



GUIDE TO GIVING SEASON

2023 GUIDE

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Guide to Giving Season

"Giving Tuesday" is an international day of charitable giving that typically takes place on the Tuesday following Thanksgiving in the United States. It's a day dedicated to generosity, where individuals, businesses, and organizations come together to support various causes and give back to their communities through donations, volunteering, and acts of kindness.

In this guide, we're providing you with countless examples of ways CaseWorthy and our clients and partners celebrate Giving Tuesday to inspire your own company's unique approach. Your goals on Giving Tuesday may vary depending on the type of organization you're at. For example, nonprofit organizations are likely seeking to raise funds or hold an event with volunteers on or around Giving Tuesday, while CaseWorthy would more likely donate or volunteer at such an event. In this guide, you'll find examples that can be applied to both circumstances. For nonprofits who are managing volunteers or donations, we'll touch on solutions to make that a little easier for you, too. Let's jump in!

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How CaseWorthy Celebrates Giving Season

While the official Giving Tuesday event is a specific day on the calendar, at CaseWorthy, the spirit of giving and philanthropy extends beyond that single day. As a company, we are dedicated to supporting vulnerable populations through our software and services but also with our time and resources. We're also supportive of service rendered to other causes that benefit our fellow citizens and communities. The concept of giving and contributing to the community is not limited to a 24-hour period; it's a year-round commitment to making a positive impact.



Direct Contributions

CaseWorthy allocates a dedicated budget each year for charitable giving and community support. CaseWorthy's contributions align closely with the service categories that we empower our customers to address, such as intellectual and developmental disabilities (IDD), older adults, veterans, and more.



Examples of Staff Volunteer Efforts

CaseWorthy provides an unlimited paid time off (PTO) policy, and we encourage our employees to utilize 8 hours per year during normal business hours to participate in a volunteer program that makes a difference in the community. Many of our employees are involved in year-round volunteer efforts:

14 of our staff in Florida deliver meals to homebound seniors on Tuesdays through their local Meals on Wheels organization, Aging Matters in Brevard. They rotate and take turns delivering every Tuesday during their lunch hour. It is a great opportunity to give back and to remember why we do what we do!



We regularly have opportunities to volunteer with nonprofits and agencies that provide services to people with intellectual and developmental disabilities (IDD). In May, we had 7 of our NY-based staff members volunteer with Homesteads for Hope, an inclusive community farm for individuals with and without disabilities. They spent the morning planting, watering, and staking cucumbers and summer squash alongside the farm apprentices.



Some of our Rochester, NY-based staff volunteer at events for one of our Connect clients, Empowering People's Independence (EPI) throughout the year!

- For many years, we've had staff members volunteer at or fundraise for the Chocolate Ball, which is EPI's largest annual fundraiser.
- For the past two years, we've had staff members volunteer at or run in the Seize the Day Epilepsy Trail Run!

How CaseWorthy's Clients and Partners Celebrate Giving Season

The Bowery Mission is a nonprofit that provides hot meals, overnight shelter, and faith-based residential programs for New Yorkers experiencing homelessness.

They hold a large Thanksgiving Meal at their homeless shelters – the biggest day of the year for volunteers, meals served, and donations.



Friendly Center, a nonprofit in Orange County that improves the lives of the impoverished by helping them move toward self-sufficiency, prepares Thanksgiving baskets for families that they serve. The basket includes turkey dinner items along with a gift card to purchase the meat.



Friendly Center also holds a Christmas Toy Drive and provide fresh food to families. They serve 600 families and provide toys for 1,000 children.



Volunteer Management Tools

We help make managing your volunteers simple and efficient, as it should be. CaseWorthy comes with many built-in features that can streamline your organization's volunteer intake and assignment process. Not all of your volunteers need to be used in the same jobs, so we help organize them into roles based on their skills and interests. Some of the tools we use to accomplish this include:



CaseWorthy Volunteer Portal

Using the online Portal, one of CaseWorthy's premiere features, your organization can connect with potential volunteers and get them set up in your system. Your staff can have them complete applications and background checks and fill in forms with personal information. From there, once the volunteers are approved to work, you can start assigning them to tasks that best suit them.



Calendars

Organizing volunteers takes far more detailed work than just telling them to be at a certain place at a certain time. That's why we have a sophisticated calendaring and time tracking system built into our database. You can use it and the many tools associated with it to assign volunteers to specific tasks and see what kind of progress they made during their time working.



Volunteer Tracking

Similar to how CaseWorthy can help keep track of your clients, it can also help you keep track of your volunteers, putting all their information in one place and presenting your staff with up-to-date information on their availability, work history and other essential information. It also makes communicating with them much easier, as CaseWorthy supports email and text communication.



Managing Donation Efforts



One of the features of the CaseWorthy Whole Person Care platform is the donor and contact management, which allows organizations to manage their donation efforts more efficiently and effectively.

The donor and contact management feature enables organizations to:

- Create and maintain donor profiles with detailed information such as contact information, donation history, preferences, interests, and relationships.
- Segment donors into groups based on criteria such as donation amount, frequency, type, source, and campaign.
- Communicate with donors via email, text, phone, or mail using templates and automated messages.
- Track and acknowledge donations and pledges from various sources such as online, offline, in-kind, recurring, and matching.
- Generate and send tax receipts and thank-you letters to donors.
- Analyze donor behavior and trends using reports and dashboards.

The donor and contact management feature also integrates with the campaign management feature, which allows organizations to:

- Create and manage campaigns for fundraising, awareness, advocacy, or events.
- Set goals and budgets for each campaign and track the progress and performance.
- Assign tasks and roles to staff and volunteers involved in the campaign.
- Engage and solicit donors and prospects using targeted and personalized messages.
- Monitor and evaluate the impact and outcomes of the campaign using reports and dashboards.

The CaseWorthy Whole Person Care Platform helps organizations to combine their program data and business operations into a single scalable solution. By using the platform, organizations can manage their donation efforts more effectively and efficiently, and demonstrate their proof of impact to funders and stakeholders.

To learn more about CaseWorthy's solutions for managing volunteers and donations for Giving Tuesday and year-round, [schedule a demo!](#)