

# TURN YOUR SUPPORTERS INTO **THIRD-PARTY FUNDRAISERS**





**In the age of digital and social media, individuals are more empowered than ever to support causes dear to their heart by hosting their own in-person or virtual fundraisers.**

Is your organization doing everything it can to encourage your supporters to become fundraisers for your cause? In this guide, you will learn how your charity can benefit from volunteer third-party fundraising, how to set up your own program and how to effectively engage your supporters into participating.

# Table of contents

**WHAT IS THIRD-PARTY FUNDRAISING?**

**1**

**HOW DOES IT BENEFIT MY CHARITY?**

**2**

**IS THIRD-PARTY FUNDRAISING POPULAR?**

**3**

**FUNDRAISER IDEAS TO INSPIRE YOUR SUPPORTERS**

**4**

**ENGAGING CORPORATIONS AND GROUPS**

**5**

**LAYING THE GROUNDWORK FOR YOUR PROGRAM**

**6**

ORGANIZATIONAL POLICIES AND PROCEDURES

**7**

FUNDRAISER TOOLS TO SUCCEED

**8**

**ONLINE TOOLS TO MAKE THIRD-PARTY FUNDRAISING EASIER**

**9**

**ENGAGING YOUR SUPPORTERS TO PARTICIPATE**

**10**

# What is third-party fundraising?

You have probably seen examples of third-party fundraising on your social media channels, at your kids' school, or local community centre.

Unlike walks, runs or other “thons” hosted and financed by a non-profit organization, third-party fundraisers are planned and executed by volunteer individuals, businesses, or community groups who are passionate about supporting a charity. The responsibility of developing the fundraising idea, organizing, managing and financing is assumed by the person or group hosting, while the non-profit receives all the funds raised. With the right platform, charitable organizations can empower third-party fundraisers with little to no need for their own involvement. For example, you have the option to require approval and coaching from your team, or you can let your fundraisers run with their ideas all on their own.

Sounds like a winning scenario for your organization, and it is! However, you need to provide your supporters with a framework, some guidance and a fundraising platform, also known as a crowdfunding platform, that allows them to easily collect funds for your organization to help them succeed—and hopefully do it again.

Read on to learn more about setting up a successful third-party fundraising platform for your charity. If you are looking for tips and tricks on launching your own charity-driven “thon”, download our free, comprehensive white paper, [Launching Your First Peer-to-Peer \(P2P\) Fundraising Event](#).



# How does it benefit my charity?

Easy and cost-effective access to technological solutions has given non-profits a myriad of ways to connect with their supporters and raise more funds. With the help of social media, your supporters can spread the word to their friends, and family, amplifying your message with little effort and investment from you.

## Of all the available tools in your toolkit, why should you choose third-party fundraising?

Here are some possible benefits that can help you determine if it's the right solution for you.



### Save time and money:

Your organization does not have to be as heavily involved (if at all) in planning and financing a fundraiser. In fact, most fundraisers are either virtual or part of an existing event like a birthday party—incurring no cost to you at all.



### Extra revenue stream:

Your supporters may already be donating to your cause regularly, but this provides them with another way to give more.



### Grow donations year-round:

Third-party fundraisers can be held in celebration of birthdays, weddings and more, allowing you to raise funds regularly throughout the year.



### Gain new supporters:

Through these fundraisers, new supporters will be introduced to your cause giving you a great opportunity to nurture new, repeat donors.



### Boost geographic reach:

It's a great way to reach more Canadians from coast-to-coast without breaking your marketing budget.

# Is third-party fundraising popular?



It sounds like a great strategy—someone else does most of the work and your charity gets the benefit of all the funds raised. You may be wondering “is this something a lot of people actually want to do?”

The concept of third-party fundraising has been around for years. There’s no shortage of people who are personally connected to or passionate about a cause and want to help by hosting their own fundraiser. In today’s hyperconnected digital world, it is easier than ever to spread the word about an in-person event or host a virtual event, and to raise more funds. Thus, volunteer third-party fundraising has been increasing in popularity.

## Here’s what Canadians were up to in 2016:



**Thousands of individuals raised funds for charities by launching personal fundraisers through the CanadaHelps.org site for donors**



**The average personal fundraiser raised \$1,421**



**The average donation amount to a personal fundraiser was \$151**



**The vast majority were virtual events requiring minimal time and no financial outlay**

In an April 2016 survey completed by over 5,500 Canadians who use CanadaHelps to donate or fundraise for charity, 36% said they are likely to donate their birthday to a charity by creating a fundraising page, and in lieu of gifts, asking friends and family to donate.

You need to tap into that desire of your supporters. Help them turn that goodwill into funds for your organization by giving them the tools to execute fun and successful fundraisers in support of your cause!

# Fundraiser ideas to inspire your supporters

For your third-party fundraising program to take off, you must give your supporters some inspirational fundraising ideas.

Most charities find it's best to provide supporters with many fundraiser concepts, and keep it open. If you have the flexibility, you can even offer the option of a custom event, giving the fundraiser the creative freedom to plan a fundraiser that is truly meaningful to them.

However, depending on your organization's goals, if you have a jam-packed marketing calendar, and based on the demographics of your audience, promoting a specific type of fundraiser might work best. It could be one, simple option such as Donate Your Birthday or Fundraise for Your Trek.

In time, you may choose to set up different sites for different types of third-party fundraisers. This is particularly true if Tribute donations are a significant source of funds for your organization.

**Here are some fundraiser ideas to fuel your creativity, including sample messaging for your supporters!**



## **Birthdays, weddings, graduations and other special occasions**

In lieu of accepting gifts, ask your friends and family to donate to your fundraising page. It's a great way to show that you are grateful for what you have on your special day and would like to share your blessings with others.



## **Challenge events such as runs, walks or sporting games**

Host your own challenge event and ask participants to join or create a team and fundraise a minimum amount. You'll be doing something good for yourself and your cause.



## **Bake sales, craft sales, car washes and other community events**

Turn your passion into a fundraising tool with the proceeds from your event being donated. Who doesn't love to eat a cupcake for a good cause?



## **Memorials and tributes honouring a loved one**

Create a fundraising page in tribute or in memory of a loved one, supporting a cause that is important to both of you. Consider honouring your furry friends in support of an animal related charity.



## **Holidays like Christmas, Hanukkah, Mother's Day and more**

Seasonal and religious holidays are a popular time to give back, so if there's a cause you are particularly passionate about, start a fundraising page for it.



## **School or corporate events**

Engage your students, co-workers or employees in a cause that is important to you or ties into a school project or corporate culture. You can host a fun event like a bake sale, sporting game or silent auction.





# Engaging corporations and groups

Companies are realizing that a key ingredient in their recipe for success these days is giving back. Consumers are more conscious of choosing brands that are involved in their communities or support a cause.

Because of this, more and more corporations are choosing to engage in philanthropy and to partner with local charities. In addition to helping build a company's profile, it has been shown to boost employee morale, and enrich the local community.

If a corporation or group is aligned with your mission and expressing interest in hosting a third-party fundraiser, it could be a great opportunity for your charity.

Not ready to take inbound requests from corporations or groups? That's okay! You can position third-party fundraisers as being for individuals only. But take note of the corporations that are interested. Should the opportunity arise for them to get involved in the future—for example, by sponsoring an upcoming campaign—reach out to them for support.

# Laying the groundwork for your program

You're convinced third-party fundraising is the right solution for your organization and are ready to get started. Great! Before you let your supporters run with your amazing fundraising ideas, it's important to put a few things in place to ensure the program's success—for your charity and the fundraiser. You want to strike that perfect balance of letting fundraisers do it themselves, and making sure your organization is comfortable that fundraisers are on-brand and on-mission. Make your supporters feel welcome to ask the odd question that might be key to their fundraising success.

1

## Organizational policies and procedures

- Ensure organization-wide support and select the right people to run your program.
  - Define measurable goals and monitor progress quarterly to see if any tweaks to the program need to be made to improve outcomes.
  - Carefully choose the types of fundraisers you want to promote based on your goals and capacity. If maintaining brand control is important, you may guide your supporters to only consider simple, virtual types of fundraisers, recognizing the in-person events may create more demands on your charity.
  - Consider creating Terms and Conditions governing your third-party fundraising to make sure you are compliant with applicable laws, and to make sure fundraisers follow your messaging guidelines and use your creative assets appropriately.
  - Decide if approval for third-party fundraisers will be required and set guidelines for what types of fundraisers your organization will approve. If it's an individual conducting a virtual fundraiser and using your online fundraising page template and donation platform, you probably don't need to approve individual events.
- However, if a fundraiser is proposing a larger public event, doing any paid advertising or seeking media to attend, you may prefer to get more involved.
- If you decide that approval is required, appoint a person who will oversee contracting, approvals, ongoing support and post-event follow-up.
  - Decide on how many resources you are willing to commit to supporting fundraisers. For example, will you attend events if invited? Who can attend such events and how often?
  - Make sure you have as much access as you need to a web developer and/or designer who's able to create a landing page on your website to promote third-party fundraising, develop graphics for your platform, help you develop tools for your fundraisers and make them available online.





## 2

## Fundraiser tools to succeed

It's a little bit of work up front, but giving your third-party fundraisers the tools they need to succeed will ensure the program runs smoothly on both ends. Keep it simple, and within the scope of your program and organizational capabilities. If at any point you find yourself getting too involved with individual events, take a step back and revisit the tools you have in place.

### Sample “Host Your Own In-Person Fundraiser” toolkit:

- Fundraising event ideas and guidelines for what's involved
- A checklist of to-do's
- Step-by-step planning guide for in-person events
- Fundraising tips and best practices
- Key messages about your organization's impact
- Sample fundraising emails and social posts
- FAQs

### Sample To-Do Checklist:

- ✓ Create a fundraising page and agree to our Terms and Conditions.
- ✓ Download our online *Host Your Own In-Person Fundraiser* toolkit.
- ✓ Promote your event via word of mouth, social media or email.
- ✓ Provide updates and encouragement throughout your event to keep your supporters engaged.
- ✓ Send a “Last Call” message to your friends and family five days before your event end date so they can help you reach or exceed your fundraising goal.
- ✓ If you've received any funds by cash or cheque, please provide us with the funds within 30 days of the event end date.
- ✓ Show plenty of gratitude and thank each person who donated, so they feel appreciated for contributing to your fundraising event.

# Online tools to make third-party fundraising easier

Receiving donations and providing individual tax receipts is made much simpler if you use an online platform designed to do so. That way, your fundraisers won't have to manage pledge forms, cash and credit card numbers, and you will be able to stay focused on your core fundraising program.

**Here are some benefits of using the CanadaHelps online fundraising solution to help manage your third-party fundraising:**



#### **Custom fundraising pages:**

Third-party fundraisers can quickly and easily create their personal fundraising pages using your organization's customized templates—you are in full control of the look and messaging.



**Automatic tax receipts:** Tax receipts are issued to donors automatically instead of your charity having to issue them manually. The "thank you" message can be customized and you can include your logo on the receipt.



**Automatic fund transfers:** Donated funds are automatically transferred to your organization instead of having to wait for the person hosting the fundraiser to manually send them to you.



**New donor lists:** You can download reports and information about the new donors who were introduced to your cause through the fundraiser. Upload them to your CRM and start nurturing!



**Fundraising terms:** Fundraisers must agree to your Terms and Conditions up front, before they create a page, saving you the headache of chasing after them for compliance.



**Easy to manage:** An online solution is more accurate and provides real-time information on all fundraisers.

**CanadaHelps provides a turnkey solution for online third-party fundraising with Peer-to-Peer Social Fundraising. [Learn more now!](#)**

# Engaging your supporters to participate

You have come up with great fundraiser ideas, laid the groundwork and now it's time to promote your third-party fundraising program. As with other methods of fundraising, you want to keep awareness high throughout the year, so build it into your regular marketing communications calendar.

Check out these ideas on how to spread the word about your new third-party fundraising program!

**Build a stellar landing page:** The landing page for your third-party fundraising program is where people will go to learn more about getting involved. Be sure to link to it from the “Get Involved” or “How to Help” portion of your website. Once visitors are on your landing page, you need to inspire them to take the next step and sign up. Outline your program's details and provide information that helps them understand the key points.

## **Landing page tips:**

- Keep it simple and easy to read with short paragraphs and bullet points.
- Answer the big questions: What? Why? And How?
- Include a few lines about your charity and the impact of their donations to inspire action.
- Include a prominent and clear call-to-action for supporters to create their own third-party fundraising page.
- Provide downloads of everything they need to succeed. Guidelines, toolkits, checklists—you name it.

**Email and newsletters:** Your mailing list includes some of your most dedicated supporters. Be sure to inform them of your new fundraising program and demonstrate how easy it is for them to host a fundraiser.

**Get social:** Not only can you share the details of your program and fun event ideas on your social channels, you can use them to highlight individual fundraiser success stories. Testimonials and personal stories are a great way to inspire others!

**Holiday-specific ideas:** During the holidays, offer up some holiday-specific fundraiser ideas. Summer is a great time to suggest challenge events. On your organization's birthday, promote your impact and encourage supporters to donate their birthdays to your cause.

**Communicate regularly:** Keep in touch with your fundraisers. Let them know how great of an impact they are making, that they are appreciated, and encourage them to make their event an annual activity. Don't forget about the new donors who were introduced to your cause through a third-party event. Engage them and turn them into repeat donors.

**Engage your community:** Reach out to local businesses or community organizations who are aligned with your cause and interested in philanthropy. Many love to engage their employees or members through fundraising events—so next time, make it yours!

**Tip: Their success is your success! Consider promoting third-party fundraisers on your website, social channels or newsletters.**

Feeling excited about ramping up your third-party fundraising program? Learn more about the solutions from CanadaHelps with resources and [how-to videos](#).

# Empower Your Charity's Third-Party Fundraisers with Powerful Online Tools

Birthdays, memorials, gala dinners and virtual events are just some of the popular occasions people leverage to independently host fundraisers for the causes they love. With CanadaHelps, you can give your supporters the tools they need to successfully host third-party fundraisers, also known as “Do-it-yourself” events, on your charity's behalf.

An extension of the CanadaHelps Peer-to-Peer Social Fundraising Solution for launching your charity's team-based events, the third-party fundraising feature provides you with all the same robust branding, reporting and administrative controls, but with the refined feature set and controls you need to easily empower your supporters to raise money for your charity.



## With CanadaHelps' Third-Party Fundraising tools, your charity can:

- Empower your individual and corporate supporters to fundraise for your charity.
- Launch your online third-party fundraising site in minutes.
- Watch your supporters easily sign up, create their fundraising pages and start raising funds.
- Access ready-to-go images and banners for your charity and fundraisers to choose from.
- Choose the colours that match your brand for consistency across all fundraising pages.
- Get funds automatically disbursed to your bank account.
- Count on us for automatic tax-receipting.
- Use built-in email messaging to communicate with your fundraisers.
- Download donor and donation reports to upload to your CRM platform.
- Add custom signup questions and require fundraisers to agree to your Terms and Conditions.
- Manage your flexible campaign-approval settings based on your organization's comfort level.

**It's easy to get started!** Access the Peer-to-Peer Social Fundraising Solution available in your CanadaHelps Full Fundraising account and choose “Create New Third-Party P2P Campaign” to create your campaign.



# Peer-to-Peer Social Fundraising

## Benefit from the Fastest Growing Source of Charitable Donations.

Launch team-based events like runs, walks, and other “-thons” with ease, or empower your supporters to engage their personal networks using third-party fundraising. Our robust solution provides everything your charity needs, including: a feature-rich yet easy to use self-serve experience, paid registration support, extensive branding, customization, administration, and reporting. Achieve all the advantages of social fundraising at a fraction of the cost of for-profit alternatives with CanadaHelps.



## Designed to inspire participation and maximize fundraising results.

Start social fundraising in minutes.

### 1. Launch Your P2P Campaign in Minutes

It's easy. Define your site-wide branding, choose your configuration options, and create your charity page inspiring supporters with your fundraising story and rich media. Then, invite Team Captains and/or participants to get started and use the built-in communication tools to continue engagement throughout the campaign.



### 2. Participants Easily Sign Up

Simple online sign up – including social sign up options – makes it easy for participants to join and share their own personal fundraising story and pictures to best appeal to their friends and family. And, getting started is even easier with the integrated email and social media features.



### 3. Powerful Engagement Features Go To Work

From dynamic content like Top Teams and Top Participants lists, fundraising thermometers, and messages from donors, the solution invites participation, inspires donations, and promotes social sharing. All pages are built on today's e-commerce best practices and are fully mobile ready.



## Designed to inspire participation and maximize fundraising results.

### Extensive Branding & Customization Options

- Add a marquee campaign header image displayed on all pages and emails.
- Tell your story with words, inspiring photos and videos.
- Choose from a full array of colour palettes.
- Display your fundraising goal so donors can see your progress.
- Customize sign-up to capture the information you need like t-shirt sizes or signed digital waivers.



### Easily Manage & Engage Participants

- Tightly control who can participate or allow anyone to join.
- Easily invite and manage Team Captains, Team Members and individual participants.
- Let your Team Captains do all team management or share the load.
- Keep participants engaged. Easily email Team Captains, Teams, or all participants.
- Optional paid event registration.



### Anytime Access to the Reports You Need

- Dashboards provide at a glance insight into your overall fundraising progress, top teams, participants, and donors.
- Easily export Team, Team Member and individual participant information.
- Download full donor information and easily import into leading CRM databases like Salesforce and Raiser's Edge.



“At Foursquare Gospel Church of Canada we are so grateful for the P2P tool from CanadaHelps! It gave us all the branding and feature options we needed to successfully run our Charity Ride, and look professional in the process. As an organization we've saved hundreds of administration hours and have been able to run a substantial fundraising event, just like the large charities, but at a fraction of the cost.”

—Foursquare Gospel Church of Canada







## Did you benefit from this resource?

Learn more about CanadaHelps and our fundraising solutions for charities [here.](#)

CanadaHelps – CanaDon is a registered charity

BN: 896568417RR001

Phone: 1-877-755-1595

Email: [charities@canadahelps.org](mailto:charities@canadahelps.org)

[www.canadahelps.org](http://www.canadahelps.org)

