



# Launching Your First Peer-to-Peer Social Fundraising Event

*Your Getting Started Guide for Planning a Charity Walk, Run or Other "Thon" Event*

# In this Guide

## Introduction

Welcome to P2P!  
What is P2P?  
Benefits of Using P2P



## Getting Started

Choosing Your Objective  
Consider the Basics  
Size Your Event  
Set Your Fundraising Goal  
Getting Creative



## Plan, Plan, Plan!

Budgeting  
Logistics  
Partners and Sponsors  
Choosing Your Platform  
Organization



## Engaging to Maintain Success

Promotions  
Reaching Your Fundraising Goal  
How to Email Your Fundraisers  
Inactive Fundraisers Tip Sheet



## Event & Post-Event

Event Day Checklist  
Event Day Wrap-Up  
Post-Event Debrief



## Peer-to-Peer Social Fundraising with CanadaHelps

Service Overview  
Contact Us



# Introduction

## Welcome to Peer-to-Peer Social Fundraising (P2P)

Thinking about launching your first P2P event? Already committed to running a P2P event but looking for help to ensure your event will be a fundraising success? We're here to help. With the right organization and planning, running your first P2P event can be incredibly beneficial for your charity. It's an opportunity to acquire new donors, raise significant funds, and deepen your relationships with your supporters. This getting started guide for planning a charity walk, run or other "Thon" event covers the basics: benefits of P2P social fundraising, setting your event objectives, creating a memorable event, arranging the logistics, engaging and motivating participants, choosing a P2P event platform, day-of planning tips, and more. It's everything you need to get started!



### What is Peer-to-Peer Social Fundraising?

Peer-to-Peer Social Fundraising is when a charity — that's you! — empowers their supporters to raise money for their organization. Your supporters reach out to their friends, family and co-workers to endorse your charity as a cause they believe in and ask their personal networks to donate to your charity.

As a charity, your job is to provide the guidance your supporters need to feel inspired to reach out to their personal networks, and the tools they need so that fundraising is easy and fun. Creating a P2P event is a powerful way to turn your supporters into fundraisers for your charity; they'll feel more comfortable asking their friends to give when they are giving themselves and participating in an event. It also sets the stage

for your supporters to engage their networks regularly leading up to the event, on event day, and post-event wrap-ups and thanking supporters.

Using an online platform can allow your supporters to easily share their fundraising story, collect donations and engage their friends and family online. Online platforms are key to cultivating supporters who keep an effective outreach cadence in support of your charity's P2P fundraising event.

As for the type of event itself, P2P events can be almost anything. "Thon" events — walks, runs, swims — are very popular but are just the tip of the iceberg when it comes to your charity's options.



# What are the Benefits of Running a Peer-to-Peer Campaign?

## **The number one reason people give is because they were asked.**

Why is peer-to-peer fundraising the fastest growing source of charitable donations? Online giving has experienced strong, double-digit growth in Canada over the past ten years, but no other fundraising technique harnesses the power of the digital world and social relationships like peer-to-peer social fundraising. For Canadians, it provides a meaningful way to help the charities they care about, and to inspire friends and family while having fun participating in an event. For charities, it provides a tremendous opportunity to raise incremental funds vital to fuelling your charity's work, acquire new donors, and strengthen relationships with current supporters.

## **Get the fundraising help you need at little to no cost.**

For most charities, adding more fundraising staff or paying for third party services to organize a fundraiser is not an option. Turning to your supporters allows you to multiply your reach with only the costs that it takes to inspire your supporters to join you. Half of all adult Facebook users have more than 200 friends in their network. <sup>1</sup>Just imagine your expanded reach when even a handful of your top supporters are lending their support!

## **Benefit from a personal introduction to new potential donors.**

Today, we live in a world where most of us are busier than we'd like and the demands on our wallets are immense. When you reach out to new potential donors, it's hard to break through to have them listen and learn about your cause, let alone support it financially. It's a different story when the same message and ask comes from a trusted friend. The number one reason why people give is because they were asked and the likelihood of giving increases when asked by someone they

know. In fact, friends asking for money to support a charitable P2P event is the most widely accepted method of solicitation, ranking above mail, email, social media and phone.<sup>2</sup> In the workplace, 46 per cent of Millennial employees (people born between 1980 and 2000) said they were more likely to donate to a cause if a co-worker asked them to.<sup>3</sup>

**Increase the lifetime value (LTV) of your supporters.** When your supporters join your P2P event, they are deepening their commitment to your charitable work and becoming an ambassador for your charity by showing others your work matters. Many will even go on to participate in your P2P event annually and help you raise even more funds for your cause. As demonstrated in a recent four-year research study, the amount raised online by a regular participant increases significantly every year.<sup>4</sup> Running a P2P campaign is an investment in your organization's future.

**Unleash the story.** Your role as a charity running a P2P event is to support participants and provide them with ideas on how and when to engage their network. Ensure they have a basic understanding on why the cause matters and the work you do. Provide them with key messages they can draw upon and encourage them to tell their own story about why they care about your charity. A personal story will resonate with their friends and family, and you're almost certain to find some inspiring stories to draw upon for years to come.

**Connect with a younger demographic.** The digital world is by no means limited to the younger Gen X and Y generations. That said, younger generations are significantly more comfortable to talk to others about the charities they support and to join your P2P event.<sup>5</sup> In fact, 64 per cent of Millennials prefer to fundraise through walks, runs and cycling events.<sup>6</sup> Ensuring you're offering the younger generation the types of opportunities to engage with your charity is key to growing a stronger donor base.

# Getting Started



## The Objectives of Your Campaign

Raising money for your charity is the primary goal of any fundraising event; however, peer-to-peer social fundraising can accomplish many other objectives for your charity. Consider the following questions to help establish and prioritize your objectives to help guide you through the subsequent steps in creating your P2P event.

### **Do you want to raise money for a specific program or sub-cause of your organization, or have all funds go to your general fund?**

Choosing a specific fundraising goal tied to the needs of a specific program can be an effective strategy as supporters rally behind a more concrete, achievable goal and donors will respond knowing how their donation will be used. That said, doing so will limit the flexibility you have in use of the funds.

### **How important is building awareness of your charity and the work you do?**

If you're a new charity, building awareness will require you to arm participants with shareable key facts and messages. In addition, you may want to consider the level of exposure and branding the event location can provide, and budget to promote day-of awareness building for those passing by (e.g. handouts, signage, t-shirts, etc.).

### **Is fostering loyalty and a deeper affinity to your charity a top priority?**

If yes, you'll want to focus on creating a memorable experience that participants will talk about and want to experience year after year. Take-away mementos will keep your charity's work top-of-mind, but there are lots of less costly options. Think about how you can engage participants pre-event; how about offering an athletic training email series to help prepare for the

event? Could you create some healthy competition by offering prizes for "most shares", "most raised", "best costume" and more? Or, what about taking day-of photos and creating the ultimate personal thank you. With low-cost email services such as MailChimp that make segmentation of your participants very easy (more on emailing follows), it's easier than you might think.

### **Is this a one-off P2P event or is it important that you launch an event with the potential for it to become an annual event?**

No matter what your secondary objectives beyond raising funds are, you'll definitely want to think through your event experience from announcement, sign-up, and event countdown, through to post-event wrap. Build in some real memory building communications and you'll see many positive effects. Firstly, supporters will share their photos, videos and messages on their social media pages and that will provide you with honest, easy promotional materials. Secondly, the good word-of-mouth created will help attract more fundraisers for next year's campaign. Lastly, you will strengthen your relationship with your supporters by taking the time to ensure they have a positive experience. They are much more likely to continue supporting your cause if they had tons of fun doing it the first time.

# Consider the Basics

Once you've decided peer-to-peer social fundraising is for you and you've determined your objectives, it's time to start considering the basic logistics of your first campaign. What you decide in the beginning may change throughout your planning process. You may gain a new sponsor, receive a grant, have more fundraisers than you expected, or switch event ideas completely. Remember that running an event is a process, so you will need to go back and forth and update your plan as you go along.

Start by considering the size, fundraising goal, budget, and type of event. After you've covered these basic steps, you will be able to dive deeper into your planning and refine your event.

# Size Your Event

Figure out how many supporters you currently have and how many could potentially join your event. Think about your supporters' proximity to the event location and how involved they have been in your organization in the last year. Be realistic about this number. Then, see how you can expand this number through your contacts and promotions so you can tap into the largest number of social networks possible. At the end of this exercise you'll need to understand the minimum number of participants you need to consider your event a success, and the maximum number of participants your event can accommodate so you can plan accordingly.



## Tips for Keeping it Simple

Remember, there is no right event size! Your successful P2P event could be an intimate event with just 5-10 fundraisers. Here are a few examples:

- Are you a camp? How about a weekend-long canoe-a-thon?
- Do you operate a long-term care facility? How about a 24-hour writing campaign where fundraisers write encouraging notes to your beneficiaries?
- Engaging your board? Why not have them each host a Wine & Cheese party where friends are welcome if they've donated — and have them compete to see who can raise the most?

It's not about how many people attend your event, it's about creating an event where you hit your fundraising goal, reach new donors, and create an experience that uplifts participants and your charity.

***More on getting creative to follow!***



# Set Your Fundraising Goal

Set your fundraising goal in consideration of the number of participants and the average amount each will raise. Be realistic as your budget should be proportionate to this goal. Some charities have a fundraising goal for budgetary purposes and a second goal for promotional purposes, but either way, be realistic with both goals. In the end, if the total amount raised is far off from the goal, supporters may feel deflated. Studies show that donors give more the closer a campaign is to reaching its fundraising goal. A good rule of thumb is to aim to secure 30 per cent of your total goal within the first 48 hours of your campaign launch<sup>7</sup>. In other words, think about what you are realistically going to raise in those first two days and multiply it by about 3.5 to get a reasonable goal amount. Also, remember that individual participants can set their own goals, so make sure to give them some guidance on realistic goal-setting to help keep morale high.

## Forecasting Tips

**Consider these questions when thinking about what you should set your fundraising goal at – they will help you estimate a reasonable number:**



What age are your participants? Younger participants will typically have very large social networks, but older donors tend to give more consistently.



What is the socio-economic background of participants? If board members or prominent community members are participating, they may have affluent personal networks that are interested in donating.



What's your average gift size for a new donor? You'll likely reach many first-time donors the first year you're running a P2P event, so looking at your average new donor gift size is a useful reference.



What path does your average new donor take before making their first gift? If the average new donor has used your services or attended one of your events, you may want to choose a slightly lower P2P event average gift size. If your average new donor is secured through media coverage or online advertising, a slightly higher P2P event average gift size may be appropriate given the personal referral donors receive to charity through a P2P event.





## Get Creative: Choosing Your Event

Now on to the fun part: what is your event going to be? From basic to complicated, and traditional to non-traditional, anything goes! The only criterion is that it needs to involve individuals and/or teams fundraising for your charity before the actual event or activity takes place. This can be interpreted in many ways, including raising money to do an activity, to stop doing an activity, to break an office rule, to accomplish a task, or to complete a project. The activity or event can be dependent on a target amount raised by each participant or on any amount raised.

You can start by thinking of a basic event that suits your organization and then build it to fit within a peer-to-peer campaign framework. Finally, add a twist to make it interesting, like a fun theme or an added challenge.

## Ideas to Get You Started



### Cook-a-thon

A cook-a-thon is ideal for charities with cooking facilities. Participants can cook for invited guests such as neighbourhood friends, sponsors, influencers, and beneficiaries. It's a great way to connect with people in your community. Groups can be brought in at different times of the day to lessen the chaos and the space needed to host the event. Make it memorable by asking local restaurants to provide recipes and chefs for judging the dishes.



### Clean-a-thon

Charities of all types can find this useful! Participants can help to clean up the neighbourhood, organize your office, and help with simple renovations such as painting, yard maintenance and gardening. Make it memorable by adding some fun, friendly competition. For example, the participant with the most amount of garbage cleaned up at the end of the day wins a prize! This can be measured by most number of filled garbage bags or highest weight in garbage collected.



### Walk-a-thon

Walk-a-Thons are a popular choice because almost anyone can participate and can be relatively low-maintenance when it comes to planning. You can turn a basic walk-a-thon into something your participants will remember by adding a creative twist. Ask your participants to bring their pets along, have them walk the last 100 meters in heels, or set up learning stations to teach people more about your cause and charity.



### Work-a-thon

A work-a-thon could be a great way to get kids involved in helping the community. Think of your charity's needs and how you can tie them into this kind of event. For example, if your charity services the elderly, you can have participants help them write letters or use the computer, organize rooms, read books, or simply spend time with them.

## There Are Endless Possibilities!

You can get participants involved in a way that will inspire donors, around pretty much any art, sport, game, or activity you can think of.

- Bowling
- Reading
- Fasting
- Letter Writing
- Praying
- Painting
- Singing
- Dancing
- Skating
- Math
- Basketball
- Talent Show
- Canoeing
- Gardening
- Scavenger Hunt
- Mission Trip
- Knitting

## Tips for Choosing Your Event:



Can your event take place sometime in the low season? It's usually much cheaper to rent a venue when there are fewer events taking place.



How old are your participants? This may guide how physically active you want the event to be, as well as time and length of the event.



Does the event relate to the work you do? If you run a cat shelter, having a short cat walk is a great fit. If your charity does scientific research, finding an easy correlation could be more challenging.



Does your event have the potential to be covered by local media? Easy accessibility, unique qualities, and whether or not it relates to a trending topic are some considerations.






How important is building awareness for your cause from passers-by? This will impact whether you need to invest in a more public venue, which may present a few more obstacles when it comes to venue permits. Or you can host an event in your charity's office or a local community centre.



Survey your supporters! An online platform like SurveyMonkey lets you easily survey your supporters via email, social media and/or website to find out what kind of event they'd be most interested in.

## Will your chosen event work with your budget?

Now that you've decided what you want to do, you may have lots of creative ideas you'll need to narrow down. To help make these important decisions, one of your key considerations should be your budget. Here are some important questions for you to consider before you move forward with your event idea:

-  **Does your budget work for the type of event you've chosen?**
-  **Can you handle the logistics that this type of event requires?**
-  **Can you bring on the right partners and sponsors to make it work?**

In the upcoming Budgeting section, we've provided some suggestions on how to save on costs, but if it still doesn't seem feasible, it may be time to rethink a more cost-effective type of event — and that's ok! You'll have already made some progress since knowing your limits is half the battle. There are so many options for a great event but you need to be able to pull it off. If you are unsure, it may be better to step back and rethink another event type that you're more confident in.



# Plan, Plan, Plan!

## Budgeting

P2P events can be very inexpensive – or very expensive. Oftentimes, event planning committees can get so excited about their ideas that budget is completely thrown out the window! To prevent this from happening to your event, here are some of the costs you need to be aware of before even selecting a type of event. Be sure to figure out all of your costs before you commit to the extras like t-shirts, free food or other participant giveaways. Giveaways can be powerful, but lots of successful P2P events have been run successfully without them.



## Budgeting

**Location:** investigate the costs of various locations.

**Insurance:** you may need it depending on your event location or type.

**Safety:** first aid, security, and/or police services may be required.

**Comfort:** tables, chairs, and tents may need to be rented, borrowed, or donated.

**Food and drink:** even if you aren't planning on providing any unnecessary free food and drinks, there should be water available if it is an athletic event.

**Sound system:** you should have a microphone and several speakers on event day for speeches and announcements.

**Portable toilets:** your location may not have washrooms that you can use, so you may need to rent portable ones.

**Permits:** for some events you may need permits to use your location or host specific activities during your event.

**T-shirts, hats, race numbers, or other gear:** you will probably need to have your participants easily identified.

**Marketing and promotions:** advertisement space and printing costs can be expensive.

**Staff:** make sure you can manage the event with charity staff and volunteers so you don't need to hire any extra event staff.

## Tips for Stretching Your Budget

- Reach out to potential sponsors. Try to collect as many donated or subsidized items and services as possible, especially from your sponsors. They may be able to donate a location and promotional materials, or provide volunteers and printing discounts.
- Choose a budget friendly idea. A cycling event may require policing to help manage traffic or washrooms, while a bowl-a-thon simply requires a venue which you can potentially get a discount on by making the company a head sponsor.
- Ask your participants to BYO-everything. It's much easier for each of your participants to bring their own lunch, wear a black hat, or use face paint than for you to provide everything for everyone.
- Provide unique identifiers for your participants like temporary hair dye, hair chalk, body paint, or stickers. You can also make everyone wear the same goofy hat or oversized sunglasses you picked up at a dollar store. All of these options are less expensive than making custom t-shirts for everyone.
- Host a potluck lunch during your event where anyone who doesn't bring a dish has to donate an amount to eat. Alternatively, keep things simple and ask food trucks to stop by your event.
- Invest only in what matters such as banners, signs, collage boards, prizes, and thank you gifts. Spend money where it matters and cut corners where it doesn't matter as much.
- Get your tax receipts issued automatically to save your staff loads of time – some online platforms offer convenient, instant tax receipt services. CanadaHelps services, including our Peer-to-Peer Social Fundraising Solution, always include automatic tax-receipting.





# Logistics

Each event comes with a different set of things to do. Here are some of the most common (and sometimes forgotten) tasks to handle for a peer-to-peer event.

**Waivers:** For most events, it will be necessary to ensure participants sign a waiver. This is true for athletic events where there is a greater risk of physical injury, and in other scenarios as well. For example, a waiver may be required if you want to make promotional use of photo or video footage of participants. Ideally, the P2P platform you choose will allow you to add waivers into the sign-up process to save you time and effort.

**Your Course:** If you are doing any sort of walk, run or cycle event, you will have to make sure to choose your course, get it approved, set everything up, and take safety precautions, all before event day. This may require permits, police, signs, partitions, stations, and roped off areas. You may also have a short window for route setup and takedown if it covers a busy area, so make sure you have enough hands to do so.

**Emergencies:** You should have a first aid station at any event where your participants can get hurt, like athletic or very large or long events. It's also good to have a place where announcements can be made in case someone is lost or there is an emergency. Meeting areas are also great for any event that involve teams or where people can easily get separated.

**Directions:** Ensure there are adequate parking facilities nearby and your participants are aware of them. Provide transit and walking directions as well.

**Entertainment:** You want to provide an unforgettable experience for your participants so they will share their experiences on social media and return next year. Entertainment is a great way to avoid slow points in the event and to switch it up each year. You can have speeches and guest speakers, music to keep people upbeat and having fun, or get creative and really make an impact by inviting local entertainers, and engaging the audience in friendly contests, such as freezie-eating contests or trivia questions about your cause.

**Staffing:** Your volunteers and staff are vital for the success of your event so make sure they aren't too overworked or confused. Make a schedule that's clear so everyone has breaks and knows exactly what they should be doing, when they should be doing it, and where.

## Keeping it Simple

You don't need to run complicated events to achieve your fundraising objectives. If the logistics of a run, walk, or cycling event feels intimidating, try something different altogether! Think of an event that requires very few logistics.

- Are you an educational charity? A read-a-thon can help increase awareness and a write-a-thon can produce valuable materials — without any chaos.
- Does your charity serve people in long-term care? A letter writing campaign can help further your work by offering words of encouragement to your beneficiaries. Looking for more stories to share? Why not have your supporters come out to write and publicly share or display their connection to your charity? You'll leave with great content for your charity's future use and a beautiful collage created during the write-a-thon so passers-by will stop to learn more about your cause.
- Spread out your activities to reduce concerns when it comes to having a lot of people in one area. For example, do you serve the local community? How about a work-a-thon where teams tackle various projects in the community from clean-ups, to painting, and repairs? By spreading out activities, you may even get more exposure for your cause!
- Host an event that doesn't have tight timing, such as a weekend-long event or an event with staggered start times. Are you an arts charity? How about a weekend long sign-a-thon or paint-a-thon with rotating participants? Walks, runs, and other sporting activities can also be transformed into 24-hour relays where the number of participants at any given time is kept to a minimum. Bake-a-thons, dance-a-thons, work-a-thons, hair cuttings, head shavings, games and/or sporting tournaments can also be organized in a way in which you can avoid having everyone in one place at one time, and you can get by with less staff, space, and materials.





# Partners & Sponsors

What charity couldn't run a more successful event with some extra help? Work to stretch your budget by securing great corporate partners and sponsors that believe in your charitable cause, and can offer free or subsidized goods relevant to your cause or specific event. Some areas where corporate partners can help stretch your budget and amplify your charitable work include:



**The small stuff.** Ask local companies to support your P2P event with free products, subsidies/ discounts, or employee volunteers. Can your grocery store provide your event with water? Can your real-estate team provide a cash donation? Can your company provide a team of volunteers who will handle registration? Can your company provide co-branded t-shirts? Can your advertising shop develop signage? Can your music studio provide sound equipment? Can your church help run a post-event barbeque? Can your school provide a team of students to direct participants on the marathon course? Can your coffee shop provide coffee and tea? Can your health store offer protein bars?

**Location, location, location.** When looking for sponsors, try matching corporate partners with your event location. Big sponsors may have an event room in their building you could rent at little to no cost, or they may receive huge discounts at great locations.

**More hands.** Sometimes companies that love what you do can't offer much when it comes to making your budget work, but they can still offer invaluable help. Instead of requesting financial assistance, request company staff to be involved in planning, volunteering, marketing, or fundraising. Even if you only get a handful of volunteers, it can still benefit your organization greatly.

**Marketing and promotions.** Some sponsors can easily market and promote your event with very little effort. For example, ask a corporate partner to send an email to clients or print flyers for you at their office.

# Choosing Your Platform

You can try to harness the benefits of social fundraising through paper and in-person collection, but it can be very time consuming to reach a lot of potential donors. To build true momentum and maximize the real power of social fundraising, try using a combination of online and offline fundraising methods. In today's connected world, you can't afford to miss out on the benefits of online fundraising. That said, to build momentum and harness the real power of social fundraising in today's connected world, you need an online platform offering social media integration, self-serve sign-up, online donation collection, instant tax receipting, real-time fundraising tracking, and deep customization for participant storytelling.

Look for platforms that automatically display your top individual and team fundraisers — this way you'll know who your power fundraisers are!



**Connectivity:** The nature of peer-to-peer fundraising is all about allowing your participants to share your campaign with the people they are connected with. You'll want a platform that includes email and social media integration and high-impact pages that will inspire participation and donations.

**Team and Individual Pages:** Not only should you have the ability to create individual and team pages — in addition to your campaign page, you should also be able to control who can join your campaign. Once you're sure the platform provides you with the features you need, ensure participants can personalize their page by telling their fundraising story, adding pictures, videos, and more!

**Customization:** Look for platforms that allow a high level of customization to allow your charity's brand to stay consistent. Your supporters should be able to recognize your

colours, logo, and mission statement, with no chance of being confused by a generic template. Make sure you can tell your organization's story too by sharing photos, videos, and stories on your campaign pages.

**Communication Tools:** From event details and motivational messages, to progress updates and participant engagement, you'll want to be able to communicate easily with team captains and participants.

**Reports:** It's important to know who your top fundraisers and donors are. They're the ones who worked hard to support your cause and it's important to thank them and keep the relationship strong so that next year, you can ask them to support you again. Ensure you can access and display this information on your pages for others to see.

**Personalized Sign-Up:** When participants sign-up, it is important to make sure your charity can ask custom questions such as t-shirt size, how they heard about your organization, dietary restrictions, etc. This will make it easier to gather information about your participants to make your campaign run smoothly now and in the future.

**Bonus Features:** There are other useful features some platforms offer such as the ability to add offline donations. Additionally, platforms offering mobile-ready pages are ideal because over 30 per cent of charity fundraising and donation page visitors stem from mobile devices such as cell phones or tablets.

**Costs:** Not all P2P platforms are low-cost. Since most P2P platforms are run by for-profit companies, their fees can be hidden and high. Make sure to not only check the percentage fee taken off all donations, but be sure to also check sign-up and/or registration fees, credit card processing fees, designing fees, and data report fees.

**User-friendly Platform:** Look for an easy-to-use platform that doesn't require a high learning curve to use. You'll need to save as much time as you can to focus on launching and managing your event! There are many platforms in the market but not all are created equal, and some are more challenging to use than others.

The CanadaHelps Peer-to-Peer Social Fundraising Solution includes all of these features and more for a low non-profit rate of only 4.9%, including credit card fees. [Learn more about it here.](#)



# Organization

Every campaign involves a lot of tasks that need to be done within a specific time frame, so organization is beyond important. Issues don't usually arise from basic event logistics, but rather from the more complicated and easy-to-forget aspects of a fundraising campaign.

Make sure you cover all of your bases. Have a master list of tasks in the order they need to be done. Ensure all participants and leaders are aware of what is expected of them. A great idea is to email checklists for before, during, and after event day to your supporters so everyone is on the same page.

Also, ensure you have a great Frequently Asked Questions (FAQ) resource online that you can direct questions to. Either provide it on your campaign page or charity's website, and make sure your supporters have received the link in an email. There are always questions and it will save you plenty of time to answer them just once.



# Engaging to Maintain Success

## Promotions

When organizing a P2P campaign, spread the word near and far, across your charity's social media, email communications, and website pages. Encourage your participants, sponsors and partners to do the same.

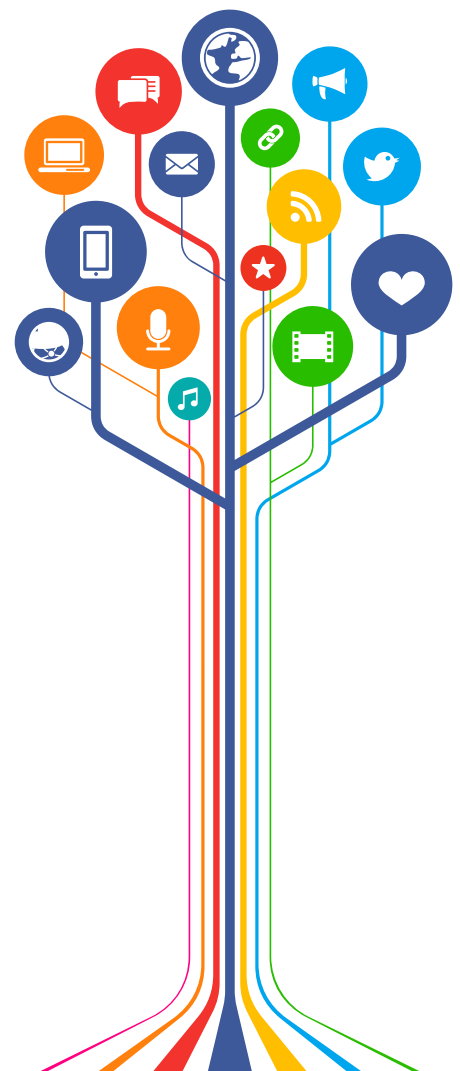
## Email

Email is the most time and cost-effective way to promote your P2P event. Spend time planning an email series and gathering the imagery you'll need to make your emails are a success. Don't underestimate the power of email and think through your messaging very clearly, which includes everything from the email subject lines to headers, to copy and visuals. Each email you send should have a very clear purpose with a call-to-action. In other words, what action do you want the email recipient to perform when they read it? We recommend creating and delivering your emails using a user-friendly email marketing platform such as MailChimp, which offers charity discounts and free services for occasional users. This will allow you to track important email metrics such as the number of people who have opened your emails, how many have clicked links inside the correspondence, and more.

Often overlooked, your personal email signature is a great place to include a link to your P2P campaign page with a small note that lets people know what you're fundraising for. Ask your P2P participants to add a note to their email signatures as well to let people know that they're fundraising for a cause they are passionate about.

## Social Media and Website

Use social media and online promotions as much as you possibly can. Get a visually-appealing banner designed to consistently use across all of your social media pages, in your emails and on your website. While the purpose of the banner is to increase awareness of your P2P event, it should still be on point with your brand, and at the same time consistent with the visual look of your peer-to-peer campaign pages. It's a great place to quickly get across key information such as a one-line event description, event date, hashtag and website URL. This can be something a sponsor or volunteer with design skills is willing to help with, so don't be afraid to ask!





Create a catchy hashtag to use on social media to connect your online promotions to your campaign pages, and let others easily find and join the online conversation.

Provide an easy-to-find information section about the P2P event on your website, possibly on your “Support Us” page and a smaller call-out on your homepage that links to your P2P campaign page for more information.

Get local! If you feel there’s potential, ask your sponsors, corporate partners, local coffee shops, and businesses that align with your mission to help promote your event in a small way: whether it’s sharing your event on Facebook, retweeting some of your messages, allowing your organization to hang posters on their in-shop bulletins, asking for assistance can involve an infinite number of possibilities!

## Public Relations

Get in touch with your local media! Brush up on your PR skills with the following tips:

- Start reaching out to media early, to give those interested ample time to write about your campaign.
- Develop a compelling story to get media interested. Your story can be presented in the form of a news release, or even something as simple as a paragraph of information.
- Pick a spokesperson from your organization that will be readily available to speak with media about your organization and campaign. Your spokesperson will be the face of your campaign, so ensure that this person is passionate about your cause, available on-call, comfortable speaking in front of a camera and knows your organization very well! They should practice, practice, practice — in advance of any media opportunities.
- Craft simple key messages that you want said about your charity and campaign. Include them in your media pitch and ensure your spokesperson knows them by heart.
- Include a great photo or video with your story. If media will attend your event, ensure that there are plenty of photo-worthy moments, so that they can capture their own photos and videos, too.
- When looking for media contacts to pitch, start off by looking at the “Contact Us” section on each media outlet’s website. Search for relevant editors, reporters, general newsroom or assignment editors, and don’t forget to ask your friends and family if they have any connections.
- When pitching media, send your information by email and then follow-up by phone. Try to connect with them in the morning when they’re less likely to be on a deadline for an assignment.

## Print and Direct Mail

If you have the budget, you can consider allocating some money towards printing costs for signage and direct mail marketing pieces.

# Reaching Your Fundraising Goal

In order to reach the goal you set for your current campaign, and to reach other campaign goals in the future, focus on making sure the following tasks are accomplished:

- Remember when we said the first 48 hours are critical to getting the fundraising momentum going, and ultimately accomplishing your fundraising goal? Now it's time to deliver! Achieving early fundraising success and overcoming the initial hurdle of getting started will inspire other potential donors visiting other participants' fundraising pages. Ask your participants to kick-start the campaign by making the first donation to their own pages, and to ask their friends and family to donate early to help the campaign pick up momentum. Without this strong start, your campaign goal may never be reached. It is very effective to call them on the phone, but a personal email can work, too. Emphasize that they are a part of the "inner circle" of the campaign so they feel as special as they really are to your organization.
- During your fundraiser, roll out a special event in the middle of your campaign to boost fundraising momentum. A great option is to have sponsors and partners match donations, even if they only agree to do so for a short period of time. If that doesn't materialize, ask your corporate sponsors and partners to donate prizes or cover some administrative costs for you. In return, help advertise their business to your supporters. People will give more when they know their dollars go further, no matter how that's achieved.
- Lastly, don't stop reaching out to your supporters once the campaign is over. The people supporting your project are potential donors to other campaigns, and you need to



continue nurturing them by reporting on the progress of the project they donated to. After all, the median donor retention rate for charities in 2013 was only 43 per cent, meaning that 57 per cent of donors that donated once did not make a repeat gift.<sup>8</sup> A main contributor of this low donor retention rate is lack of communication between the charity and donor on the donation's impact. One of the key things you should ask all participants and donors for is their permission to receive notifications on the progress of your project after the campaign has ended. This is an excellent way to grow your list of email subscribers and continue the relationship at a very low cost.

- Earlier, we mentioned the power of using email marketing to help make your fundraising campaign a success. Your fundraisers should hear from you consistently, and the easiest and most resource-friendly way to do so is through email. With that said, not all of them should receive the exact same messages from you. Sending one general email blast to your entire email list will increase the likelihood your email subscribers will slow down or stop opening your emails altogether. To prevent this from happening, you'll need to send targeted emails by segmenting your email list. We'll discuss email segmentation next.



## Email Segmentation: What is it and how do I do it?

Before you draft an email blast, you must first have a clear idea of who you're sending emails to, and how to segment your subscribers in order to personalize your emails. You should target specific groups of individuals on your list with messages relevant to them. Put simply, segmenting your database is like creating smaller lists within your main mailing list. Most email marketing platforms will allow you do this easily and some even provide excellent video tutorials and online support. The small learning curve is well-worth the investment, and you'll use this knowledge over and over again.

There are many ways to segment your subscribers (i.e. age group, monthly donors vs. one time donors, method of support such as volunteers vs. donors, new vs. long-term supporters, location, language, etc.). For example, you can segment your list by people who have donated to a specific project and send them email updates about the project's progress and the impact their donations have made. Or, you can segment your email list by people who have given to your charity over the span of three years and send them an email outlining the two-way benefits of becoming a monthly donor, if they're not already one.

The more relevant the email content is to the reader, the more engaged they will be, and the better results you will see from your emailing efforts. When it comes to peer-to-peer fundraising, there are so many roles a person can play in the success of your campaign and therefore, many ways to segment your supporters. Some examples are:

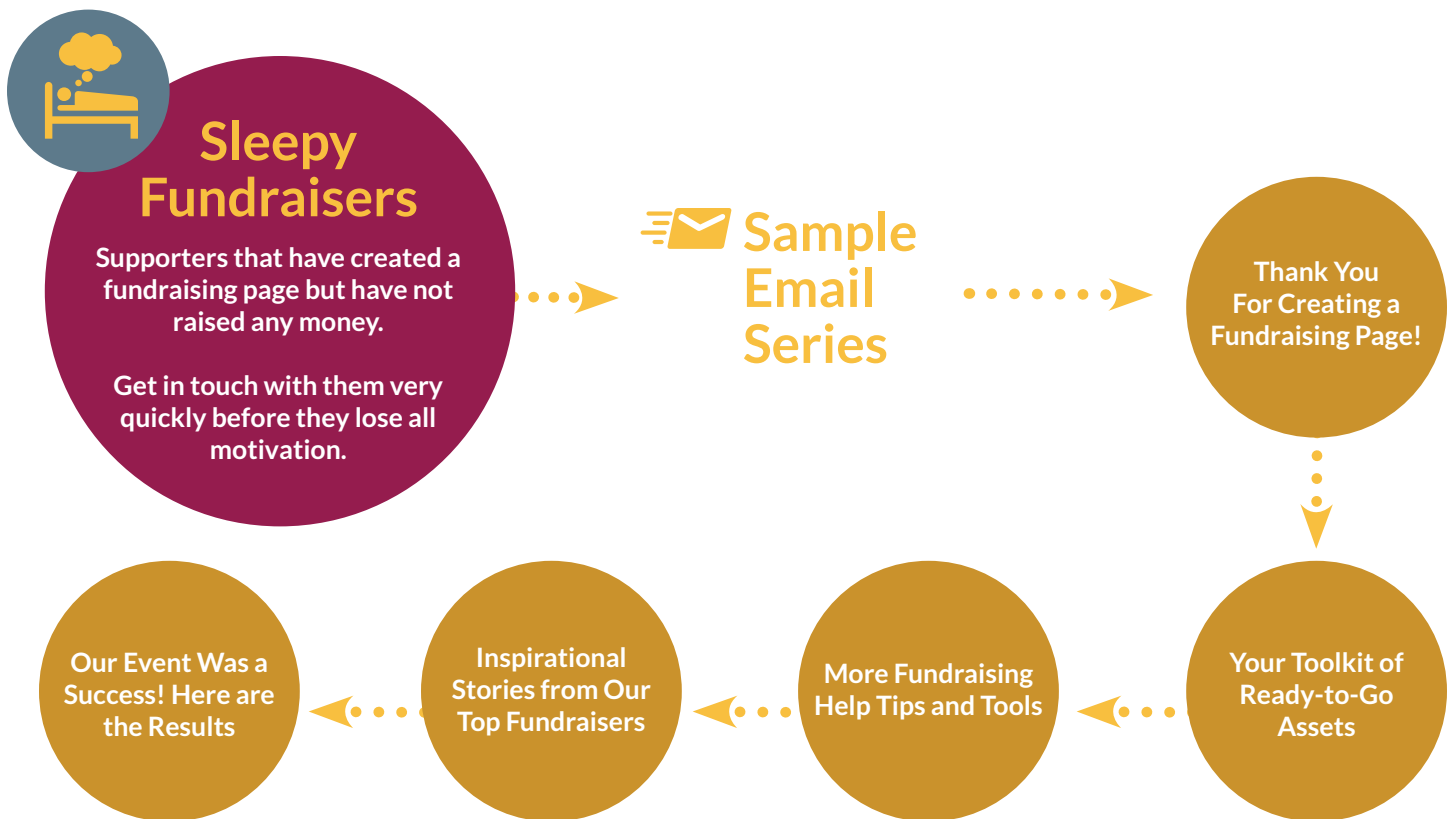
- 1 Volunteers and staff members who will help the event run smoothly on event day;**
- 2 Donors who have given to your charity in support of someone they know who is participating in your campaign; and/or**
- 3 People who are fundraising on your behalf.**



## How to Tailor Emails to Your Fundraisers

Your fundraisers are doing your charity a big favour, and they'll need all the help and support they can get. That's why it's so important to provide them with a fundraiser toolkit to give them the knowledge they need to succeed. It can come in the form of an email and/or blog series of fundraising checklists and tips, messages of motivation and inspiration, progress updates, how-to guides, a Frequently Asked Questions resource, and much more. All of your fundraisers should be equipped with this toolkit before they begin fundraising so they can have time to review the material, take it in and ask questions.

But still, not all of your P2P fundraisers will fall into the same bucket. Some will actively fundraise throughout, some will create their fundraising page and do nothing more, and some will raise a few dollars. We suggest separating your fundraisers into three distinct groups and sending them the first segmented email communication within a few days of launch.





## Tip Sheet for Sleepy Fundraisers

Send your Sleepy Fundraisers a tip sheet to get them going. Here are some sample tips, and you'll want to add your own, too!

- 1** Customize your page! Share the reasons why you want to support our campaign and why your friends and family should support it too. The more personal and unique your story is, the more people you will inspire.
- 2** Use a wide variety of communication methods. Try different approaches including in-person and/or online options. When online, share your fundraising page on Twitter, Pinterest, Google Plus, Facebook, LinkedIn, Instagram, or through email. You can also use direct messaging, or post in groups and event pages. For offline options, you can call or visit your neighbours, ask co-workers, call your relatives, and ask your friends to donate, or use the mail -- everyone loves to receive a letter from a friend!
- 3** When posting on social media and other places online, use our online toolkit of ready-to-go messages, images and quotes to help inspire others to give.
- 4** Offer your own incentives. If you ask your close family and friends to support you but they don't end up following through, try offering them a service in exchange for their donation. For example, offer to clean a friend's car or walk your neighbour's dog if they donate.
- 5** Spark that passion! Visit our website for inspiration and read stories about our clients/beneficiaries to see the positive changes you're making in their lives.



## Active Fundraisers

Supporters that have raised some money.



## Sample Email Series

Congratulations on Hitting a Fundraising Milestone!

Our Event Was a Success! Here are the Results

Campaign Progress Reports

Some Fundraising Incentives to Keep You Going

Inspirational Stories from Our Top Fundraisers



## Champion Fundraisers

Supporters that are raising large amounts of money in comparison to the majority of your fundraisers.



## Sample Email Series

Thank you for Being One of our Top Fundraisers!

What's Your Fundraising Story and Tips? We'd Love to Feature You!

Our Event Was a Success! Here are the Results

Can You Take on this Special Challenge?

Congratulations on Reaching Your Goal!

Campaign Progress Reports

The email examples listed above are just that—examples. You may decide other topics are more relevant to talk about, the frequency should be less or more, some emails may overlap among segments; it's all very dependent on your organization. Ultimately, knowing your supporters well is key.

# Event and Post Event

## Event Day Checklist

- Check the weather and have a back-up plan
- Give directions to all participants by car and public transit
- Figure out parking and traffic surrounding your location
- Post plenty of signs so participants can easily find the registration area, washrooms, help, and meeting spots
- Share the event schedule with everyone involved
- Provide safety and security information for everyone involved
- Share the success of the campaign with everyone involved
- Thank all participants, leaders, and donors
- Celebrate the amazing job everyone did so they feel appreciated and help out again in the future
- Clean everything up properly

## It's Not Over When It's Over: Tips for Retaining Your Fundraisers

Since experienced fundraisers raise more money on average than new fundraisers, it's important to retain as many of them as you can for next year's event. The better your donor and fundraiser retention is, the more money you'll raise next year. Retention starts once your fundraisers sign up – their decision to come back next year will depend on their entire experience from beginning to end. That said, there's a lot you can do before and after your event to increase event satisfaction levels.

- Make it a memorable event day and capture it. Take tons of pictures and videos, post them on social media and tag the people in them.
- Thank donors, fundraisers, and supporters and stress the fact that without their help, your event wouldn't have been as great as it was. Make them feel like an integral part of the event.



- Survey your fundraising participants, volunteers, sponsors and staff to find out what they liked, how satisfied they were with the event, and what they'd like to see done differently next time.
- Ask them for a small pre-commitment, such as having them sign an online pledge that they'll fundraise again.
- Get them excited about a special part of your next event, such as a new theme or feature event for next year. Even if you haven't decided what it is, the suspense of the imminent surprise could get them on board again. Or even better, ask for their input and ideas.
- Reward their loyalty. Publicly acknowledge those who have been with you for a long time. It'll inspire others to strive for that kind of recognition, too.

In addition, you may want to email donors to the campaign, sharing campaign results and even asking for their feedback.

## Post Event Debrief

Beyond surveying participants, be sure to debrief with all stakeholders. That can include fundraisers, donors, volunteers, sponsors, vendors, board members, and staff.

You want your next event to be even better than your first, so reflect on what you did with your team. What would you do differently? What could you improve on? Cover everything, from the timing of your event and its announcement, through to each aspect of event logistics, and of course, final fundraising results.





# Resources

<sup>1</sup>PewResearchCenter, February 2014, “6 New Facts About Facebook.”

<sup>2</sup>HJC New Media, September 2013 slideshare, “Fundraising Today and Tomorrow: The Next Generation of Canadian Giving.”

<sup>3</sup>The Millennial Impact, “2015 Millennial Impact Report”

<sup>4</sup>HJC New Media, April 2014 eNews article, “It’s been on our mind a lot, it might be on yours too ... what’s the Lifetime Value (LTV) of p2p event fundraisers and why does it matter?”

<sup>5</sup>Blackbaud, September 2014 slideshare, “The Big Picture for Events”

<sup>6</sup>The Millennial Impact, “2013 Millennial Impact Report”

<sup>7</sup>National Crowdfunding Association of Canada, May 2015, “Social Media and Crowdfunding Toolkit Intensive”

<sup>8</sup>Association of Fundraising Professionals, “2014 Fundraising Effectiveness Project”

Paradigmpr and GivingTuesday.ca, August 2015, “8 Practical Media Tips for Non-profits.”





## Did you benefit from this resource?

Learn more about the CanadaHelps Peer-to-Peer Social Fundraising Solution at:  
[www.canadahelps.org/en/for-charities/peer-to-peer-social-fundraising](http://www.canadahelps.org/en/for-charities/peer-to-peer-social-fundraising)  
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Learn more about CanadaHelps and our fundraising solutions for charities [here](#).

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