



November Roadmap Checklist

- ☐ **Review GivingTuesday campaign and donation forms**
- ☐ **Schedule GivingTuesday emails and social posts**
- ☐ **Plan how and where to thank donors from your Charity Account**

Resources

- [GivingTuesday Resource Hub](#) - includes email templates, guides, tips, etc.
- Blog: [How to Maximize Your Fundraising Results This GivingTuesday](#)
- Social Media Templates: Sample [calendar](#) and [posts](#)

November Roadmap

Action Plan

☐ REVIEW GIVINGTUESDAY CAMPAIGN AND DONATION FORMS

A seamless donation experience is critical on GivingTuesday, when thousands of donors are giving simultaneously.

Campaign review:

- Read through your GivingTuesday campaign goal, headline, and description as if you're a donor seeing it for the first time. Is it clear what you're raising funds for, and does it compel action?
- Verify that your impact statements are concrete and measurable. Example: *"Every \$50 gift provides 10 meals"* or *"Your \$100 gift funds one week of counselling services"*.

Donation Form tests:

- Test your CanadaHelps Donation Forms on desktop and mobile to ensure the layout looks professional and matches your branding, wherever they choose to give.
- Thank-yous and CRA-compliant receipts are sent automatically after a donation is made. Ensure you've created a customized thank-you message for your CanadaHelps Donation Forms.
- Document your findings. Create a simple checklist of what you tested and note any issues that need fixing. Prioritize critical issues (form doesn't work) vs. minor ones (typo in description). Fix everything before December 1.



☐ **SCHEDULE GIVINGTUESDAY EMAILS AND SOCIAL POSTS**

Timing and consistency are everything on GivingTuesday. Donors need to hear from you multiple times – but it shouldn't feel like spam.

Email Scheduling:

- Create and schedule all GivingTuesday-specific emails. Send yourself test emails to verify formatting, links, and images display correctly.
- Plan email sends to donors for optimal times, for example: morning (6-8 AM), midday (12-1 PM), and evening (5-6 PM) on December 1.
- Create a version for each donor segment (major donors, recurring donors, lapsed donors, first-time prospects).
- Keep subject lines short (50 characters or less) so they display fully on mobile.
- Include clear calls-to-action linking to your Charity Profile campaign or donation form on website - don't make donors search for it.
- Emphasize matching gift challenges and time-sensitive giving incentives.



Social media scheduling:

- Schedule social media posts for the week leading up to GivingTuesday and all day on December 1, 2026.
- Prepare multiple post variations so the content feels fresh, not repetitive.
- Include a direct link to your donation page in every post.
- Encourage shares and tags ("Tag someone who needs to see this").
- Create a backup plan in case something breaks (have a team member on standby to post manually if needed).

[**You can find an August 2026 - January 2027 social media calendar template here.**](#)

[**And sample posts here**](#)

☐ **PLAN HOW AND WHERE TO THANK DONORS FROM YOUR CHARITY ACCOUNT**

Donor stewardship starts immediately after giving. Have a plan so nothing falls through the cracks.

- **Customize your thank-you email on CanadaHelps**
 - CanadaHelps enables you to send automated thank-you emails to your donors when they donate through your Charity Profile or Custom Donation Forms.
 - This is the email donors receive immediately after completing their donation. It's their first confirmation that their gift was received. It's an opportunity to make them feel appreciated and connected to your mission.
- **If you are sending thank-you emails via other channels, ensure the email is set up** to reach donors as soon as they donate, and include relevant information, such as the donor's name and gift amount, a link to your website or social media, etc.
- **Plan personalized follow-ups for major donors** (within 48 hours of the gift) and thank your supporter base via other channels, such as social media and the website.



KEY TAKEAWAYS FOR SUCCESS

- **Start early:** Giving season prep begins in August, not November. This longer runway gives your team time to plan, create, and optimize.
- **Use data:** Leverage CanadaHelps Giving Season Report and your metrics to make informed decisions about channel prioritization, donor segmentation, and campaign timing.
- **Segment strategically:** Not all donors are the same. Tailor your messaging and channel strategy to major donors, recurring donors, lapsed donors, and first-time prospects.
- **Emphasize different giving options:** Promote one-time giving, monthly recurring, and securities donations. The split between channels matters as you focus on growth opportunities.
- **Authentic storytelling:** Use real volunteers, staff, and beneficiaries as the faces of your organization. Persona-driven content builds trust and connection.
- **Plan for peak giving days:** Track when donors give and adjust your messaging and frequency accordingly.
- **Thank donors thoroughly:** Thank-you messages are your easiest win for donor retention. Send them quickly, personalize them, and keep thanking throughout January.
- **Analyze and iterate:** Use January to audit your campaign, document lessons learned, and plan improvements for 2027.



Best of luck with your 2026 giving season!