

CanadaHelps

Educational Webinar Series



Small Organizations Achieving Big Peer-to-Peer Fundraising Results

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Webinar Reminders



- You can hear us, but we can't hear you.
- Have questions?
Type them into the Questions Log at anytime.

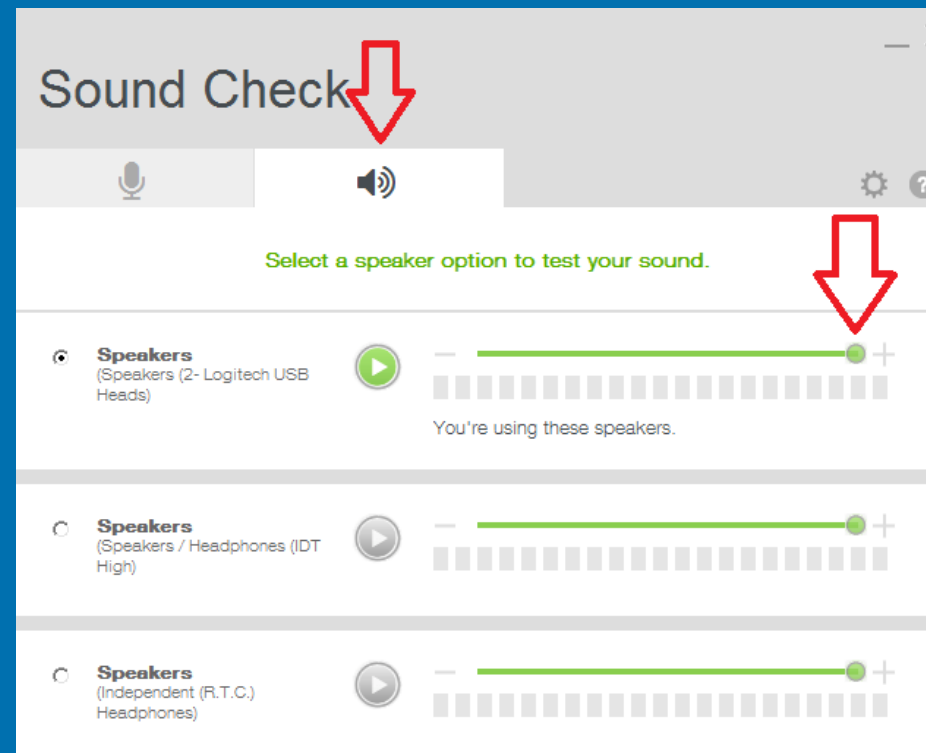
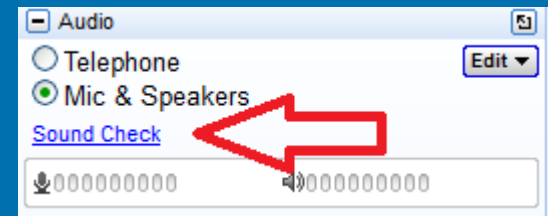
A screenshot of a web-based interface for submitting questions. It features a window titled "Questions" with a large text area for input. Below the text area is a smaller input field with the placeholder text "[Enter a question for staff]". To the right of the input fields are vertical scrollbars. At the bottom right of the window is a "Send" button.

Webinar Reminders



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- Turn up your computer's volume.
- Click Sound Check under Audio in your GoToWebinar Panel.
- Select the speaker tab and then turn the volume on the speaker to the far right for maximum volume.



Webinar Reminders



- For the best webinar experience, close all other applications.

- **Yes!**

The links to the webinar slides and recording will be emailed to you within 24 hours. You'll be able to watch the recorded video on demand.



Ready to get started?

CanadaHelps is a non-profit social enterprise serving charities & donors.



CanadaHelps is a charity that helps charities. We ensure all Canadian charities – most notably the smallest ones that need it the most – have access to the online fundraising tools, technology, and education they need to succeed. Because we're a charity, our fees are a fraction of those of the for-profit alternatives.



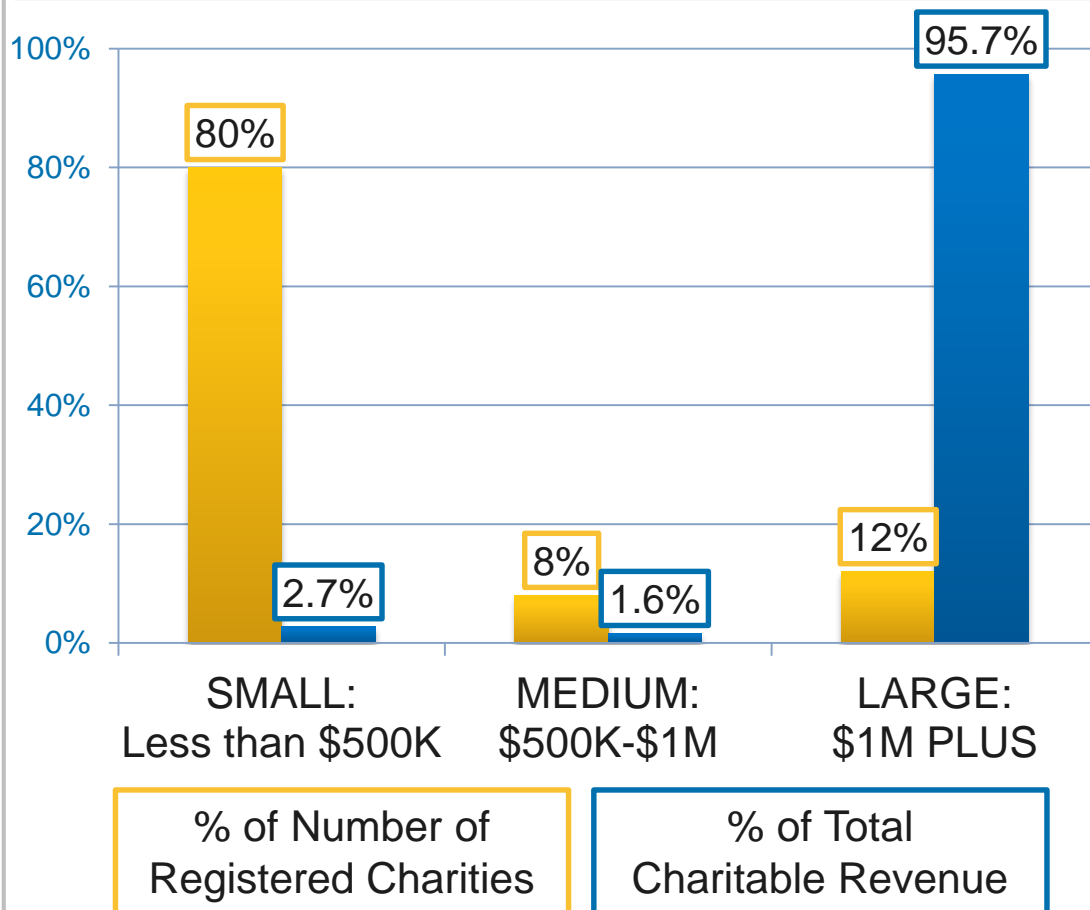
For donors, we offer a one-stop shop for supporting any registered Canadian charity online. CanadaHelps makes giving easy. Easily explore and discover new causes. Give once or monthly, donate securities, or increase your impact fundraising for charity. Enjoy instant or anytime access to all your charitable tax receipts.



At a glance: Trusted for 15 years, over 16,000 charities rely on our non-commercial online fundraising platform and more than 1 million Canadians have given using CanadaHelps. We have a spotless record for safe and secure payment processing & instant tax receipting, and operate on less than 1.8% of donation revenue.

About Small Charities

Only 2.7% of total charitable revenue in Canada goes to the 80% of charities that are small.



Small charities do vital work with incredible limited resources.

- 85% have 4 or fewer staff members.
- 44% are fully volunteer run.

Small charities are fill critical, unmet societal needs society:

- 82% of small charities have been operating for over 10 years.

Achieving Big Results for Small Organizations



**DO > MORE
WITH < LESS**

RESULTS

Achieving Big Results for Small Organizations

1. Choosing Your Event Type: Your most important decision
2. Right Sizing Your Event: Goal setting and planning
3. Learning from Small Charities: Campaign examples
4. Step by Step Success: 9 Guide posts

#1

Choosing Your Event Type:
Your Most Important Decision

Choosing Your Event Type

Why is it so important?

1. It can have tremendous implications on cost.
2. It can be a make or break point on whether your supporters participate.
3. It is your stage for creating an experience that will foster repeat participation.

Managing Costs

Run, cycle or swim-a-thons will likely require some, or all, of the following:

- Permits
- Road closures
- Traffic management
- Security
- Insurance
- Medical support
- Portable Washrooms
- Food and drink
- Sound system
- Rest area (tent, tables, chairs)
- Signage
- Weather Back-up

Other event types can reduce cost and complexity:

- Read-a-thon
- Letter-a-thon
- Clean-a-thon
- Cook-a-thon
- Dance-a-thon
- Hack-a-thon
- Party-a-thon
- Skate-a-thon
- Work-a-thon
- Volunteer-a-thon
- Virtual-a-thon
- DIY-a-thon

Attracting Participants

Your supporters may want to fundraise for you.

BUT will they do it if asked to Swim? Run? Cook? Dance?

Create Your Event Types Short List

Weight & Rank:

- Appeal to your donors
- Cost
- Complexity
- Fundraising potential
- Fit with other objectives
- The “It” factor

Get Input From Your Key Support

Ask the hard questions:

- Probe type, time, date.
- Do you want to do it?
- Or, would you do it?
- Will you commit?
- How much?
- Any better ideas?

Get A Commitment – Validate Your Top Ideas

Engage a wider group:

- Corporate sponsors
- Speakers
- Volunteers
- Secure 30%+ of participants upfront

Driving Repeat Participation

What makes your event memorable or unique?

- Your supporters have choice in good causes & events.

Does your event inspire repeat participation?

- Does it “fit” within their lifestyle?
- Did they leave feeling good?
- Did they leave feeling like they made a difference?
- Did they leave with an experience they’d want to share?
- Did they leave more connected and committed?

What steps can you take to drive repeat participation?

- Sharing the importance of your work
- Showcasing the impact of funds raised
- Securing early pledges to participate next year
- Recognizing repeat participants
- Connecting with these high value supporters

DID YOU KNOW?*

- ✓ Repeat participants raise 2-3x more than first time participants!
- ✓ Team participants are more active fundraisers & earn more.
- ✓ Team Captains achieve the highest fundraising results.

*Blackbaud, March 2013.

Is your organization ready to run a P2P event?

Small charities with few staff or undeveloped volunteer programs are often cautioned. The effort to run a P2P event may be disproportionate to the results.

Our experience says success takes:

- a few people committed
- a “right-sized” event
- realistic goals and plan



#2.

Right Sizing Your Event

Setting Your Goal

To success at your ultimate goal of fundraising, you need to have a more specific goal in mind and create an event experience that will help you get there.

Balancing Your Goals:	Shaping Event Tactics:
Building awareness	<ul style="list-style-type: none">• Social sharing, educational engagement, PR.
Attracting new supporters to grow fundraising results	<ul style="list-style-type: none">• Teams-based event, supporting participant fundraising, stewarding P2P donors.
Deepening current supporter commitment & loyalty	<ul style="list-style-type: none">• Focus on the experiencing, creating personal connection to your work, clients and impact.
Developing brand	<ul style="list-style-type: none">• Focus on developing a memorable event that shouts out your brand values & personality
Experimenting with P2P	<ul style="list-style-type: none">• Simple turn-key event with no expectations or decisions beyond on this year.

Meticulous Planning

Feasibility:

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

Planning & Mitigating Risks:

Forecast

What do you need to consider it a success (# of participants, donors, gift size)

Validate

Get COMMITMENT from core supporters & sponsors. 30%+ of goal pre-launch.

Right Size

The right event with 10 passionate people can succeed if well planned for.

Revisiting Goals for Success:

- Revisit goals to ensure they are attainable. Success breeds success.
- Fundraising may be your top goal but year 1 may be about staging that in year 2+.

#3

Learning from Small Charities

Walks, Runs, Swims & Cycle-a-thons

Yes, small organizations can succeed with walks, runs, swims and cycle-a-thons too!



Toronto Chinese Community Church
Footprints Walk-a-Thon surpassed its
\$100,000 goal by 20%.

You have many event type options. Be sure to carefully evaluate fit with your resources:

- Fit with your goals
- Costs
- Demand on staff
- Volunteer requirements

Targeting Participants

Targeting can help you create a more meaningful experience and can allow you to connect and inspire participants whom otherwise would not have joined.

The Grandparents Stroll



There are many ways to target:

- Gender, Age
- Singles, Families, Couples
- Children of ... Parents of ...
- Lifestyle: People who run, knit, code ...
- Mission: What are the roots of your cause?
- Friends of people with ...

As a small organization you may need to appeal to a broader group. That's OK! Develop a profile of your ideal participant you use to support development of strong communication materials.



Parent Support Services Society of BC

Team Events

A great approach to acquiring participants. Core supporters or clients form their teams largely handle participant recruitment.



Same planet. Different world.



Transforming Simple

A sweet spot for small organizations. Manageable. Fun. Flexible.

The 100 Inning Game



Family Respite Services
Windsor - Essex

Extending the length of event:

- Allows for more participants
- Creates excitement & memorability
- Marginal added cost or complexity

Countless ways to transform the event:
e.g. for every 10 innings ...

- A different contributing sponsor
- A different story shared
- A new set of players – leverage it with friendly competition or fun awards.

Unique Events

A great way to attract media - think annual polar bear plunge. Include data trends and insights in your media pitch to increase coverage.



Unique events can also be a powerful way to:

- Build your organization's brand.
- Connect on a deeper level with participants and the community.

Eliminate the logistics. Pure marketing. Participants identify in a way that sparks conversations and action.

Where Your Helmet to Work or School Day



In support of the Mulder Trauma Centre at Montreal General Hospital:

- Team based approach
- Minimum \$50 per participant
- Ask your employer to match
- Participants equipped with facts & stat
- Open invitation to day of rally

Other examples:

- Shave it for cancer
- Movember

Designed for Social

Again, pure marketing and no event logistics. Quality, supporter generated content tied to a direct donation ask.



The iStand Campaign:

- Awareness building sharing insights on number of people affected by HIV.
- I Stand for education, prevention, treatment, an end to the stigma ...
- Call to Action: Take a photo or short video. Share it. Link it to your fundraising page.

Works as a pure play P2P campaign or to build momentum for your event.

Hope, Housing and Compassionate Care Since 1988
BRUCE HOUSE
25th Anniversary

Events That Get Work Done

Your supporters want to help. An event that allows them to get involved in tangible work can strengthen their loyalty and commitment.



Back-end work:

- Office clean up. Painting party.
- Skilled volunteering commitment.

Mission-based work:

- Work that serves your clients.
- E.g. Hospice society sets teams up to do Fall clean-up for families in need.

Smaller Side P2P Events

Do you have a turnkey platform for third party P2P events?

Motorcycle Ride



Enable smaller secondary P2P events fully managed and run by a key supporter.



Rotary District 5550
Building Schools in Guatemala

#4.

9 Guide Posts

Recruiting Partners & Sponsors

One large sponsor covering all costs who cares deeply for your cause is ideal. That said, bite sized asks from an array of sponsors is typically more attainable.

Types of Corporate Asks:

- Monetary sponsorships
- Employees to staff event
- Employees to fundraise in event
- Creation of marketing materials
- Entertainment and speaker system
- Provision of co-branded signage
- Provision of co-branded giveaways
- Food, water, and more
- Event promotion
- Prizes

Who to Ask:

- Companies with a natural fit or affinity to your cause
- Companies with related businesses, e.g. music school for sound system, grocery store for food or water, etc.
- Personalities with a connection to cause or from local area
- Seed introductions from connections – yours, your board's, core supporter's



Participant Engagement

Plan your engagement program before launching your campaign.

TIPS:

- ✓ Try to appeal on multiple levels.
- ✓ Engage them early & maintain engagement throughout campaign.
- ✓ Follow participants socially.
- ✓ Provide ready-to-go shareable content and fundraising tools.
- ✓ Motivate tams and participants with prizes. Get creative.

FUN

Training tips are often provided to marathon runners. Why not bowlers sharing pictures of their regime?

AWARENESS

Keep participants mission-focused. Let them know sharing awareness stories helps prime friends & support the ask.

PERSONAL

Simple participant segmentation and messaging can dramatically lift results. Sleepy fundraisers, top performers, etc.

COLLECTIVE

Build excitement sharing collective progress, ideas that worked, adding friendly competition.

Attracting media starts with providing a newsworthy story.

Building Your Story

- **Story over call to action** – make it mission based, showcasing the need. You need to convey why it matters and why you should care.
- **Personalize the story** – make it really and ready to report on including real examples of people you serve. Offer ready-to-go visuals and quotes.
- **Include data and trend insights** – a great way to provide context, and increase newsworthiness.
- **Adjust pitch closer to the event** – move from cause and how to get involved message to why write about the cause at our event.

Getting Your Story Told

- **Develop your media list** – ask who is speaking to people who care about my story (local/national, health or environmental, etc)
- **Do your research** – make sure you're contacting the right person.
- **Use your connections** – ask for intro to the right person for the story.
- **Customize your pitch** – when suitable.
- **Call, write, call back** – within reason.
- **Prepare your spokespeople**

Right Size The Extras

Your supporters are there because they care about your cause and want to make a difference.

- T-shirts, hats, prizes and food are all nice to haves.

Get creative and deliver a great memory packed experience

- Event check-in, takes pictures of teams and share socially
- Personalized thank you with a picture of participant on day
- Arrange on-site silk screening on a BYO-T-Shirt
- Ensure signage and banners are fully re-usable
- Have fun with colour hair spray, face paint, branded bandanas, or stickers
- End the day with a Bring Your Own Lunch & memorable talk

Day of Logistics

Email written logistics plan in advance to all supporting staff, speakers, volunteers, and participants.

- Tailor plan based on role of recipient.
- Include all pertinent details - times, directions, contact numbers.
- Cover all relevant tasks – set-up, during event, takedown
- Make it easy for them to ask questions and make suggestions.

At event:

- Prepare early; reserve hour before for any last minute surprises
- Provide directional signs – parking, check-in, washrooms, etc.
- Make schedule accessible – and have team ensuring its upheld.
- Kick-off event with inspiring words, thanks and safety & logistic info.
- End event with a recap, thanks to participants, donors and organizers - celebrate the event and
- Full team looking listening for feedback and suggestions

**Advanced
Organization
is Critical**

**Incorporate
personal
stories when
possible**

Seize the day

Your best supporters are at your P2P Event. **What else can you do?**

- Ongoing social media engagement
- Get photos that will lift up your marketing
- Create videos
- Secure testimonials and stories
- Learn more about your supporters
- Share new program information
- Share impact results
- Sell t-shirts
- Pledge participation next year
- And more!



It's Not Over When It's Over

Continue to engage participants, volunteers, and P2P donors.

- Share the moment – social media, pictures
- Send personalized Thank You
- Ask for Feedback
- Share results
- Secure pledge to participate next year
- Steward participants with updates on work made possible by campaign



Hello << Test First Name >>,

On behalf of all the volunteers that organized the Ride4RealFood, thank you so much for participating!

Four things to know (and two requests):

1. First, how was it? We would love your feedback. Please take just a couple of minutes **and complete this survey**.
2. **Thanks to all of your hard work and support, we have now successfully raised over \$30,000!** This amount includes donations and support in cheques, and cash outside of the online system. Thank you for all of your help! We truly could not have done it without you.
3. Our second request: We are keeping the fundraising page open until the end of September. Please let people know it's not too late to support a great cause!
4. For those riders who have (or will) raise \$600, you can get a \$60 credit at the West End Food Co-op. WEFC will be in touch with you in the weeks to come.
5. The bike draw will be held in the fall at a social event and we'll be sending you an invite soon. Although we really hope to see you there, you're not required to be present to win.
6. The Ride4RealFood is always held on the second Sunday in September. We hope you'll join us again on **Sunday, September 11, 2016!**

Turn P2P Donors into Repeat Donors



1 in 4 people donate to a cause because a friend or family member asked them to.*

A special treatment plan is required for Net New P2P Donors.

- Create your plan before active P2P fundraising starts
- Start with a personalized thank you sharing the work donations enable
- Stage 1-3 welcome emails focusing on education: your mission, the need, your approach, your impact, stories & images that bring your work to life
- Stage 1-2 early asks before moving P2P Donors into your standard plan

*NPEngage, September 29, 2015.

Leverage Your Data & Plan Early

Key P2P Metrics to review:

Aggregate Results:

- Number of participants
- Number of donors / participant
- Average donation size

Break Down:

- Funds raised tiers (Include a \$0 raised tier)
- New vs. Repeat participant
- Team participant vs. individual participant

Get creative and go deeper if you have time!

USING YOUR DATA:

- ✓ Report on results versus campaign goals and set goals for next year.
- ✓ Identify where further investment is required.
- ✓ Test new tactics and segmented engagement plans.

#5.

Your Online Platform

The MUST HAVES for success

Intuitive User Experience:

- ✓ Fully mobile ready
- ✓ Team & Individual participation
- ✓ Roll-up fundraising thermometers
 - with offline donation support
- ✓ Self-serve signup & page management
 - with custom signup questions & waiver
- ✓ Personalized fundraising pages
 - pictures, videos and words
- ✓ Dynamic leaders board & supporters wall
- ✓ Integrated social sharing tools
- ✓ Streamlined donation path
 - all major payment methods
 - custom suggested gift amounts
 - optimized for best e-commerce practices
- ✓ Instant tax receipting

Cohesive Charity Branding

- ✓ Your brand colours, logo, campaign imagery, and story across all pages.
- ✓ Campaign themed email templates.

Anytime Access to Reports:

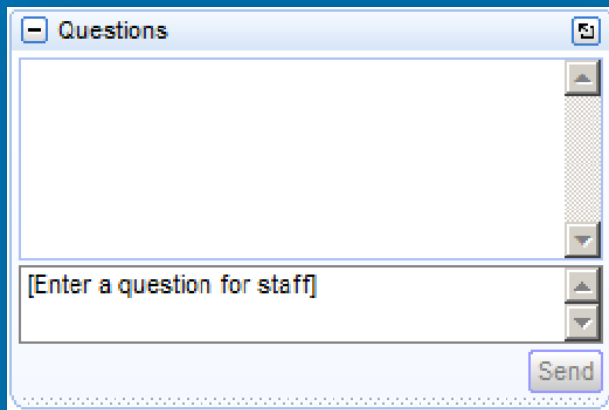
- ✓ Real-time, at-a-glance dashboards
- ✓ Full team, participant & donor reports
- ✓ Simple export/import into your CRM

Key Administrative Controls:

- ✓ Define participation rules
- ✓ Easily invite and manage participants
- ✓ Delegate to Team Captains
- ✓ Easily email participants

Have questions? Ask Us Now!

Please type your questions into the Questions Log on your GoToWebinar panel.



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Thank you!

Contact us with any questions.

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