



# Your P2P Fundraising Playbook: 5 Steps to Success

# Step-by-Step Instructions

## 1. Activate your Peer-to-Peer Fundraising Page

Start the process as soon as possible to customize your page and raise awareness in advance of the giving day.

### A. Accepting a Fundraising Invitation

If you were invited by through email to fundraise for your organization, follow the steps below:

1. Within your email invitation from the organization, you'll be prompted to access your P2P Fundraising Toolkit. Do so by selecting the "Get Started" button within the message.
2. If you haven't used GiveGab before, be sure to sign in with the email and password provided in your invitation.
3. If you have a GiveGab account already but are not signed in when you select the prompt, you'll be asked to log in. If you received your invitation to a different email address from your existing GiveGab account, write into the blue chat bubble for assistance.
4. Once you've successfully logged in, click [here](#) to learn how to access your toolkit.

## B. Starting your own Peer-to-Peer Fundraising page

If you would like to begin a fundraising page for an organization on your own, follow these steps:

1. Head to your organization's giving day profile by searching for their profile on the giving day.
2. Select the "Fundraise" button to the right of the "Donate" button.
3. You'll be prompted to log in if you have an existing GiveGab account. If you haven't used GiveGab before, you will need to create an account. If you want to link your GiveGab account to your Facebook credentials, you have the option to do so by clicking the blue Facebook button.
4. Upon successful completion, you'll be taken to your P2P Fundraising Toolkit to get started.

## 2. Use your Peer-to-Peer Fundraising Toolkit to customize your fundraising page

While your P2P Fundraising page will have components of your organization's giving day profile, you will customize key sections to convey your goals and personal connection.

### A. Select the "Tell Your Story" tab and complete the following sections:

1. Explain your connection and why you're a passionate supporter.
2. Set a monetary fundraising goal.
3. Add a personal image for your story that relates to the organization.
4. (Optional) Include a video in place of the photo.

### 3. Send emails from your P2P Toolkit leading up to, on, and after the giving day.

Contact your family, friends, coworkers and additional peer networks about the giving day and the organization you're supporting.

- Expand the "Reach Out" tab.
- To enter email addresses in for your supporters, select the "Send Email" button. Enter in emails for the individuals you want to contact (you can enter in multiple email addresses).
- To import your contacts in order to email a larger group, click on the "Import Contacts" button.
- Once you've selected your method for entering your contacts, you'll be prompted to create your message. This messaging feature is in plain text, so there aren't additional formatting options.
- Suggested emailing schedule:
  - 1 email before the giving day.
  - 2 different emails on the giving day.
  - 1 Thank You email after the day.

## 4. Share your P2P Fundraising Page through Social Media

Reach beyond direct connections and inform your social networks that you're supporting this organization. Post before, on, and after the giving day.

- Expand the "Share Socially" tab.
- Facebook and Twitter buttons are readily available for easier posting.
- You'll also find your P2P Fundraising Page's unique URL to share on additional social media platforms.
- Suggested posting schedule:
  - 1-3** posts before the giving day.
  - 3** posts on the giving day (include progress updates).
  - 1** Thank You post after the day.



## 5. Thank your peers who donated through your Peer-to-Peer fundraising page.

This is your opportunity to thank your network of supporters directly. Donors will also receive an automatic thank you message from the organization your fundraising for.

- Select the “Give Thanks” tab in your P2P Toolkit.
  1. A full list of all donors who gave through your page will appear.
- Select the donors you want to thank. Segmenting your thank you messages allows you to send tailored messages to your supporters.
- Select the “Thank Selected Donors” button to create your plain text email.
- Once you’re done, mark the donors you have thanked. This allows you to keep track of who you’ve thanked.

## Best Practices & Resources for P2P Fundraising

### Peer-to-Peer Fundraising Guide for Give Local Greater Waterbury and Litchfield Hills

This guide provides a number of resources for how organizations can recruit and support Peer-to-Peer Fundraisers.

### Navigating your Peer-to-Peer Fundraising Toolkit

Learn how to manage and customize your P2P fundraising page.

## Telling Your Story

Curate a message to your network that conveys why you support this organization. A few questions to consider as you tell your story:

- Select the donors you want to thank. Segmenting your thank you messages allows you to send tailored messages to your supporters.
- Select the “Thank Selected Donors” button to create your plain text email.
- Once you’re done, mark the donors you have thanked. This allows you to keep track of who you’ve thanked.

Add a photo or video of you volunteering, attending an event, or supporting the cause to increase engagement and connect to potential donors.

## Direct Communication

Start your communication by creating a list of at least 10 individuals you are comfortable asking to make a contribution. This list is often made up of friends, family, or anyone you have a close connection with.



## Direct Communication (cont.)

Once you've contacted those you're most comfortable asking for donations from, you can move on to the potentially more difficult asks, like coworkers or acquaintances.

For sample email templates, click [here](#).

## Social Media

Facebook, Twitter, or Instagram are ideal platforms for spreading the word to larger networks of individuals, in particular, those you may not be in regular contact with.

Facebook is the most popular platform and typically sees the highest levels of engagement. If you aren't comfortable with other forms of social media, Facebook is the ideal starting point.

Add a photo of you volunteering, attending an event, or supporting the cause in another way to provide a meaningful visual component.

## Social Media (cont.)

Another way to reach your peers is to share the organization's own posts to your social media account. You can share posts on Facebook, retweet on Twitter, and Repost with Instagram. When using hashtags, include any your organization is using as well as the giving day hashtag in your posts.

For example posts, giving day specific graphics that you can use, and social media tips, click [here](#).

## Thank your donors and cheer them on

Showing personalized gratitude is vital. Send them a personal email through your P2P Fundraising Toolkit, thank them in person, or send them a handwritten note.

When showing your thanks on social media, consider creating your own graphics using free and easy to use tools like [www.canva.com](http://www.canva.com).