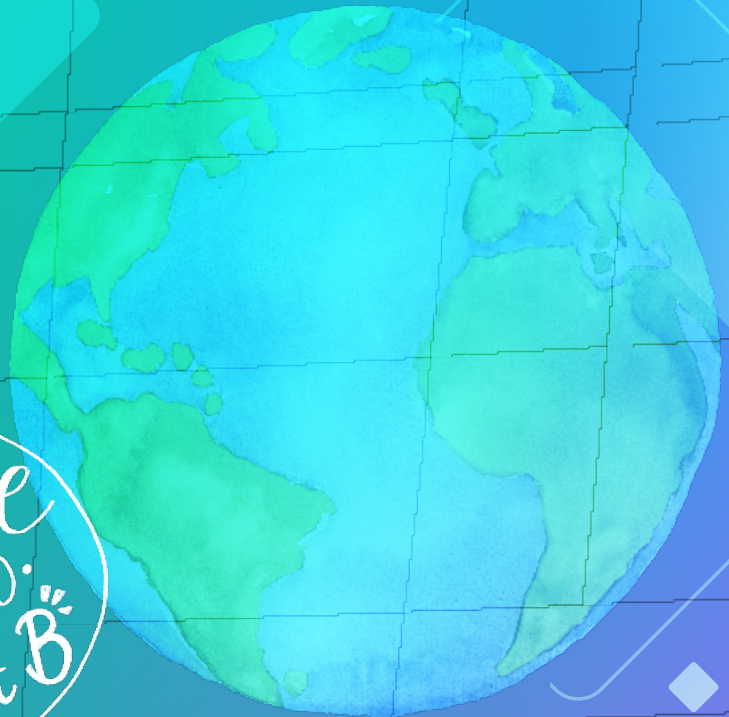


MOMENTS THAT MATTER

CHECKLIST

Planning your next campaign



there
• IS NO •
Planet B

CHECKLIST:

What to Do Before, During, and After Your Campaign

To make it even easier to prepare for a big campaign, we've crafted a checklist of things you can consider in the months or weeks leading up to the kickoff, followed by a calendar of philanthropic giving and service days.

TWO - THREE MONTHS OUT

Think globally, act locally

There are a lot of moments that matter throughout the year, but your CSR team and employees only have so much capacity to support a cause.

- What matters and what are the needs of the local communities where your employees work or where your company does business?
- How can these campaigns connect to a broader initiative within your organization?
- Can you connect these campaigns to DEI initiatives by serving underrepresented groups?
- Can you connect this campaign to the Sustainable Development Goals?

Research and find partners

Internal Partners

- Key leadership to champion the campaign
- Employee Ambassadors or Resource Groups

External Partners

- Nonprofits close to the cause or serving the location for the community you want to support.
- Your peers! If you determine the need in the community requires a resource you can't easily provide how can you partner with a nonprofit or other organization to help serve the community?

Review last year's campaign initiative and results

- How many volunteer hours or dollars donated did you reach?
- What was the employee participation rate?
- What were the favorite nonprofits or causes that your employees supported?
- What data were you missing that would have been nice to have? How can you collect that information moving forward?
- What was the impact from the campaign on the community? How can you partner with nonprofits moving forward to understand how your company made a difference?

Identify and set goals

Internal Goals

- Set yourself up for reporting success by understanding what goals you want to measure for this campaign.
- Is this campaign focused on supporting a specific cause or disaster with a limited charity list?
- Or focused on getting a high employee participation rate and open to any nonprofit organization?

External Impact Goals

- Can you work with any nonprofits to understand goals they have that your company can support? ie fundraising goals or a special skills-based project to solve a need.

Create a budget

- Consider creating a budget for a special matching gift, incentives or Causes Cards to boost employee engagement with your campaign.
- Ask your employees how they would like to be recognized for their contributions. A simple meeting or small event to congratulate and thank your employees can go a long way.

Plan your communication strategy

We have a CSR Communication Toolkit [available for download](#), but we'll highlight the key points in this checklist as well!

- Use data as a guide. Analyze your digital communications to determine the best channels or multi-channel approach to spread your message
- Think of all your employees' needs and how they may be different for new-hires, remote workers, seasonal, contract or retirees.
- Use story telling. Make sure your employees know the 'why' behind supporting this campaign. Invite your nonprofit partners to come tell their stories.
- Keep it consistent. Keep it transparent. Make it easy for all stakeholders to find the information they need.

ONE MONTH OUT

Start executing your communication plan

- Create a campaign Engagement Element in CSRconnect to keep all the details in one place.
- Consider creating a Volunteer Campaign to track volunteer events and hours and allow employees to easily search by campaign tag.
- Work with your Customer Success Manager if you are launching a special campaign.

Connect with your internal and external partners

- Schedule any training or reoccurring meetings needed with employee ambassadors, your committees, and senior leadership to keep them updated on the campaign's progress.
- Does your nonprofit partner require any training or background checks for volunteers prior to your event?

ONE WEEK OUT

- Schedule campaign kickoff announcements and meetings
- Communicate “day of” details that employees need for in-person events
- Complete final requirements and sign-offs for giving campaigns with your Customer Success Manager
- Launch your campaign in CSRconnect

LAUNCH DAY AND DURING THE CAMPAIGN

- Thank your employees for showing up
- Communicate your mission and goals again
- Communicate again where employees can find campaign details
- Schedule updates with employees and leadership so they can see campaign metrics like volunteer hours reached, dollars donated etc.
- Consider planning for employees to share their story of how they participated throughout the campaign.

AFTER CAMPAIGN

- Celebrate**
 - Take the time to celebrate with your employees and your nonprofit partners
- Collect feedback**
 - Schedule an all-employee survey to get feedback, collect stories, or allow them to drop photos from their participation during the campaign.
- Check-in with your partners**
 - Plan meetings with your internal and external partners to get feedback and document what you can work on for next year.

Conclusion: Action Steps

Here is a helpful list of action steps you can take today to be prepared for your next campaign:

- 1 Work with your team and get executive support for driving and maintaining your CSR programs
- 2 Review the calendar of giving and service days for Canada, the United Kingdom and the U.S. Check out our [online calendar](#) to see a highlight of dates throughout the year that align in each region.
- 3 Check out our [resources](#) for the role of CSR in responding to disaster. Create a disaster response plan and download our disaster response checklist.



World Wide Notable Giving and Service Days

Days of service and giving bring awareness to important issues that people don't normally think about as they go about their daily lives. So it's not just a corny wear red day or wear pink month; it is a time to come together to support one another around the world. That can look like one small act of service like posting about International Women's Day or World Suicide Prevention Day to bring awareness to these important causes.

About Blackbaud

Blackbaud unleashes the potential of the people and organizations who change the world. As the leading software provider exclusively dedicated to powering social impact, Blackbaud expands what is possible across the nonprofit and education sectors, at companies committed to social responsibility, and for individual change makers. Built specifically for fundraising, nonprofit financial management, digital giving, grantmaking, corporate social responsibility and education management, Blackbaud's essential software accelerates impact through unmatched expertise and powerful data intelligence. Millions of people across more than 100 countries connect, give, learn, and engage through Blackbaud platforms.

U.S. GIVING & SERVICE DAYS 2024

| JANUARY | FEBRUARY | MARCH |
|---|--|---|
| National Mentoring Month | Black History Month | Women's History Month |
| <ul style="list-style-type: none"> 1 World Day of Peace 4 World Braille Day 11 Nat'l Human Trafficking Awareness Day 15 MLK Day of Service 24 Int'l Day of Education | <ul style="list-style-type: none"> 1 Nat'l Freedom Day 2 Wear Red Day 4 World Cancer Day 11 Int'l Day of Women and Girls in Science 17 Random Acts of Kindness Day 20 World Day of Social Justice | <ul style="list-style-type: none"> 2 Read Across America Day 3 World Wildlife Day 8 Int'l Women's Day 15 Red Nose Day 18 Global Recycling Day 20 Int'l Day of Happiness 21 World Down Syndrome Day 22 World Water Day |
| APRIL | MAY | JUNE |
| National Volunteer Month | Asian American and Pacific Islander Heritage Month | LGBTQ+ Pride Month |
| <ul style="list-style-type: none"> 2 World Autism Awareness Day 4 Nat'l Wildlife Week 7 World Health Day 21 Nat'l Volunteer Week 22 Earth Day 24 World Immunization Week 28 World Day for Safety and Health at Work | <ul style="list-style-type: none"> 7 Nat'l Teacher Day 9 Nat'l Children's Mental Health Awareness Day 12 Women's Health Week 17 Endangered Species Day 22 Int'l Day for Biological Diversity 27 Memorial Day | <ul style="list-style-type: none"> 5 World Environment Day 8 World Oceans Day 9 Nat'l Children's Day 14 World Blood Donor Day 19 Juneteenth 20 World Refugee Day 28 Stonewall Riots Anniversary |
| JULY | AUGUST | SEPTEMBER |
| Disability Pride Month | National Immunization Month | National Hispanic Heritage Month |
| <ul style="list-style-type: none"> 1 Clean Beaches Week 3 Int'l Plastic Bag Free Day 15 World Youth Skills Day 30 Int'l Friendship Day 30 World Day against Trafficking in Persons | <ul style="list-style-type: none"> 1 Nat'l Minority Donor Awareness Day 12 Int'l Youth Day 17 Nat'l Nonprofit Day 19 World Humanitarian Day 26 Women's Equality Day | <ul style="list-style-type: none"> 5 Int'l Day of Charity 8 Int'l Literacy Day 10 World Suicide Prevention Day 20 Global Goals Week 21 Int'l Day of Peace 22 Climate Week 29 World Heart Day |
| OCTOBER | NOVEMBER | DECEMBER |
| Global Diversity Awareness Month | Native American Heritage Month | Universal Human Rights Month |
| <ul style="list-style-type: none"> 1 Int'l Day of Older Persons 2 Int'l Day of Non-Violence 4 World Animal Day 6 Nat'l Diversity Day 10 World Mental Health Day 16 World Food Day 17 Int'l Day of the Eradication of Poverty 28 Nat'l Pro Bono Week | <ul style="list-style-type: none"> 11 Veterans' Day 13 Hunger & Homelessness Awareness Week 13 World Kindness Day 15 America Recycles Day 20 World Children's Day 28 Thanksgiving | <ul style="list-style-type: none"> 1 World AIDS Day 3 Giving Tuesday 3 Int'l Day of Persons with Disabilities 5 Int'l Volunteer Day 10 Human Rights Day |

CANADA GIVING & SERVICE DAYS 2024

| JANUARY | FEBRUARY | MARCH |
|---|--|---|
| Mentoring Month | Black History Month | National Social Work Month |
| <ul style="list-style-type: none"> 1 World Day of Peace 4 World Braille Day 11 Nat'l Human Trafficking Awareness Day 15 MLK Day of Service 24 Int'l Day of Education | <ul style="list-style-type: none"> 1 Nat'l Freedom Day 4 World Cancer Day 11 Int'l Day of Women and Girls in Science 19 Family Day 20 World Day of Social Justice 28 Pink Shirt (Anti-Bullying) Day 29 Rare Disease Day | <ul style="list-style-type: none"> 3 World Wildlife Day 8 Int'l Women's Day 15 Red Nose Day 18 Global Recycling Day 20 Int'l Day of Happiness 21 World Down Syndrome Day 22 World Water Day |
| APRIL | MAY | JUNE |
| Parkinson's Awareness Month | Asian Heritage Month | National Indigenous History Month |
| <ul style="list-style-type: none"> 2 World Autism Awareness Day 7 World Health Day 7 Green Shirt Day 8 Nat'l Wildlife Week 21 Nat'l Volunteer Week 22 Earth Day 28 Nat'l Day of Mourning | <ul style="list-style-type: none"> 1 Mental Health Week 6 Nat'l Nurses Week 7 Nat'l Child & Youth Mental Health Day 17 Endangered Species Day 20 Victoria Day 22 Int'l Day for Biological Diversity | <ul style="list-style-type: none"> 1 Int'l Children's Day 1 Nat'l Health and Fitness Day 5 World Environment Day 9 Nat'l Public Service Week 20 World Refugee Day 21 Nat'l Indigenous Peoples Day 28 Int'l Pride Day |
| JULY | AUGUST | SEPTEMBER |
| Social Wellness Month | Immunization Awareness Month | Hunger Action Month |
| <ul style="list-style-type: none"> 1 Canada Day 3 Int'l Plastic Bag Free Day 5 Nat'l Injury Prevention Day 15 World Youth Skills Day 24 Int'l Self-Care Day 30 Int'l Friendship Day | <ul style="list-style-type: none"> 5 Civic Holiday 9 Nat'l Peacekeepers' Day 12 Int'l Youth Day 19 World Humanitarian Day 26 Women's Equality Day | <ul style="list-style-type: none"> 5 Int'l Day of Charity 8 Int'l Literacy Day 10 World Suicide Prevention Day 21 Int'l Day of Peace 29 World Heart Day 30 Nat'l Day for Truth and Reconciliation |
| OCTOBER | NOVEMBER | DECEMBER |
| Women's History Month | Adoption Awareness Month | Universal Human Rights Month |
| <ul style="list-style-type: none"> 1 Int'l Day of Older Persons 2 Int'l Day of Nonviolence 4 World Animal Day 10 World Mental Health Day 14 Thanksgiving 16 World Food Day 17 Int'l Day of the Eradication of Poverty 31 Nat'l UNICEF Day | <ul style="list-style-type: none"> 11 Remembrance Day 13 World Kindness Day 15 Nat'l Philanthropy Day 20 World Children's Day | <ul style="list-style-type: none"> 1 World AIDS Day 3 Giving Tuesday 3 Int'l Day of Persons with Disabilities 5 Int'l Volunteer Day 10 Human Rights Day |

U.K. GIVING & SERVICE DAYS 2024

| JANUARY | FEBRUARY | MARCH |
|---|--|--|
| National Mentoring Month | LGBTQ+ History Month | Women's History Month |
| <ul style="list-style-type: none"> 1 World Day of Peace 4 World Braille Day 11 Nat'l Human Trafficking Awareness Day 15 MLK Day of Service 24 Int'l Day of Education | <ul style="list-style-type: none"> 1 Time to Talk Day 4 World Cancer Day 5 Nat'l Apprenticeship Week 5 Race Equality Week 11 Int'l Day of Women and Girls in Science 12 Student Volunteering Week 20 World Day of Social Justice | <ul style="list-style-type: none"> 3 World Wildlife Day 8 Int'l Women's Day 15 Red Nose Day 18 Neurodiversity Celebration Week 18 Global Recycling Day 20 Int'l Day of Happiness 21 World Down Syndrome Day 22 World Day for Water |
| APRIL | MAY | JUNE |
| Autism Acceptance Month | Local & Community History Month | Pride Month |
| <ul style="list-style-type: none"> 2 World Autism Awareness Day 7 World Health Day 11 World Parkinson's Day 22 Earth Day 24 World Immunization Week 25 World Malaria Day 25 On Your Feet Britain | <ul style="list-style-type: none"> 8 World Red Cross Red Crescent Day 11 World Fair Trade Day 13 Mental Health Awareness Week 13 Foster Care Fortnight 13 Learning At Work Week 14 Children's Day 22 Int'l Day for Biological Diversity | <ul style="list-style-type: none"> 1 Volunteers' Week 5 World Environment Day 8 World Oceans Day 14 World Blood Donor Day 17 Refugee Week 17 Learning Disability Week |
| JULY | AUGUST | SEPTEMBER |
| Disability Pride Month | Happiness Happens Month | National Organic Month |
| <ul style="list-style-type: none"> 3 Int'l Plastic Bag Free Day 11 World Population Day 15 World Youth Skills Day 24 Int'l Self-Care Day 30 Int'l Friendship Day 30 World Day against Trafficking in Persons | <ul style="list-style-type: none"> 9 Day of the World's Indigenous Peoples 9 Nat'l Opportunity Day 12 Int'l Youth Day 19 World Humanitarian Day 23 World Water Week | <ul style="list-style-type: none"> 5 Int'l Day of Charity 6 Food Bank Day 8 Int'l Literacy Day 9 Fairtrade Fortnight 10 World Suicide Prevention Day 18 Int'l Equal Pay Day 23 Nat'l Inclusion Week 29 World Heart Day |
| OCTOBER | NOVEMBER | DECEMBER |
| Black History Month | Men's Health Awareness Month | Universal Human Rights Month |
| <ul style="list-style-type: none"> 1 Int'l Day of Older Persons 2 Int'l Day of Nonviolence 4 World Animal Day 10 World Mental Health Day 16 World Food Day 17 Int'l Day of the Eradication of Poverty 21 Nat'l Adoption Week | <ul style="list-style-type: none"> 4 Pro Bono Week 4 Trustees' Week 11 Remembrance Day 11 Anti-Bullying Week 13 Kindness Day 16 Int'l Day for Tolerance 20 World Children's Day | <ul style="list-style-type: none"> 1 World AIDS Day 3 Giving Tuesday 3 Int'l Day of Persons with Disabilities 5 Int'l Volunteer Day 10 Human Rights Day 26 Boxing Day |