# Best Practices of Peer-to-Peer Teams

## Overview

Peer-to-peer fundraising is a great technique to raise a lot of money in a short period of time. It is a more personal approach than direct mail and e-appeal. The success rate (# of people asked: # of gifts are also higher because you are tapping into personal networks. You are also mobilizing many people to fundraise for you not just your staff and board. It is also a great way to start build or reinforce a fundraising culture within your organization. It is a great way to have program participants and members get involved in fundraising and increase their ownership of your organization.

## Objectives

After this lesson participants will have more understanding and skills to:
- how to motivate people to fundraise for their organizations
- run a successful peer-to-peer/crowd-funding campaign

## Requirements

Although not required, participants who are ready to use peer-to-peer fundraising are more able to optimize these best practices. Participants who are considering, will see be vast benefits of this methodology.

## Materials

For participants:
- paper and pen

For presenter:
- Slide deck
- Worksheets: Circle of Influence, ABC of Prospecting, Donor Range Chart

## Description

OUTLINE

| Time | Description | Materials, Props |
|---|---|---|
| 5 | <u>What is peer-to-peer?</u><br><br>Early days – walk-a-thon: paper and check<br><br>Nowadays – nearly any activity: online, instantaneous | FLIP CHART |
| 10 | <u>Why Peer-to-peer?</u><br><ul><li>many people involved in fundraising not just your development team and ED</li><li>campaign style and many people --> raise lots of money in a short time</li><li>personal ask and close networks usually ---> bigger gifts</li><li>great way to involve program participants ---> increase sense of ownership</li><li>more people involved and increase ownership ---> fundraising culture  ---> stronger grassroots fundraising ----> more stable and diverse income.</li></ul> | FLIP CHART |

| 30 | BEST PRACTICES | SLIDE DECK |
|---|---|---|
| | 1. Create an internal and external case | WORKSHEET/ EXERCISE |
| | • have a consistent goal and message | |
| | • everyone knows why you are doing this and is saying the same thing | circle of influence |
| | • have a clear start and beginning | ABC |
| | | donor range chart |
| | 2. Plant the seed early and water regularly | |
| | • prepare people (convey your goals, their relationship to the goals) | |
| | • be sure you have the energy and resources to see this through | |
| | 3. Provide Skills, Tools and Methods | |
| | • don't assume people will know what to do. | |
| | • Provide specific fundraising tools for them to set their goals: | |
| |     • circle of influence | |
| |     • ABC of prospecting | |
| |     • donor range chart | |
| | • a list of ways to outreach – email, social networks, in-person | |
| | 4. Determine Benchmarks | |
| | • three sets of benchmarks to get to your $ goal | |
| |     • individuals – donor range chart | |
| |     • teams – derived from individuals | |
| |       • pick a team leader to help with cheerleading | |
| |     • organizational – derived from teams | |
| | • does it add up? | |
| | 5. Gaming Strategies to motivate – Challenge, Match or Gift | |
| | • for donors: difference between a challenge and a match | |
| | • for fundraisers: team &/or individual trophies, recognition on website, social media (use gaming strategies) | |
| | 6. Align Your Logistics and launch | |
| | • does everyone know how to set up their pages | |
| | • are you prepared for the follow-ups? Thank you emails, letters, notification to fundraisers when donor gave, offline donations | |

7. Keep Up the Momentum
   - send cheerleading messages;
   - get team leaders to send encouraging emails
   - send progress
     - benchmarks (___% to goal with ___ weeks left!)
     - leaderboard
   - send suggestions of outreach

8. Celebrate
   - give out trophies
   - public acknowledgement of donors and fundraisers

9. Evaluate
   - send reports to fundraisers
   - ask them what went well and what can be improved for next time

10. Continue to Engage Donors
    - learn more about the donors by asking fundraisers about them
      - who to bring closer in, engage in program
      - any potential major donors?