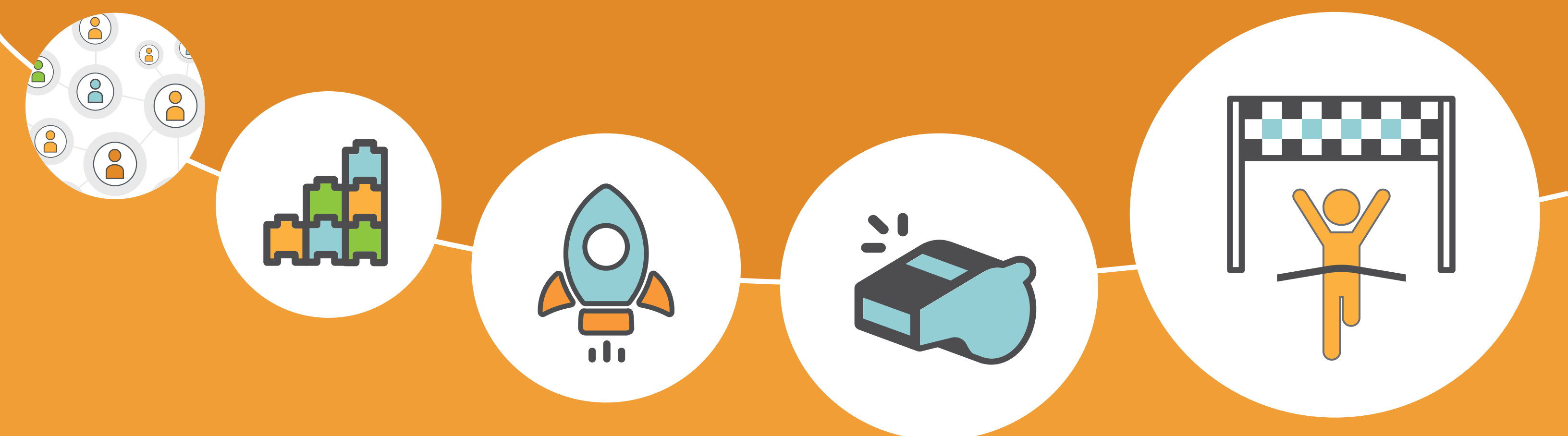
THE NONPROFIT'S GUIDE TO PEER-TO-PEER FUNDRAISING

How to plan, launch, run, and wrap up successful online campaigns



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INTRODUCTION TO PEER-TO-PEER FUNDRAISING

There's nothing like the peer-to-peer (p2p) model for extending your fundraising reach. Whether it's associated with a large event – like a 5k run/walk, or it's year-round – like a tribute campaign, p2p fundraising is all about engaging supporters to raise funds from their networks on your nonprofit's behalf. It lets your supporters translate their enthusiasm for your mission into dollars to help your organization thrive.

P2P fundraising takes many forms. The traditional run, walk, and ride event model is tried and true. But non-traditional p2p campaigns, such as tribute, memorial, and DIY campaigns, have an important place in fundraising, too. They're typically less expensive to pull off than run, walk, and ride events. They can be an effective way to supplement traditional p2p events, especially during less active fundraising times during the year. And for organizations using a p2p software platform for traditional events, using the same platform for additional non-traditional campaigns is an efficient use of a tool that's already in place.

No matter what type of peer-to-peer fundraising campaign your organization takes on, you're not in it alone. In this guide, we've pulled together some top learnings from our work with hundreds of nonprofits on their p2p fundraising technology and campaigns to provide tips, tricks, and techniques for successful p2p fundraising.

We hope you find helpful ideas and fresh inspiration as you read through the guide.

Happy fundraising!

The Cathexis Partners Team

PLANNING YOUR PEER-TO-PEER CAMPAIGN

Running a p2p fundraising campaign or event can be challenging, involving a great deal of time and logistics. So, whether you're just starting out, or you're looking to polish your p2p approach, it's worth it to take time for up-front planning.

DO SOME RESEARCH

You may have several campaigns or events under your belt, but it never hurts to look at what other organizations are doing. Consider signing up for one or two p2p campaigns at other organizations to experience how the campaigns work from the perspective of a volunteer fundraiser.

Some things to pay attention to:

- How easy is it to set up a campaign?
- What tools does the organization provide you?
- What kind of coaching and support does the organization give you?
- What do you like/dislike about the process of fundraising for the organization?

FOCUS ON INSPIRATION

As you look at other organizations' campaigns, focus on incorporating ideas you like into your campaigns and avoid directly copying other organizations' content and designs.

Also, ask staff at other organizations about their p2p fundraising campaigns. Find out what lessons they've learned from past campaigns, and what advice they can offer you.

IDENTIFY YOUR GOALS

You could jump right into a p2p fundraising campaign or event. But given the level of time, effort, and money you'll likely spend, it's ideal to know what you want to achieve and how much money your campaign will likely raise. Here are some things to think about:

- **Non-financial goals** — Think through the different types of supporters your organization has – service recipients, volunteers, board members, etc. Of these groups, list the top five, 10, 25 (or however many come easily to you) individuals you think would likely take part in your campaign. This will be your "easy" target audience. Then, multiply that amount by what you feel comfortable setting as an **overall participant goal**. Then, you can set other non-financial goals, such as **total number of donors** and **overall new constituents** to your organization. These numbers will depend on variables including:
    - Type of campaign (walk, fun run, timed run, endurance event, virtual campaign, etc.).
    - Organizational reach – How big is your constituent base?
    - Market saturation – How many other organizations do similar campaigns?
    - Local, regional, and national social/economic factors.
    - Campaign marketing budget – How much can you spend?
- **Financial goals** — Campaign revenue tends to fall into three buckets: sponsors, registration fees, and fundraising totals. If you plan to offer **sponsorship opportunities**, think through how many sponsors you could secure at various levels. Decide if you will require a **registration fee**, and if so, how much. Then, use your number of estimated participants from above to calculate your total registration revenue.

Think about the different types of participants you identified and what you think each would realistically be able to **fundraise**. Multiply that amount by the total participants to set a fundraising revenue goal. Add up the various revenue streams for an estimate of what your campaign will raise and a realistic financial goal for your p2p campaign.

- **Agreement on goals** — Speak to others at your organization to ensure everyone is on the same page as to what constitutes a "successful" campaign, both financially and otherwise.

INDUSTRY BENCHMARKS: KNOW WHAT YOU CAN EXPECT

Several providers of p2p fundraising platforms publish benchmark reports. Using benchmark information, you can start shaping your p2p campaign goals. Once you nail down your campaign format details (which you'll work through later in this chapter), you can revisit your goals and update them using benchmark information relevant to the type of campaign you plan to run.

DETERMINE YOUR BUDGET

On the heels of "how much will this campaign raise?" is the question, "how much will it cost?". This is about available resources – both money and time. Consider the following costs before starting your next campaign:

- **Staff time** for campaign planning, copywriting, participant support and coaching, event management, campaign website management, and database management
- **Marketing costs** for things like graphic design, advertising, printing of flyers and posters, and postage for direct mail
- **Cost of online software** that allows fundraisers to create their fundraising pages, use emails and social media to ask friends and family to donate, and accept donations online
- **Costs for any kickoff party** for fundraisers
- **Event costs** if your campaign is related to a physical event, such as a 5k

REMEMBER EXPENSE AND TIME

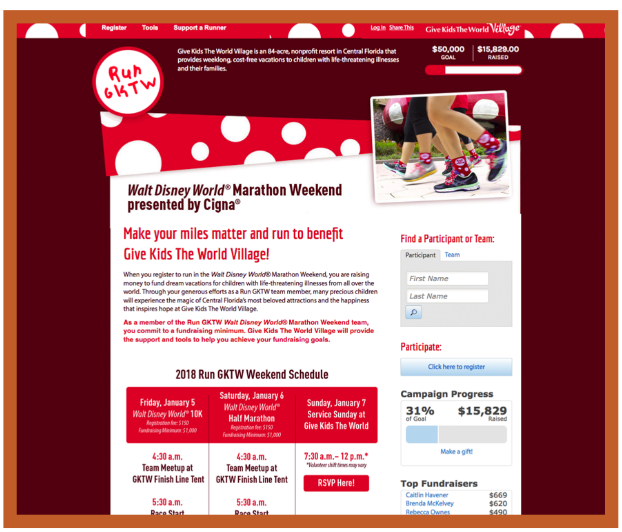
Remember that physical events can be expensive and time intensive. They won't necessarily return as much for each dollar spent as non-traditional p2p campaigns or other online fundraising campaigns. But the cost can pay off in expanded constituent base and increased fundraising per constituent, making it worth the effort and expense.

DECIDE ON THE FORMAT

The type of campaign you run goes hand-in-hand with your goals and budget: Your goals and budget should help drive the format of the campaign, and the format of the campaign may require you to go back to adjust your goals and budget. Following are descriptions of four campaign types and their characteristics to help get you started:

Proprietary physical events — nonprofit-hosted events that take place on a certain date. Participants sometimes pay a fee to sign up. They also raise additional funds once registered. This campaign type includes standard walks, 5ks, bike rides, and unique campaigns like stair climbs, rappelling, and other campaigns that are coordinated by the nonprofit.

- **Effort level:** High. Often require a great deal of planning, marketing, and logistics.
- **Budget:** High. Often require sponsorships to cover the hard costs of the event itself.

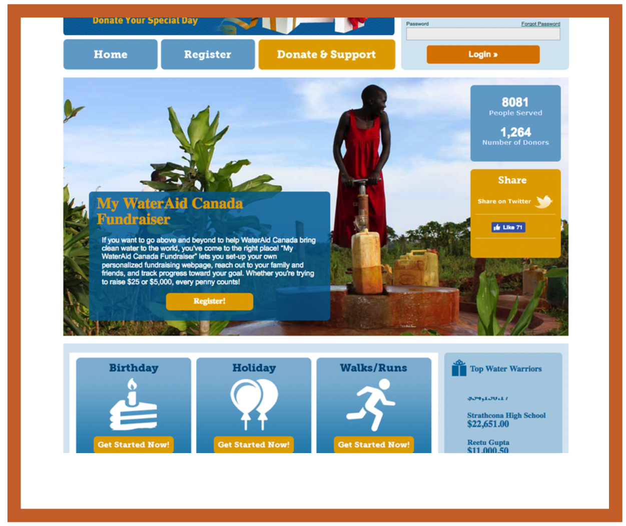


Challenge/endurance/destination events — events, such as marathons, that are hosted by an entity other than a nonprofit, with potentially multiple beneficiaries. This type of campaign allows a participant to register for an event that you aren't organizing, and still fundraise for your organization.

- **Effort level:** High. Often require a great deal of planning, marketing, and logistics, as well as coordination with the hosting entity.
- **Budget:** Moderate, though the hard costs of the event are often covered by the host.

Virtual campaigns — campaigns organized by the nonprofit, but without the logistics of physical events. With these campaigns, an organization provides an online environment for supporters to set up their own fundraising pages in support of a campaign created by the nonprofit. The organization often will establish fundraising categories such as “workplace giving,” “in memory/honor,” or “special occasion” to help participants get started. The campaigns can be seasonal, annual, or “evergreen” (with no specific end date). These campaigns have a common brand and often a specific fundraising goal. Registration fees typically are not charged.

- **Effort level:** Moderate. But a friendly warning: Because these types of campaigns don’t require the same level of investment as a physical event, organizations sometimes forget to allow for proper resources, time, and money to market the campaign. It can also be challenging to get people motivated to fundraise for a non-physical event, so it requires thoughtful planning and execution.
- **Budget:** Moderate. Most costs are related to staff time and marketing.



Independent fundraising, or do-it-yourself (DIY) campaigns — allow participants to host their own events and invite their friends and family to the events.

- **Effort level:** Moderate. But as with virtual campaigns, because these types of campaigns don’t require the same level of investment as a physical event, organizations sometimes forget to allow for the proper time and money to market their campaign.
- **Budget:** Moderate. Most costs are related to staff time and marketing.

CREATIVE APPROACHES TO PEER-TO-PEER FUNDRAISING

Nonprofits of all sizes and missions are finding creative ways to use the p2p fundraising model to raise money and engage supporters. Here are a few examples of approaches that can get your supporters involved beyond traditional events:

TRIBUTE/MEMORIAL

These types of campaigns are often found in the “cause and cure” and “animal welfare” verticals of the nonprofit space. If you have a mission tied to supporting the fallen, injured, or lost due to disease, disorder, injustice, or war, consider providing your constituents with online tools to raise funds in the name of someone who has touched their lives.

SPECIAL DAYS

Everyone has special days, such as birthdays, weddings, baby showers, and other meaningful events in their lives. Ask your constituents to “donate” their special day to your organization by asking friends and family to donate to your organization in lieu of presents.

VIRTUAL DRIVES

Ask your supporters to create their own virtual drives. Provide them with online tools and suggested email or social media content to help them ask their friends and family to donate. Set up the campaign on your website so that supporters’ friends and family can place items in a virtual shopping cart that represent what you can do with the money they give. This approach can be used for food drives, clothing drives, housewares drives, etc.

ALUMNI CAMPAIGNS

If your organization is an educational institution, you could create online campaigns that allow your alumni to raise funds for the programs at your organization that mean the most to them, such as athletics, scholarships, and research.

CHALLENGES

Set up a “challenge” environment in which your supporters can sign up to do X if their friends and family donate a certain amount of money. There are virtually limitless “challenge” campaigns that you can create.

BUILD A TEAM

You'll need the right people in place from across your organization to support various aspects of the campaign.

Here are some key roles to consider:

- **Campaign leader** — This person oversees the entire campaign and pulls together the right resources to ensure the campaign stays on track.
- **Executive leader** — This person "sponsors" the campaign throughout the organization, helping the entire organization to understand the campaign's importance.
- **Marketing manager** — This person provides writing, graphic design, promotional help, and PR assistance to support the campaign. This may be the event manager or director, a communications team member, or an agency.
- **IT representative** — This person typically steps in at the beginning of a campaign to ensure any p2p software implementation and integration with other systems is completed correctly. This may be an internal staffer, or a third-party agency.
- **Finance manager** — This person ensures that appropriate donation processes are in place so that campaign donations are accounted for correctly.
- **Fundraising manager** — This person will work with participants to help them fundraise, and also help troubleshoot any website issues or general questions they may have.
- **Database manager** — This role could fall to someone who already manages your existing database, or you may need to train someone on how to manage the aspects of your database that this new campaign will use.
- **Community cheerleader** — It's possible to run a p2p campaign without one, but having a "cheerleader" in the community – someone to evangelize your campaign and your nonprofit's mission – is a big help.
- **Other roles to consider** — These may include a logistics manager, volunteer and community engagement coordinator, recruitment manager, and sponsorship and corporate relationship manager.

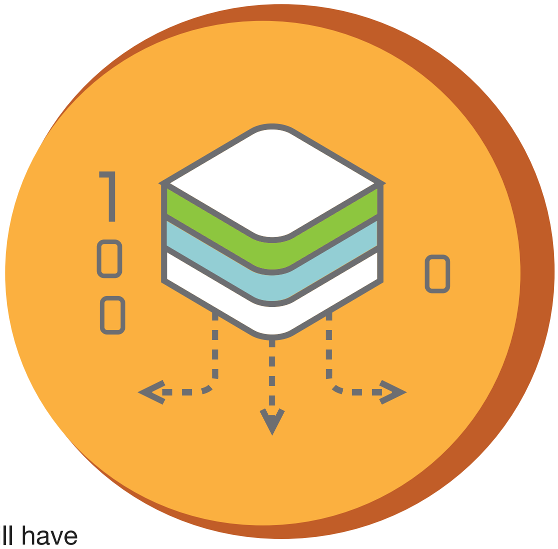
SELECT A PEER-TO-PEER SOFTWARE PLATFORM

Your supporters need a way to create their online fundraising pages, send emails to friends and family, use social media, and accept donations online. At the same time, you need to track campaign performance and communicate with fundraisers. So, you'll need the right software tools.

If you already have a p2p software platform in place that works well, great! Skip ahead to the next section. If you need to find your first platform, or are looking to replace the software you have, here are some steps to help you choose one that's right for your organization:

1. **Discover your p2p fundraising platform options.** We created The Toolkit for Selecting Peer-to-Peer Fundraising Software, which offers a how-to guide and interactive online tool to help nonprofits find the right software for their needs. This is a great place to start before you do additional research.
2. **Know your p2p fundraising requirements.** Before you commit to a platform, here are some areas to consider and questions to ask:
   - **Design** — Are you looking for design templates, or do you want a fundraising site that looks and feels like your organization's main website? Some platforms provide their own design with limited editing, while others give you the option to customize.
   - **Time** — How much time does it take to have a functioning p2p website – from the time you sign a contract to when you can start fundraising? Some systems can be set up in a couple of hours, while others may take several days based on other setup requirements. A quick setup isn't necessarily better; just be sure to understand time requirements and weigh them against your needs.
   - **Compatibility** — What other systems does your organization use that your p2p platform needs to integrate with? Be sure that you will be able to move data automatically from your p2p platform to your other systems so you can access this information and use it across your organization.
   - **Fundraising tools** — How easy it is for participants to fundraise and what tools do they have access to that will help them raise more? Some platforms have a separate fundraising center with a variety of tools, while others may have everything located on the person's fundraising page but offer less fundraising guidance.
   - **Responsiveness** — Most platforms are responsive (optimized for viewing on a wide range of browsers and mobile devices), but given how many people use a mobile device, it's worth double-checking.
   - **Payment processor/true cost** — Find out the true cost of a fundraising campaign. For example, does the software need an additional payment processing system, or is this included with the product? Sometimes there is a payment processing fee in addition to the actual cost of the product (and platform vendors aren't always transparent about this).
   - **Other setup requirements** — While a platform demo may look like it was easy to set up, that may be the case only if you already have other systems in place, such as a payment processor.

So, be sure to ask what different pieces need to be in place before your site can truly go live.



- **Offline data entry** — Do you need to enter offline registrations or donations, such as paper registration forms collected on the day of the event? If so, make sure the platform allows for this.
- **Reporting** — What data do you need, and how easy is it for staff to pull reports? Are there dashboards that give you quick progress updates? Is it easy to download information that you may need on event day? Does the system collect information that will be useful for analyzing event metrics?
- **Creating new events** — Once you have one event set up, is it easy to create a new one? Be sure to weigh how much others will have to rely on you (or a developer) to set up a new event versus how much they can do on their own.
- **Ability to create security categories/roles** — You may not want everyone who works on a campaign to have equal access to the database. Be sure to ask about the platform's ability to restrict certain users' access.
- **Ability to grow** — Do you plan on adding more events or other kinds of campaigns in the future? Pick a platform that will give you room to grow.
- **Ease of use** — How easy is it for participants and donors to use the website? Test the platform from both a participant and donor perspective.
- **Special characteristics** — Does your event have unique requirements? For example: Will people need to register or donate in honor/memory of others? Do you sell merchandise in the registration process? Do you want participants to be able to sell items and get credit for money they raise? Do you need to be able to hide fundraising pages for certain participants? Does your event require a fundraising minimum? Ask platform providers how they can handle anything unique to your event.
- **Additional assistance** — If you need help, how easy is it to contact customer service? Do they provide basic guidance on building your campaign, or are they there just to troubleshoot problems? Is training provided so you can understand how to use the software?

3. **Rank your p2p fundraising wish list.** Before you talk to p2p platform providers, rank your feature and function requirements in order of importance based on internal discussions about what is best for the organization. Be sure to differentiate between what you need, and what are "nice-to-haves". Knowing this before you speak with software representatives will help you steer the conversation in a useful direction.

4. **Contact platform contenders.** Choose a handful of options that you'd like to explore more. Contact the platform vendors to set up times to talk.

5. **Ask questions.** Ask the platform vendor about your must-haves as well as other items on your wish list. Ask for examples, a demo, and access to a platform "sandbox" so you can play around a bit. Ask what type of

fundraising growth other organizations have seen, and compare these answers from one platform to another. See if they have a site where you can register and do a test run – as a participant and as a donor.

6. **Ask for references.** Ask the vendors to give you contact information for two or three references. Call or email the references and ask them about their experience using the software. Did it meet the organization's needs? What challenges does the organization have with the product? What does the organization like most about the product?

7. **Make a decision.** Once you've explored a few options, weigh the platforms' ability to meet your needs against the platform costs. Choose an option that works for you now and in the future. You don't necessarily have to pick one that will work for you ten years down the road, but you also shouldn't have to change your platform each year as your organization evolves.

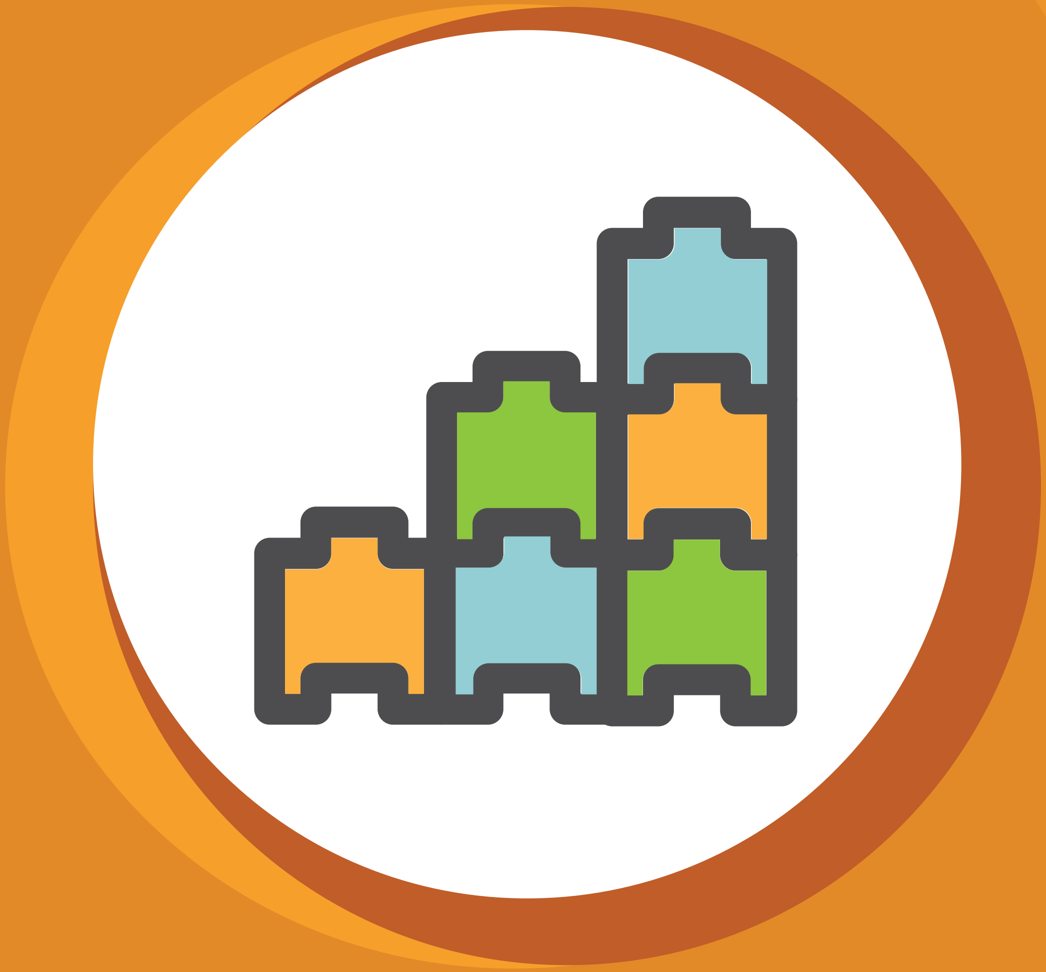
TO RFP OR NOT TO RFP

Some nonprofits issue a request for proposal (RFP) when they need new software. An RFP specifies an organization's requirements and their evaluation criteria for assessing proposals. An RFP isn't required – following the steps in this section should provide you with the information you need to make a decision. However, an RFP can be a valuable tool if you want to follow a more formal process. A typical RFP includes:

- A summary about the organization and campaign(s)
- An overview of the current technology environment, including items being considered for replacement and supporting platforms remaining in place
- Campaign functional requirements (front end and back end)
- The RFP process (steps, response requirements, and timeline)

BUILDING YOUR PEER-TO-PEER CAMPAIGN

You've got the foundation in place for a great p2p campaign. Now, it's time to start building it. Get your team together, roll up your sleeves, and dig in!



CREATE A STORY

To get your supporters excited about helping you raise funds, you need a compelling story to tell them and for them to tell their friends and family. Start by brainstorming ideas for your campaign, and then review the ideas with your campaign team. Consider the following aspects with your team:

- What problem does your campaign solve (why should someone donate)?
- What difference does one donation make (quantify this to help donors understand the impact of their donation)?
- How do you want people to feel about your campaign (touched, inspired, outraged)?

Once you know your campaign story, summarize it (actually write it down!), and use it as the "rallying" theme for your campaign.

DETERMINE YOUR BRANDING

Simply put, your campaign's "brand" is its name, design elements, and overall design. It's what identifies your campaign as distinct from other campaigns (yours or other organizations'). When choosing colors, photos, and general design look and feel, keep in mind what emotions you want your campaign to evoke in your audience.

Your campaign brand should connect with your organizations' mission, support your campaign story, and appeal to your audience. If you're unsure of how to tackle your campaign brand, consider consulting with your organization's marketing manager or bringing in an agency to help.

CREATE A COMMUNICATIONS PLAN

The goal of the communications plan is to help your organization think more strategically and communicate more effectively about your campaign. There are a few areas to focus on when constructing your plan: campaign steps, audiences, message points, and communications channels.

Map out every step of your campaign. Start from the first moment you start speaking about the campaign, and write down every step you will need to complete during the campaign. Some phases to keep in mind:

- Planning and creating your campaign (working with your staff, board members, and other stakeholders to build your campaign)
- Launching your campaign (getting the word out about what you're doing)
- Promoting your campaign (keeping the momentum going)
- Recruiting and coaching participants
- Wrapping up your campaign (sending thank yous and asking for feedback)

INCLUDE ALL STEPS
Read through to the end of this guide before you create the communications plan so you can be sure to include all steps and aspects of your campaign.

Consider your audiences. Think about the key audiences that you plan to engage with during your campaign to achieve your ultimate goal. Your audiences may include:

- Board members — to help with outreach and fundraising
- Staff members — to build and coordinate your campaign
- Volunteers — vital helpers in executing campaigns and events
- Existing donors — the people most likely to donate and spread the word
- Past participants — the people most likely to participate again and recruit other participants
- Community members — individuals or organizations who can help get the word out about your campaign
- The general public — people you don't even know yet who may want to support your campaign

Think through your message points. Once you've compiled your audience, segment your lists and determine what messages to communicate to each audience and when. Here are some ideas to consider:

- Donate to our campaign
- How your gift helps our organization do [insert your mission]

- For campaign/event participants:
    - Register or make a donation for our event
    - Personal story from a past participant (this could be a video)
    - Discount codes that participants can use to register
    - Incentives that participants can earn when they reach a certain fundraising level
    - Fundraising tips to ensure participants' success
- Email autoresponders — Many online peer-to-peer fundraising platforms include the ability to send automated email responses for registrations, donations, and other actions. These emails are a great opportunity to communicate with participants without additional effort beyond the initial setup of the email. Be sure to include messaging for email autoresponders in your overall strategy so that they remain cohesive with your other messages. You can even get creative and use these emails to encourage additional actions from your donors and fundraisers.

Determine your communications channels. Think about how you'll send each message to your various audiences. The channels you use can include your organization's own channels, such as email and direct mail. They also can include external channels such as TV, newspaper, and social media. Here are some channels to consider as part of your plan:

- Website
- Landing and registration pages for your event
- Email
- Direct mail
- Member or donor newsletters/magazines
- Social media (Facebook, X, etc.)
- Text messaging
- Print materials (posters, postcards, etc.)
- Public service announcements (PSAs) and local news coverage (TV, radio, newspaper)
- Print and online ads

DON'T FORGET THE PHONE

Using the phone as a communications channel can be time-consuming, but it can be a highly effective personal touch. Consider calling captains of the top 10 fundraising teams from last year's p2p fundraising event to thank them for their ongoing support and leadership. Or ask your board members to call past donors, thank them for their support, update them on how funds have been used, and ask them to support your current campaign.

DEVELOP A COMMUNICATIONS CALENDAR

A communications calendar is an essential piece of every campaign. Here are a few reasons to develop a communications calendar:

- Helps multiple staff members visualize various messages, deliverables, and timelines
- Provides an overview to help you avoid sending mixed or "competing" messages
- Ensures that your messaging is strong and receives the right traction

To start your calendar, write down the date of the last communication you'll send for your campaign, and then work backward to add the other communications and prep work you'll need leading up to that last communication. If you want to secure any public service announcements or local media appearances, allow plenty of time to schedule, as they can sometimes take weeks or even months to arrange.

CHAT WITH YOUR MARKETING TEAM

Be sure to work closely with your marketing department to ensure your communications *don't* overlap with other planned campaigns and that you *do* leverage other planned communications when appropriate.

Putting together your communications calendar doesn't have to be fancy. A simple Word document or Excel spreadsheet can do the trick. An easy way to organize it is by each channel that you will use to disseminate your message, for instance: email, printed outreach (e.g., magazines, postcards, flyers), purchased advertisements, and social media.

Here is a sample calendar:

Tentative Date Scheduled or to Post	Message Title/Subject Line	Key Message Points	Channel	Audience	Sent/Published Y/N	Notes/Comments
2 p.m. 3/15	Registration now open!	Registration now open "link to register "username reminder	Email	Monthly Email Subscribers List	YES	
As participants register	Thank you for registering	Confirmation email	Autoresponder	All event participants	Automatically sent	
As donors make a gift	Thank you for your gift	Confirmation email	Autoresponder	All event donors	Automatically sent	
TBD 4/2	TBD Message	TBD	Email	All past team captains	NO	Need copy from marketing dept
5/1	A Special Offer for Being Such a Fantastic Supporter	*Special promo code for donors $xxx and above to use when they start a team and pledge to fundraise $xxx	Direct Mail	All donors $xxx amount and above	YES	Mail-house confirmed mail has been delivered to USPS
10 a.m. 5/14	Video: How Your Support Helps [org name]	*Video from CEO or Board Chair explaining how event participation & donations help the mission	Facebook post	All Facebook followers	NO	
10 a.m 5/14	Video: How Your Support Helps [org name]	*Video from CEO or Board Chair explaining how event participation & donations help the mission	Twitter Post	All Twitter followers	NO	
9 a.m. 5/14	Video: How Your Support Helps [org name]	*Video from CEO or Board Chair explaining how event participation & donations help the mission	YouTube video	All YouTube followers	NO	Share to YouTube first and use link on Facebook & Twitter
9 a.m. 5/31	This is [instert name's] Story	*Story of one participant and CTA to register	Website story	All website visitors	NO	Need to update photo carousel on website and link to story
9 a.m. 5/31	This is [insert name's] Story	*Story of one participant *Fundraise tips *link to fundraise center & reminder to send emails	Email	All current event participants	NO	
9 a.m. 6/1	Did you forget to register?	*Thank you for returning captains *username reminder *link to register	Email	All past team captains	NO	
9 a.m. 6/1	Register today and get $10 off	*Special promo code for Facebook	Facebook Ad	*targeting women ages 18-55 *within 50 mile radius of walk 8	NO	Check with marketing department to confirm ad has

This sample calendar is easily customizable and is just a starting point. [Here is a template to make getting started even easier.]

CREATE CONTENT

You have a campaign plan and a calendar. Now it's time to create your content. It may help to group together similar messaging. For instance, you can have a document for all webpage content (event home page, event details, frequently asked questions, contact information, etc.), another document for email content (autoresponders, email campaigns, etc.), and another document for printed materials (flyers, brochures, registration forms, pledge sheets, etc.) When creating content, refer to your communications calendar for timing and target deadlines. Work closely with your communications team on messaging and branding. If there is a consistent theme that you want to carry through all of your content, be sure to include that through text and imagery.

DON'T FORGET TO PROOFREAD

Ask team members to review the various content items and provide feedback. Another set of eyes can help spot spelling or grammar errors as well as identify any content that may be confusing to participants and supporters.

CONFIGURE YOUR PEER-TO-PEER SOFTWARE PLATFORM

If you haven't already done so, it's time to configure your p2p software platform. Configuration of the online environment can be broken down into a few phases:

- **Platform configuration** — This refers to the items that you as the system administrator can turn on and off, define in a text box, or drag and drop. This includes things like naming the campaign, setting participant type(s), and defining registration and donation forms. For a basic campaign, allow four to eight hours of discussion and planning, and one to four hours for configuration (or longer if it's the first time your organization is using the platform).

- **Design** — When it comes to designing your campaign, it all depends on the software. While it's great to have control of design capabilities, more control means more time to configure than when dealing with a pre-configured or template-style platform. Allow eight to 32 hours of discussion for design (depending on the complexity of the design) and one to four hours for simple configuration via drag-and-drop and upload configuration. Allow anywhere from four to 40+ hours for custom coding of a campaign (again, depending on the complexity of the coding).

PLATFORM SET-UP: HELP IS AT HAND

Enlisting the services of a firm like Cathexis Partners can help ensure your platform is set up to work the way you need it to, while freeing you to focus on your campaigns.

- **Content –** The following is required content that you may or may not have control of, depending on the platform:
    - Campaign home page
    - Default personal and team fundraising pages
    - Donation and registration thank you pages and autoresponder/receipt emails
    - Other built-in campaign pages

  Content creation, editing, and implementation can take eight to 40 hours for a simple campaign. The following are optional, but highly recommended content (not supported in all platforms):
    - Additional campaign pages, such as Sponsors, About, FAQ, Participant Support, etc.
    - Suggested emails and social media posts for participants and donors
    - Additional autoresponders, such as fundraising milestone or time-released emails (e.g., seven days after registration)

DETERMINE YOUR METRICS

The metrics you track should mirror the goals you set at the beginning of your campaign. You'll need a way to track progress and should make sure that your software is set up to monitor what's important to your organization.

Think about metrics that will allow you to see how you're doing in terms of your goals, the effectiveness of certain outreach efforts, and general status information that you can use to adjust your campaign strategies if needed.

The exact metrics you track will be unique to your organization, but here are a few key metrics to get you started:

- How many people have signed up
- How many people have started to fundraise*
- Number of teams*
- Number of self-donors*
- Someone's connection to your cause (and which connection types are your biggest supporters)*
- Average amount raised per fundraiser
- How much money the entire campaign has raised
- Total number of donations
- Average amount of each donation
- Week-over-week growth of fundraising and participant totals

- Year-over-year growth of fundraising and participants for repeat campaigns
- Open, click-through, and unsubscribe rates of your e-communications

**These metrics can be useful for communicating with participants. For example, you may send different coaching messages to someone who has raised $0 vs someone who has raised $500. You may also speak differently to a team captain vs. someone who is signed up to participate individually.*

Here are some other ideas to determine the effectiveness of your campaign's communications/ advertising efforts:

- If you're using web ads, consider setting up Google Analytics.
- If your software allows for discount/promo codes, use a unique code in each ad to track return.
- Include an optional question during registration that asks how someone heard about your event/campaign.

IDENTIFY WHAT'S IMPORTANT EARLY ON

It's easy to get caught up in all of the metrics you could run, so be sure to identify what's important early on. Make sure your platform is set up to capture this information, know how often metrics will be run, and who will run the reports. Setting clear expectations in these areas will help you use your resources wisely.

LAUNCHING YOUR PEER-TO-PEER CAMPAIGN

Everything's in place: your plan, your calendar, your content, your platform. You're ready to go. Now, it's time to open the door and get your supporters fundraising!

KICK OFF YOUR CAMPAIGN

Sending an email and direct mail to current and past participants and donors is a good way to get the word out and recruit supporters to fundraise for you. But, why stop there? Think about other channels that reach beyond your donor list: social media, your website, signs at your organization's events, public service announcements, local TV news shows – all of these channels can be used to announce your campaign. To build anticipation, announce the campaign well in advance, including a "countdown" (via your website, email, and other channels) leading up to the campaign launch.

DON'T FORGET YOUR TEAM

Be sure to notify your organization's internal stakeholders that you're kicking off the campaign. This will help prepare them to answer any questions from supporters.

Also, consider a "soft launch" for your campaign in which you ask staff members, board members, and your most involved constituents to register and begin fundraising ahead of the official launch. Then, when other constituents, frequent site visitors, or others come across the campaign, they'll see that it already has interest. A soft launch can also help to identify any bugs or confusion with registration or donation processes before your campaign really kicks off.

RECRUIT YOUR FUNDRAISERS

Now that you've kicked off your campaign, how do you get participants to sign up? How do you turn constituents who have donated once or twice to your organization into fundraisers? How do you make sure previous participants return? And more importantly, how do you turn people who aren't your constituents (yet) into fundraisers? Here's how:

Identify your audience. Just as you'll use a variety of channels to kick off your campaign, you'll need to use a variety of channels to recruit fundraisers. The key is to make sure that the message fits with the channel and the audience most likely being reached by that form of communication. In other words: know your audience.

Tailoring each message to a specific audience with a specific call to action makes a difference. Just remember, your audience may know little or nothing about your campaign, so communicate accordingly. A few ideas:

- **Look at the data.** Explore data that you already have about your constituents. Where has your organization seen the best response (email, social media, or maybe even snail mail)? Looking at your data can also help with other challenges, like finding the best place for an event (where are most of your constituents located?), and who are possible candidates for sponsorships (where do your constituents work?).
- **Ask questions.** For example, use a survey tool or post questions on social media to get to know your audiences better. Ask specific questions to make sure that you're getting useful information. And once you have it, make sure that it's noted in your constituent relationship management (CRM) system. This method can be used for existing constituents or for people who are brand new to your organization.

- **Attend events.** If your organization holds events that are informational and not fundraising related, these are great opportunities to meet an audience who is already familiar with your mission. Ask if you can set aside time at the event to talk with supporters, learn more about them, and tell them about your campaign. Outside events (community fairs, school events, etc.) are also a great way to introduce your campaign to a new audience.

Know what to say and when to say it. Once you know who your audience is, what do you say to them? Recruitment messaging should begin with the obvious, such as “Registration is now open” and “Please join us again this year” as soon as registration is available online. If your platform offers the ability for return users to log in, be sure to add that as a reminder to your communication. Early bird specials (discounts off registration fees or other perks) are a great way to entice any audience (new or returning) to your event.

Once registration is in full swing, move to more mission-focused messaging, such as “How your support helps (your organization name)” and “This is (person who has benefitted from your mission)’s story”. Send these types of messages 10, five, and two weeks out from your event. As you get closer to the big day, you can remind your audience that they still haven’t registered. Depending on your type of organization, you can keep this communication on the lighter side, or write with a greater sense of urgency. This is also a great time to offer registration incentives or challenges to help with the final push.

WHAT ABOUT YEAR-ROUND CAMPAIGNS?

If your campaign is virtual, you can use the messaging above if there is a date associated with the campaign, but what if it’s an evergreen campaign? In this case, start with the standard, “Registration is now open,” and add mission-focused messages throughout the entire year.

Think outside the box. Once you've reached out to your constituents, start looking at other groups who may be interested in your campaign:

- **Start with with sponsors of your campaign.** Check with their HR department to see if you can visit the company before, during, or after work to let their employees know about your campaign. Ask if you can help them start a team, so that in addition to sponsorship dollars, you also get their employees involved.
- **Visit shops near your event.** Ask if they'd like to start a team or join a community team that you've created for this campaign. If creating a team isn't their thing, ask if you can host a recruitment event at their shop, or ask to leave information about the campaign for employees or customers. (Running a virtual campaign? Simply apply this suggestion to shops around the physical location of your organization.)
- **Rinse and repeat** with schools, churches, synagogues, mosques, civic groups, scout troops, sororities, fraternities, etc. And don't forget running and/or walking clubs if your campaign is centered on a run or walk.

COACHING YOUR PEER-TO-PEER FUNDRAISERS

Your fundraisers have a connection to your mission and want to take on the extra work of fundraising for your nonprofit. Help them support your organization by providing fundraising tools, tips, and encouragement throughout the campaign.

The whole point of communicating with your fundraisers during your campaign is to keep them informed and motivated. So, keep your messages succinct and engaging. Use bullet points, graphics, and videos to make communications easy and interesting to read. And be sure to keep content varied and compelling, giving them a reason to open and read your messages.

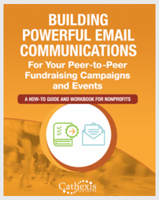
THERE'S ALWAYS ROOM FOR FUN

Your organization's mission may be serious, but there are still ways to add fun to your campaign to keep fundraisers engaged and motivated. For example, create campaign-specific fundraising "thermometers" and social media badges that fundraisers can use to show off their progress. Offer incentive/appreciation gifts such as t-shirts, hats, or stickers for fundraisers who reach specific milestones. Enter top fundraisers into a drawing for a prize.

USE EMAIL

Sending regular emails is a great way to inform and motivate fundraisers throughout the campaign. A few ideas for what to share with fundraisers:

- An article highlighting a top fundraiser
- Tips on "how to raise $X this week"
- A thermometer of funds raised so far
- An example of what funds can do for the organization's mission (for example, a $50 donation can feed a family of four for X days)
- An inspirational story about someone who benefitted from your organization's mission



Learn how a thoughtful email strategy can help you recruit peer-to-peer participants, coach your fundraisers, and build long-term relationships: Get the guide and workbook, Building Powerful Email Communications for Your Peer-to-Peer Fundraising Campaigns and Events

MAKE IT SOCIAL

Use social media to keep your campaign vibrant. Post images and stories about your campaign and your organization's mission. Post a video of a staff member giving fundraising tips or talking about the importance of the campaign. Share pictures and stories of those who benefit from your organization's work.

GET PERSONAL

We often forget about the power of one-to-one communication. Pick up the phone and call your fundraisers. Ask them how things are going, and thank them for their work. Also, consider writing a personalized note, perhaps signed by your executive director or a member of your board, to thank fundraisers for their support.

INCLUDE TEXTS IN THE MIX

While it may not be as personal as a phone call or a handwritten card, text messaging is a key communications channel. Add texts to the mix – they're a great way to send messages of encouragement, updates, and even virtual high-five to fundraisers as they reach milestones.

OPTIMIZE YOUR PARTICIPANT PORTAL

Your participant portal is the web page where your peer-to-peer participants manage their fundraising and find resources to help them support your campaign or event. Most peer-to-peer fundraising software products offer some form of participant portal functionality.

Make sure you've optimized your participant portal to help your participants recruit team members, access resources that help them fundraise, ask for donations from their social network, and track progress toward their fundraising goal.

SEGMENT. SEGMENT. SEGMENT.

In all communications with fundraisers, be sure to segment your lists and tailor your messages. For example, if your campaign allows for the formation of teams, send tailored messages to team captains with tips and encouragement for motivating their team members. Also, use different messages for your top fundraisers, and even for fundraisers from past p2p campaigns (who you can continue to encourage to sign up to fundraise this time around).

TIP

Segmenting your audience can become complex, but it doesn't have to. Just be sure to think about your key audiences and what will keep them engaged with your campaign.

LISTEN

While it's important to get feedback from your p2p fundraisers once your campaign ends (more on that later), remember to listen to them during the campaign, too. Use short online surveys throughout your campaign so that fundraisers can give you feedback. You might also hold in-person or virtual get-togethers to get feedback from fundraisers and let them share lessons learned with each other. Make sure contact information is easy to find on your website and in communications you send so that people can reach you.

WRAPPING UP YOUR PEER-TO-PEER CAMPAIGN

You did it! The campaign or event is over. There's nothing left to do but pat yourself on the back and go home! Right? Not quite. There are still a few things you need to do to wrap up your campaign and ensure that your next one is *even better.*

ANALYZE YOUR CAMPAIGN

In addition to reviewing your campaign's status on a regular (weekly and monthly) basis, take time after the campaign to review overall results compared with the initial goals and metrics you set before the campaign launch.

- **Gather the numbers** — Once all donations are entered, run final reports. How did the campaign do compared with your goals? What goals were too low or too high, and why do you think that was the case? How effective were your various marketing efforts? Look for metrics including total participants, total funds raised, number of returning participants, and average fundraising per participant. Dig deeper to find trends, such as amount raised based on registration date, number of emails sent, and if someone updated their personal/team fundraising page.

- **Look at other factors** — Just as important as numbers are qualitative aspects. How much staff effort did it take? What did participants like/dislike about the event: registering, fundraising, and the event itself if it was a physical event? Was the website easy to use for participants and staff? NOTE: You will have been listening to participant feedback throughout the event, but be sure to include post-event feedback (more on that later) in your analysis.

- **Debrief** — Bring together everyone who was involved with the campaign to review the campaign goals, discuss results, and consider lessons learned. Take notes so that you'll have them to look back on as you start the next campaign.

- **Think about the next campaign** — Now that you have another p2p campaign under your belt and data to show results, you can start thinking strategically about your next campaign. If you're going to continue with the same format, perhaps your focus will be to improve fundraising. If your campaign wasn't as successful as you'd like, maybe changing your campaign structure would help. Or maybe fundraising was really successful this time and your strategy will focus more on recruiting more participants, retaining those who participated this year, and getting more people to fundraise.

GET FRESH PERSPECTIVES

Being receptive to feedback from staff and constituents, and enlisting services from a firm like Cathexis Partners, can give you new ideas and perspectives to help you plan your next campaign.

SAY THANK YOU

Your fundraisers have worked hard, and while you have thanked them throughout the campaign, be sure to send them a wrap-up thank you email, and maybe even call your top fundraisers. Let them know how much money your organization has raised due to their support and commitment, and tell them what your organization will be able to do with the funds raised. In your messaging, you can include pictures and stories to highlight features of the campaign. And, just as you held a kick-off event to get the ball rolling with your campaign, consider inviting your fundraisers to a wrap-up event — virtual or in-person — to recognize your participants' great work.

ASK FOR FEEDBACK

While the experience is still fresh in their minds, send your p2p fundraisers a survey with questions that address what worked, what didn't, and how you can improve the next campaign. Some questions you might ask:

- On a scale from one – five (with one being easy and five being difficult), how easy was it for you to set up your own campaign?
- What tools did we provide you that were *most* helpful?
- What tools did we provide you that were *least* helpful?
- What did you like *most* about the process of fundraising for our organization?
- What did you like *least* about the process of fundraising for our organization?
- What can we do to improve our next campaign?

It's also helpful to leave an open comment area where people can provide feedback. They may include additional information that isn't covered by another survey question but can help improve the next campaign.

KEEP IN TOUCH

Your fundraisers are typically your most loyal supporters. So, keep them engaged with regular updates on what your organization has done with the funds they helped raise, and they'll be even more likely to help you again with the next campaign. Also, be sure to keep them on your newsletter distribution list, and include them in some of your year-round campaigns so that they are up-to-date on all of your organization's activities. As soon as you have the kick-off date for your next p2p campaign, be sure to let them know that, too.

TAKE YOUR PEER-TO-PEER FUNDRAISING TO NEW HEIGHTS

There's virtually no limit to the number of ways you can use the peer-to-peer model to raise funds and engage supporters. With some inspiration, time, and the right peer-to-peer tools for the job, you can take campaigns in exciting new directions.

At Cathexis Partners, we help nonprofits like yours to implement and use technology to raise funds and spread the word about their missions affordably and effectively. Our services include peer-to-peer fundraising strategy and software implementation.

Contact us today, and let's talk about how you can take your peer-to-peer fundraising to new heights.

Cathexis PARTNERS

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