Peer-to-Peer Fundraising Made Easy: A Step-by-Step Workbook

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FOREWORD

When we first began our conversations with Idealware about developing this workbook, it was clear that this was an area about which both of our organizations felt strongly. Fundraising is an essential process for nonprofits—but it's important to branch out to other appeals beyond your annual campaign.

Peer-to-peer fundraising has been a powerful tool in fundraisers' toolboxes for years, primarily through large events like walk-a-thons, races, or endurance challenges. These large fundraising events require a lot of time and resources to pull off, and that's where we at Cathexis Partners come in—but we want nonprofits of all sizes to have the ability to take advantage of this fundraising model.

With the recent surge in online peer fundraising tools, all nonprofits can now benefit from the peer-to-peer model. By moving campaigns online and making use of social media, online donations, and even personal fundraising pages, the smallest organizations can leverage the power of their communities through virtual fundraising "events."

We want nonprofits to take advantage of this model and run their own successful peer-to-peer fundraising campaigns. That's why we teamed up with Idealware—to produce this workbook to guide your organization through the whole process, start-to-finish. So read through the following pages, take a look to see if this fundraising model would be a good fit for your organization, and then use this workbook to keep all your planning in one place, year after year.

Enjoy!

Mark Becker, Founding Partner
Cathexis Partners

INTRODUCTION

Idealware and Cathexis Partners are proud to present this exciting new resource. Cover to cover, it walks you step-by-step through the design and implementation of a successful fundraising campaign that enlists your friends and professional relationships and their own networks for the benefit of your nonprofit organization.

Peer-to-peer fundraising, or friend-to-friend fundraising, isn't new. For years, organizations have engaged their supporters—everyone from staff and volunteers to program participants and current donors—to raise funds on their behalf. Traditionally these individual campaigns took the form of walk-a-thons or house parties, where supporters enlisted sponsors from their own networks of colleagues, friends, and family members, a kind of distributed fundraising sometimes called "team," "a-thon," or "social" fundraising. But peer-to-peer events have grown to include the use of online tools that let supporters participate in broader campaigns.

In fact, such tools make it easier than ever to have a successful campaign without any event at all.

This workbook will guide you step-by-step through planning and implementation your campaign. You'll start with the pre-planning process, deciding whether this type of fundraising is the right fit for your organization and determining how much money you could raise in a campaign and who should be involved in the planning process. Then you'll work through high-level planning, identifying a format, writing your organization's campaign narrative, setting your goals, and choosing the software to best help you meet those goals. From there, you'll put together the strategies to launch your campaign, which includes everything from recruiting and training your supporters to be great fundraisers to planning your big kickoff event.

Finally, you'll make a plan for what will happen after the campaign ends to make sure you follow-up with the contacts you've made and thank donors and fundraisers for their support, and to help you compare the goals you set at the beginning to the numbers you ended up with to see how well you did. You'll also start gathering ideas for your next campaign.

Peer-to-peer fundraising offers an organization's supporters an opportunity to convert their own enthusiasm for the nonprofit and its cause to dollars to help it thrive. It also offers the organization a chance to vary from the annual year-end ask or other direct campaign. While peer-to-peer campaigns can be complicated events with a lot of logistics, a little planning and a little effort can ensure they pay off.

This workbook can help. Ready to get started?

TABLE OF CONTENTS

PHASE 1: LAYING THE GROUNDWORK

In this section you'll lay the groundwork for a successful campaign, starting with determining whether or not peer-to-peer fundraising is even the right type of campaign for your organization.

WORKSHEETS

1. **How to Decide if Peer-to-Peer is Right for You**. Is it worth investing the time and energy into such a campaign? It's important to look at how much time your organization can reasonably devote to this sort of fundraising, as well as how energized your community of supporters already is. You should complete this worksheet before moving on to the rest of them.

2. **How Much Money Do You Expect to Raise?** Once you've decided that a peer-to-peer campaign makes sense for your organization, it's time to estimate how much you could expect to raise. Who in your community can you expect to fundraise for you? How many people in each of their networks would donate? How much will your fundraisers raise from each donor? This worksheet will help you answer these questions and set your overall fundraising goal.

3. **Defining Your Campaign Budget**. How much should you expect to spend to create and manage your campaign? This worksheet will help you define your costs and determine if a peer-to-peer fundraising campaign makes financial sense for your organization.

4. **Assembling Your Campaign Committee**. You shouldn't have to go through this process alone—use this worksheet to help brainstorm who from your organization, board of directors, or community of supporters has a stake in this process and might be interested in helping you plan and execute your campaign.

Complete this section before diving into the details campaign planning.

1. HOW TO DECIDE IF PEER-TO-PEER IS RIGHT FOR YOU

While many organizations have successfully run walk-a-thons or virtual peer-to-peer campaigns, this style of fundraising isn't right for everyone. As with any fundraising appeal, you need to think carefully about the return on investment you can expect to gain for the effort you'll put into the campaign–not to mention the cost. This worksheet will help you determine if this approach makes sense for your organization.

You're going to need a number of things for your campaign to be successful. Check all of the following that you know your organization can count on:

☐ Someone in your organization to be point-person

☐ A cheerleader in your community

☐ At least five supporters you can count on to fundraise

☐ The staff time needed to spend on the campaign

☐ Buy-in from your organization

If you're missing one or more of these five essentials, you may want to reconsider a peer-to-peer campaign.

While they're essential to the success of a campaign, there are many other factors that can help your chances. Take the quiz below by putting checks in the appropriate boxes to see if your organization has the right stuff for a successful peer-to-peer campaign:

> **HOW MUCH TIME SHOULD YOU SPEND ON YOUR CAMPAIGN?**
>
> The number will vary depending on the type of campaign you're running. For a basic virtual campaign, you could spend as little as 20 hours over the entire duration. But for most campaigns, expect to spend at least 10 to 20 hours per month. Holding an event will greatly increase the amount of time needed–remember, some organizations have full time staff devoted to friend-to-friend event planning.

	We don't have this at all	We might be able to get this together	We are reasonably confident we have this	This is a big strength for us
An anchor event (walk/run, volunteer day, open house, etc.)				
A mission with broad appeal (children, animals, etc.)				
Staff excitement about the campaign				
Community excitement about fundraising				
Board involvement				

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	We don't have this at all	We might be able to get this together	We are reasonably confident we have this	This is a big strength for us
A major celebration—anniversary, milestone, etc.				
An online community				
A strong volunteer community				
A tech-savvy staff				
An organizational social media presence				
Totals:				

Score your answers

Number of "We don't have this at all"   x 1 = _____

Number of "We might be able to get this together" x 2 = _____

Number of "We are reasonably confident we have this" x 3 = _____

Number of "We are reasonably confident we have this" x 4 = _____

                 Total: _____

Evaluate your answers

0 - 13	14 - 25	26+
THIS ISN'T REALLY FOR YOU	**EXPLORE FURTHER, BUT WEIGH PROS AND CONS**	**ABSOLUTELY FOR YOU**
Based on your answers, a peer-to-peer campaign might not be successful right now. Consider focusing on building up the above factors before attempting a campaign.	You have most of the factors of a successful campaign. Peer-to-peer might be right for you, but this first campaign might be a little risky.	It looks like peer-to-peer fundraising is a great match for your organization. Go for it!

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2. HOW MUCH MONEY DO YOU EXPECT TO RAISE?

In order to determine if a peer-to-peer fundraising campaign is the right fit for your organization, you'll need to get an idea of who in your community could potentially fundraise for you and how much they could possibly bring in. Unlike other fundraising appeals, raising money from a peer-to-peer campaign depends on your supporters reaching out to their own networks of friends, coworkers, and neighbors to meet both their personal goals and those of your organization.

Not all your supporters are the same. The types of fundraisers each of them is makes a world of difference in how much they can raise from their networks. Your top fundraisers will have large networks with a lot of giving capacity and a strong connection to your organization, and won't be afraid to go the extra mile.

Who are your superstar supporters? List them below, along with how much you think each could raise.

Top Fundraisers	How much can you expect them to raise? Circle one.					
	$100	$250	$500	$1,000	$5,000	Other: _____
	$100	$250	$500	$1,000	$5,000	Other: _____
	$100	$250	$500	$1,000	$5,000	Other: _____
	$100	$250	$500	$1,000	$5,000	Other: _____
	$100	$250	$500	$1,000	$5,000	Other: _____

Total $ expected =

A FUNDRAISER'S ABILITY TO RAISE FUNDS IS A COMBINATION OF...

- **Passion for supporting your organization.** Fundraising for an organization takes a lot of time and effort. A passionate supporter has greater potential to raise funds than one who is less motivated or unlikely to make the time.

- **Strength of their network.** A large, well-connected network could indicate a greater giving potential.

- **How much their network can give.** It often takes the same amount of work to get a $5 donation as a $100 donation—deeper pockets can drastically grow a fundraising total.

- **Connection to your organization.** Not only are supporters with a personal connection to you going to have more at stake by raising funds, they'll also likely to be more successful at relating your story to their networks.

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Beyond your top individual fundraisers, there is likely a whole body of potential fundraisers in your network. Your challenge is finding them. Start by thinking about prospective fundraisers as groups of individuals: Who is closely connected to your organization? Who might rally around a fundraising campaign? What groups might typically get involved in a program like this?

First, identify key groups (use the list in the box to help get started). Think through how many people might fundraise from each group and how much money you estimate the group might be able to raise in aggregate. This will help you estimate your fundraising total.

Potential Fundraising Groups	How many people in this group do you expect will fundraise?	About how much do you expect this group to raise? (Give a ballpark estimate.)

Total $ expected =

Grand Total =
(Total from your top fundraisers plus the total from your groups)

Now that you have an idea of how much you could expect your top fundraisers and other groups to raise for your campaign, you can start to reflect on whether that amount of money is likely to be enough to make your efforts worthwhile.

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3. DEFINING YOUR CAMPAIGN BUDGET

Now that you have an idea of how much you could raise from a peer-to-peer campaign, you need to determine the cost of running it. From marketing and promoting the campaign to the staff time you'll need to manage it, the incidental costs can add up quickly—it's essential to figure out ahead of time how much you'll need to spend, and to identify any materials you can get as in-kind donations or costs that might be covered by sponsors. This worksheet looks specifically at the costs for a campaign that is not built around a physical event like a walk-a-thon; if you're planning to incorporate an event into your campaign, it can bring a whole new list of expenses to consider.

First, read through the following sections and cross off any that don't apply to your campaign. Then, for the sections you keep, cross off any line items in each category that aren't applicable.

Then, for each remaining categories, fill in your best estimate for how much each line item will cost. Note that it can be helpful to brainstorm these estimates as a group with other staff members from your organization.

Staff Time Costs

A campaign won't run itself. Depending on the size and scope of yours, expect to spend 10 to 20 hours of staff time during each month—or even each week—of the campaign.

Staff	Hours Worked	Cost Per Hour	Total Cost of Staff Time
Campaign Strategy			
Marketing			
Campaign/ Event Management			
		Total:	

Cost of Software

Most peer-to-peer campaigns now take place at least in some part online. You'll need a tool to allow your fundraisers to create their own fundraising pages for their networks and to accept donations online. These tools range in costs and features, but all will at least take a percentage of each donation. (You'll be identifying the type of fundraising tool you'll need in Worksheet 8.)

Line Item	Estimated Cost
Up-front licensing fee or monthly fee	
Set-up fees	
Percent of each donation paid to the vendor	
Total:	

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Kickoff Party Costs

(Note: If you're not holding an in-person kickoff event, skip this section.)

A party or other in-person event can be a great way to train your supporters to effectively fundraise from their networks, set achievable goals, and build overall excitement for the campaign—but this sort of event takes planning. You'll need a venue, food and drinks, and materials for your fundraisers.

Line Item	Estimated Cost
Cost of venue	
Cost of food	
Cost of beverages	
Cost of decorations	
Cost of printing materials for fundraisers	
Cost of signage	
Cost of entertainment (sports game, DJ, etc.)	
Overtime costs for hourly staff members	
Total:	

Marketing Costs

In order to reach enough fundraisers and potential donors, you'll need to promote your campaign. This could mean posters, direct mail, or advertising in local media—and that takes money.

Line Item	Estimated Cost
Cost of printing flyers/posters/brochures/banners	
Cost of graphic design for posters/signs	
Cost of postage for direct mail	
Cost of newspaper ads	
Cost of TV ads	
Cost of radio ads	
Total:	

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Volunteer and Fundraiser Recognition Costs

Once the campaign is over and done, it's essential to thank your fundraisers, volunteers, donors, and other supporters. They'll have put in hours of their own time to help make your campaign a success, and deserve some recognition. (You'll work through ways to thank supporters in Worksheet 17.)

Line Item	Estimated Cost
Cost of prizes	
Cost of printing award certificates	
Cost of thank-you gifts for volunteers	
Cost of postage for thank-you cards/letters	
Cost of awards ceremony (*see Kickoff Party for line items*)	
Total:	

Consider Gifts or Donations

How much of the cost could potentially be offset through gifts or donations? For instance, would someone donate food, gifts, ads, printing, or more? First, copy the numbers from the total box of each category above into the appropriate cells in the table below. Then go back through the list of items in each category and put a star next to those that could be covered in part or entirely through in-kind gifts; add them up and lower the estimated cost of each line item in the table below to adjust for donated goods or services.

	Total Estimated Cost of Campaign	Adjusted for Donated Goods
Software total		
Staff costs total		
Kickoff Party total		
Marketing total		
Recognition total		
Grand Total:		

Budget Summary

Finally, write in the total amount you can expect to raise from your campaign that you identified in the previous worksheet. How do the two compare?

Total Amount You Expect to Raise	Total Adjusted Cost of Campaign	Difference

Now that you know how much your campaign will cost and how much you can potentially raise, does a peer-to-peer fundraising campaign make sense for your organization at this time? Note that if you plan to conduct a significant event like a walk-a-thon, it can bring both extra expenses and revenue all by itself.

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BUDGETING FOR EVENTS

Organizing a team or peer-to-peer fundraising event, like a walk-a-thon, is a complicated process—not unlike planning a gala. Event planning could be an entire workbook in itself. Fundraising events are a lot of work, planning, and logistics, and a lot of cost. While some expenses will be fairly obvious and expected—such as food, beverages, port-a-potties, and the venue itself—there are many unexpected considerations, including:

- Permits and security for the event
- T-shirts for staff, volunteers, and participants
- Overtime costs for hourly staff members
- Cost of trash and cleanup for after the event
- Cost of goodies to hand out to participants

While these costs can add up and sometimes become prohibitively expensive, many can be offset through in-kind donations from local businesses or your own donors, such as:

- Food and beverages
- Paper goods
- Press coverage and advertising
- Photography
- Entertainment

In fact, events can create whole new revenue streams through selling sponsorships for the event or advertising in the program book to local businesses. These will take considerable work and staff time, but can more than cover the cost of the event itself, or even raise more money than the campaign itself.

You could also consider registration fees as an additional source of revenue for your event. Think about asking your individual fundraisers and teams to make a reasonable contribution in order to participate in the physical event, in addition to the donations they are raising from their personal networks.

Event fundraising can be a lucrative fundraising strategy on its own, but keep in mind that events require a lot of staff time, logistics, planning, and skill. Event planning can be an art, and will require a significant portion of a staff person's time.

RESOURCES FOR PLANNING AN EVENT

http://www.fundraising123.org/article/planning-and-executing-your-next-big-event#.UmaXZnAqjbk

http://www.thefundraisingauthority.com/fundraising-basics/fundraising-event/

4. ASSEMBLING YOUR CAMPAIGN COMMITTEE

You shouldn't plan and manage a peer-to-peer fundraising campaign by yourself. There are people at your organization and in your community who can assist you. Think about who would have a stake in this process, including staff members, board members, or motivated volunteers.

Who should be responsible for each role in managing your campaign? Brainstorm names and write them under each role listed below. Roles labeled with stars are essential to your campaign; the others are optional, but still nice to have represented. The same person can fill more than one role.

*CAMPAIGN LEADERSHIP:
Who will ultimately be responsible for the campaign?

_____
_____
_____
_____

*CHEERLEADER:
Who can help you drum up excitement in your community?

_____
_____
_____
_____

*EXECUTIVE LEADERSHIP:
Who from your executive team will advocate for your campaign?

_____
_____
_____
_____

*FUNDRAISER:
Who from your organization will be in charge of fundraising for the campaign?

_____
_____
_____
_____

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COMMUNITY LEADER:
Who from your pool of current or potential fundraisers will step up to help you run the campaign?

_____

_____

_____

_____

VOLUNTEER MANAGER:
Who at your organization knows how to reach volunteers or the community?

_____

_____

_____

_____

BOARD REPRESENTATIVE:
Who from your board will motivate the other board members to fundraise?

_____

_____

_____

_____

From these lists, circle three to seven people who will form your Campaign Committee and write their names below.

_____

_____

_____

_____

_____

_____

PHASE 2: PLANNING YOUR CAMPAIGN

In this section, you'll dive into the actual planning of your peer-to-peer fundraising campaign.

WORKSHEETS

5. **Defining the Format of Your Campaign**. In this worksheet you'll weigh the pros and cons of building a campaign around a big event, defining the geographic reach of your campaign, and running an on- or offline campaign.

6. **Setting Your Goals**. What do you hope to accomplish with your fundraising campaign? How much money do you hope to raise? How many fundraisers or donors do you hope to recruit? In this worksheet you'll set realistic, attainable goals that you'll use to evaluate your success once your campaign is over.

7. **Crafting Your Story**. What is the story of your campaign? Why should people fundraise for you? Why should people donate? In this worksheet, you'll create a unified narrative that will be the rallying point for your entire campaign.

8. **Choosing a Tool**. There are a number of peer-to-peer fundraising platforms available to support your campaign, ranging from low-cost tools with few features to feature-rich platforms that cost $1,000 or more. This worksheet will help you determine what type of tool is right for you based on the features you really need.

After completing this section, you'll be ready to start recruiting your fundraisers and planning for your launch.

5. DEFINING THE FORMAT OF YOUR CAMPAIGN

A peer-to-peer fundraising campaign can take many forms and sizes. Will yours be built up around a major event like a walk-a-thon, or stand on its own? Will you focus just on your immediate local community or try to reach a more geographically diverse audience? Will your fundraisers and donors interact mostly in-person or online? In this worksheet, you'll decide what format makes the most sense for your campaign.

> **DO YOU NEED AN EVENT?**
>
> You don't need an event to pull off a successful campaign. Like an end-of-year appeal, the campaign itself can be your event. Make sure to focus on building your supporters' excitement and energy to keep them motivated. Try incorporating things like milestones or even fun, silly themes to build excitement.

Event or No Event?

Many people assume that peer-to-peer campaigns are built around a big event, like a walk-a-thon or gala, but many are run without big events—for example, birthday campaigns, workplace giving, tributes or memorials, or other ongoing "evergreen" campaigns. In fact, unless your organization has already been putting on an event-based fundraising campaign for years, we recommend not creating an event just for this campaign.

Do you already have an event around which to build your campaign? If not, would it be practical to create an event? Read the benefits of each below, decide for yourself, and check the appropriate box.

Event	No Event
☐ • Builds supporter excitement. • Gets all your supporters in one place. • A big event is newsworthy—you could get press coverage. • Possibility to raise money through sponsorships for the event.	☐ • Minimal costs to plan and put on. • Takes less time and energy to plan. • Faster process from start to finish.

Primarily Off- or Online?

Finally, should your campaign and donations take place primarily on- or offline? A face-to-face, offline campaign can provide opportunities for deeper interaction in the real world, but limits your fundraisers' ability to involve their entire national or international networks of contacts. Read the benefits of each below, decide for yourself, and check the appropriate box.

Offline	Online
☐ • More able to interact with fundraisers and donors on a personal level. • Because you're interacting with supporters in person, they may be more likely to donate.	☐ • Can reach a much wider audience. • Don't need to meet with fundraisers in person, so reduced time commitment. • Smaller time commitment for fundraisers.

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Local or Dispersed?

While event-based campaigns have traditionally focused more on the local community, online fundraising platforms make it easier to reach a wider, more-dispersed network. Should your campaign be local or geographically dispersed? Read the benefits of each below, decide for yourself, and check the appropriate box.

Local	Dispersed
☐ • Ability to rally your supporters as a local community. • Works best with issues that have local appeal. • Much easier to coordinate and recruit.	☐ • Wider reach. • Good for wide-spread communities. • Larger fundraiser and donor pool.

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6. SETTING YOUR GOALS

It's hard to know whether your campaign has been successful unless you set some specific numeric goals for each of the different groups of people who will be involved in your campaign.

Fundraisers

First, think about your potential fundraisers. How many people do you expect will raise money for your campaign? If you've run a peer-to-peer campaign before, you have an existing group of supporters you can expect to raise funds this time around—but it's still valuable to recruit new fundraisers for each campaign in order to expand your reach. If you've never run this type of campaign before, however, all your fundraisers will be new. Use the spaces below to record your target number of overall fundraisers, and your target for new fundraisers.

Target Total Fundraisers:

Target New Fundraisers:

Donors

Now, think about how many donors you expect to give to your campaign. If you've run a peer-to-peer campaign before, use the shaded boxes below to record how many people gave to your last campaign, how many new donors you think you'll be able to recruit, and how many of last year's donors are likely to give again. If this is your first campaign, skip the shaded boxes; either way, think through how many total donors you expect.

Last Year's Donors:

Returning Donors This Year:

New Donors This Year:

Total Donors This Year:

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Fundraising Goals

In Worksheet 2 you estimated a dollar figure you hoped to raise based on your fundraisers—copy that figure into the box below as a useful estimate.

> **Total Donations Expected (by Fundraiser, from Worksheet 2):**

Now you're going to create a second estimate based on average-donation-per-donor. Take your number of total donors from above and multiply it by an average gift size. (Look to your last annual campaign and use that average number, or estimate a ball park figure— $25 to $35 is about typical for peer-to-peer campaigns.)

Total Donors (from above):		**Average Gift Size:**		**Total Donations Expected:**
	X		=	

How do these two numbers compare? Are they fairly similar, or drastically different? Do they seem like reasonable amounts? Too big? Too small? Use them to set three fundraising goals for your campaign: one that's very achievable; a public goal that aims higher; and a goal that provides a stretch to aim for after you've already met the others.

Completely Achievable $ Goal	**Public, Slightly Aspirational $ Goal**	**Stretch $ Goal**

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7. CRAFTING YOUR STORY

A good campaign needs a compelling story and a specific end result to motivate people to donate. What's your campaign's story? Why should people give? How can your supporters be heroes? Crafting your story can be the most-difficult part of this process—use this worksheet to think through the different elements.

First, brainstorm five ideas or concepts for your campaign. Try to think about what you hope to accomplish or why you've decided to run the campaign.

1. _____
2. _____
3. _____
4. _____
5. _____

Take those ideas to your campaign team. Talk about what you've come up with and vote or decide on one to use, and circle it above. Then use that concept to fill out each of the four areas below in order to identify the specific details of your story.

What is the tangible result of your campaign? What specific thing do you hope to accomplish?	What problem do you hope to solve with your campaign? What are you trying to accomplish overall?
What is the tangible result of an individual donation? What difference can one donor make?	What is the emotional content of your campaign? Why should people give? How should people feel about your problem or goal?

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Now that you've identified the elements of your campaign story, write a compelling sentence explaining it:

_____

_____

_____

_____

_____

You're almost finished! All you need now is a compelling name for your campaign that sums up the story you've created. Take some time to brainstorm.

_____

_____

_____

_____

_____

_____

_____

This story and title are the rallying point for your entire campaign. Take the time to talk about it with your team and think about this process—don't just hastily pick the first idea that comes to mind.

8. CHOOSING A TOOL

The tool you choose will depend on the features you need to support your campaign and how much you are willing to spend. We've provided a list of common features below—it's not a complete list of all possible features, but will help you assess the complexity of your needs.

Select the bubble that indicates how strongly you need each feature for your campaign. Consider carefully what's really a "must have."

Basic Features	Don't Need	Nice to Have	Very Useful	Must Have
Let people create their own fundraising pages	○	○	○	○
Can let fundraisers send campaign emails to their networks	○	○	○	○
Can take donations online	○	○	○	○
Mid-Range Features	**Don't Need**	**Nice to Have**	**Very Useful**	**Must Have**
Ability to create campaign blogs	○	○	○	○
Social media "widgets" or "badges"	○	○	○	○
"Badges" for achieving campaign milestones	○	○	○	○
Integration with social media	○	○	○	○
Thermometers or progress bars for profiles	○	○	○	○
Lists of people who have already donated	○	○	○	○
Ability for donors to comment on campaign or individual pages	○	○	○	○
Ability to upload comments from other sources	○	○	○	○
A "behind-the-scenes" view for your organization to see the total amount raised across all campaigns	○	○	○	○
Ability for fundraisers to seamlessly reuse a campaign for the following year	○	○	○	○
Ability to create an organizational home page for your campaign	○	○	○	○
Advanced Features	**Don't Need**	**Nice to Have**	**Very Useful**	**Must Have**
Ability to integrate campaign data with other systems	○	○	○	○
Allow fundraisers to organize themselves into teams	○	○	○	○
Ability to track the progress of fundraising teams	○	○	○	○

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Advanced Features	Don't Need	Nice to Have	Very Useful	Must Have
Ability for your organization to make changes to individual campaign pages	○	○	○	○
Ability to display a public summary of the entire campaign	○	○	○	○
Ability to customize the look and feel of fundraising pages to match your organization's branding	○	○	○	○
Ability for fundraising pages to work on mobile devices (through responsive design)	○	○	○	○
Ability to set auto response emails for coaching and supporting your fundraisers	○	○	○	○
Totals:				

Score your answers

Number of "Nice to Have" features   x 1 =   _____

Number of "Very Useful" features   x 2 =   _____

Number of "Must Have" features   x 3 =   _____

Total: _____

Number of "Must-Have" Mid-Range features   _____

Number of "Must-Have" Advanced features   _____

WHAT TOOL IS RIGHT FOR YOU?

Even once you've defined the type of tool you need, choosing between options can still be daunting. Idealware's article, A Few Good Tools for Peer-to-Peer Fundraising, can help you compare the tools that are out there. Read it at http://idealware.org/FGTOnlineDistributedFundraising.php

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Evaluate Your Answers...

TOTAL FEATURE SCORE LESS THAN 28	TOTAL FEATURE SCORE 29 TO 39	TOTAL FEATURE SCORE MORE THAN 40

YES → Do you have fewer than three "Must-Have" Midrange features? → **NO**

YES → Do you have fewer than three "Must-Have" Advanced features? → **NO**

YES

YES → Do you have one or fewer "Must-Have" Advanced features?

YES

BASIC TOOLS

At this level, almost any tool will work. There are a number available for little or no licensing fee, except for a percentage of each donation. The tools are usually all online, with the vendor hosting all the fundraising pages, and no ability to brand the pages to your campaign. Tools in this category include Razoo, Crowdrise, and StayClassy.

MID-RANGE TOOLS

At this level of functionality, you'll likely have to pay a fee for the tool you choose–either monthly or just a setup fee. Expect to spend a couple hundred dollars for the length of your campaign. It may be possible to find one without a licensing fee, but you'll need to pay special attention that the tool you find has the right features. Tools in this category include FirstGiving, Artez, DonorDrive, and RallyBound.

ADVANCED TOOLS

At this level, you'll definitely have to pay for a tool–likely several thousand dollars. Tools in this category include Blackbaud's Friends Asking Friends and Team-Raiser.

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PHASE 3: LAUNCHING YOUR CAMPAIGN

In this section, we'll dig into planning the nitty-gritty details of your campaign, from defining and refining your list of potential fundraisers and creating recruitment emails to training your supporters to be good fundraisers and planning your kickoff event.

WORKSHEETS

9. **Making Your Campaign Fun**. It might seem like an afterthought, but fun is a driving force in keeping fundraisers focused and motivated on the campaign. In this worksheet, you'll brainstorm ways to make your campaign fun and exciting for your supporters.

10. **Announcing Your Campaign**. How will you recruit supporters to fundraise for you? Who just gets an email, and who should get a more personal ask—a phone call, a letter, or a lunch meeting? In this worksheet, you'll define how you reach out to each group of supporters, and write the email you'll send all your potential fundraisers.

11. **Communications Calendar: Recruitment Stage**. You only have a few weeks to send out recruitment emails, get the logistics of your campaign in order, and organize and prepare fundraisers—you'll need to make sure you create a schedule and stick to it. This worksheet will help you plan out the important communications and milestones that need to happen before you launch your campaign.

12. **Tracking Your Progress: Recruitment Stage**. In order to effectively be able to evaluate the success of your campaign, it's important to start tracking the numbers that matter to you early on. This worksheet will help you set your weekly goals for fundraisers, donors, and money raised.

13. **How to Train Your Fundraisers**. You can't just turn your fundraisers loose and expect the money to roll in—you'll need to coach them on how to identify their networks, set realistic fundraising goals, effectively tell their stories, and thank their donors once the campaign has ended. In this worksheet, you define how to train your fundraisers, both during your kickoff event and throughout the campaign.

14. **Creating an Agenda for Your Kickoff Event**. You've identified your fundraisers, written your emails, and brainstormed activities—now it's time to launch your campaign. In this worksheet you'll define the logistics of your kickoff event, from time and date and location to scheduling activities. Don't forget to make it fun!
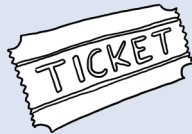
Make sure this section is complete before your program launch, as it will help you identify what should be included.

9. MAKING YOUR CAMPAIGN FUN

To keep your donors and fundraisers motivated, it's important to make your campaign fun–especially if your campaign is primarily online or isn't centered around an event. The key to helping supporters keep up their energy levels is to make it enjoyable for them to participate. Below are eight ideas to help build excitement for a campaign. For each, use the box to brainstorm how you could make it resonate with your own community.

RAFFLES AND DRAWINGS:
People who raise $10 get entered once, $50 entered twice, etc.

THERMOMETERS TO MEASURE PROGRESS TO GOAL:
Visual guides/reminders of the progress toward the goal on website, social media, and fundraising pages.

MILESTONE APPRECIATION:
First person to raise $X gets a certificate, shout-out on social media, etc.
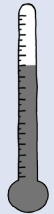
SILLY THEMES:
Pirate theme, luau theme, baseball, etc.

MATERIAL GIFTS:
T-shirts, bumper stickers, hats, etc.
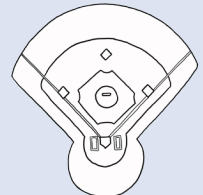
NON-MATERIAL INCENTIVES:
Milestone badges for social media...

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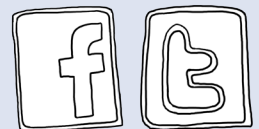
IN-PERSON REMINDERS:
Phone calls, lunch meetings, etc.
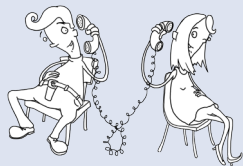
SILLY PERSONAL PLEDGES:
At a certain goal, will shave someone's head, throw a pie at your executive director, etc.

Once you've filled out each category, look through the whole list and circle the three ideas that best fit your campaign and community. When will you use these? You'll define that when you set up your communications schedule in Worksheet 19.

Another way to keep the momentum going in your campaign is to highlight or celebrate a few milestones. What sort of milestones could you celebrate? We started a list of ideas for you below, or you can write in your own:

- First $ _____ raised
- _____ number of fundraisers reached
- First (AMOUNT) of donations
- Time passed in campaign (one week in, two weeks in, etc.)
- $_____ raised in first week
- _____ percent of goal reached
- First person or team to meet their goal
- When a person gets _____ donations
- Two or three days into the campaign
- _____
- _____
- _____
- _____
- _____

Which of the above milestones will you want to celebrate? Circle the ones that would resonate most with your community. You'll use these when you set up your communications schedule in Worksheet 18.

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10. ANNOUNCING YOUR CAMPAIGN

Now it's time to think about how you'll announce the campaign to your potential fundraisers. While it's essential to send a general recruitment email to all your supporters, some groups will need a different, more personalized approach. In this worksheet you'll define what recruitment communications you should send to each type of fundraiser.

General Announcement

Start by thinking about a general announcement to most of your likely fundraisers explaining what you're hoping to do: what your campaign is, why they should become fundraisers, and what their next steps should be. This should go out through primary communication channel(s) like direct mail, email, or social media. Email is likely to be useful for this, especially for an online campaign; if you have an email list, it's worth using.

What are your primary communication channels for general audience news or announcements?

#1: **Ex: Email**   #2: _____   #3: _____   #4: _____

If you only identified one channel, think about whether it's worth adding another. For instance, an email/social media combination makes a power play for tech-savvy supporters, while an email/direct mail combo is a more-expensive, but potentially more-effective, model to reach more traditional supporters. You don't necessarily need four channels to support your campaign, but it can't hurt to have two or three—especially if there's not much overlap between the people you're reaching with each.

With the thought that it makes sense to send an email announcement for almost every campaign, take some time to draft a general announcement email to invite supporters to fundraise as part of the campaign. Use the elements listed below and from your campaign story (from Worksheet 7).

FROM:

SUBJECT:

The header information—the **subject** and **from** line—determines whether people will open the email. Think it through carefully.

INTRO:

Try incorporating elements of the story you defined in Worksheet 6 into your introduction. And it never hurts to bring the fun!

CALL-TO-ACTION:

Make sure to ask your supporters directly to join you in fundraising and give them a specific, tactical next step (like signing up online).

CLOSING:

Close by coming back around to your campaign story and consider signing the email with the name of someone at your organization they know personally.

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The communication shouldn't stop at a single email, though. How will you follow up on the announcement? How many times should you remind your supporters? Which channel or channels will you use? Identify the follow-up communications you will send to your general audience to continue to recruit your fundraisers.

Ex: Facebook—One reminder each week in August to sign up as fundraisers.

_____

_____

_____

_____

More-Targeted Communications

The announcement you just crafted will work for some groups, but what about announcements to people who might be particularly valuable fundraisers? Will some groups of people get customized emails? What about an additional communication, like a phone call or direct mail piece?

To think this through, start by looking at the groups of potential fundraisers you identified in Worksheet 2. Which groups can you segment out to target with specific efforts? Are there groups that ought to be subdivided when you start thinking about who's worth extra effort? With these considerations in mind, make a list of groups in the table below, breaking out those who might require a different level of communications. For each group, think through what you should send them.

Groups from Worksheet 9	What launch email do they get?			Do they get anything in addition?				
	General Announcement Email?	Special Email?	No Email?	Phone Call/ Meeting	Follow Up Emails	Photos/ Video	Direct Mail	Other:

Take a look at everything you're planning for each group. Does it feel overwhelming—are you pelting them with communications? Do you have the time to actually compose everything you've decided on?

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Finally, in the lines below, write down a name for each communication you've identified that varies from the general communications; describe the approximate content.

Ex: Volunteer launch email—Customized general email, with a thank you for all their work.

_____

_____

_____

_____

HOW DO YOU KNOW WHO'S WORTH EXTRA EFFORT?

How should you choose which groups are worth more personal or extensive recruiting? As we mentioned near the beginning of this process, focus on those likely to bring the following:

- **Strength of Network:** People who have a large personal network—potentially even including a lot of high net-worth individuals—have larger fundraising potential than people with smaller networks.

- **Passion for Supporting Your Organization:** Fundraising for an organization takes a lot of time and effort. A passionate supporter has greater potential to raise funds than one who is less motivated or unlikely to make the time.

- **Connection to Your Organization:** Not only are supporters with a personal connection to you going to have more at stake by raising funds, they're also likely to be more successful at relating your story to their networks.

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11. COMMUNICATIONS CALENDAR: RECRUITMENT STAGE

Now that you know how you'll reach out to potential fundraisers–and through which channels–it's time to schedule those communications until the moment you launch your campaign.

On the calendar below, start by writing the date you'll launch the fundraising process in the last week—your recruitment stage ends at this date. Then, working backwards from that date, fill in when each email, phone call, or important social media appeal goes out.

There's also a lot of internal planning and logistics that need to happen before the campaign launches. Write in the dates when important milestones need to happen.

POTENTIAL DATES AND MILESTONES
- Define planning committee
- Set campaign goals
- Craft your story
- Choose your fundraising tool
- Announce campaign to potential fundraisers
- Provide details on logistics
- Early launch to fundraisers
- Early launch to "friends and family"
- Launch campaign to general public
- Hold your kickoff event

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Example	Email staff to form committee		Assemble Committee		Identify potential fundraisers		
Week of:							
Week of:							
Week of:							

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	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							

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12. TRACKING YOUR PROGRESS: RECRUITMENT STAGE

You'll have a lot of balls in the air when you're running a campaign. It's essential to keep track of them so you always know where you are in your schedule. Use these worksheets to track your fundraisers, the amount raised, the number of donors, and other important metrics for each week of your campaign.

WHAT SHOULD YOU TRACK?
Track whatever is important to you. You might want to add one or more metrics from this list to track:

- Growth rate since last week
- Change in (X) since last week
- Number of prospective fundraisers
- Percent of active fundraising pages

Weeks Before Campaign	Number of Committed Fundraisers	Number of Donors	$$ Raised to Date	Additional Metric:	Additional Metric:
Eight					
Seven					
Six					
Five					
Four					
Three					
Two					
One					
KICKOFF					

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13. HOW TO TRAIN YOUR FUNDRAISERS

It's not reasonable to expect your fundraisers to immediately know what they're doing unless they've raised funds for many of your past campaigns. They're likely to need some help identifying the people in their networks who could donate, setting personal fundraising goals, setting milestones and commitments for their campaigns, and telling their campaign stories. Your campaign kickoff is your opportunity to teach your fundraisers how to effectively raise funds and how to set up and use their personal fundraising pages and the online donation tool. It's also an opportunity to get them excited about the campaign—you'll plan that in the next worksheet. For this worksheet, follow the instructions in each section below to define how you can prepare your fundraisers.

IDENTIFYING YOUR NETWORK In order to make a strong campaign, you need to maximize how many people each fundraiser reaches out to. Who should they consider? • People at work • Family and friends • People on social media • Other people in their communities	Brainstorm how to do this in the kickoff:
Come up with a few activities for brainstorming networks during your kickoff. How will you encourage your fundraisers to expand their network after the kickoff? For ideas, see Appendix 2.	Brainstorm how to do this after the kickoff:

SETTING INDIVIDUAL FUNDRAISING GOALS Setting a goal gives your fundraisers something to aim for, and helps motivate them. They should set two or three goals each: • One they can definitely reach • One that aims higher, but that they can probably reach • A stretch goal	Brainstorm how to do this in the kickoff:
How will you coach your fundraisers on goal-setting in the kickoff? How will you support your fundraisers after the kickoff? For ideas, see Appendix 2.	Brainstorm how to do this after the kickoff:

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MILESTONES & ACHIEVEMENTS

Just as milestones for the entire campaign can energize your supporters, personal achievements can also motivate your individual fundraisers. Have them identify how many dollars they will have raised and how many people they will have reached…

- …by a specific day
- …halfway through the campaign
- …a day before the campaign ends

Should your fundraisers set silly milestones to make the campaign more fun? What will they do when they reach their milestones? How can you bring these milestones and achievements into the kick-off discussion? How will you encourage your fundraisers to set milestones?

Brainstorm how to do this in the kickoff:

Brainstorm how to do this after the kickoff:

TELLING YOUR STORY

What makes a compelling story? Just like you did for your organization in Worksheet 6, have your fundraisers brainstorm parts of their story. What sort of activities could you have in your kickoff for your fundraisers to practice their stories? Look to Appendix 2 for ideas.

It can be helpful to provide a list of prompts to get your fundraisers thinking about their stories, such as:

- What makes [YOUR ORG] special?
- What do you say about [YOUR ORG] to your friends and family?

For ideas, see Appendix 2.

Brainstorm how to do this in the kickoff:

Brainstorm how to do this after the kickoff:

THANKING DONORS

After the campaign is over, your fundraisers need to thank their donors for their support. Try brainstorming ways to thank donors during the kickoff, or provide ideas throughout the campaign in weekly emails. Here's a list of ideas to get you started:

- Record a thank-you video
- Take a picture
- Do something silly (shave your head, pie in the face, etc.)
- Personally call donors
- Throw a party for your donors
- Send a card
- Send them a small gift

Brainstorm how to do this in the kickoff:

Brainstorm how to do this after the kickoff:

CONSIDER MULTIMEDIA

It can be beneficial to encourage your fundraisers to incorporate multimedia on their pages or in their email appeals. Online videos or photos can be a compelling way to tell a personal story. Videos don't need to be long or even very polished to be effective–in fact, simple is better when it comes to fundraising videos. For tips on creating great videos on the cheap, visit http://www.idealware.org/blog/nonprofit-film-school-primer-or-idealware-school-video-nonprofits-don%E2%80%99t-video-good-part-1

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14. CREATING AN AGENDA FOR YOUR KICKOFF EVENT

Once you have recruited your fundraisers, it will be important to kick off the fundraising stage of the campaign with an in-person event or virtual meet-up. A kickoff event will build excitement and energy among your fundraisers and help them understand how to start actually raising money. While your fundraisers may be passionate about your organization, they may not already know how to set goals or solicit donations from their friends and family.

How will you officially kick off your campaign with your recruited fundraisers? Include whatever activities you want from those you identified in the last worksheet, but make sure not to overwhelm your supporters. Make sure that you've answered the following questions before you launch your campaign:

Will you kick off the campaign with an in-person event, or will train your fundraisers online? Who is invited to the kickoff event?

_____   _____

_____   _____

_____   _____

Where will your event be?

_____

What do you want fundraisers to walk away knowing?

_____

_____

_____

What will you cover in your kickoff?

_____   _____

_____   _____

_____   _____

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What is your budget for this event?

_____

What materials will you need?

_____   _____

_____   _____

_____   _____

What needs to be prepared before the kickoff starts?

_____   _____

_____   _____

_____   _____

How will you let people know about the kickoff?

_____

Who will be available to help you?

_____   _____

_____   _____

How will people RSVP to the kickoff?

_____

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Now, pull the ideas for activities you identified in Worksheet 13—which will you incorporate? Use this sample template to help you plan out your event from start to finish. Adjust the agenda accordingly if you're doing an online kickoff event.

Date of Event:		
Start Time	**End Time**	
		Entire event
		Guests arrive and mingle
		Opening speaker
		Activity #
		Goals for the campaign
		Activity #
		Activity #
		Activity #
		Closing remarks
		Guests leave
		Clean up

Good luck with your event!

NOT DOING AN EVENT FOR YOUR KICKOFF?

Consider the following:

- Video chat or conference to train your fundraisers (via Skype, Google Plus, telephone, social media meet-up etc.)
- Small regional meetings (if geographically dispersed)

How else could you kick off the campaign and train your fundraisers? Think about some ideas with your team.

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PHASE 4: CONTINUING THE EXCITEMENT

Now that you've had your kickoff event, you'll need to keep the momentum going. Weekly updates on the progress of the campaign can motivate supporters. Make sure to keep coaching and supporting fundraisers with helpful hints and tips.

WORKSHEETS

15. **Supporting Your Campaign**. Weekly emails, social media posts, and other communication can provide helpful tips, inspirational quotes, and generally keep the energy up. In this worksheet, you'll think about the email and social media posts that will go out throughout the campaign.

16. **Communications Calendar: Support Stage**. In this worksheet, you'll take your communications plan to the next level to define what, when, and how often you plan to communicate.

17. **Tracking Your Progress: Support Stage**. How is your campaign doing week-to-week? In this worksheet, keep track of your total fundraisers, donors, and money raised.

Make sure to complete this section as you're kicking off your campaign in order to keep your fundraisers' enthusiasm going strong.

15. SUPPORTING YOUR CAMPAIGN

After the kickoff, it's important to keep your fundraisers excited and motivated about your campaign. Weekly emails can be a great way to both inform and motivate your supporters from start to finish.

What could go into your weekly email? Below is a list of ideas:

- An article highlighting a particular fundraiser
- Report of the week's fundraising numbers
- Tips (i.e. "How to raise $100 this week")
- Silly or goofy milestones
- Facts about or a profile of the organization
- A story from the community
- A weekly picture about the campaign, or one sent in from the community
- Comments made with donations
- Inspirational quotes
- Random math analysis of gifts-to-date—in a real or goofy way (i.e. "If the funds we've raised so far were in dollar bills, laid end to end they'd reach from the Earth to the Moon and back…")
- "If you only do one thing this week…" (continuing each week)
- A thermometer of funds raised
- Fundraiser-of-the-week profile
- Mission-based story
- Event logistics
- Virtual campaign of the week (i.e., "Laura just had her birthday/wedding…")

It's fairly easy to define a standard framework for your weekly email. Pick three that resonate with your community or campaign and place them in the sample email template on the next page. This is a great starting point to write your actual weekly email.

WHERE DO YOU GET A THERMOMETER?

If your online tool doesn't provide a thermometer or progress bar, try obtaining a separate one. Here are a few places to get you started:

- http://www.entropyfarm.org/software/thermo/
- http://www.easy-fundraising-ideas.com/tools/fundraising-thermometer/

Make your emails fun with a custom thermometer that matches your theme.

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FROM:

MULTIMEDIA GOES HERE:
• Photos
• Links to Videos
• Campaign Thermometer

SUBJECT:

THING 1:

THING 2:

THING 3:

CLOSING:

Wondering how to send email newsletters? Check out our article:
http://www.idealware.org/articles/fgt_email_newsletter_tools.php

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In addition to your weekly emails, you might consider sending out special emails when you hit key milestones (like first $1,000 raised, campaign midpoint, etc.). Go back to Worksheet 10 and write down the top milestones you identified as resonating with your community, then put a star next to those that should get their own email.

_____   _____   _____   _____

What could you post on social media? Almost all the things listed above would also work well if sent out through Facebook or Twitter to build excitement in multiple channels. You could rotate between a handful of these ideas (like a picture on Monday, a quote on Tuesday, etc.), or mix it up. List all the ideas you'd want to send out on social media. What channel or channels will you use? If using more than one social media channel (i.e. Facebook and Twitter), think about what you should send out to each. (For examples of Facebook and twitter posts, go to Appendix 1.)

What can you do to keep the excitement going on social media?

Channel	Idea	Frequency

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16. COMMUNICATIONS CALENDAR: SUPPORT STAGE

Now, with all that in mind, use the calendar below to schedule your weekly emails, special milestone emails, social media posts, and other supporting communications.

First, write in the date of your kickoff in the first week. Your support stage starts at this date and ends when your campaign does.

Second, think about the milestone or milestones you identified in the previous worksheet. Based on your fundraisers and the money you've already raised, make an estimate of when you'll reach each milestone. Mark each estimated milestone on the calendar.

Next, think about when you want to send your weekly email to your supporters. It's good to have that go out on the same day each week, if possible. Place the weekly email on the calendar.

Finally, what about other communication channels? What days will you post to each social media channel you identified in Worksheet 11, and what will you post (picture of the week, a story from your community, etc.)? Use the calendar to plan posts and other communications. Make sure to think about what would resonate with your community and what they would expect. How often is too often for them?

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Example	Facebook: Fact about the mission	Weekly Email	Facebook: Story from community	Twitter: Inspirational Quote Facebook: $$ raised so far	Facebook: Pic of the week		
KICKOFF Week of:							
Week of:							
Week of:							

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	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							

If you're planning on running a longer campaign, continue this calendar on another sheet of paper.

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17. TRACKING YOUR PROGRESS: SUPPORT STAGE

You'll have a lot of balls in the air when you're running a campaign. It's essential to keep track of them so you always know where you are in your schedule. Use these worksheets to track your fundraisers, the amount raised, the number of donors, and other important metrics for each week of your campaign.

WHAT TO MEASURE?
Track whatever is important to you. Pick one or more metrics from the list here to track:

- Growth rate since last week
- Change in (X) since last week
- Number or percent of fundraisers who haven't raised anything
- Percent of active fundraising pages

Weeks before campaign	Number of Committed Fundraisers	Number of Donors	$$ Raised to date	Additional Metric:	Additional Metric:
KICKOFF EVENT					
One					
Two					
Three					
Four					
Five					
Six					

Don't Lose This Worksheet! This will be incredibly useful for planning next year's campaign.

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PHASE 5: WRAPPING UP YOUR CAMPAIGN

Congratulations! Your campaign has ended—time to kick back and count the money, right? Wrong. If you want to run another successful campaign in the future, you'll need to spend the time and effort to properly wrap up this one.

WORKSHEETS

18. **Thanking Your Supporters**. Your fundraisers have spent the past few weeks soliciting donations from their friends, families, and coworkers—they deserve a reward. In this worksheet, you'll brainstorm how to thank your fundraisers and donors for a job well done.

19. **Communications Calendar: Post-Campaign Stage**. While the fundraising may be done, your communications shouldn't stop. This worksheet will help you plan out when you'll send your thank you emails or cards, distribute a follow-up survey, and announce awards for your top fundraisers.

20. **Reflecting on Your Campaign**. Now that the excitement of your campaign has died down, it's time to evaluate your success. What went right? What went wrong? In this worksheet, you'll compare your actual fundraising numbers with the estimates you made while planning the campaign and see how things added up.

Though you will have finished this workbook, you hopefully won't be done with peer-to-peer fundraising. It's time to start getting ready for your next campaign with the lessons you learned from this one.

18. THANKING YOUR SUPPORTERS

When your campaign ends, don't forget that you have two very different audiences to thank: the people who donated to your organization, and your fundraisers. Make the people in both groups feel not just appreciated, but over-appreciated.

Thanking your donors

Let's start by thinking about your donors. How will you thank them? Will they get cards? Letters? Will they come from the organization or the fundraisers who encouraged them to donate?

_____

_____

_____

Is there a dollar threshold to determine what donors get what thank yous?

_____

Thanking your fundraisers

It's essential to think of your fundraisers as your major donors. While they may not all bring in major individual donations, they have volunteered their own time and passion into raising money for your organization. They are dedicated, personally attached to your organization, and networked—major assets for future fundraising campaigns, drives, and asks. How can you thank your fundraisers? Here are a few ideas to get you started:

- An award ceremony
- A "wrap party"
- Personalized thank you cards
- Recognition on social media or in a newsletter
- Post-campaign progress reports to let supporters know about the good works accomplished with their donations

IDEAS FOR AWARDS

- Most $ raised
- Most donors
- Brought the most fun
- Largest team
- Most creative use of...
- Best costume
- Most creative virtual campaign
- Best personal page

Which of these ideas will you use to thank your fundraisers?

_____

_____

In addition, remember to think about the details for each way you will thank them. For example, who will sign thank you cards to fundraisers?

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In addition to thanking your fundraisers for raising money, will you recognize them for anything else? What will you thank them for?

_____

_____

_____

_____

_____

Finally, think about how you can add a personal touch to thanking your fundraisers. You could:

- Make personal phone calls to your top fundraiser(s)
- Send out special invitations for a gala or other major fundraising event
- Put their name(s) on a plaque/trophy/brick

What will you use?

_____

_____

_____

_____

_____

While you're thanking your supporters, this is the perfect time to collect their feedback on the campaign. Consider sending out an online survey to gather their thoughts on the format or theme of your campaign, how the event was organized (if you had a physical event), the online experience of registering and creating their personal pages, and how they felt the campaign went overall. What kind of things would you want to find out from your supporters?

_____

_____

_____

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19. COMMUNICATIONS CALENDAR: POST-CAMPAIGN STAGE

It's important to schedule out what has to happen after your campaign ends. When should you send out a follow-up survey? When will the survey close? When should your fundraisers and other supporters be thanked? If you're planning on holding an awards ceremony, either a physical event or online, when will it be?

On the calendar below, mark the close date of your campaign in the first week—this marks the start of your Post-Campaign Stage. Starting from there, schedule out when thank you letters should be sent, when the awards will be announced, and other important post-campaign milestones. Look to the sidebar for ideas of what milestones you should think about.

IMPORTANT DATES AND MILESTONES

- Thank fundraisers
- Thank donors
- Thank volunteers
- Announce awards
- Send logistics for awards ceremony/announcement
- Launch post-campaign survey
- Create wrap-up document

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Example	Campaign Ends!		Email: Announce how much was raised.		Launch follow-up survey.	Facebook: Announce the top teams.	
CAMPAIGN CLOSE Week of:							
Week of:							
Week of:							
Week of:							

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	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							
Week of:							

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20. REFLECTING ON YOUR CAMPAIGN

Once your campaign is over and the excitement has died down, you and your team should take the time to assess your campaign, think about what you've learned, and brainstorm ideas for next year.

First, remember those fundraising metrics you defined in Worksheet 6? Let's see how you did on those:

	Target Range from Worksheet 6 (from "Completely Achievable" to "Stretch Goal")	Actual
Donors:		
New Donors:		
Fundraisers:		
New Fundraisers:		
Dollar Amount Raised:		

Now, let's compare the estimates you made in Worksheet 2 for how much you could raise from specific people or groups to what you actually raised:

Top Fundraisers	How much did you expect them to raise? (from Worksheet 2)	How much did they raise?	Difference?

Did your Top Fundraisers end up actually being the top, or is there anyone else you might want to think of as a top fundraiser next year?

_____   _____

_____   _____

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Fundraising Groups:	How many people did you expect would fund-raise? (from Worksheet 6)	How many people actually fundraised?	How much did you estimate each group could give? (from Worksheet 6)	How much did they actually give?

What other metrics have you been tracking throughout your campaign—like the ones you identified in Worksheets 13 and 16? Use the space below to record your final numbers for these metrics.

	Metric A	Metric B	Metric C	Metric D	Metric E
What was the metric?					
What did you expect?					
What actually happened?					

Take this space to reflect on your campaign overall, and what these numbers tell you.

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What do you feel went well with the campaign?

_____

_____

_____

_____

_____

What didn't go well?

_____

_____

_____

_____

_____

What do you wish you had known ahead of time?

_____

_____

_____

_____

_____

Finally, what five things have you learned from this campaign that you would want to remember for future peer-to-peer campaigns?

1._____

_____

2._____

_____

3._____

_____

4._____

_____

5._____

_____

APPENDICES

APPENDIX 1: SAMPLE TEXT FOR YOUR FUNDRAISERS

Anything you ask your fundraisers to fill out—like individual fundraising pages or emails and social media posts they send out—should come with some template or sample text you've created to make raising funds for your campaign as easy as possible. The more you lower the barrier of entry and the burden you put on your fund-raisers, the less time they have to spend setting things up—and the more time they can spend being effective fundraisers.

You (and your team) will need to create some generic text your fundraisers can use as a starting point for their fundraising pages, emails to their networks, responses and thank yous, and social media posts. As your fundraisers are taking their own time to set up their pages and send out these emails, it's best to prepare as much as possible for them. It's reasonable to expect that some of your supporters may not have the time to update their personal pages, so take care to make sure that the sample text you provide can run as-is, even if a supporter doesn't personalize it at all.

Below are a few templates to get you started:

Create Your Sample Email for Fundraisers

Use this template below to craft a sample email that your fundraisers can use as a template for the emails they'll be sending out to their networks.

SUBJECT: Help **ORGANIZATION** raise money for **SPECIFIC, DESIRED OUTCOME**

BODY:

Hi,

I am raising money for **ORGANIZATION** in support of **SPECIFIC, DESIRED OUTCOME**.

[They craft their story here. Circle a few of the following prompts to get them thinking about their story.]

Prompts for thinking about your story:

- What makes [ORG] special?
- What do you say about [ORG] to your friends and family?
- How can [ORG] make a difference in your community?
- How has [ORG] had a personal impact on you?
- Who in your community is most helped by [YOUR ORG]?

Just $_____ will go a long way to helping me raise $_____ to for **ORGANIZATION** to do **SPECIFIC, DESIRED OUTCOME**.

[Insert instructions on how people can donate.]

SIGNATURE:

P.S.: Want to join me in fundraising? Visit **THIS LINK** or call **PERSON AT YOUR ORGANIZATION** at **PHONE NUMBER**.

Note: You'll also want to create an email that can be copy-and-pasted as is, with the story fully crafted for your busy fundraisers. Consider offering both versions to your fundraising community.

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Create Sample Social Media Posts for Your Fundraisers

Social media is an increasingly important communication channel, both for individuals and organizations. Expect your fundraisers to reach out through their online social networks in addition to phone calls or in-person meetings. You'll want to create one or two sample posts for each social network you expect your fundraisers will likely use. We've included templates for Facebook and Twitter. Think through what other networks your supporters are likely using.

Facebook

> I'm raising money for **ORGANIZATION** in support of **SPECIFIC, DESIRED OUTCOME**. Please help me by supporting this wonderful cause! To make a donation on my behalf, please go to my fundraising page. [**LINK**]

Now try writing your own sample Facebook posts for your supporters to use. Keep in mind that Facebook lets users tag their friends in posts—talk to your fundraisers about how to use this to their advantage.

_____   _____

_____   _____

_____   _____

Twitter

> Help me raise money to **SPECIFIC, DESIRED OUTCOME**. All proceeds go to **ORGANIZATION**. Visit [**LINK**] to donate now!

Now try writing your own sample tweets for your supporters to use. Keep in mind that Twitter limits posts to no more than 140 characters, so brevity is important.

_____   _____

_____   _____

_____   _____

Both Twitter and Facebook allow posts to include hashtags—short phrases prefaced with the hash or pound sign (#). This allows you search by that tag and see all the posts, tweets, and messages associated with it. If you don't already have a hashtag for your campaign, think about whether or not to create one.

Write your hashtag here: #_____

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Create Your Sample Fundraising Page

Use this template below to craft a sample page like those your individuals will have to set up. Select from the list of prompts in "Helping your fundraisers tell their/your story" to provide starting-points for your fundraisers.

MY FUNDRAISING PAGE

Hi, my name is NAME, and I am raising money for YOUR ORGANIZATION in support of YOUR SPECIFIC, DESIRED OUTCOME.

Photo/Video/Thermometer goes here.

I'm getting involved with [YOUR ORG] because:
• [YOUR ORG] makes a difference in our community
• [YOUR ORG] has affected me personally
  –see Appendix 2 for more prompts–
Please help me by supporting this wonderful cause!

Use the prompts from Appendix 2 here.

Just $_____ will go a long way to helping YOUR ORGANIZATION achieve their goal of $_____ to YOUR SPECIFIC, DESIRED OUTCOME. To make a donation on my behalf and help me reach my fundraising goals, please click on the "Donate" button below.

DONATE

LOOKING FOR MORE EXAMPLES OF PERSONAL FUNDRAISING PAGES?

Below are links to a couple real-world examples of effective peer-to-peer fundraising pages.

http://www.biketobeatcancer.org/site/TR/Events/General?px=1028044&pg=personal&fr_id=1070

http://vvmc.convio.net/site/TR/Events/General?px=1002218&pg=personal&fr_id=1060

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APPENDIX 2: ACTIVITIES FOR YOUR FUNDRAISERS

As talked about in Worksheet 13, it can be helpful to use one or more activities when you're training your supporters to be more effective fundraisers. Use the below examples for ideas of how you can help your fundraisers identify their networks, set their fundraising goals, or tell their story.

Activities for Identifying Networks

What sort of activities could you have in your kickoff, or even ongoing, to help your fundraisers identify their networks? Consider the following:

- Have each fundraiser brainstorm their personal networks and then discuss these lists as a group.
- Provide a sample list of people to ask (i.e., coworkers, family and friends, people in the community, people at church, etc.).
- Hold a contest for the fundraiser who reaches out to the most people.
- Have them reach out to people by week. For example, in Week One of the campaign, they reach out to people they talk to now; in Week Two, people they talked to two years ago; Week Three, people they talked to five years ago. Working backwards like this, your fundraisers may be surprised at how large their networks really are.

Activities for Setting Goals

What sort of activities could you have in your kickoff, or ongoing, to help your fundraisers set achievable goals for their personal campaigns? Consider the following:

- Help them identify how much they could raise from their networks by listing the top 10 people they know who are likely to donate, and assume each person will give $10 each. Is this goal too big? Is it too small?
- Encourage everyone to set a goal of at least $100, and have them think about what raising $10 from 10 people would look like.
- Once everyone has set at least one goal, have everyone share it with the group. Total up all the goals in the room—seeing that big number will help build their excitement. For more examples of how to set goals, visit www.cathexispartners.com/resources.

Activities for Telling Your Story

What sort of activities could you have in your kickoff, or ongoing, to help your fundraisers create their personal stories of your organization and practice telling it to people? Consider the following:

- Group everyone into two concentric circles facing each other. Each person will tell their story to the person they are facing, and then the inner circle rotates to the right. Repeat until they make it all the way around or at least a few times.
- Speed-dating: Break your group into pairs, and give them one minute for to share their stories; at the end of the minute, switch pairs. Go through this process a few times.
- Write down different story prompts on slips of paper. Have each person draw a prompt out of a hat and use that prompt to say something about their stories about your organization or the campaign itself.

Prompts for Thinking about Your Story

These short prompts can be great starting places for your fundraisers to craft their stories.

- What makes [**YOUR ORG**] special?
- What do you say about [**YOUR ORG**] to your friends and family?
- How can [**YOUR ORG**] make a difference in your community?
- How has [**YOUR ORG**] impacted you personally?
- Who in your community is most helped by [**YOUR ORG**]?

AUTHORS

Andrea Berry, Director of Partnerships and Learning

Andrea oversees Idealware's training activities and curriculum design. Prior to joining Idealware, Andrea held fundraising positions in education, health research, and museums and has taught math, performing arts, and history in traditional and non-traditional educational settings. She brings a breadth of experience with fundraising software, particularly as it relates to small nonprofits, and has worked as a consultant with nonprofits across New England to help identify appropriate donor management software. Additionally, as a former teacher, Andrea brings front-line tested expertise in curriculum development and training.

Kyle Andrei, Research Analyst

As Research Analyst, Kyle is responsible for researching software through demos, interviews, and surveys, and using that information to create Idealware's reports and articles. In addition, Kyle also draws on his broadcast experience to produce Idealware's Ask Idealware videos. Outside of Idealware, Kyle volunteers with the Maine League of Young Voters as chair of the Civic Guide Committee, providing nonpartisan guides to the civic process in Portland. Kyle is a graduate of Indiana State University, where he studied broadcasting, managed the student radio station, and volunteered on local election campaigns.

Laura S. Quinn, Founder and Executive Director

Laura has been working in the software sector for more than 15 years. As Idealware's Executive Director, she directs Idealware's research and writing to provide candid reports and articles about nonprofit software. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create Internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software, designed interfaces and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

ABOUT IDEALWARE AND CATHEXIS

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Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial and accessible resources about software to help nonprofits make smart software decisions.

Nonprofits maintain a complicated relationship with technology. Most know that software can streamline their processes and help fulfill their missions more efficiently and effectively, yet lean staffing and tight budgets mean they're unable to devote the time necessary keep up with new technologies and find the right tools.

From the most basic questions (like how to use software to help manage emailing hundreds of people at once), to the more complex (like understanding the role of social networking and mobile phone text-messaging in fundraising strategy), organizations need a trusted source for answers. Idealware provides an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps nonprofits make the most of their time and financial resources. And, our reach is expanding! Our reports have been downloaded hundreds of thousands of times.

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Cathexis Partners (established in 2008) helps nonprofit and other socially minded organizations raise funds, expand house files and spread the word about their mission more effectively and more efficiently. Our services include website development (design, migrations/integrations, implementation, CSS/template deployment, social media integration and strategy), reporting, database management, IT consulting, technical support, custom training, copywriting, and project management.

Our extensive experience in CRM and CMS software solutions can help your organization maximize the tools you have, identify gaps and find the best tool and strategies to accomplish your mission. In addition, Cathexis can provide consulting services around campaign marketing and e-communications calendar creation and management.

Our team has the experience and knowledge to provide end to end project management including; strategy, design, migration (content and data), integration, deployment and ongoing support for any sized nonprofit. We can provide as much or as little support as is required for the particular project at hand and we can do all of this at a competitive rate due to our virtual work environment and partnership structure.

Cathexis Partners is a virtual organization available to support clients' projects anywhere in North America and beyond. We are on the ground in Washington DC, Chicago, Austin, Atlanta, Orlando, Las Vegas and Dallas. Learn more about us at www.cathexispartners.com or info@cathexispartners.com.