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PARTNERS



# *The* PEER-TO-PEER FUNDRAISING JOURNEY

*Keeping Donors Engaged*

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# INTRODUCTION

## Today's Peer-to-Peer Donor

With the rise of new fundraising channels such as livestream and Facebook, nonprofits are reaching a whole new group of donors. Whether you have an established peer-to-peer fundraising event or are supporting new do-it-yourself (DIY) campaigns, attracting and retaining peer-to-peer donors can be challenging, especially if you don't have a tailored plan in place that considers their unique motivators and connection to the organization.

### Fundraising is a journey, not just a single transaction.

Successful organizations are moving past a focus on the single gift to cultivate a donor relationship with continued engagement and giving.

We designed this guide to help nonprofits improve engagement throughout each stage of the peer-to-peer donor journey. The guide provides insights from the [Social Donor Study](#) into peer-to-peer donor motivators, as well as actionable tips and best practices for organizations to leverage as they optimize their peer-to-peer fundraising and donor cultivation.



**ATTRACT** ➤ **MOTIVATE** ➤ **CONNECT** ➤ **CONVERT**

# CHARACTERISTICS *of* PEER-TO-PEER DONORS

For peer-to-peer campaigns and events, there's a difference between participants, who nonprofits are trying to recruit to raise funds on the nonprofit's behalf, and donors, who the participants solicit on behalf of the organization.

In this guide we'll focus on improving engagement with the peer-to-peer donor, those who are giving to social fundraising campaigns. While peer-to-peer fundraising campaigns attract a wide variety of supporters, the chart to the right breaks down the characteristics of the peer-to-peer donor we are focusing on.



Sponsor Donors



Occasion/Challenge Donors

GENDER		
Male	47%	32%
Female	52%	67%
GENERATION		
Gen Z (1996-2000)	5%	5%
Millennials (1981-1995)	31%	41%
Gen X (1965-1980)	30%	33%
Boomers (1946-1964)	33%	22%
EDUCATION		
Less than college	55%	64%
College or more	45%	36%
HHI		
<\$25K	8%	13%
\$25-50K	23%	31%
\$50-100K	37%	37%
\$100-200K	23%	13%
\$200K+	5%	2%
Donated Before		
Yes	61%	46%
No	36%	49%
Amount of donation		
Average	\$113	\$99
Median	\$50	\$50

Demographic data based on Social Donor Study



Sponsor Donors

Sponsored someone in a fundraising walk, run, ride, or similar activity.



Occasion/Challenge Donors

Donated to a virtual challenge or occasion like a birthday.



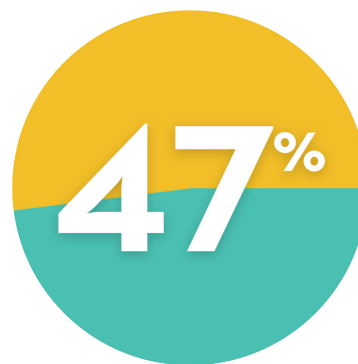


# GETTING THEIR ATTENTION

The first step on the peer-to-peer donor journey is the awareness phase – getting the donor’s attention. The typical peer-to-peer donor is often not deeply familiar or connected with the nonprofit prior to giving. Their first interaction with an organization is usually through a personal appeal from their friend, family member, or colleague.

This presents unique opportunities and challenges for nonprofits, as they must find ways to engage and activate donors who are not directly connected to the cause. Social proof, personal networks, and peer influence play a big role in getting your campaign noticed.

According to the Social Donor Study of more than 1,000 individual donors, 47 percent of peer-to-peer donors are first-time donors to an organization, and the majority are only somewhat familiar with the cause prior to donating. It’s important to keep this in mind when structuring a peer-to-peer campaign and the corresponding messaging. After all, your organization is relying on your supporters to act as third-party social influencers, tell your story, and convey your mission.



**OF PEER-TO-PEER  
DONORS ARE  
FIRST-TIME  
DONORS TO AN  
ORGANIZATION**



EMAIL



SOCIAL  
MEDIA



IN  
PERSON

When it comes to attracting new supporters, three main places peer-to-peer donors hear about giving campaigns is social media, in person, and through email. Keep in mind that social and email channels are especially crowded with competing nonprofit asks, causes, and campaigns.

So how do you stand out, grab attention, and increase your likelihood for the donor's share of wallet? Surveyed peer-to-peer donors say the three most important factors when evaluating a potential giving opportunity are:

**1. THE NONPROFIT HIGHLIGHTS ITS MISSION.**

**2. DONATING IS EASY.**

**3. IT'S CLEAR HOW A DONATION MAKES A DIFFERENCE.**

## HOW TO MAKE YOUR CAMPAIGN STAND OUT



To get your supporters excited about helping your nonprofit raise funds, you need a compelling story to tell them and for them to tell their friends and family. Establishing an emotional connection with donors means sharing your mission, your unique value, and the reason your campaign is important in terms of direct impact to your community or constituents.

## MAKE SURE THESE MUST-HAVE MISSION MESSAGES ARE PART OF EVERY PEER-TO-PEER CAMPAIGN:

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**What mission-critical problem does your campaign solve (why should someone donate)?**

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**What difference does one donation make (quantify this to help donors understand the impact of their donation)?**

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**How do you want people to feel about your campaign (emotionally touched, inspired, outraged)?**



Once you have the pillars of your campaign messaging, it's time to give your campaign a brand and campaign story. But, what does “brand” mean, and why does it matter?

## Brand

Simply put, *your campaign's brand is its name, creative elements, and overall design* – it's what identifies your campaign as distinct from other fundraisers (yours or other organizations'). When choosing colors, photos, and general design look and feel, go back to your campaign messaging and the emotions you want your campaign to evoke in your audience.

Your campaign brand should fit with your organizations' mission, support your campaign story, and appeal to your target demographic. If you're unsure of how to tackle your campaign brand, consider consulting with your organization's marketing manager, bringing in a third-party agency or better yet, finding a board member or active volunteer who will donate their marketing talents.

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

## Audience

*Know your audience.* Create personas of your different types of site visitors and ensure you have at least one for your average donors.

- Will your imagery and calls to action resonate with your donor personas?
- How can you weave in your key campaign messages to connect with your audience?
- Does your hero image (main banner image on the page) speak to or represent your donors?



Sponsor  
Donors



Occasion/Challenge  
Donors

It's also a good idea to have a “soft launch” for your campaign, in which you have staff members, board members, and your most involved supporters to 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 also helps to identify any bugs or confusion with donation processes before your campaign really kicks off.



**TIP: INCORPORATE A/B TESTING OF CAMPAIGN MESSAGING IN YOUR SOFT LAUNCH AND THEN OPTIMIZE THE MESSAGING FOR THE OFFICIAL LAUNCH AROUND WHAT PERFORMED THE BEST.**



# MOTIVATING THEM TO GIVE

Now that you have a potential donor's attention and piqued their interest, it's time to shift focus to creating a seamless giving experience with enough substance and urgency to inspire a donation. There's a combination of factors that move a peer-to-peer donor past the initial attraction to actually completing a gift. According to the Social Donor Study, the top reasons why peer-to-peer donors are motivated to give are:

1. **IT WAS EASY TO DO.**
2. **I CARE ABOUT THE MISSION.**
3. **THE MONEY RAISED WOULD MAKE A DIFFERENCE.**
4. **I WANTED TO SUPPORT THE PERSON WHO ASKED ME TO DONATE.**
5. **MY FRIENDS, COLLEAGUES, AND/OR FAMILY WERE GOING TO THE EVENT.**

Like the rest of us, peer-to-peer donors have come to expect simplicity in their online experience, including the donation process. Donors have become more sophisticated with the rise of mobile technology and fundraising platforms that automate the giving experience. They expect tools and processes that make donating easy.



First-time donors prioritize ease and supporting the person who solicited them over a connection to the mission.

It's important to evaluate your giving experience through the eyes of first-time donors who may not be very familiar with your cause and impact. These donors are more likely to abandon a multi-step giving process since they don't have a deep connection the cause.

It's worth noting that the Social Donor Study found there's opportunity in improving the giving experience, with nearly 20 percent of donors not finding it "very easy" to make a donation. Remember, the giving experience can have a big impact on getting the actual gift and is worth evaluating for every nonprofit.

**ONE IN FIVE DONORS** stated they found the giving experience somewhat difficult, meaning there is universal room for improvement in the tools, user interfaces, and donation processes served up to peer-to-peer donors. In-person and online donations are the top areas that need improvement.





## Tips for Simplifying the Giving Experience

Here are three easy but impactful things you can do to simplify the online peer-to-peer giving experience:

### Streamline your donation process.

Pretend you know nothing about your peer-to-peer campaign and step through the online giving process. Ask yourself these questions, take notes as you go, and work with your website manager to make improvements:

- Is it obvious what I should do if I want to learn more, register, or donate?
- How many clicks does it take to donate?
- How many questions am I asked during the donation process (and do we really need to ask all of them)?
- Does the Donate button or call to action follow donors on the page?
- If I'm donating, is it easy to find the person I want to donate on behalf of?

### Tie money to real items.

Associate the donation levels for your campaign or event with what the funds will provide for your organization. Letting supporters know that their donation will help feed a family or send a child to school for a year is more meaningful than simply asking for a specified amount of money. This approach makes it easy for donors to understand the impact of their donation.

### Use clear calls-to-action.

Every communication – whether it's an email, text, or social media post – should have one clear purpose. When creating content, make sure you identify the action you want your reader to take and clearly communicate it (without adding several other asks!).

Calls-to-action should be just that – action oriented. When using buttons or callouts in your forms, and giving pages, be sure to use verbs that relate to the act of giving. Examples include:

**GIVE TODAY**

**DONATE HERE**

**GIVE NOW**



**TIP: BY SIMPLY PROVIDING AN OPTION ON YOUR ONLINE DONATION FORM FOR DONORS TO COVER THE COST OF TRANSACTION FEES, YOU CAN SIGNIFICANTLY BOOST YOUR OVERALL FUNDS RAISED.**



## CONNECTING THEM *to the* CAUSE

Retaining peer-to-peer donors can be challenging for organizations, especially those first-time donors, of which the [Fundraising Effectiveness Project](#) estimates only 31.8 percent are retained year-over-year. The good news from the Social Donor Study is there's opportunity to build a deeper connection with these donors and turn a one-time gift into additional donations.



**OF PEER-TO-PEER  
DONORS SAY THEY  
ARE LIKELY TO  
GIVE AGAIN IN THE  
SAME WAY**

And there's an increased opportunity for retention when donors:

1. Understand the impact of their gift
2. Have a positive giving experience
3. Receive consistent follow-up

When it comes to follow-up communication and thank-you's, peer-to-peer donors are clear that

they want more information on the impact of their donation. **However, 25 percent of peer-to-peer donors never hear from a nonprofit again after making a gift.** Donors who did not receive any follow-up messages were four times as likely to say they will NOT convert to a regular donor.

This points to a clear area of opportunity for nonprofits to connect first-time peer-to-peer donors to their cause and capture additional information (especially information from the channels peer-to-peer donors are most likely to stay in touch with a nonprofit through: email and social media).





## Here are two approaches to keep in mind with peer-to-peer donor follow-ups:

### Say Thank You

Be sure to provide your participants with tools that make thanking their supporters (donors) easier and more effective by providing suggested messages with logos, campaign branding, and mission talking points. When evaluating peer-to-peer fundraising technology, be sure the solution includes automated notification for participants when they've received donations. It's important to prompt your participants to send thank-you's and make it easy for them to send messages from any device.

*Thank You*

In the messages, remember that peer-to-peer donors may be hearing about you for the first time. So, make sure you make the right first impression! Include more than a simple "thank you" in the donation receipt. Include information about your mission and how their donation is making an impact. Also, include pictures and stories to highlight features of the campaign and humanize your brand.



### Keep in Touch

Just because your campaign has ended doesn't mean it's time to stop communicating with your peer-to-peer donors. In fact, your communication with them is hopefully just starting! So, keep them engaged with regular updates on what your organization has done with the funds they donated, and they'll be even more likely to donate again.

Also, be sure to keep them on your newsletter and annual report distribution list and include them in some of your year-round campaigns, so they are up-to-date on all of your organization's activities.



**TIP: SOCIAL MEDIA ALSO PLAYS AN IMPORTANT ROLE IN CONTINUED COMMUNICATION WITH PEER-TO-PEER DONORS. MAKE SURE YOUR SOCIAL POSTS EMPHASIZE THE IMPACT OF THE CAMPAIGN AND INCLUDE ENGAGING IMAGES AND VIDEO THAT BRING THE MISSION ALIVE.**



## CONVERTING THEM *to* LOYAL SUPPORTERS

Once you've developed a deeper personal connection with your peer-to-peer donors, examine the levers that increase the likelihood of long-term conversion. The Social Donor Study found that 25 percent of surveyed peer-to-peer donors say they are very likely to become an annual or monthly donor. It's important to note peer-to-peer donors typically don't go from first-time donor to a monthly donor overnight.



With this in mind, once a peer-to-peer donor has made that first donation and you've had a chance to connect them with your cause by ensuring they've been thanked and updating them on your organization's activities, it's time to shift efforts to deepen their engagement.

Focus your efforts on identifying opportunities to get them involved in other programs or campaigns. Invite peer-to-peer donors to other events such as a thought leadership series or gala; give them an opportunity to be surrounded by others with a connection to the cause. Be sure to continue leveraging your peer-to-peer participants in cultivation efforts, especially with first-time donors.

**THE SOCIAL  
DONOR STUDY  
FOUND THAT**



**OF FIRST-TIME DONORS SAY  
THEY WOULD BE OPEN TO  
ADDITIONAL DONATION  
REQUESTS THAT CAME  
THROUGH THEIR FRIEND,  
FAMILY-MEMBER, OR  
COLLEAGUE.**



## Leverage Their Time and Talents

Find opportunities for peer-to-peer donors to see their impact in action. Invite them to volunteer with your organization or leverage their talents to further the cause. Remember, the leading factor to a repeat donation from a peer-to-peer donor is that they understand the impact of their gift.



## Turn Your Donors into Fundraisers

Because these donors came to your organization through a friend or colleague's peer-to-peer efforts, a natural next step is to ask them to become a participant for your next campaign. These donors are more likely to understand the power of social fundraising, and be able to articulate their personal story and growing connection to the cause.

Here are three steps to help turn a peer-to-peer donor into an active participant:

1. Send a special email to last year's donors asking them to take the next step and become participants / fundraisers in this year's campaign.
2. Make your email more personal by adding a note such as "thank you for donating \$X last year" or "thank you for being one of our top donors last year".
3. Make this year's campaign even more compelling by adding data from last year's past campaign, such as "Last year we raised \$X dollars. With that money we were able to fund XX research grants. So far, those grants have produced XXX hours in the lab, which resulted in X new clinical trials set to launch in Q1 next year."



**TIP: ENCOURAGE ANNUAL PARTICIPANTS TO START THEIR OWN TEAM AND INVITE DONORS FROM THE PREVIOUS YEAR TO JOIN THEIR FUNDRAISING TEAM. IT'S A GREAT WAY TO REINFORCE SOCIAL CONNECTIONS TO THE CAUSE.**

# Conclusion

There's great opportunity to improve peer-to-peer donor retention if your nonprofit focuses on the larger donor journey. The mind shift from a focus on a single gift transaction to a long-term relationship changes everything about the way your organization engages supporters, builds campaign messaging, utilizes fundraising technology, conducts follow-up communications, and executes cultivation activities.

We encourage you to identify opportunities to improve your efforts along the four steps of the peer-to-peer donor journey:

**GETTING THEIR ATTENTION** – Make your campaign stand out with visually engaging branding and messaging that bring your mission to life. Remember to leverage loyal supporters for a test launch to optimize content and gauge initial activity.

**MOTIVATING THEM TO GIVE** – Identify opportunities to simplify the giving experience with clear calls-to-action that tie gift amounts to real impact.

**CONNECTING THEM TO THE CAUSE** – Build a targeted follow-up strategy for your peer-to-peer donors that continues their social connection with the fundraiser and reinforces the impact of their gift.

**CONVERTING THEM TO LOYAL SUPPORTERS** – Create specific cultivation activities for peer-to-peer donors with additional opportunities to see their impact in action, be around others connected to the cause, and join in on the fundraising.

## About OneCause

OneCause is committed to helping cause-driven organizations amplify their message and raise more funds with easy-to-use fundraising solutions. First to market ten years ago with a mobile bidding solution to revolutionize silent auctions, OneCause now offers a full suite of cloud-based fundraising solutions including online giving, event management, mobile bidding, and peer-to-peer social fundraising. OneCause has supported more than 20,000 fundraising events and online campaigns, helping nonprofit organizations raise more than \$1.5 billion for their respective causes. Located in the marketing technology hub of Indianapolis, OneCause has been recognized on the Inc. 500 list of Fastest Growing Companies, received a TechPoint MIRA award for Mobile Technology Excellence & Innovation, and is a five-time Stevie® Award winner for excellence and innovation in Customer Service.



## About Cathexis

Founded in 2008, Cathexis Partners helps nonprofit organizations implement and use technology to raise funds and spread the word about their mission more effectively and more efficiently. Our services include:

- CRM, CMS, and peer-to-peer fundraising software implementation and ongoing support
- website development – including responsive design, integrations, implementation, CSS/template deployment, social media integration, and strategy
- custom software training
- database management
- reporting
- IT consulting
- online fundraising campaign strategy and execution
- project management

We partner with several peer-to-peer fundraising platforms and other software to help organizations maximize their technology investments.

## About Social Donor Study

The online survey of 1,056 Social Donors was conducted by Edge Research between October 11-22, 2018. Social Donors are defined as anyone who has given to at least one charitable organization through a ticketed fundraising event, fundraising sponsorship, occasion or challenge within in the last 12 months. Data is self-reported, not transactional. Edge Research worked with an established industry sampling partner, consisting of opt-in research participants. This is a non- probability/convenience sample. Quotas were set to ensure incoming data (prior to screening for charitable donations) was census representative in terms of age and gender, region and race/ethnicity.



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