

# Online Fundraising Guidebook



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This guidebook is designed to help organisations across Wales benefit from online fundraising and build it as a new income stream.

The following pages provide comprehensive information and tasks for causes to work through independently.

Alternatively, third sector support organisations could study the steps with their network.

Please feel free to share the guidebook as appropriate.

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“PAVO, through its support to Third Sector organisations in Powys, knows how difficult it can be to secure funding. We feel that online fundraising is an option that the sector should embrace much more actively. This guidebook will ensure that any group, large or small, can set up an online fundraising platform and have a structured strategy that can ensure they maximise the benefits of online fundraising. It has been developed to give organisations a step-by-step breakdown of how to make the most of online fundraising, in a structured, accessible and thought provoking way.

We feel this is a really important new tool for the organisations we support, and we look forward to promoting its use to the Third Sector.”

*PAVO, CVC for Powys*

# WHAT IS ONLINE FUNDRAISING AND WHY IS IT IMPORTANT?

- Online fundraising refers to activities that drive donations on the internet through computers, tablets and smartphones.
- A large portion of donations in the UK are now made online and by mobile and it is important to tap into this large income stream
- The average online donation is double that of an offline donation and this funding stream can help diversify your income.
- The internet is used across all ages; therefore, online fundraising is relevant to whoever your organisation works with and wherever they are based.
- Online fundraising makes it very easy to thank donors and to keep track of donations coming in. It is efficient, needs minimal resources and makes it easier to continue a relationship with supporters.
- This largely unrestricted income also helps to raise awareness of your cause, build your networks and develop an online presence.

“We were worried about our supporters making a donation online - but it was so easy.”

*Asbestos Awareness & Support Cymru*

# TASK 1

# 01

Review your current digital capacity and fundraising activities

## OBJECTIVE

To enable you to understand your organisation's digital capacity and fundraising activities

Does your organisation have basic digital skills (e.g. knowledge of email and web browsing)?

What fundraising does your organisation currently undertake?

What other forms of income do you have?

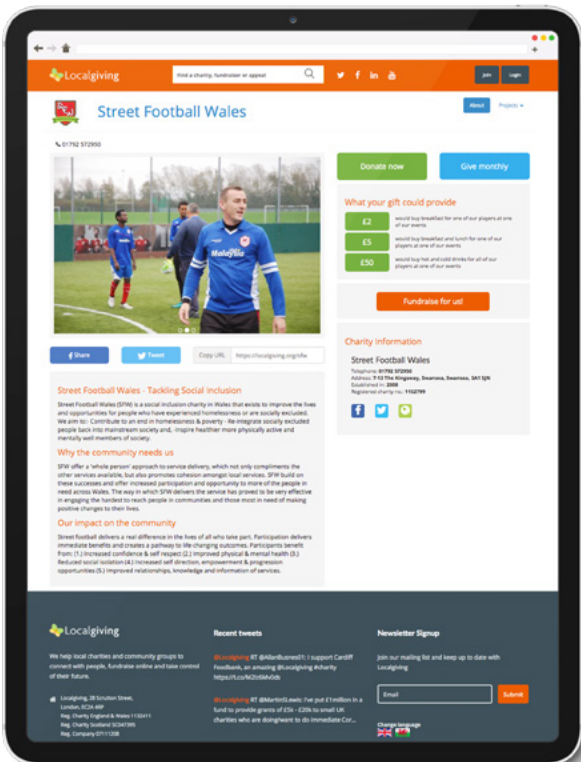
Have you ever worked with online fundraising before?

Have you personally ever donated or fundraised online yourself?

Have you previously provided or do you currently provide your supporters with the ability to donate to you online?

# DIFFERENT TYPES OF ONLINE DONATION PAGES

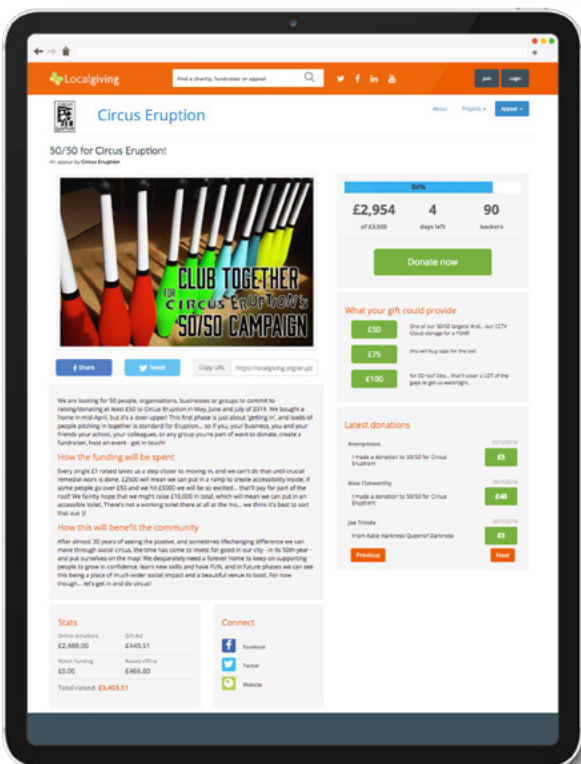
This section provides a snapshot of the different online donation pages that can be made and the rest of the guidebook provides further detail on how to succeed with each area of individual giving.



## Central donation page

The first step with online fundraising is to create a **central donation page**, which summarises your work as a whole. Add photos and example amounts that people could donate (e.g. £5 provides a hot meal for a homeless person).

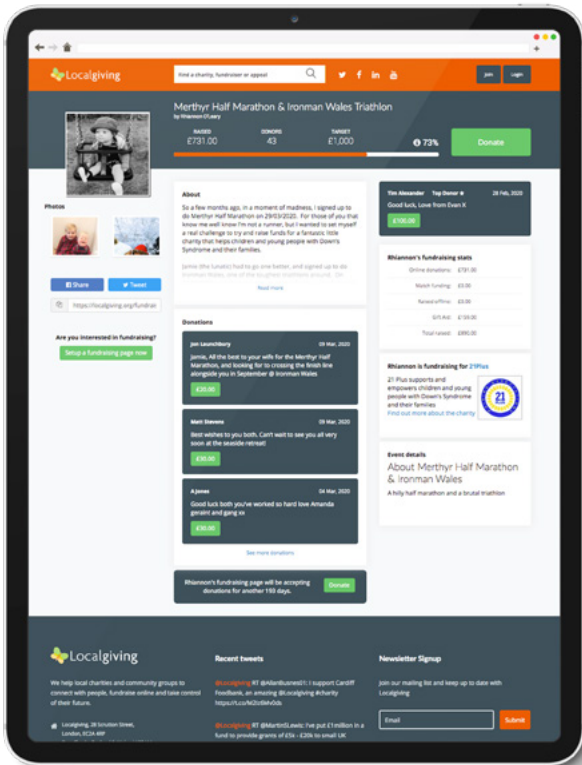
*Tip: Keep the donation page up-to-date, use emotive photos and thank donors in a timely manner. Make the most of Gift Aid, as well as encouraging monthly direct debit donations. Remember to make your donation page accessible through bi-lingual content.*



## Crowdfunding donation pages

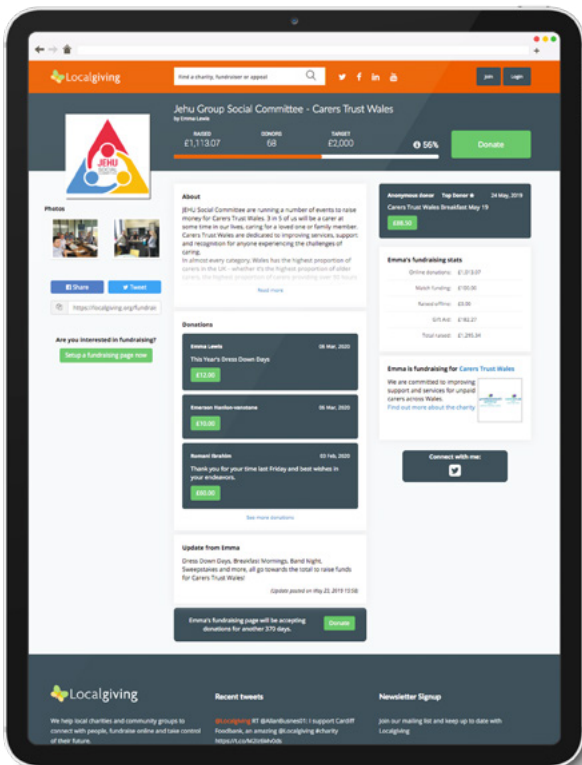
It is important to plan **online crowdfunding pages**, which can also be called **crowdfunders or appeals**. These are pages that will be live for a specific amount of time, whilst your organisation is trying to hit a specific target towards a specific outcome. This outcome can be anything that you can put a target against, such as equipment, projects or continuing existing work. The focus is to get many individuals or a 'crowd' of people to give small amounts towards a larger target. Strengthen your campaign with a video as this is a very effective way of getting a message across. Essentially, crowdfunding pages vary your fundraising 'ask'. Rather than just asking for general donations throughout the year, **appeals allow you to plug very specific needs and add a sense of urgency**.

*Tip: Be aware that some platforms need you to hit a target before you can receive the money raised.*



## Fundraiser donation pages

You can invite anyone to take on a **fundraising challenge** or event for your cause. **Fundraisers** can be those involved in your organisation already or members of the public. They can choose what challenge to do, how much they want to raise and how long they give themselves to do it. They can personalise their page with photos, donor comments and training updates.



## Consider whether there are local businesses that you could ask to undertake fundraisers.

They could run a staff-wide challenge or become a partner of your organisation and fundraise for you across the year.

# CREATING A STRONG DONATION PAGE

# 02

## TASK 2

### Telling your story

#### OBJECTIVE

To make it clear why your organisation is needed, what you do and what the outcomes are, as well as how funding would help. The strongest donation pages will include a short case study, quote or testimony. It is essential to create strong donation pages.

*Tip: This is the basis of the text on your online donation page. You could concisely replicate wording that you have used in grant applications to form your donation page content.*

What is your organisation's tagline? E.g. Food for those facing a financial crisis.

#### What is the purpose of your organisation?

What are the circumstances that prompted action and what was the challenge that needed addressing?

#### How do you benefit the community?

How does your organisation fulfil its purpose and help? Why does the community need you?  
How do you address the need around you?

#### What are the outcomes of your work?

What does the situation look like as a result of your work? What is your impact?  
How would funding help? Include a case study/quote/testimony.

# TASK 3

# 03

## Understanding the importance of a strong donation page

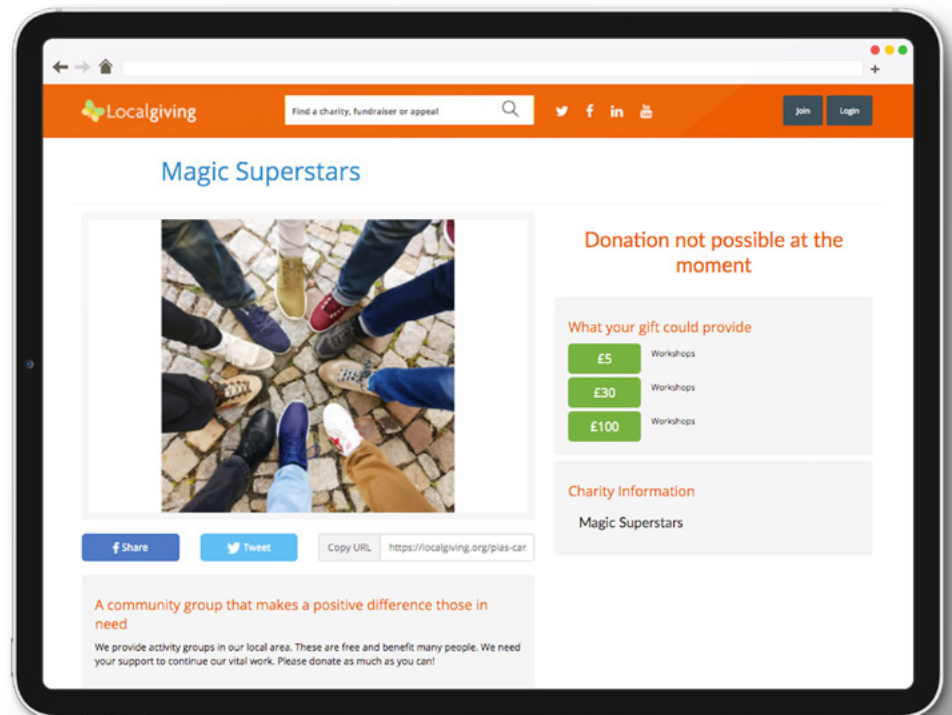
### OBJECTIVE

Imagine you are in the donor's shoes and this is the first and only impression that you have of these organisations.

Here are example donation pages. Consider the best and worst aspects of the example pages.

As you can see, it is essential to clearly and visually explain what you do and where donations go!

- What would or wouldn't encourage you to donate to their cause?
- What does this tell you about the importance of content?
- What is beneficial or damaging to a donation page?





# SEGMENTING AND GROWING YOUR SUPPORTER BASE

Your potential supporter base is the network of people that are aware of your organisation or interact with you in some way. They may be participants of what you do, family members of those who are helped or the local community.

Think about each segment of your network and consider what the best message is for them. This may be a donation message or it may be inviting them to plan a fundraiser or asking them to

spread the word via social media posts. You need people who interact with your organisation to know what you are doing, why you are doing it, who is involved, where the service is available and how to find out more.

**Your network will grow as you reach relevant people that engage with your messages.**

“ We have felt very emotional about the support we have had from our donors and fundraisers...we never knew so many people were backing us! We work so hard on our project, but the support that has been shown to us via donations makes us feel great that people are actually aware and even more so are cheerleading us from local and far away. It's been a wonderful process. ”

*Colwyn Victoria Pier Trust*

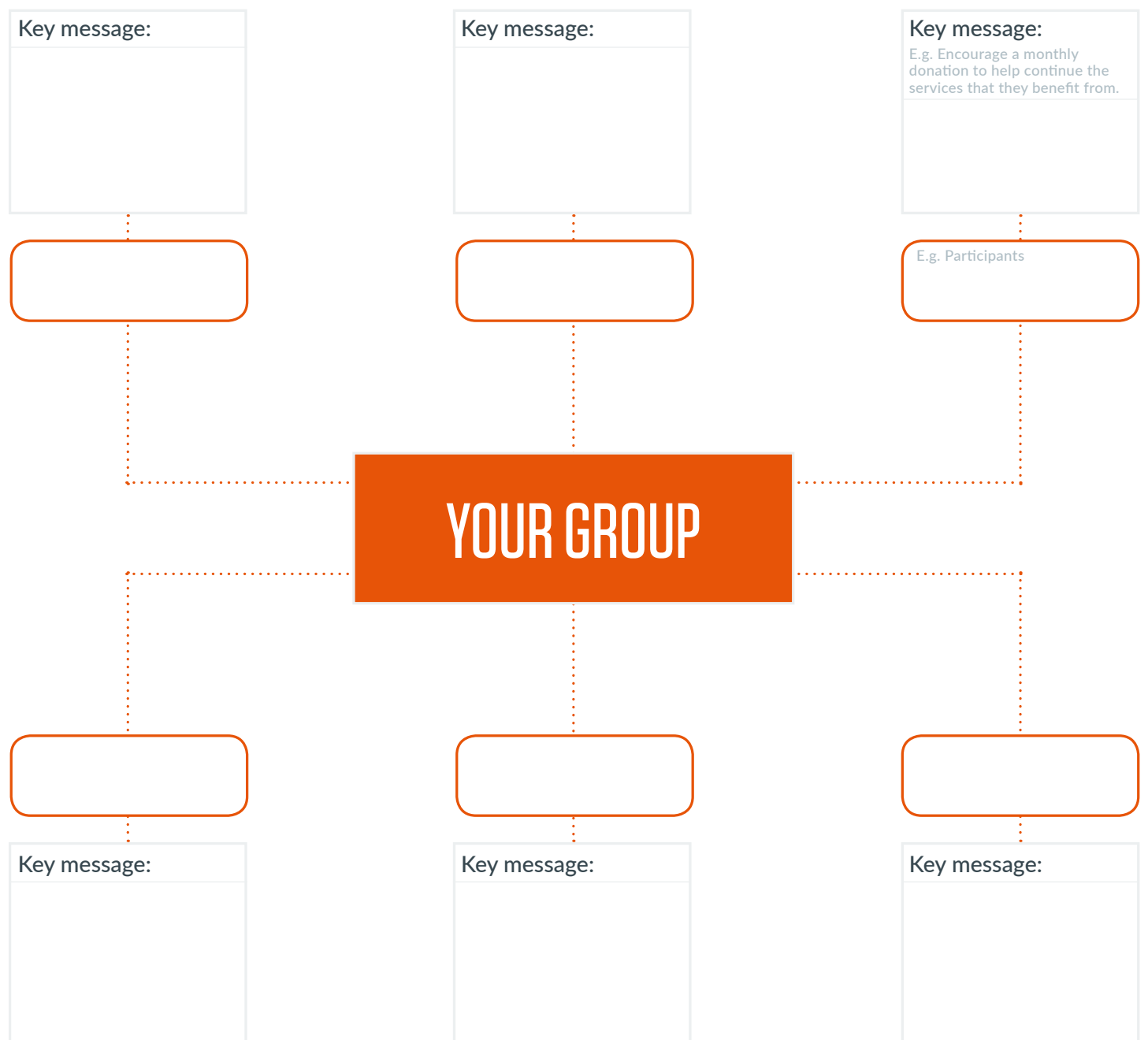
# TASK 4

## Mapping your potential supporter network

# 04

### OBJECTIVE

The objective of this task: add in groups of people that interact with, benefit from or are aware of your organisation's work. Consider the most appropriate key fundraising message for each group.



# DEVELOPING A FUNDRAISING STRATEGY

To begin any of these steps it is important to be familiar with your organisation's situation and what has taken place historically.

**It is important to develop a realistic fundraising strategy based on research, data and conversations with your network.**

## The aims of a strategy:

- A strategy should include realistic action plans, appropriate targets and knowledge of the systems, tools and training needed. The best fundraising strategies are simple and clear.
- A strategy should guide your organisation to the point where it is financially sustainable and able to continue its prominent work to the same and increased levels.

## The key elements of a strategy:

01

A number of short interviews should be held with senior staff and trustees.

03

Any areas for potential risk or opportunity should be identified through a SWOT analysis.

02

Desk research and an audit of your organisation can help identify the potential areas to cultivate new support. Examine the present strategy, your data and publicly available data.

04

Ask the important questions of: Where are you now? Where do you need to get to over the next few years? What resources do you have available?

05

Be mindful of which regulations apply to your fundraising activities, such as, **Code of Fundraising Practice** , **General Data Protection Regulation (GDPR)** and **The Welsh Language Measure 2011** .

10

Plan out the best way to grow your supporter base and maximise their involvement.

06

Undertake competition analysis. What are similar organisations doing, how are they funded and do they have any major upcoming fundraising campaigns?

11

Complete a set of conclusions and outcomes at the end of the strategy. This summary will explain the best way forward with fundraising, based on the evidence collated and analysed.

07

Understand the external challenges and opportunities for funding both offline and online. Focus on the potential to attract sponsorship and grants from individuals, institutions, businesses, trusts and foundations.

12

Present key recommendations to the whole staff/volunteer/trustee team, keeping them closely informed. Allow challenge and feedback before the recommendations are concluded.

08

Once the market has been tested and obvious funding opportunities have been explored, you are ready to examine the internal factors required to deliver a successful campaign.

13

These recommendations can then be used as action points to put in place and maintain. Set targets and develop a calendar of activities to track and assess your progress.

09

Create a case for support and an elevator pitch that would motivate support.

14

Your strategy should be reviewed regularly and shared with your supporters at your AGM.

# TASK 5

## SWOT analysis and capacity awareness

# 05

### OBJECTIVE

To establish how ready you are to fundraise.

*Tip: Identify and analyse the networks of similar organisations. Consider who your donors are most likely to be, both locally and nationally, and map out how they might hear about the organisation. Test your ideas, record outcomes and suggest actions. Understand your capacity, resources and networks.*

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<i>E.g. Social media platforms in place</i>	<i>E.g. Lack of time</i>	<i>E.g. Upcoming events</i>	<i>E.g. Lack of volunteers</i>

Do you have someone that leads or can lead on online fundraising within your organisation?  
If so, how regularly could they focus on this?

Has anyone else in your organisation been involved in fundraising previously?  
Does anyone else have skills that they could contribute?

# PROMOTING YOUR CAUSE, CASE FOR SUPPORT AND FUNDRAISING EFFORTS

*Tip: Before you make the 'ask', your organisation needs to identify who your donors actually are and which ones you'd like to reach. Undertake interviews with any existing supporters and prospects to understand their current motivations and to help shape a stronger case for support.*

Raising awareness of your organisation is fundamental to fundraising. This is also the first step in developing a larger network, which is the foundation for spreading a fundraising message.

Review your organisation's case for support. Be it a fundraising appeal, website content, social media posts, trust application or conversation with a major donor, your case for support will form the basis for all your communications.

A case for support should be based on your organisation's vision, mission and values. It should set out what you do, why, who you benefit, why they need you, the outcomes, what you need and the impact funding would have. You will need to identify an appealing proposition for each of the groups in your network. Create a proposition that is compelling enough to secure and retain funders, but that is also manageable.

Essentially, a case for support should lay out why donors should give to your cause. What pitch will be most compelling to key supporters? How is the case currently communicated? Demonstrate the impact – statistics, visuals, data, stories and testimonial quotes.

Once you have developed a case for support and a strong donation page then you need to promote the URL (the website link) and spread the word about your fundraising efforts.

- Create visual promotional materials (photos and video) and proactively highlight the cause. The aim is to gain attention, explain the problem and why they should care.
- Make it clear how your organisation can make a difference
- Get supporters to understand the need before inviting them to contribute.
- Make the most of existing events and awareness days.
- Use bilingual content.

# TASK 6

## Elevator pitch

# 06

### OBJECTIVE

To develop a call to action that is based on your case for support.

An elevator pitch is a short and engaging description of your organisation or project. This can be used with your fundraising message for a short call to action. Develop an elevator pitch based on your mission statement, as well as your organisation's vision and values.

E.g. 'Through regular neighbourhood activities we ensure that local elderly people stay active, build friendships and do not feel isolated.'

Use no more than 100 words to consider the above and use the summary that you created for your donation page content

“ For me Localgiving is the most proactive online fundraising platform and we have raised more through Localgiving than any other platform. The support is second to none. ”

*Paul Popham Fund, Renal Support Wales*

# MARKETING METHODS



Retaining and cultivating donors costs less than acquiring new ones. Nurture relationships and guide individuals to the next level of engagement. Treat them as long-term partners who share the same passion and demonstrate the impact of their support. Ensure they stay updated by encouraging them to follow on social media and sign up to newsletters. Set targets, calendar reminders and track progress. Review your progress regularly.



Newsletters are important because a third of donations are due to email. It is essential to email donors a regular update, even if you can only manage twice a year. Keep your network in the loop, showing them what their donations have enabled and sharing future plans.



Traditional marketing methods are also important. Localgiving has a website page dedicated to newspapers, including a selection of newspapers in Wales ([localgiving.org/news-submit](http://localgiving.org/news-submit)). Click on the name of the relevant newspaper and it will take you straight to the part of their website where you can submit an article. This makes it easy to submit articles to multiple newspapers.



Set up a Google Alert for certain words or names in your article ([www.google.co.uk/alerts](http://www.google.co.uk/alerts)). This will generate an email to you if your article is published online. It is also good practice to set up a Google Alert for your organisation's name as this will alert you to any newly published online content and enable you to share positive media.



# TASK 7

## Understand your digital footprint

# 07

### OBJECTIVE

To review your online marketing channels and become familiar with your current digital activity.

What are the most common ways that you communicate with your network?

Digital Source	How big are your audience / followers?	How did they find / engage?	How regularly do you post / keep updated?	How can you grow this?
Website				
Newsletter				
Email				
Facebook				
Twitter				
Other				

How could you promote a donate button and donation pages?

# OUR TOP DIGITAL MARKETING TIPS

01

You can schedule social media posts via a free multi-platform resource such as Hootsuite or directly on Facebook.

02

When writing a Facebook post, instead of clicking Post, there is a drop down arrow where you can choose to Schedule it to go out on a date and time of your choice. This saves time as you can schedule multiple posts in one go to regularly promote your campaign.

03

Social media posts highlight how easy it is to support you, why you need funding and why you are the best way for this to be achieved. Include a line that encourages people to share the post, helping to spread the word.

04

Ensure all social media posts are visual, increasing the likelihood of them being looked at. This could be in the form of a picture or video. If you lack content then there are sites that provide free and high quality media that you can download, such as Pexels or Giphy.

05

Explore a free design programme such as Canva, which allows you to make any visual resource to a high standard. This includes posters, social media images and bespoke dimensions that you can design and then download. You can use Canva's high quality images and elements or upload your own. You can also make an image that includes text, which summarises your campaign. It is possible to link your account with those of your colleagues and share branding colours.

“The support we have received from Localgiving has been inspirational in highlighting and accessing the world of online fundraising, it has helped us to up our game and to think bigger as a small organisation, thank you.”

*leuenticid Tysul Youth*



# ENGAGING REGULAR DONORS

*Tip: Highlight the feasibility of a small monthly gift to make it seem less daunting, such as explaining that £10 a month is just the equivalent of a coffee a week or 33p a day.*

It is important to encourage regular donors. These are individuals that financially support the cause on a regular basis, typically through a monthly direct debit donation. A reliable, steady monthly income allows you to plan better and it soon adds up. These are often long-term supporters that have a strong relationship with your organisation and are ambassadors for the work. Those who set up direct debit donations are very likely to have supported the cause previously. Guide one-off donors, fundraisers, volunteers, beneficiaries and staff to take the next step and support with a regular gift.

Some organisations may suggest different membership levels that are thanked in different ways. These might be different levels of communication, annual events or experiences. Your organisation should invest time in building relationships with existing and potential donors.

Consider whether regular payments could be broken down into monthly direct debit amounts, such as annual friends memberships or weekly subscriptions. Encourage contributions from those accessing free help.

Plan relevant and personalised messages. Connect on an emotional level, evidencing your impact with case studies and testimonies. Increase trust by clarifying what monthly donations will enable to happen. This could be helping a precise number of people or generally going towards a particular service. **Emphasise that monthly support is the lifeblood that protects against turning anyone away and that helps prepare for the next opportunity.**

Guide existing supporters to the next level of involvement and ask them to help spread the word. **Regular donors are investing in the cause's long-term future.** Therefore it is important to create tailored thank you messages, share your organisation's ambitions and highlight the long-term impact.

“Before using Localgiving we sometimes struggled to engage new donors. Thanks to the ease with which people can donate we have significantly increased awareness of our work, reconnected with long-term supporters and reached new supporters.”

*The Speakeasy*

# TASK 8

## Engaging monthly donors

08

### OBJECTIVE

To explore regular giving and understand how you could launch a campaign

What is the long-term impact of your work?

What would different monthly amounts enable? E.g. £5 a month would go towards...

£5	
£10	
£20	

How will you regularly show that you appreciate and value the support of your regular donors?

# FUNDRAISERS

*Tip: A cause gains new donors from every person that takes on a fundraiser. You will gain donations from those that have never heard of your organisation or those who are already helping other causes, as donors will readily support loved ones undertaking a challenge.*

Individuals can take on a fundraising challenge for your cause, creating their own online page and attracting donations towards a target that they have set. This is a time efficient income stream as the fundraiser recruits donors on your behalf and your organisation receives the income. Fundraisers are great ambassadors for your work and all you need to do is thank the fundraiser afterwards. **You will access more donors, grow your network and raise awareness about your work.**

It is often easier to initially look internally for prospective fundraisers, such as volunteers. Over 50% of fundraisers to small charities are directly connected to your organisation. Group fundraisers are also worth considering, as people can join together to do a challenge and it takes the pressure off one person hitting the target by themselves or having a big enough network. An even bigger audience will then hear about your work. It is worth inviting existing groups of beneficiaries and volunteers to plan a fundraiser together, perhaps even as a fun activity that is part of their work together.

## Where can you find fundraisers?

- Staff
- Trustees
- Volunteers
- Family and friends of staff, trustees or volunteers
- Family and friends of service users
- Existing donors
- Local sports clubs and other groups
- Staff at local businesses, especially when one employee is connected to your organisation

## Fundraising checklist

Encourage personalisation of fundraiser pages, providing photos and updates.

Provide fundraisers with a digital toolkit, which includes your logo, a summary of your work, promotional materials and suggested social media posts.

Promote their fundraiser across your organisation's social media and celebrate their milestones.

Be sure to thank fundraisers and their donors.

There are three main fundraising avenues to consider.



### Existing third-party events

Existing third-party events, such as annual challenge events that anyone can sign up to and raise money against. Your organisation can signpost supporters to these events or buy places for fundraisers. If the latter is the case, fundraisers would usually be expected to raise a minimum amount to balance out the opportunity of a free event place, typically at least triple the cost of the ticket. These are typically events that need a training period, such as runs, cycles or even zip wires. As these are professional events, safety and accessibility concerns are already addressed, making it possible for anyone to take part.



### Supporter-led fundraising

Supporter-led fundraising, where an individual comes up with their own fundraising idea. It will involve a premise that interests the fundraiser and is entirely organised by them. They could choose something that is a personal challenge to them or put a target against something that they enjoy. It could be as small as a coffee morning or as big as a year long challenge. Supporter-led fundraisers are also a good option for those who are not interested in physical challenges, for those who could not easily travel to them or for those who cannot justify the fees of third-party events. It is the fundraiser, not your organisation, who makes the call to action and leads on promotion.



### Your own fundraising event or idea that others could take part in

Your own fundraising event or idea that others could take part in. This could be a group walk or an activity aligned to your cause. For example, a number of charities working to support homeless people organise sleep outs to raise funds.

*Tip: Come up with a few fundraising ideas internally and then get your network to vote on their favourite idea. This way you will not put time into anything that doesn't appeal to your audience. Furthermore they will have a sense of ownership and feel a responsibility to support an event that they voted for. This could be done through a social media poll, an online survey or feedback at an AGM.*



Other organisations go one step further to work out fundraising ideas that appeal to their supporters. The table on the following page allows you to collate information about your supporters: the relationship they have with your organisation; their motivation for being involved with your work, their needs and goals; and fundraising ideas that take all of those areas into account. These could be ideas that put a target against an impressive achievement that warrants highlighting, such as how many people are helped each autumn. Fundraisers could also focus on what volunteers are

already putting time into, such as setting the challenge to build a community garden in one weekend. Or it could be something that allows people to directly help achieve your organisation's natural work, such as a litter pick.

A community dance organisation might look at a table like this and realise that the basic facts of their network are that they consist of young people that are very local. Their relationship is that they do not even necessarily know that the organisation is charitable and that they need funds. Their motivations

for being involved are that they love dance and seeing each other. Therefore a fundraising idea that takes this into account could be a 24 hour danceathon.

Each young person could sign up to a half hour slot of dancing and between everyone there would be continuous dance for 24 hours. This makes the most of the facilities, skills, insurance and interests that are already in place. Each young person then fundraises against their time slot and together these amounts add up.



# TASK 9

## Fundraiser personas

# 09

### OBJECTIVE

To explore relevant fundraising ideas

Complete the four boxes by choosing one set of people that your organisation interacts with (that you listed in the earlier mapping task):

Basic info about a set of potential supporters	Relationship with your cause
<i>E.g. Local and young people</i>	<i>E.g. Unaware that you are not-for-profit</i>
Motivations, needs and goals	Fundraising ideas
<i>E.g. Love dance and socialising</i>	<i>E.g. 24 hour Danceathon</i>

*A fundraiser is also a great way to say thank you to your organisation for your help. If you provide suggested targets then fundraisers can be more tangible. For example, if it costs £300 to give someone a day of support when they reach crisis point, then invite them to raise £300 for someone else who really needs it.*

*A tangible target provides a very good reason for raising every £1, strengthening their fundraising ask.*

# CROWDFUNDING

*Tip: By running regular donor reports you can become aware of any trends. These reports are often the start of a donor database or can be easily added to an existing database. This makes it possible to easily contact previous donors when launching a new campaign. Be sure to adhere to the latest data protection regulations.*

**A crowdfunding page or appeal allows you to build urgency by fundraising for something very focussed.**

This is a temporary campaign to raise money against a specific target, over a specific time, for a specific need. This need can be existing or new, it can be anything that you can put a financial figure against. For example a project, equipment, an event or to continue your work for the next six months.

Crowdfunding campaigns raise more in donations as most supporters prefer to give to a specific need, rather than donating directly to your organisation. This is because transparency inspires confidence and it is very clear what donations are being used for. Donors are helping something very specific to be achieved. On average 27% of crowdfunding donors will go on to volunteer for the cause and 90% will promote the project via social media.

For a first appeal, set a target of between £500 and £5,000. This will make it worth the time but allow you to learn a lot from your first campaign, such as the average donation amount and what parts of your network respond. When a target is too big then it can put off supporters who can only manage a smaller donation size. You can always increase your target if you get close to exceeding it.

## Top Tips

01

Plan ahead, preparing any staff or volunteers. Get everyone involved in at least promoting the campaign, making the most of your organisation's skills and assets.

02

Make a campaign video as this will enable you to get much more across than you can with just text. This can be anything from a professional standard to a homemade clip on a mobile phone of volunteers talking. Make sure that you have permission from those featured in any videos or photos.

03

Consider launching the appeal around an awareness day, an anniversary or an event. Special dates like these could also be useful in the middle of an appeal, to help maintain momentum. Decide if it fits into a time of year when your work is most active and people are most aware of it. The autumn and lead up to Christmas are when people are most generous, this is always a good time of year for an appeal.

04

Run the appeal for 3 weeks to 3 months, to give enough time to reach your network but not so long that you lose urgency or that you find it a burden to run.

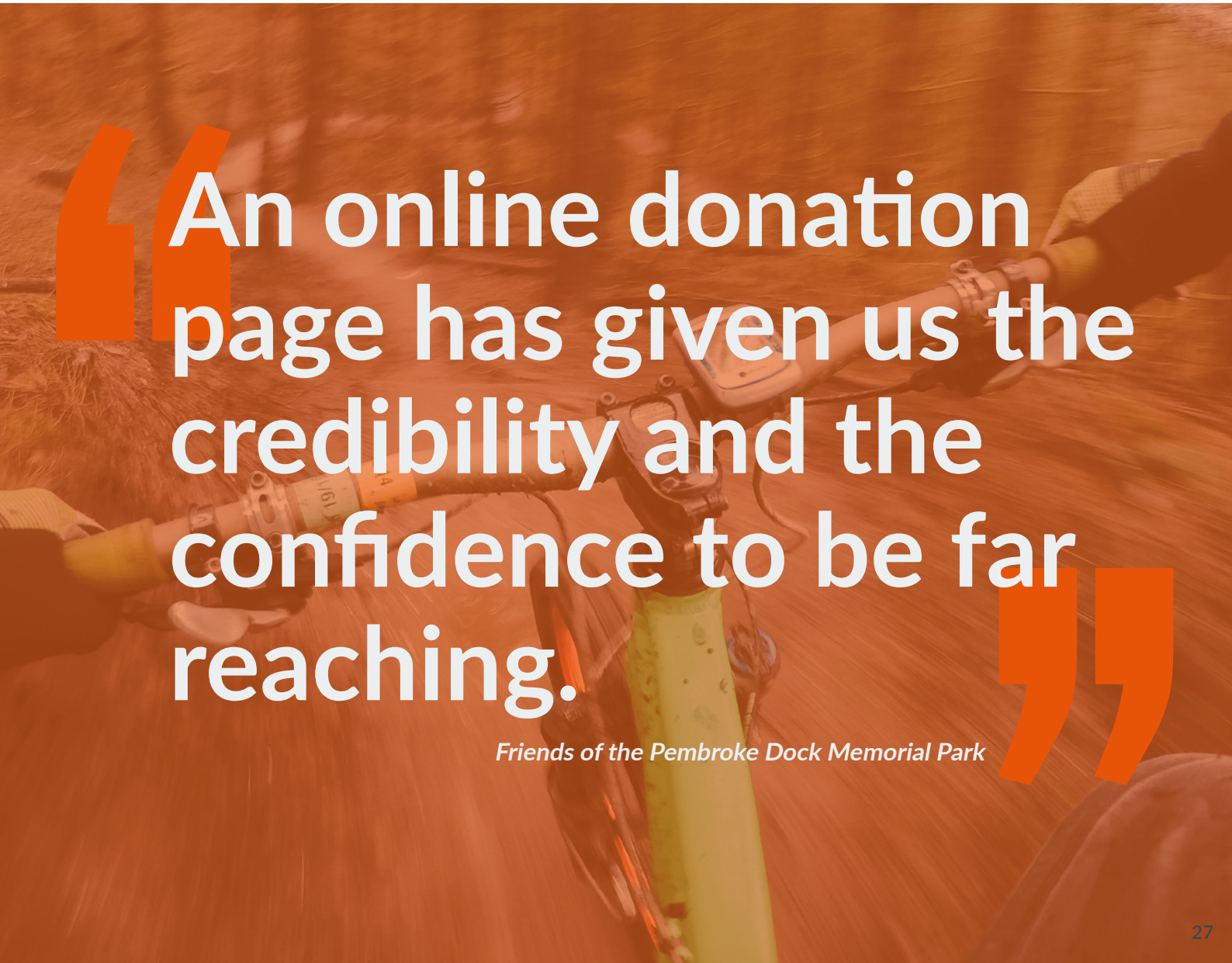
Once a crowdfunding page has reached 30% of its target then it is statistically likely to hit its target. This is because you have achieved the work of getting it off the ground. It is encouraging for new donors to see that a substantial portion of the money has already been raised. There is nothing more off-putting than going to donate and then finding an appeal being on £0 or barely started. To avoid this situation, there are two main ways to move on from the £0 mark as quickly as possible.

Firstly, there is the option of showing offline donations that you have also raised in the online total. If you already

have a grant towards the same work or have had a recent cash donation, then you can update your online total at any time. This means that all of your hard work is shown in the target bar, even if it is money that has not been processed online.

Secondly, you could look at doing a 'soft launch'. This is where you ensure that those closest to your organisation are 'in the know' about the date that your appeal is launching. You then encourage them to donate as soon as possible to get the appeal off the £0 mark, ahead of a public launch.

On your crowdfunding page, clearly explain what the need is, what your work is doing and what the outcome would be. Make sure that your wording makes it sound like the donor is the hero who is achieving this great outcome. Campaigns help to vary how you ask for support throughout the year, focusing efforts for both your organisation and your network. It is worth planning between one and four campaigns a year, depending on your needs, time capacity and how often you feel it is appropriate to ask your network for donations. Apply what you have learnt in your first appeal to future fundraising.



An online donation page has given us the credibility and the confidence to be far reaching.

*Friends of the Pembroke Dock Memorial Park*

# TASK 10

## Campaign objectives

# 10

### OBJECTIVE

To pull together ideas for your first campaign.

*Tip: Thanking donors well and in a timely manner is really important in making them feel appreciated. Highlight the impact of the gift and include an invitation to follow you on social media or sign up to a newsletter. This will help to ensure that the thank you message is not the last bit of communication that the donor has with you. If every donor followed you on Facebook or Twitter then that would be a good outcome. Most fundraising platforms will allow you to save a number of thank you templates, saving time on writing each message anew. Donors should also be encouraged to share their support on social media.*

Do you have any fundraising targets for the next 6 months?

Do you have any ideas for fundraising campaigns? Are there any internal skills that can be utilised?

How could you promote your upcoming campaigns or ideas? Could you make a campaign video?

Do you have any existing offline donations or contacts for a soft launch, to help you get started?

Do you have an existing thank you message that you adapt?



# SETTING UP A FUNDRAISING PLAN

It is important to make a fundraising plan and think about how you would like your fundraising to break down across the year. Even if capacity is limited, commit to a minimum amount of fundraising activity. Take into account existing dates that you can build on, such as anniversaries and awareness raising days. Make the most of any opportunities or assets that you have, such as internal skills and networks.

Other types of fundraising can also fit into your plan. For example, if you have recently run a successful crowdfunding campaign then you might cite this as evidence that your community really

cares about your work, that they have got behind it with their own donations and that you are now seeking the remaining funding in the form of a grant. You may even be able to match fund grants with what you raise online. Consider asking local businesses to sponsor you by donating online or by encouraging their staff to do fundraisers.

Many organisations initially feel uncomfortable about asking people to give. However, **if you don't ask, then you don't get**. As soon as you begin to succeed then feed back to other staff, volunteers and trustees that it is worth putting time into fundraising.

Involve fundraising in existing events. For example, if you run any free events then invite people to give a voluntary contribution and have a volunteer at the back of the room to help people donate quickly online via a laptop. Search for similar organisations or campaigns, identifying good ideas that you could replicate. **Equip your colleagues to support you with fundraising, as it should be a team effort as everyone benefits from the outcomes.**

“Localgiving has given us a huge kick start to our online fundraising activities and given us the confidence to grow and do more. We can't thank Localgiving enough for the fantastic opportunity provided, access to a great fundraising platform and all the tools needed to get it to work for us.”

*Camaes Community Interest Company*

# TASK 11

# 11

Set out a breakdown of your plans in this fundraising calendar

## OBJECTIVE

To create an annual plan for your various fundraising campaigns throughout the year.

*Tip: Make sure to use some months to prepare or review campaigns*

JANUARY	FEBRUARY	MARCH
APRIL	MAY	JUNE
JULY	AUGUST	SEPTEMBER
OCTOBER	NOVEMBER	DECEMBER

# TASK 12

## A breakdown of initial actions

# 12

### OBJECTIVE

To establish your next steps

We hope this guidebook has been really useful and this task will help you plan out the initial actions to undertake.

1. After signing up to an online platform of your choice, then you need to create a strong donation page. Finalise the text, images and gift examples on your online donation page.
2. Add a donate button to your website if you have one, linking directly to your online donation page.
3. Begin to promote the link to your page by scheduling social media posts and informing colleagues.
4. Prepare your perfect thank you messages for donors, monthly supporters and fundraisers.
5. Thank donors in a timely manner - every week check if there are donors that need thanking.
6. Decide what you would like to fundraise for first, be that an online campaign, encouraging fundraisers or building monthly donors.
7. You will learn a lot as you go, but always make the most of any match funding opportunities, free resources, training or important dates.

When are you able to action these first steps?

What fundraising ideas would you like to put in place first?





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Authored by Lauren Swain, Wales Development Manager for Localgiving.

Created with the assistance of PAVO, the CVC for Powys.

Edited by Chris Dormer, Managing Director for Localgiving.

Designed by Drew Walsh.

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The content is based on training  
sessions that Localgiving has provided  
to over 350 charitable organisations  
across all 22 counties in Wales. This  
support has led to 93% of participants  
building success and confidence with  
individual giving online.

Thank you for exploring this resource  
and all the best with your next steps!



## GET IN TOUCH

If you would like to explore working with Localgiving and engage in  
further support, then please get in touch:

[localgiving.org](https://localgiving.org)

0300 111 2340

[help@localgiving.org](mailto:help@localgiving.org)

 [@Localgiving](https://twitter.com/Localgiving)