

Gateway to Crowdfunding action learning course

Raise funds, learn new skills and thrive!

Session 3: Planning Your Campaign



welcome


 GlobalGiving

Photo: The Nyaka AIDS Orphans Project

GET READY

Close emails &
documents

Turn your mobile phone
off

Be open and ask
questions

Be positive

Share constructive
feedback

Use Chatbox not Q&A

Have fun



Agenda

(Get paper and pen for today's session)

- What is your goal?
- Who will help you? **Resources.**
- How will you achieve it? **Activities.**
- When will your activities happen? **Timeline.**
- What if it isn't working? **Creativity & persistence.**

Key Dates

- **20th October – Session 4: Mapping Your Network**
- **21st October – Winter Crowdfunding Challenge London Workshop**
- **25th October – Session 5: Using Email Effectively for Fundraising Online**
- **27th October – Session 6: Developing A Successful Social Media Campaign**
- **28th October – Deadline to Submit Project Pages**
- **14th November – Gateway to Crowdfunding Challenge Begins**
- **19th December – Gateway to Crowdfunding Challenge Ends**

Taking time to plan your campaign

Why it matters

Plan each step of your crowdfunding campaign

Create an **weekly activities plan** to share with your team and keep you on track

Step 1

Planning

Start at least 6 weeks before (if you can)

Step 2

Sustained Execution

Schedule prepared communications and engage with network

Step 3

Follow Up

Thank your donors, evaluate and learn what worked

Set a goal. Evaluate what is working and not working throughout. Review at end.

WHAT IS YOUR GOAL

ACTIVITY

Setting goals for the Challenge

Gateway Challenge : Raise £2,500 from 50 donors in 35 days

- **But what are your goals? Have a think...**
 - **How many people do you know**
 - **How many people do they know 10 x 10 x 10**
 - **Will you approach individuals – friends, family....**
 - **Will you hold events**

Campaign plan and goals

Campaign Goals (broad goals)	Campaign objectives (be specific)	How we will do this (activities)	How we will measure success
To increase funds for our after school programme	To raise £5,000 in 5 weeks from 70 donors	Email and phone supporters Host a film night Sponsored event	Amount raised No of donors
To increase our individual supporter database	To gain 30 new donors during the campaign	Engage champions to reach out to their friends Host event open to public and encourage newcomers	Number of new donors
To improve our skills in online fundraising	To use digital social media, email and online content to promote our work.	Develop a facebook page Develop a giving page Tailor emails to effectively raise funding	Amount raised online compare with past campaigns Increased number of people engaging / donating online.

Donor Targeted Strategy

Name	Type (one-time, recurring, major, or group)	Projected donation volume	Goal	Responsible Individual
<i>Alexis</i>	<i>Major donor</i>	<i>£200</i>	<i>Increase donation volume this year</i>	<i>Manmeet</i>
<i>Brian</i>	<i>One-time</i>	<i>£100</i>	<i>Convert to recurring</i>	<i>Britt</i>
<i>Rotary Club</i>	<i>Group</i>	<i>£1,000</i>	<i>Host online fundraiser</i>	<i>Jonathan</i>

Plan campaign with goals in mind

- Activate people to donate (now)
- Involving 'crowd' in different ways
- Focus people on a specific project goals
- Create a reason to engage people
- Expand supporter base
- Raise funding for an important project

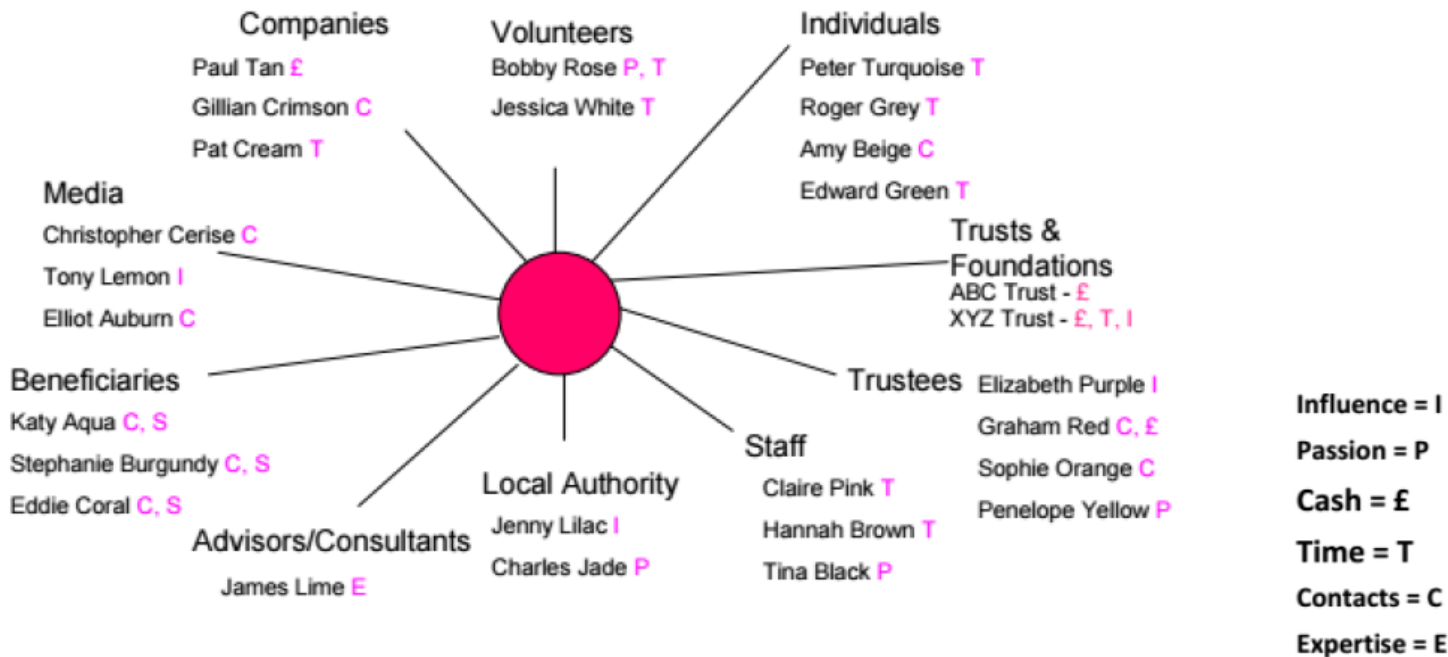


What will you do to achieve this goal?

- Regular email updates
- Social media engagement
- Hosted events
- Phone calls
- Presentations
- Special requests
- Fundraising champions
- Sponsored activities
- What else?

WHAT ARE YOUR RESOURCES

Resources in your network



Evaluate the Resources Available

- **Who is in your campaign team?** *Staff, volunteers, trustees, friends, relatives, champions, fundraisers?*
- **What existing experience and skills do you have?** *E.g. events, active local community, lots of volunteers, passionate alumni*
- **Who or what else could you access through your network?** *Are there new networks? Warm contacts? Untapped resources?*
- **What do you try / develop through the campaign and how?**

Plan your activities: what and who

Activity	Lead Person	Lead activity	Who else?	Support activity
Send emails to network	James	Draft emails, coordinate sending to champions, check in with senders, draft follow up emails, measure success (how many emails sent?)	All staff, volunteers and champions	Personalise emails and send to all contacts. Send follow up emails/calls.

Fundraising champions

Who are these people? Give them a mini-goal.

Who	Role	Skills / Offer	Time
Mark	Volunteer	Photography, art, social media	1 day per week
Sarah	Board member	Corporate network, event space, pianist	16 hours in evenings

Example mini-goals

- Each staff member to coordinate 5 fundraisers (goal £1k).
- Recruit 10 champions. Ask them to raise £200 each (goal £2k).
- Ask 10 'community supporters' to raise £200 each (goal £2k).

ACTIVITY

Make a list of the staff, volunteers and champions that could help

Who	Role	Skills/offer	Time
Mark	Volunteer	Photography, art, social media	1 day per week
Sarah	Bored member	Corporate network, event space, pianist	16 hours in evenings

Types of activities



Get ideas online – search for ‘fundraising ideas’

Big charities have great ideas e.g. CAFOD, Fundraising A-Z

TIMELINE

Schedule including your planning weeks

Week start	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
18th May	Plan						
25th May	Prepare						
1st June	Pre Launch						
13th June	Launch						
15th June	Activities						
22nd June	Activities						
29th June	Activities						
6th July	Activities						

Schedule your activities (and planning)

Example Calendar

Week 1	Send launch email, post link to project page on Facebook, and add GG widget to homepage. Ask supporters to "Like" FB page. Mon	Check Champions have forwarded launch email to their networks and posted on Facebook/ Twitter. Tue	Facebook/ Twitter: post updates, photo / beneficiary story, link to GG page. Call Board/ Staff reminding them of Challenge & their tasks Wed	Use GG donor management tools to send thank you email to donors. Send reminder to those not yet donated. Thur	Post end of week 1 progress update on Facebook, Twitter. Fri	Give presentation at local church service about our organization and the Open Challenge. Sat/Sun
Week 2	Organize team meeting to assess success so far and develop strategy for upcoming week. Check in with Champions Mon	Update Facebook and Twitter. Contact local community figures/ leaders - engage with your work and ask to support Challenge. Tue	Make presentation at community event about project and Challenge. Collect email addresses then follow up with an email asking them to donate. Wed	Post progress on social media, along with a photo / story of a beneficiary and link to GG project page. Thur	Send thank you emails to those donating during week 2. Reminders to those who haven't Fri	Sat/Sun
Week 3	Halfway point! If using them, call Champions to see how they're doing and what they need. Facebook/ Twitter update Mon	Plan and coordinate your weekend's fundraising events. Write to the local paper about them. Tue	Send weekly email to entire network. Specify how much money has been raised and how much remains. Update Facebook/Twitter Wed	Send personalized emails directly to individuals who haven't yet donated. Call round those for whom you don't have emails. Thur	Send personalized emails directly to individuals who haven't yet donated. Call round those for whom you don't have emails. Fri	Coordinated series of fundraising events hosted by your Champions. Sat/Sun
Week 4	Post pictures and results from weekend's fundraisers on Twitter and Facebook. Thank champions - personally and publicly Mon	Call board members, reminding of deadline and urging them to contact their networks Tue	Update social media. Ask supporters to repost Wed	Coordinate a "final appeal" email with your Champions. Ask everyone who has donated to ask 3 more people to donate. Thur	Thank you email and Facebook posts with final reminder. Emphasize impact/ results. Fri	Post a "last day of the Challenge" party. Make sure to have a computer available so attendees can make last minute donations Sat/Sun

- Per activity?
 - Per person?
 - Overall?
- You decide.

CREATIVITY AND PERSISTENCE

Changing your plans?

- Give it time, but not too much
- Evaluate what **IS** working
- Re-evaluate your time resources
- Re-set your plan
- Inform your team
- Evaluate and learn
- Debrief with team
- Let both success and failure encourage you in equal measure!



"There is no failure except in no longer trying." Elbert Hubbard

Setting some new goals

The whole team should be responsible for meeting your ultimate goal.

- Staff member to coordinate 10 fundraisers (goal £2k).
- Recruit 10 champions. Ask 10 to raise £200.
- Ask 10 'community supporters' to raise £200 each.
- Post 3 interesting, relevant posts on Facebook daily.
- Increase Facebook page likes by 10%.
- Trustees to raise £500 each from their network.

You can either wish or succeed

**A GOAL
WITHOUT
A PLAN
IS JUST
A WISH**

Raising funds on and offline

- ***Online: direct via your new GlobalGiving project page***
 - Add link to emails
 - In social media posts
 - On your website (you can the widget) or blog posts
 - On your partners, friends etc websites, blogs, social media
 - Ask people to Share your project page on FB or Tweet about it
 - Sign up for your newsletter from your Project Page.
- ***Offline: add to project page yourself or send in cheque/breakdown***
 - Collect donations offline as cash or cheque (tickets, auctions etc)
 - Send in a cheque (or make bank transfer) to GlobalGiving UK for total amount
 - Email us the total and send a breakdown including donation amount, name, email address, gift aid (yes/no) and mailing address (if applicable) min £5.

Use GlobalGiving UK's Fundraiser Page

2. what kind of fundraiser is it?

GENERAL FUNDRAISER

use this type for any kind of fundraiser or choose from one of our other types!



CELEBRATION

birthdays, graduations, baby showers



TRIBUTE

in memory of a loved one



REGISTRY

weddings,
civil unions,
anniversaries



ATHLETIC EVENT

marathons, walks,
treks, hikes,
bike tours



BE AWESOME

grow a beard,
shave your head,
be awesome



DISASTER RELIEF

help fundraise for
disaster relief



COMPANY OR ORGANIZATION

inspire your
employees to
make a difference



ONLINE COMMUNITY

rally your readers,
fans, or followers



DIL Trust UK Raised £29,526 from 42 donors in 2 weeks



Nikki's Top 5 Tips

1. Timing is everything
2. Social Media
3. Support other charities
4. Hold events
5. The next generation

Dear Kevin,

You subscribed to email updates from [Bringing children's palliative care to Bangladesh](#), a project on GlobalGiving. Here's the unedited update from the field:

One final push to reach our total

By Sue Boucher - Project Leader

Dear Friends

ICPCN would like to thank each one of you for so generously donating to our Global Giving Challenge project which will fund the development of children's palliative care in Bangladesh through strategic training of doctors and nurses. We are incredibly grateful and have been quite overwhelmed by your generosity and your willingness to help us. Please be assured that your money will help to make an invaluable difference to the lives of thousands of children in this country who have such limited access to the comfort, relief from pain and emotional support that palliative care can provide

Work Hard and Get Back What You Put In

*We set our target quite high for the project because of the longer term aims so I am pleased that **we reached the threshold** but we have more to do. It ended up being **intensive time** - especially the last couple of weeks! We realise that we need to have more **people involved** to support these kind of campaigns. We have a mailing list now and a Facebook page.” Andrew, Red International*



Engagement 31 points

Donations

8 points \$5,000+	▶ \$27,676 in donations in the past 12 months
4 points 1,200-\$4,999	
1 point \$120-\$1,199	
0 points \$0-\$119	

Number of Donors

8 points 60+ donors	▶ 133 donors in the past 12 months
4 points 36-59 donors	
2 point 12-35 donors	
0 points 0-11 donors	

Project Reports

10 points <i>Early</i>	▶ You or a member of your team met GlobalGiving reporting requirements by submitting four approved quarterly reports in the past 12 months.
5 points <i>On-time</i>	
-5 points <i>Late</i>	

Thank You Emails

4 points 75%+ thanked	▶ Your organization thanked at least 75% of your non- recurring donors over the past 12 months using GlobalGiving's Thank You Tool
3 points 50-74% thanked	
2 point 25-49% thanked	
0 points 0-24% thanked	

Eligible to be included in corporate and thematic campaigns. So far, **your organization has been included in 17 campaigns.** [Learn more](#)

Eligible to receive gift card redemptions from donors

Possible to be recommended for a corporate partner's gift card or cause marketing campaign. So far, **your organization has been included in 7 referrals to companies.**

A pair of hands is shown from a top-down perspective, gently cupping a small, vibrant green seedling with two leaves. The hands are positioned centrally, with the fingers slightly curled around the base of the plant. The background is a soft, out-of-focus blur of green and pinkish tones, suggesting an indoor garden or a similar setting. The overall lighting is soft and natural, highlighting the texture of the skin and the freshness of the plant.

Questions?

ACTIVITY

Homework

Get GG Reward Points for Participating in the Webinar

Share the recording and slides with your team

Complete your Organisational Survey

Create or Improve your Project Page

Create or Update your Campaign Plan

Need help during the Challenge

We're here to help!



Email: UKPROJECTHELP@GLOBALGIVING.CO.UK

**Post your questions or share on
our Winter Challenge Facebook
Page**

Call: 44 2072428079

A close-up photograph of a young boy with a joyful expression, smiling broadly. He is wearing a light-colored, possibly white, collared shirt. The background is a blurred classroom setting with other students and a green chalkboard.

thank you

[@PatatGG](#)

[@GlobalGivingUK](#)

