

ONLINE

RAISE MORE MONEY

FUNDRAISING

DO MORE GOOD

TOOLKIT

BY

SWELL FUNDRAISING

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Starter Case Statement

This case statement is meant to help you get started. This should give you a clear idea of what your campaign will be like, and this will also give you a description of your campaign that you can communicate to people who you are asking to be fundraisers during the campaign.

Fill out these four steps to have a complete case statement.

1. Goal:
2. What are you funding?
3. Why?
4. Timeline:

How to Identify a Good Fundraiser

Finding the right person to fundraise for your campaign can be difficult... We can help you start thinking about who might be the perfect group of people for your campaign!

Fundraisers are people who are extremely passionate about your cause. They have a compelling story to tell. Whether they have been impacted personally, or have seen your organization impact the life of a friend, family member, colleague or co-worker, these fundraising partners can present your mission with great emotion. These people advocate on your behalf, dedicating time to support you. You trust them to take on a high level of responsibility and follow through with their commitment to the campaign. Once they say yes, you want to provide them with the tools to succeed. Lastly, your fundraisers need to have strong networks. (diversity is key!) Each person should use different channels, professional organizations, companies and networks to ask for support during the campaign.

How to Recruit Fundraisers

Finding the right person to fundraise for your campaign can seem difficult... The first step is to start thinking about who might be the perfect group of people for your campaign!

Your initial thought might be to engage your board members, but your board members are typically better at brainstorming and knowing the right type of people you want to recruit. Looking outside of your organization and getting others involved is important because they are able to reach a network of people that your organization doesn't have access to.

When you are thinking of who to ask, keep in mind what type of characteristics you are looking for. Fundraisers should be passionate about your cause and have a compelling story to tell. Peer-to-peer fundraising is done best when you are story telling. It draws people in and gives them a sense of what type of impact their gift will make.

Fundraisers advocate on your behalf, dedicating time to support you. They should be confident, have a high level of responsibility to follow through with their commitment to the campaign, and have strong networks. The more diverse these networks are, the more likely that fundraising efforts won't be duplicated.

A successful campaign typically has between 15-20 fundraisers, and it is important that you tell each fundraiser what their role and goal is in this campaign. It is always a good idea to start by answering a few questions to get a good overview of your campaign.

What is the fundraising goal?

What are you funding?

Why?

What is the timeline?

It is important to communicate this information to your fundraisers and tell them what your expectations are for them as well.

What is their individual fundraising goal?

How many people do they need to reach out to?

Finally, once you have a strong group of fundraisers recruited, equip them with the tools they need to succeed. This includes sample emails, sample social media posts, and an FAQ if someone has questions about your organization.

Example to Prospective Fundraisers

Hi <First Name>,

I hope you are doing well!

It is time to place the <Event Name> for <Organization Name> on your calendar! On <campaign date>, <campaign name> will begin! With that in mind, we are recruiting the best of the best to become our Fundraising Champions!

We are looking for someone who advocates on our behalf, and has the ability to dedicate time to support <Organization Name>. Your confidence and strong network makes you the perfect Fundraising Champion!

This will be a great opportunity to support <Organization Name> and have fun while doing it! Fundraising Champions will be able to compete with each other for prizes and incentives <insert examples>.

As a Fundraising Champion, you will be able to invite friends to join you in support of <Organization Name> and fundraise for a great cause! You don't want to miss out on this fun opportunity to be the first Fundraising Champion for <event name>!

Please [CLICK HERE](#) (add link) to sign up now!

Please reach out to <insert contact info> with any questions!

Thank you!

<Signature>

EXAMPLE SOCIAL MEDIA POSTS

Fill in the blanks below to customize the posts toward your organization's cause.

FACEBOOK

- (INSERT ORGANIZATION) is fundraising to _____! We provide _____ (INSERT SERVICE PROVIDED). Imagine you were without (LIST SERVICE OR ITEM AND WHY YOU WOULDN'T WANT TO GO WITHOUT IT. *Ex Clean water, school books, food*). You can make a difference. Support your community today by donating now! *INSERT LINK* *tag friends in post* *tag organization*
- Who loves (INSERT ORGANIZATION)? They are fundraising for _____ campaign. Help make a difference and be the gift that helps _____ (INSERT DESIRED RESULT OR IMPACT). Donate today! *insert link* *tag friends in post*

TWITTER

- Remember what it was like when _____ (INSERT A MEMORY OF SOMETHING YOU COULDN'T DO BUT CAN NOW) - you can create that for _____. Visit *LINK* and support _____ (INSERT ORGANIZATION). #YOUREVENTHASHTAG
- I have committed to raising \$\$\$ for _____ (INSERT ORGANIZATION / CAMPAIGN NAME), and I could use your support! _____ (INSERT PERSONAL FUNDRAISING LINK) #YOUREVENTHASHTAG
- I'm almost to my goal, help a girl / guy out in order to _____ (INSERT WHAT YOUR FUNDRAISING GOAL HELPS). _____ (INSERT PERSONAL FUNDRAISING LINK)

- Can we all agree that (INSERT GROUP / AREA AFFECTED) needs _____? Then join us in supporting our _____ campaign!
 _____(INSERT LINK) #YOUREVENTHASHTAG

INSTAGRAM

- *Post a meaningful picture that shows why the cause is important to you*

I support (INSERT ORGANIZATION) because _____. We could use your help!
 This campaign will provide _____. #hashtag *tag friends participating*
 tag organization

- *Post a picture of your friend / you and your friend* *add the donation link to your bio*

My beautiful/wonderful friend @NAME has committed to raising \$\$___ for our community through (INSERT ORGANIZATION). She/he can use your help, link in bio! #hashtag *tag friend* *tag organization*

EXAMPLE EMAIL

Friends,

I am a supporter of (INSERT ORGANIZATION) and learned about their _____ online campaign. I take _____ (INSERT SOMETHING THE ORGANIZATION PROVIDES THAT YOU TAKE FOR GRANTED) for granted, don't you? Then I imagine _____ (INSERT UNDESIRABLE RESULT FROM NOT HAVING THAT ITEM). I love this fundraiser because the funds directly support (INSERT WHAT FUNDS GO TOWARD). Our goal is to raise <\$\$\$> to fund _____. Will you join me?

I have set a personal goal to raise \$XXX this week and would be so thankful for your help in reaching that goal.

(INSERT PERSONAL FUNDRAISING LINK)

Thank you!

YOUR NAME

Who to Ask

Having a hard time thinking of who to ask for support? Sometimes it can be hard to think of someone who might donate when you are so close to something. Here are a few thoughts and ideas that might help you:

Friends you have hobbies with (golf, tennis, book club, etc) :

Coworkers:

Doctors:

Dentist:

College friends:

Childhood friends:

Hairdresser:

Family:

Family Friends:

Neighbors:

Boards you are involved in:

30 Day Guide to a Successful Online Campaign

- ❑ **Day 1** → Find a core group of 15-20 people who are passionate about your cause. They should have qualities that embody someone who is unafraid, confident, passionate, committed and has a high level of responsibility, and well networked. You also want diversity in this group of people. They should have different channels and different networks. (these will be the people who reach out to others in the community asking to donate) Your board can help suggest people as well.
- ❑ **Day 2** → Now that you have found a core group of people, it is time to equip them for the campaign. Put together a case statement with information that will give your fundraisers a better idea of what they are being asked to do. This should include your fundraising goal, what the campaign will fund, why the organization needs the funding, and a timeline. Also, explain to them that they are being asked to fundraise from launch of campaign to the end. Their job is to go online and share their story. They will also find success sharing their story by email and phone. The more personal the ask, the better chance of a donation.
- ❑ **Day 3** → Now that you have equipped your fundraisers, it is time to get them signed up! Have them sign up on your campaign website by clicking the "Become a Fundraiser" button. Once they do this, they will receive an email with their personal fundraising page link.
- ❑ **Day 4** → You will receive a fill-in-the-blank resource page with sample social media posts and a sample email. Fill in all of the blanks to make the resource page is specific and unique to your organization's online fundraising campaign.
- ❑ **Day 5** → It is time to create a hidden content page now that your resource page has been created. This will be a place your fundraisers can come to get the sample social media posts and sample email. Login to the Swell dashboard. Once in your campaign, click on the Setup tab then Content. Once there, click the green plus in the top right corner to create a new content page. Place your filled out resource page in the white space and make sure to check the active

and hidden box. This will allow your fundraisers to see this page if they have the link, but it won't show up on the campaign site for everyone to see. Make sure to hit 'Save' so the page will be created!


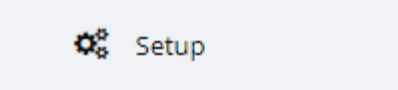
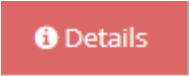
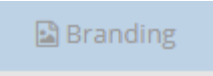
- ❑ **Day 6** → It is time to send resources to your fundraisers now that the hidden resource page has been created on your campaign site! First, send them the document of the resource page you created. Make sure to tell them they can personalize this to fit their story and connection to the organization. Second, send them the link to the hidden resource page on your campaign site just in case they lose the document you sent them. They can easily copy and paste from here.
- ❑ **Day 7** → Reach out to your fundraisers and ask them to raise awareness about the campaign before it launches tomorrow. Have them post on their social media channels that they are fundraising for your campaign during the dates it is live and they could really use the support of their friends and family when it launches tomorrow! They can tell a personal story to make it more meaningful as well. This will allow people to start talking and thinking about the campaign before it launches tomorrow so it won't be the first time they are seeing something about it.
- ❑ **Day 8** → LAUNCH DAY!! Tell your fundraisers to reach out by email or phone to at least 10 people in their network asking for a gift to your organization on their behalf. They should look at the resource page you gave them, and build on the sample email as their template. If they do not want to ask people in bulk due to time, ask them to reach out to 2-3 people each day instead.
- ❑ **Day 9** → Change your organization's Facebook header to match the event header on your Swell campaign site! This will help promote the campaign.
- ❑ **Day 10** → Now that you have changed your Facebook header, tell your fundraisers to do the same!
- ❑ Make sure they start raising awareness on all of their social media platforms by sharing their personal fundraising link.
- ❑ **Day 11** → Social media is best used for raising awareness about your campaign. Post the link to your campaign on your organization's social media platforms explaining why you are fundraising.

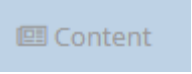


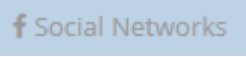
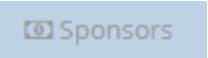
- ❑ **Day 12** → Reach out your fundraisers and make sure they have asked at least 10 people for donations. Tell them to continue to reach out to people by email or phone and tell their story of how your organization impacted their life.
- ❑ **Day 13** → Take time to go follow your hashtag for the campaign on your Twitter account. Once you follow it, you will be able to see the thank you tweets automated by us so you can retweet it and thank donors on your personal Twitter page!
- ❑ **Day 14** → Reach out to your fundraisers as their cheerleader! Congratulate those who are doing well so far. Give a shoutout to those who are leading the way, and encourage those who are struggling or haven't started yet.
- ❑ **Day 15** → Give your fundraisers an update on where you stand in the campaign. Tell them how close you are to reaching your goal and maybe set a goal for the week so they have something to strive for.
- ❑ **Day 16** → Post on social media about the campaign. This is a great time to highlight one or some of your fundraisers and their personal story that connects them to your organization.
- ❑ **Day 17** → Tell your fundraisers to reach out to those who have yet to give, and challenge them to email 10 more people this week.
- ❑ **Day 18** → Reach out to your fundraisers and tell them to thank their donors on social media or personally thank them with an email or phone call.
- ❑ **Day 19** → Check your twitter account so you can retweet all of our tweets thanking your donors!
- ❑ **Day 20** → Take the time to personally reach out to the fundraisers who are struggling. See if there is something you can do to help them get on their feet.
- ❑ **Day 21** → Tell your fundraisers to get creative. They can make this more fun by challenging each other. They could both try to reach a fundraising goal by a certain time, and the winner could get rewarded. They can also challenge themselves to reach a certain goal. For example, if they don't reach their goal they might have to get pied in the face.

- ❑ **Day 22** → Post on your social media platform highlighting another fundraiser, and tell how their story connects to your mission for the campaign.
- ❑ **Day 23** → Thank people who have donated so far on social media. If someone made a large gift, reach out to them personally by letter/email/phone to thank them. This will establish a donor relationship for future fundraisers.
- ❑ **Day 24** → Pump up your fundraisers by congratulating those are doing well so far. Also create a little bit of competition! See if someone can move up on the leaderboard by the end of the campaign.
- ❑ **Day 25** → Post on your organization's social media platforms that it is the last week to give. Tell them how close you are to reaching your goal and you need their help getting there!
- ❑ **Day 26** → Tell your fundraisers to post on their social media platforms as well. They can ask for support in the last few days of the campaign in order to make an impact on someone else's life like the organization did for them.
- ❑ **Day 27** → Thank your fundraisers for all of their hard work so far, and they only have a few days left. Tell them to make a big push in the last few days and to give it all they've got!
- ❑ **Day 28** → Reach out to your fundraisers and tell them to email everyone who didn't give yet and remind them it is the final day to give toward the campaign. Also tell fundraisers this is the last day they can ask someone to give and make sure they have personally asked everyone in their network. They will be more compelling if they tell their personal story that connects them to the organization.
- ❑ **Day 29** → Post on your organization's social media platforms that it is the last day to give and tell them not to miss out!
- ❑ **Day 30** → Thank donors on social media and everyone else (fundraisers) for participating and working so hard to reach your fundraising goal. If there are large donors, thank them personally with a letter or phone call.


Build an Online Campaign


Once logged into the Swell dashboard, follow these steps:



1. To create an event, click on the  icon in the top right corner
2. Click Save
3. Click on the Event Name you would like to build / edit
4. Click on the  tab on the left
5. You will start on the  icon
 - a. Fill out the Who portion for your campaign
 - i. Nonprofit Name
 - b. Fill out the What portion for your campaign
 - i. Event Name
 - ii. Description for fundraising pages- this is a description that will appear on the personal fundraising pages for those who are fundraising for you. This is typically filled in with a description of why someone should give or what their donation would be supporting.
 - c. Fill out the When portion for your campaign
 - i. Day
 - ii. Time ** If there isn't a day or time for your campaign you can always use this portion to say "online campaign 2020" or something creative you would like to highlight on the homepage. **
6. Click Save changes
7. Next, click on the  icon
 - a. Upload an Event Page Header Image
 - i. Size: 740x288 jpeg
 - ii. This image will be found on the homepage of your site and donation page
 - iii. These images can be created on a site like Canva (whatever you use)

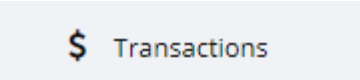


- b. Profile Page Header Image
 - i. Size: 740x288 jpeg
 - ii. This image will be found on the personal fundraising pages
 - c. Logo Image
 - i. Size: 261x16 jpeg
 - ii. This image will be found in the top right corner of your homepage
 - d. Email Header Image
 - i. Size: 550x135 jpeg
 - ii. This image will be found on the email receipts donors receive
8. Scroll all the way down and click Save changes
9. Next, click on the  icon
- a. To edit the homepage content, click on the  icon.
 - b. Click on the  in the top right to add content pages / tabs to your site
 - c. When editing tabs:
 - i. Fill out a Page url- this is the text that will go at the end of your campaign site link to take you straight to this content tab.
 - ii. Fill out a Tab Name- this is the name of the tab that will show up on your site. For example, if you created an 'about' content page, you could name the tab "About"
 - iii. Check the box active to make the tab visible to the public
 - iv. Once you are done building your content page, scroll down and click Save
10. Click on the  icon
- a. Facebook page ID- this will allow your Facebook posts to pull through at the bottom of your campaign site
 - b. Twitter Username- this will allow your Twitter posts to pull through at the bottom of your campaign site
 - c. Hashtag-Try to create a clever hashtag that is relevant to your campaign. Posts will pull through at the bottom of your campaign site when your organization or anyone else posts on social media with this hashtag.
 - d. Tweet Donations- check the box if you would like our system to do this. Everytime someone makes a donation our system will automatically send out a tweet thanking them for their donation.
 - e. Click Save Changes
11. Click on the  icon
- i. This is the area you would use to highlight and recognize sponsors. This will show up on every page of your campaign site under the raised

amount. If you have more than one sponsor it will continuously scroll through them on a loop.

- ii. Click on the  in the top right corner to add a sponsor
- iii. Type in the sponsor name
- iv. Upload a logo image for the sponsor
- v. Click Save

12. Click on the  icon
- a. This is where you will be able to customize and add features to your donation page (the give now button takes you to this page on your campaign site)
 - b. If you would like your fundraisers to get credit for donations, make sure the gift crediting feature is turned on.

13. Click on the  tab on the left side
- a. This is where you would manually add people as fundraisers. We can also add a “Become a Fundraiser” button on your campaign site if you would rather them sign up on their own.
 - b. Click on the  in the top right corner to add someone
 - c. Type in their information and click Save

14. Click on the  tab at the bottom on the left
- a. This is where you are able to see all donations made
 - b. You can manually add a donation if you receive cash or check. Click the  in the top right corner and add the donor information. Click Save
 - c. Click on the  in the top right corner to download an excel file with all of your transactions.