

IT'S A

PEER PEER

EST.

WORLD

2016

VIRTUAL CONFERENCE

Conference Hosts



Exclusive Media Partner

NonProfitPRO

Today's Schedule

- **10:00 – 11:00am** How to Optimize the Peer-to-Peer Fundraising Lifecycle
- **11:30am – 12:30pm** Defining Your Peer-to-Peer Mobile Strategy
- **1:00 – 2:00pm** Community & Identity: The Path to Sustainable Revenue, Illuminated by the Pediatric Brain Tumor Foundation
- **2:30 – 3:30pm** Using Broadcast Test Messaging to Boost Event Recruitment & Fundraising
- **4:00 – 5:00pm** Enhancing Peer-to-Peer Experiences to Generate Funds and Build Community: A Real-World Story from AIDS Healthcare Foundation



HOW TO OPTIMIZE THE PEER-TO-PEER FUNDRAISING LIFECYCLE

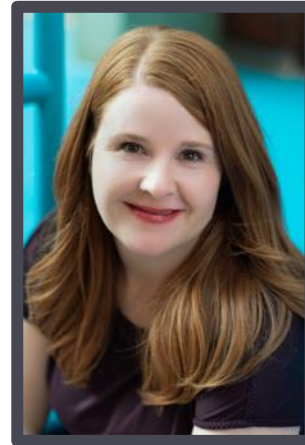
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Speakers



Mark Becker
Founding Partner
Cathexis Partners



Kari Bodell
Vice President, Development Programs Strategy
Susan G. Komen

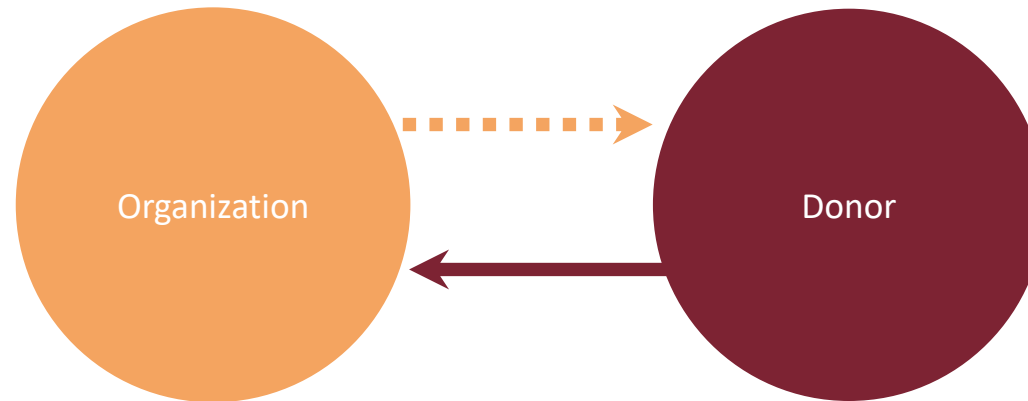


The Foundations of Peer-to-Peer Fundraising

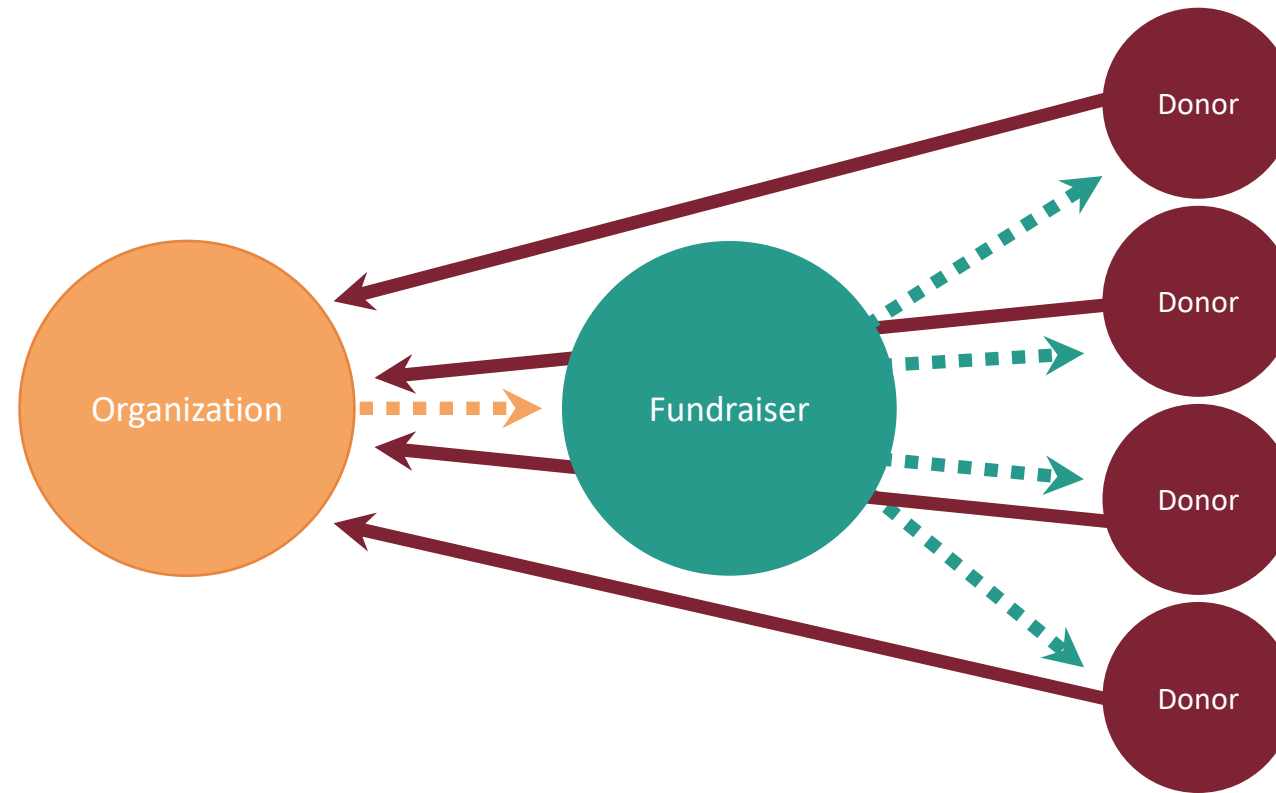
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Traditional fundraising



Peer-to-Peer fundraising



Peer-to-Peer program value chain

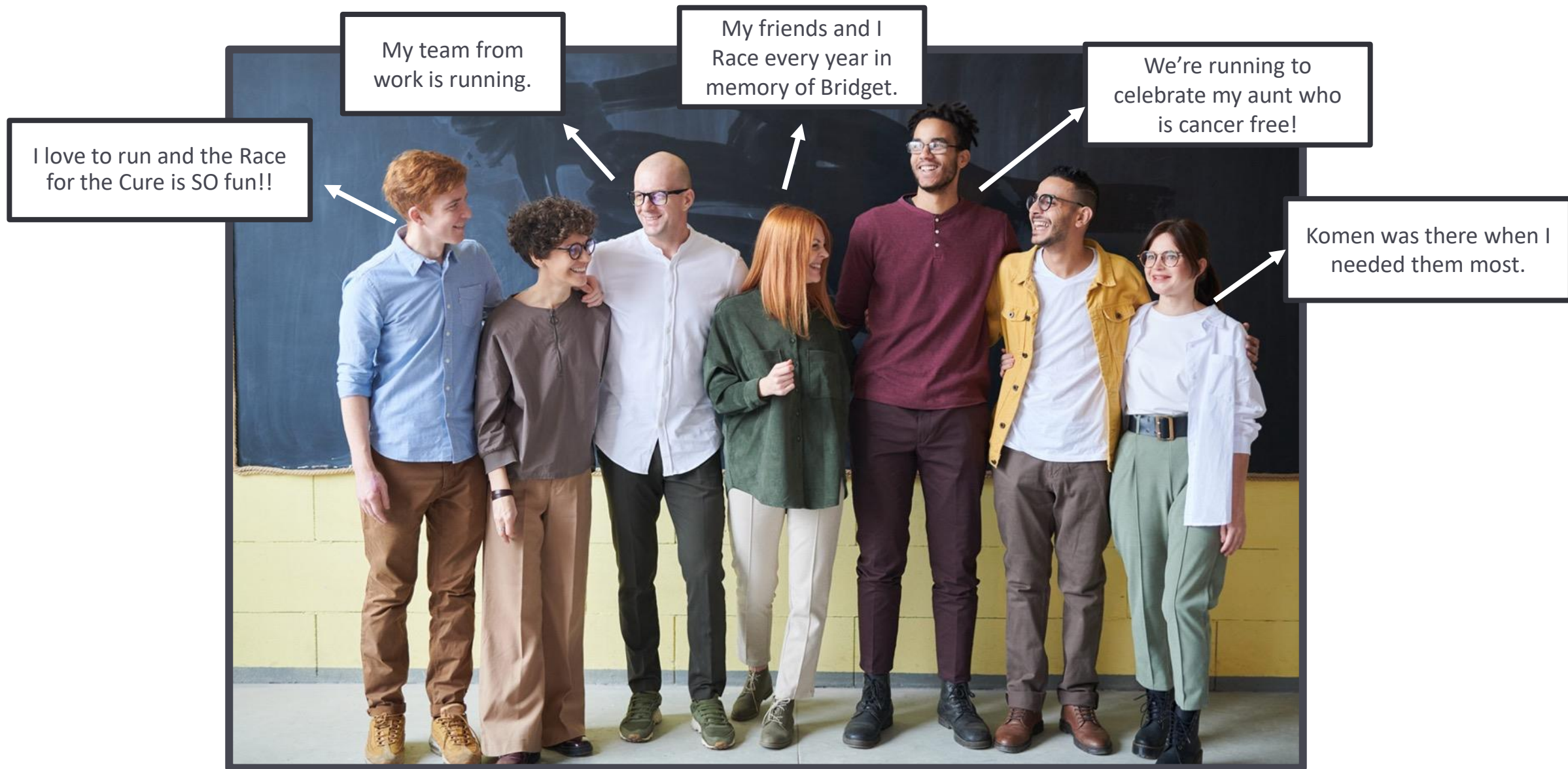




The Peer-to-Peer Program Lifecycle

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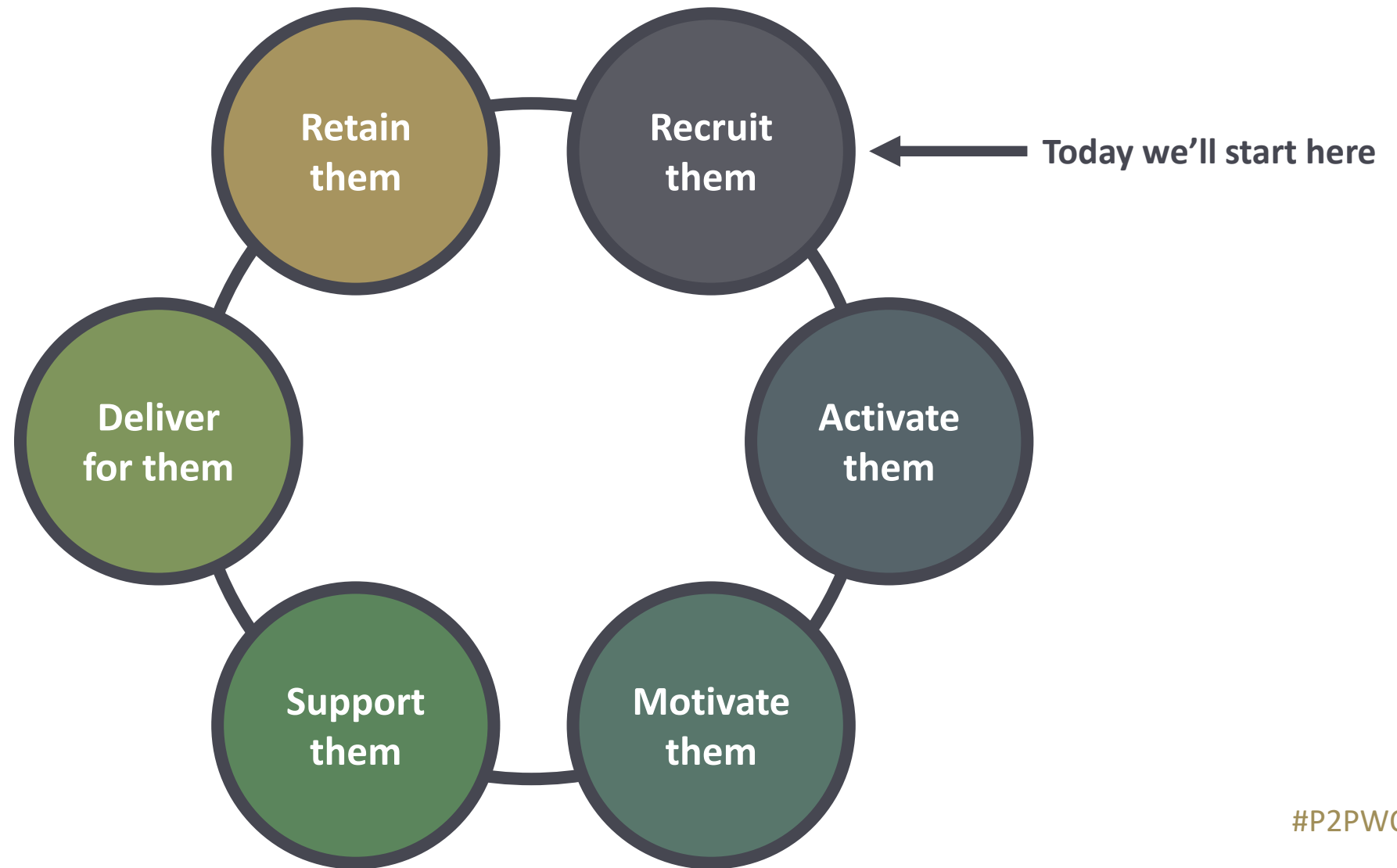
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Peer-to-Peer is about people.

**“They’re not *our* people.
We’re *their* cause.”**

Marcie Maxwell, P2P Professional Forum

The Peer-to-Peer Program Lifecycle





**Recruit them
(these are the newbies)**

Get clear about who we're trying to attract

- Articulate why different people might care about our program, event or cause
- Create demographic and psychographic profiles of target groups
- Understand how and where they receive information
- Be realistic about our ability to reach them
- Make sure our program's offer is a fit
- **TALK WITH OUR FRIENDS IN MARKETING**

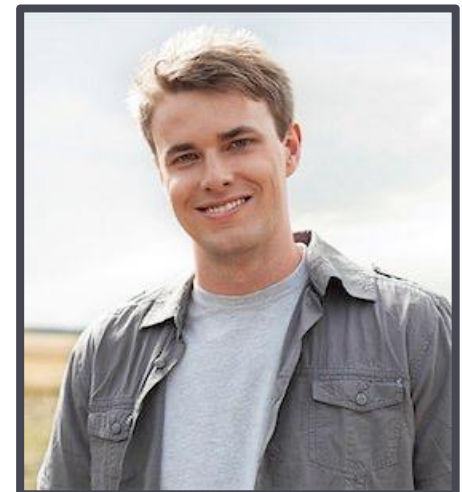
Lisa, 56

Married, kids in college.
Works full time.
Enjoys golf, pickleball and
HGTV shows.



Jake, 25

Lives with partner.
Freelancer.
Environmental activist.
Avid runner.



Aerial coverage



- Current Team Captains
- Volunteers
- Lunch and Learns
- Networks of people connected to your mission
- Street Teams
- Posters, fliers, point of purchase displays

Grassroots coverage

Recruitment

What should I measure?

- **Number of new participants**
- *Number of new teams*
- *Number of participants who match the profile*

Bold: if you measure just one thing

Italics: Worth looking at if you can





**Activate and
Motivate them**

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Set the tone

***“Your registration fee gets us to the start line,
your fundraising gets us to the finish line.”***

Make your expectations clear

What's the number one reason people give for not fundraising?

“I didn't know I was supposed to.”

Help them understand their impact

- Tell compelling stories of our mission in action
- Connect the dots between fundraising and mission delivery
- Coach participants on how to talk about our mission in direct and compelling ways
- Personalize our fundraising messages



Set clear priorities for outreach

- Repeat participants who have fundraised in the past
- Started fundraising
- Disclose a tight connection to our cause
- Made a self-donation
- Team captain or team member
- Enthusiastic new Walker
- Changed the pre-set goal
- Sent emails through the system
- Ask for help

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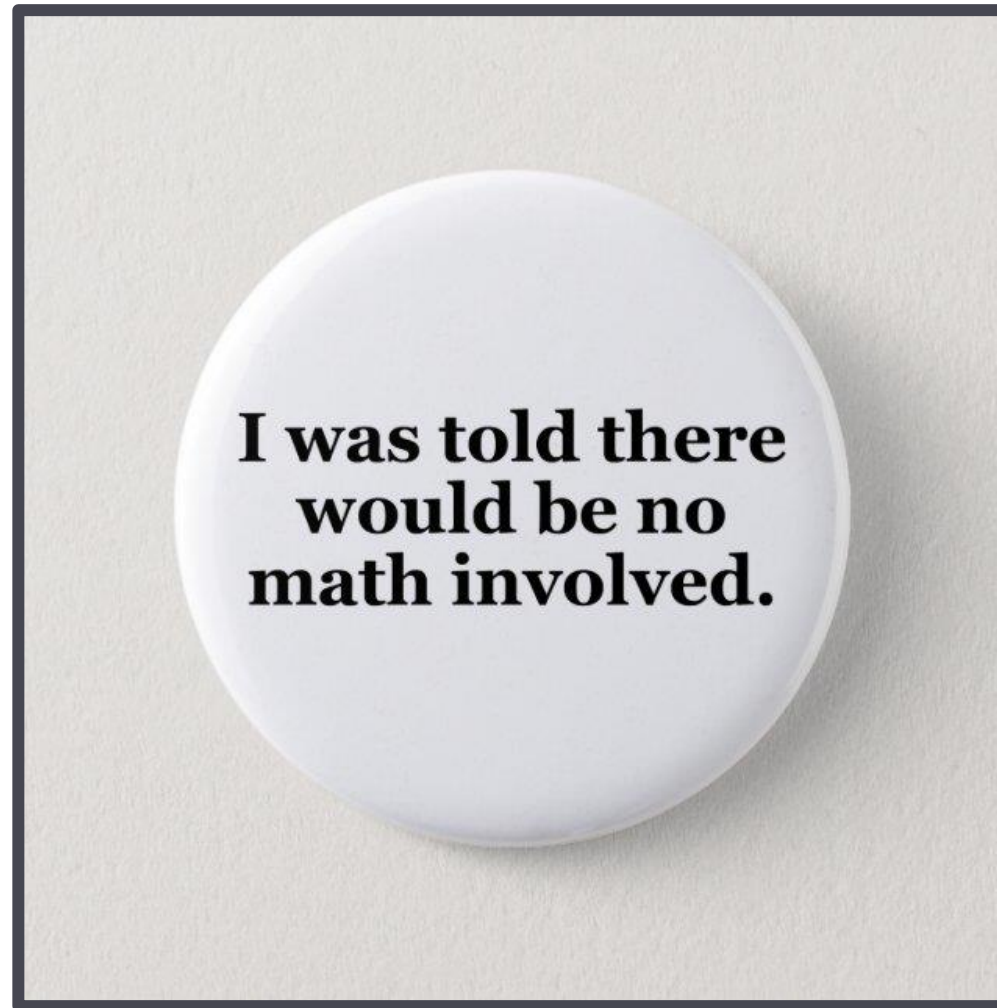


Recognition



Rewards





Event 1

1000 Registrants

Revenue \$100,000

Average Fundraising Per
Registrant: \$100

500 people fundraise

Activation: 50%

Performance: \$200

Event 2

1000 Registrants

Revenue

Average
Registrant

100 people fundraise

Activation: 10%

Performance: \$1000

When we don't look at
Activation AND Performance,
these two events
look the same.

Activation

What should I measure?

- **Percent of participants who fundraise**
- *Percent of team captains fundraising*
- *Percent of participants making a self-donation*



Performance

What should I measure?

- **Average Fundraising per participant
ONCE THEY START FUNDRAISING
(This excludes zero balance participants)**
- *Number of donors per participant and donors per fundraiser*
- *Average gift size per donor*





Support them

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Key Question:

How easy (or hard!) do we make it for people to do what we're asking them to do?

search here for your next peer-to-peer fundraising

guidance for supporting your campaign/event participants. There are dozens of platforms available, and this version of the Peer-to-Peer Fundraising Technology Landscape guide (2018), there have been many updates made online to this site – so we can update it more frequently.

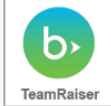


Categories:

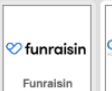
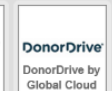


MID-MARKET

Platforms in this category might cost a bit more, but offer additional features and integration options.

Click to expand and compare features of each platform

	 TeamRaiser	 DonorDrive DonorDrive by Global Cloud	 funraisin Funraisin
API Integrations	N/A	MC	Autopilot, CM, MC
Ability to re-join a campaign year over year?	✓	✓	✗
Can a credit card guarantee be used for required minimum fundraising?	✓	✓	✓
Can remote staff be provided restricted event management access?	✓	✓	✓
What currencies are supported?	Multiple	OD	OD
Is there multi-lingual support?	✗	✗	✗
Is pdf receipting supported?	✓	✓	✓
Is livestream fundraising supported?	✗	✗	✗
Which merchant services are supported?	Blackbaud Merchant Services	multiple supported	multiple supported
Are APIs available? (Link provide where available publicly.)	APIs available		APIs available
Other integrations	facebook fundraising and others through partner network	multiple available	multiple available
Implementation costs	\$3,000+	Variable	\$5,000+ AUD
Platform fees	\$4,500 per year	Variable	\$120+ AUD
Transaction fees	2 to 5.5%	Based on volume	Fixed 3%
Contract terms	3 years	3 years	Monthly



Support them with technology

- Make it easy to register, fundraise, donate, get questions answered and request help
- Invest in seamless user-friendly technologies

<https://p2p.cathexispartners.com>

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Support them with tools and messaging

- Provide Email templates for fundraising asks to friends and family
- Share best practices for fundraising
- Share tips for event or program training or readiness
- Be concise, thorough and well-timed with communications
- Make your contact information easy to find
- Ensure that you're staffed to sufficiently support participants

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Dear Cathexis,

When you fundraise, you provide access to critical services and support to the breast cancer community. Please keep up your 3-Day Nation fundraising and join us this October during National Breast Cancer Awareness Month.

We wanted to make sure you don't miss out and let you know the fundraising deadline for 3-Day Nation is coming up soon.

All 3-Day Nation participants who meet their \$1,000 fundraising requirement by **just 31** will get a special event bundle in the mail by October 2, to help bring the Bubble spirit to your 3-Day Nation journey!

[Pink Bubble Bundle](#) page to see what's in the 3-Day Nation Pink Bubble Bundle, as well as all of the premium rewards you can earn.

Women 3-Day Team



Dear Cathexis,

Wow! You just passed an incredible milestone, raising \$10,000 for the 2021 Susan G. Komen 3-Day®. It's amazing fundraisers like you who fuel our mission to help end breast cancer forever. As a thank you for all of your hard work, we would like to give you a limited edition 3-Day mug. This 14 oz. Yeti Rambler with magslider lid is great for camping or travel, and will be personalized with your name.



Support them that day

- Applies to in-person & virtual programs
- Make registration and check-in seamless
- Accept and process donations
- Communicate through technologies and live at the event or during the program



Support

What should I measure?

- Technology support inquiries
 - Down-time
 - Usage issues (add to FAQs)
 - Inquiry response time and quality
- Email open, click, unsubscribe rates
- Text unsubscribe rates
- Technology and tool usage
 - Platform log-ins and updates
 - E-mails sent in through platform
 - App downloads and use
 - Tool downloads



And, of course, **fundraising**
compared to goals and milestones

A grayscale photograph of a cycling race. In the foreground, a cyclist is in a deep crouch, pedaling vigorously. Behind them, a line of other cyclists follows. The background shows a paved road, trees, and a building. A large, dark, semi-transparent circle is centered over the image, containing the text "Deliver for them".

**Deliver for
them**

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“Our Walk is the way we tell our story.”
John Vranas, when he was at JDRF

The event or program is

About Them

- An opportunity for story sharing, community and connection
- A celebration of their successes
- A celebration of the goals of the campaign

About Us

- Our opportunity to make good on the promises we've been making
- Our brand promise in action
- Our mission brought to life

**Not just a single day,
an ongoing relationship.**

The nuts and bolts

At the bare minimum, our live event must:

- Be safe and well organized
- Have clear signage and audible sound
- Honor the published schedule and time commitments
- Immerse people in our shared mission



Deliver for them

What should I measure?

- Participant satisfaction scores
- *Net Promoter scores*
- *The number of new registrants who say a friend referred them*

Spoiler Alert! This also influences:

- Number of repeat participants
- Year-over-year retention rate



A grayscale photograph of a cycling race. In the foreground, a cyclist is in a deep crouch, pedaling vigorously. Behind them, a line of other cyclists follows. The background shows a paved road, trees, and a building. A large, dark, semi-transparent circle is centered over the image, containing the text "Retain them" in white.

Retain them

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Value of returning participants

- There's usually a lower cost to reactivate
- They often fundraise more
- They have a demonstrated connection to the program or cause
- They become our best recruiters and advocates

Recognition



Rewards



Treat them like part of the family

- Recognize them as individuals, for their ties to the program and the way they came to our organization or program
- Make them the heroes of the story
- Cultivate them year-round, inviting them to other programs or events as our honored guest
- Host regular get-togethers, build community and solicit their input

Be ready to move them to the next program or engagement opportunity when the time is right.

What's best for
our supporter



The program
we run



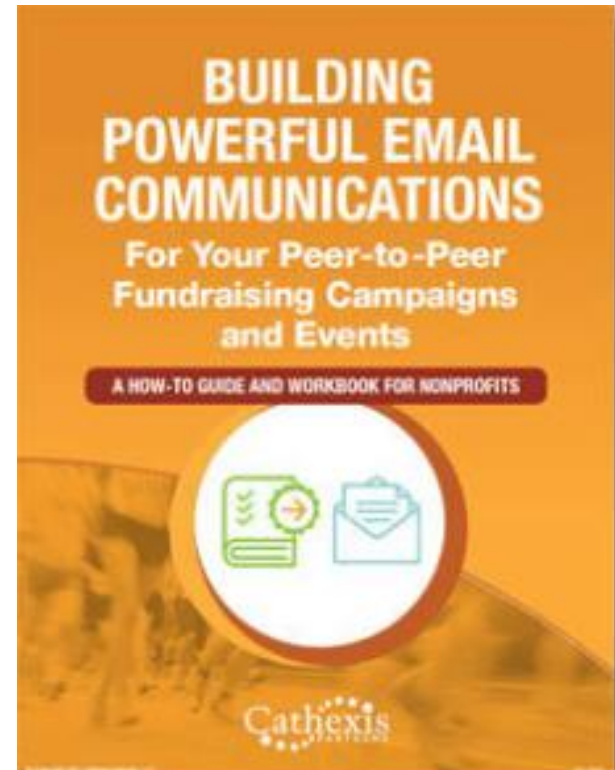
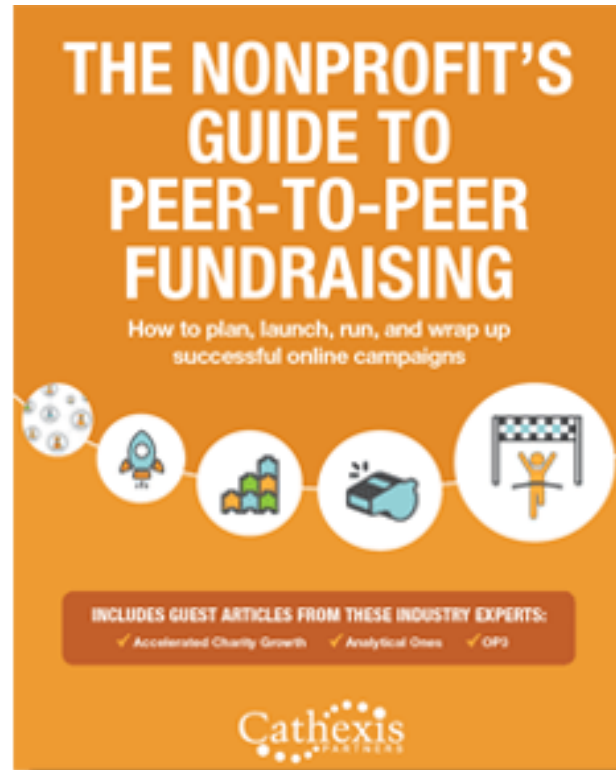
Retention

What should I measure?

- Number of returning participants
- *Year-over-year retention rate*
- *Number of returning team captains*
- *Number of returning teams*
- *Longer term retention in the organization*

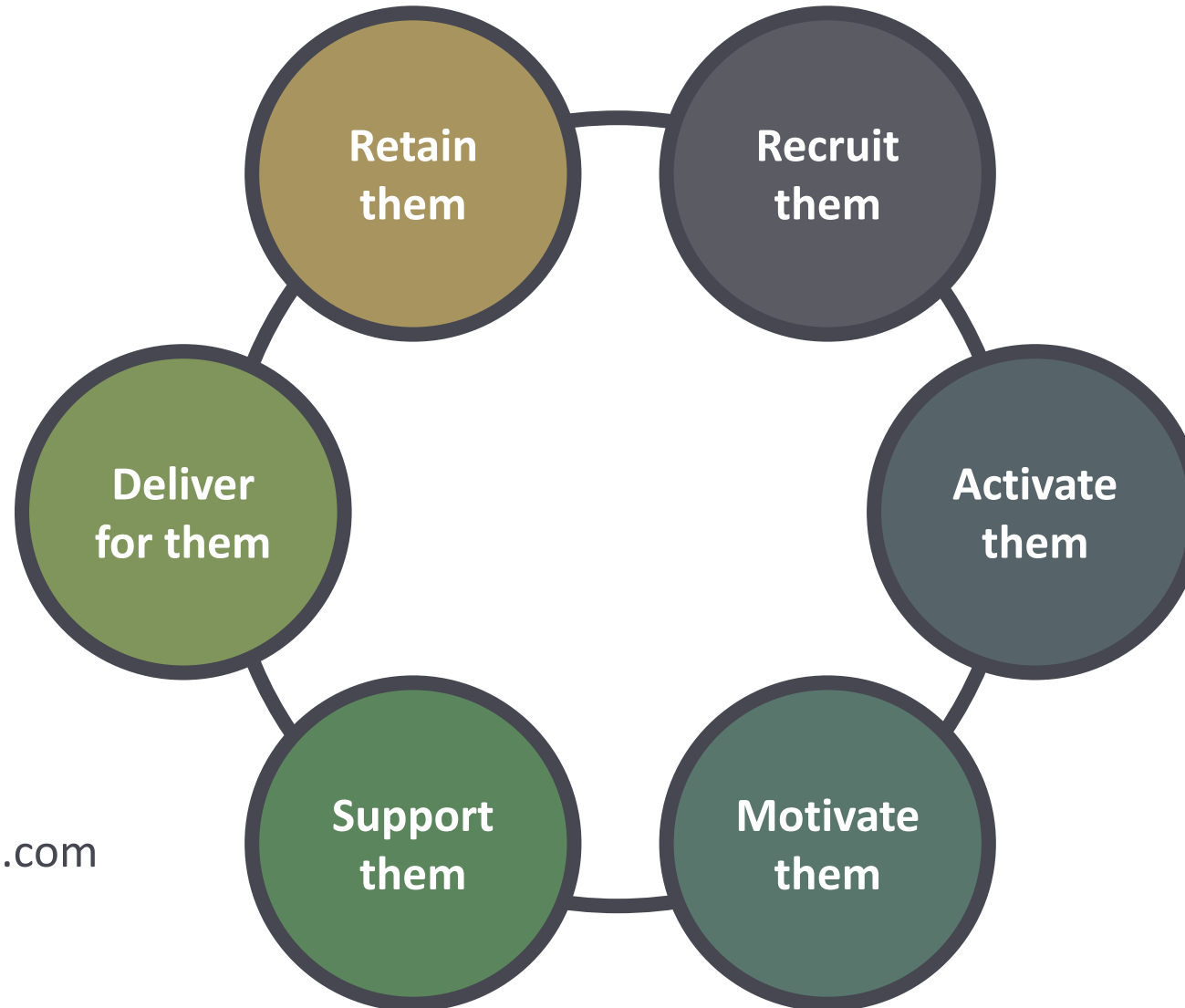


Free resources



cathexispartners.com/resources

Questions?



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Mark Becker
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