guide →](#)

Owner: _____ ☐ Done

October

WEEK 5 • Oct 6

Build Your Team, Gather Tools

Recruit volunteers, activate your board, set up your giving platform.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 6 • Oct 13

Fundraise Smarter, Digitally

Set up your online giving page and test the donation flow end to end.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 7 • Oct 20

Tell Stories That Spark Action

Draft the real stories and quotes that will anchor your messaging.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 8 • Oct 27

Share Your Story With Impact

Turn stories into posts, emails, and short videos ready to schedule.

[Read the guide →](#)

Owner: _____ ☐ Done

November

WEEK 9 • Nov 3

Engage Your Community

Invite supporters, volunteers, and local partners to take part directly.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 10 • Nov 10

Grow Through Partnerships

Reach out to local businesses or aligned organizations to co-promote.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 11 • Nov 17

Final Fundraising Push

Send reminder emails and posts; make the ask clear and easy to act on.

[Read the guide →](#)

Owner: _____ ☐ Done

WEEK 12 • Nov 24

Finish Strong: Countdown Week

Confirm day-of logistics, thank-you plan, and who covers each channel.

[Read the guide →](#)

Owner: _____ ☐ Done

Good enough is useful. The goal is a rhythm your team can actually keep.

October worksheet: Build your story bank

Make generosity visible before you ask people to act.

Use this page to gather real stories, build a story bank, and begin building a draft content calendar. Refer to the AI toolkit for more support.

Story bank

Source	What happened?	Quote/detail	Photo?	Permission?	Caption idea	Use where?
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Permission reminder

Only use names, photos, quotes, or personal stories with permission. When in doubt, keep it general or anonymised.

Mini content calendar

Date	Channel	Message / story	Owner	Done
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November worksheet: Partner outreach + follow-up

Bring others in and prepare your thank-yous before December gets loud.

Work through this page to start building a partner outreach list, a mini partner pack, thank-you drafts, and a follow-up plan ready before the final rush.

Partner outreach tracker

Partner	Why them?	What we will ask	Owner	Status	Next step

Mini partner pack checklist

- | | |
|---|---|
| ☐ Short campaign explanation | ☐ Main ask |
| ☐ Social post copy | ☐ Visual / image |
| ☐ Link to campaign page | ☐ Suggested date to post |
| ☐ Contact person | ☐ Thank-you plan |

GivingTuesday worksheet: On the day

The day will move quickly. Decide the basics before it starts.

Before the day starts

- ☐ Check campaign links
- ☐ Confirm who is posting/responding
- ☐ Prepare thank-you messages
- ☐ Confirm partner posts or reminders
- ☐ Make sure tracking is ready

During the day

- ☐ Post campaign reminder
- ☐ Share progress or stories
- ☐ Thank people publicly where appropriate
- ☐ Respond to messages/comments
- ☐ Save screenshots and examples
- ☐ Track gifts, actions, or participation

After the day

- ☐ Send first thank-you
- ☐ Share a simple update
- ☐ Note what needs follow-up
- ☐ Collect stories or screenshots
- ☐ Rest if you can

Day-of tracker

Time	Action	Owner	Done
Morning			
Midday			
Afternoon			
Evening			
Next morning			

Quick numbers

Amount raised

People reached

Partners

Other

Actions taken

Volunteers

Stories

December worksheet: Celebrate, thank, keep close

Use this page to say thank you, capture what you learned, and decide who to keep close. The day ends, but the relationship doesn't.

Follow-up checklist

- ☐ Thank-you emails sent within 48 hours
- ☐ Quick results posted
- ☐ Stories/screenshots saved
- ☐ Learning note captured
- ☐ Next invitation identified
- ☐ Public thanks shared
- ☐ Partners thanked directly
- ☐ New contacts added
- ☐ Re-engagement list started

Learning prompts

What worked?

What felt harder than expected?

Who should we keep close?

What surprised us?

Who showed up?

What would we do differently next year?

Monthly planning summary

Keep the whole journey on one page.

Month	Main focus	One thing we will finish	Who holds it?	Done
July	Know your community			
August	Tidy + AI-ready			
September	Start planning your campaign			
October	Make generosity visible			
November	Grow your circle + follow-up			
December	Celebrate, thank, keep close			

Try this prompt

What is the one useful thing we can finish this month that will make next month easier?

A few principles to keep in mind as you plan your campaign

1 Start where you are

Use the contacts, stories, partners, and tools you already have.

2 Finish one useful thing

Focus on what you can realistically complete with your team and time.

3 Keep people close

Always involve your community early, thank supporters often, and share progress as you go.



You are closer than you think

A good GivingTuesday campaign does not begin with a perfect plan. It begins with noticing who is already close, choosing one clear action, inviting others in, and thanking people well.

The first person or group we will reconnect with is:
