

Introduction

Peer-to-Peer (P2P) fundraising is part of the revenue portfolio of many of today's nonprofit organizations, and for some it's the key that unlocks fiscal success. This type of fundraising has the potential to be extremely lucrative to charities who have the winning combination of a unique campaign, a support base backing the campaign, and a passion for success. Beyond the revenue aspect of P2P fundraising, these types of campaigns can also be a great way to engage new constituents, spread awareness about your mission and provide new ways for your supporters to give back.

About the Author

Carly Samuelson is a nonprofit management professional specializing in the building and implementation of successful P2P fundraising programs, working with charities of all sizes. She has been essential in the strategy and growth of some of the nation's top endurance programs, including Team In Training, Team Challenge, and DetermiNation and has worked at other nonprofits such as Back on My Feet and Operation Homefront.

Chapter 1: Foundations of a Successful Campaign

What's this P2P fundraising thing anyway?

Let's take a moment to define P2P fundraising. P2P fundraising campaigns involve your constituent base to ask their friends and family to support your mission while participating in an activity put on by your organization.

"Traditional" P2P fundraising events are used quite frequently in the nonprofit world, and include endurance campaigns, races and walks. That said, P2P campaigns are not limited to campaigns solely in this category. Many charities have found success with campaigns such as dance-a-thons, plunges, and head-shaving campaigns. A wide variety of campaigns are P2P fundraising opportunities in the making. The Peer-to-Peer Professional Forum reports that the top 30 P2P programs in 2015 raised over \$1.5 billion dollars in total. Here were the top 5 P2P programs in 2015:

- Relay for Life (American Cancer Society)
- Heart Walk (American Heart Association)

- March for Babies (March of Dimes)
- Komen Race for the Cure Series (Susan G. Komen for the Cure)
- Bike MS (National MS Society)

While many large P2P campaigns are runs, walks or rides, other “non-traditional” campaigns such as bowl-a-thons, head shaving campaigns, and Movember also were among the top P2P fundraising campaigns in 2015.

So what does this mean for your development effort? Creativity is key! Your campaign doesn't have to be movement related. A clever fundraiser that brings hundreds of constituents together could be enough for your next campaign! Or, your pre-existing walk that needs a refresher is just waiting for P2P fundraising. You don't have to fit into the run/walk/ride mold to generate funds with a P2P campaign.

Who are You? Defining Your P2P Status

This handbook was created for all levels of P2P fundraising professionals. Maybe you are a complete “newbie” to this type of fundraising and you need a step-by-step guide to walk you through the process - you are **Starting Out** and this book is for you! Or, perhaps you are someone who has some experience with a P2P campaign but you are looking to strengthen your program - you are a **P2P Pro** and this book is for you! Perhaps you run an organization and work with staff who manage your P2P campaign and you are looking for a guide on how to manage their process - you are an **Executive** and this book is for you!

Throughout the book you'll see “tips” with General, Starting Out, P2P Pro and Executive tips. These tips will provide additional thoughts, insights, and actions for P2P professionals of all levels.

Putting Ideas into Action

The P2P Fundraising Handbook weaves in success stories from three organizations who are growing successful P2P fundraising programs. These programs are successful because they are focusing on small details that change the landscape of the overall program. Here are the organizations we'll be following:

- Young Survival Coalition: Tour de Pink
- Elizabeth Glaser Pediatric AIDS Foundation: UP 4 THE FIGHT
- Friendship Circle: Team Friendship

Discovering your Organization's Peer-to-Peer Potential

Before you decide if a P2P fundraising campaign makes sense for your organization, it's important to take some time to answer some initial questions about your organization:

- Does your organization have a solid, creative P2P idea that you are willing to invest in?
- Does your organization possess the staff, volunteers, and leadership to undertake a P2P campaign?
- Does your organization have an online fundraising platform that will support this campaign?
- What is your organization's metrics for determining the success of your campaign?
- Does leadership agree?

P2P Pro and Executive Tip

If you've already answered these questions for your organization with a resounding "yes" to all, just change the tense and reevaluate. Are you still willing to make an investment in your P2P campaign? Can you grow your staff? Are you pleased with your fundraising platform and do your metrics for success show growth?

The goal of this handbook is to help guide you through the steps of establishing a new P2P campaign or help you to evaluate your existing campaign. The expectation is that by the end of this book, you will have the toolset and the knowledge to launch or significantly improve this revenue source for your organization.

Key Components to a Successful Campaign

Some of the most important components to your successful P2P campaign begin before you get started. In this chapter, we will explore the beginnings of a successful P2P campaign.

3-Year strategy

Pre-planning your 3-year strategy is a key component to your success. Make sure that your organization sees the vision, backs the plan, and is willing to work as a team to ensure that your campaign thrives.

Realistic Budget

Determine what your organization is willing to spend in order to be successful. Know the costs associated with your campaign and be willing to invest early on in order to build your campaign.

Achievable Participation Goals

How many campaign participants will you need to meet your revenue goals and is that number achievable for your organization? Start by understanding the total number of donors you have in your donor database or housefile.

There are other key components that will fall into place once you've outlined your strategy. Later in the book we'll investigate some of these other components, such as:

- Strong, interested, mission-focused constituents
- Staff or volunteers to execute the campaign
- A strong online fundraising platform
- Grassroots and/or paid marketing efforts

Set Your Strategic Vision

Before you enter into the first year of your P2P campaign, it's important to set goals for its immediate future. Look at your campaign as a 3-year endeavor - most successful P2P fundraising campaigns start off small and grow as they are nurtured. Very few campaigns go viral overnight.

Yet, many nonprofit leaders enter the P2P fundraising space with expectations of grandeur in their first year. They expect an immediate return that will continue to double or triple as the campaign grows.

The truth is, however, that a sustainable P2P campaign takes time to become a solid part of the overall development effort for your organization. Similarly, P2P campaigns can start off very successfully and then experience peaks and valleys regarding success in subsequent years.

The Young Survival Coalition (YSC) is a great example of an organization that has planned for program growth. YSC started with East and West Coast rides, then expanded in early

2016 to include a South ride in Florida. As you are preparing your strategic vision for the next 3 years of your campaign, here are some things to remember and plan for:

Year 1

- Plan to make an investment that may be greater than revenue projections. Is your organization OK with that investment?
- Year 1 sets the stage for the future of your campaign - can your organization spend enough to make it a great campaign without guarantees?

Year 2

- Are you content with raising 20%-30% more than the first year, or do you want your growth to be more substantial?
- How much did you spend on expenses in Year 1? Do you need to spend more in Year 2?
- Is your organization invested in learning from Year 1 in order to grow into Year 2 and Year 3?

Year 3

- Are you ready to take the strengths and weaknesses learned from the first two years of the campaign and apply it to Year 3?
- Will your campaign continue to resonate with your constituent base?
- If your growth in revenue is not steadily rising, are you willing to take the necessary steps (i.e. evaluating the campaign) to grow?
- What expectations are you setting for your campaign to view it as a successful endeavor for your organization?

Executive Tip

If your P2P program is beyond its infancy, your strategic vision may already be set. Consider incorporating yearly retreats for your staff as a way to consistently reevaluate your program. Spending two to three days out of the office, focused only on your P2P campaign, will do wonders for staff morale and the overall growth of your program.

The best thing you can do for your P2P campaign is to set realistic, steady growth expectations that you can track. It's always better (and more fun) to over-deliver than to fight to meet lofty goals.

Define Your Campaign Goals and Budget

Once you have set your strategic vision, the next step is to make a budget for your campaign. Start by focusing on the first year and then use that budget to show growth in the second and third years. Setting goals in the initial years will be a good exercise for planning the future of your program.

As you prepare to budget, be ready to answer these questions:

- How much will you spend on your campaign?
- What expense ratio is acceptable for your organization?
- How much revenue do you need to generate in order to meet that ratio?

When preparing your first budget, use expense numbers that are actual instead of optimistic. For example, you may want to exclude from the budget an item that you think you might be able to receive as an in-kind donation. However, it's better to not assume anything at first, but instead look at in-kind donations as happy surprises to your bottom line, and still budget for the expense regardless.

Next, decide on an expense ratio that your organization deems acceptable. Many organizations use a 70% expense ratio for campaigns, which is very healthy. It's OK to set that goal early, but know that you may see a lower return in your first year.

Set your revenue intention for your campaign by defining the number of fundraisers needed to get to your budget. Most P2P campaigns have simple formulas for revenue based on participation, sponsorships, and add-on opportunities.

Finally, once you've evaluated both budget and goals, it may be necessary to take a step back and make sure it's attainable. Perhaps you will need to lower your budgeted revenue. Maybe you'll have to rework your expenses in order to raise more funds.

P2P fundraising can be a highly successful, creative, and lucrative addition to your organization's fundraising portfolio. It can drive new interest in your mission, can build new constituent opportunities, and help you build brand awareness in your community. Now that you are on the right path by setting your strategic vision, let's continue by looking at how to build your P2P fundraising campaign.

Chapter 2: Building a Campaign

Putting it all together.

It's essential to create a format for generating revenue that is going to work for your organization as well as appeal to your participant base. There are a few standard models that most organizations choose from in order drive their P2P fundraising campaign - here are three of the most popular: fundraising minimums, suggested goal and raise-what-you-can.

P2P Pro and Executive Tip

Don't skip this part. Even if you think you've already created the winning combination for your P2P campaign, this section can open your eyes to new possibilities. In the ever-changing world of P2P fundraising it's always good to constantly weigh new options for your campaign.

Fundraising Minimums

Some organizations set fundraising minimums for their P2P campaign. The organization sets a minimum to ensure that each participant raises a certain amount.

Oftentimes this type of P2P campaign will have a definitive start and end date. Campaigns with fundraising minimums usually have set rules about achieving the minimum goal, usually somewhere around the midpoint of the campaign. This might also include "making a personal donation" of funds by the fundraiser (known as "recommitments") that are not raised by the deadline.

It's important to note that many P2P campaigns also offer incentives to the participant once they reach the fundraising minimum. In these instances, fundraising minimums are essential to ensure that participants are raising enough (and then some) to cover the cost of their participation.

Suggested Goal

Organizations that choose a suggested goal model will give campaign participants a fundraising goal, but set looser boundaries on achieving the financial goal in order to take

part in the campaign. Choosing this strategy means the nonprofit must spend extra effort encouraging and motivating campaign participants to reach their goals.

Organizations that choose this model will often recognize participants' with fundraising milestones and even offer incentives in order to drive revenue.

Starting Out Tip

First time using P2P fundraising? A suggested goal is your best option in order to create structure for your program without "going big" right away, so set a goal!

While the suggested goal strategy requires a timeline and structure, it can feel more inclusive for participants when compared to a fundraising minimum requirement.

Raise-What-You-Can

Some organizations choose to have a completely free and open policy of campaign participation with a raise-what-you-can model. Essentially, this model allows the participant to take part in the campaign with no fundraising minimums or targets. In this model, the organization will see a wide array of participation - from the highly motivated fundraiser all the way to those who will not raise any funds but will still participate. This model can be very inclusive and attractive to a wide swath of participants because of its open nature, but it will likely have an impact on your bottom line.

Here is a breakdown of the positives, potential setbacks and major issues of each P2P fundraising format:

	Fundraising Minimums	Suggested Goal	Raise-What-You-Can
Positives	<ul style="list-style-type: none"> • Makes budgeting for revenue and expenses easy. • Ensures that participants will bring in a 	<ul style="list-style-type: none"> • Easy to “sell” to constituents who may not be fully committed to raising funds. 	<ul style="list-style-type: none"> • Very attractive to campaign participants: “No pain, all gain.” • Drives campaign

	<p>minimum amount of revenue.</p> <ul style="list-style-type: none"> Shows participant commitment by agreeing to a pre-set minimum. 	<ul style="list-style-type: none"> Sets a standard that participants will strive to meet. Enables use of gamification as motivation to inspire participants. 	<p>participation higher than with an campaign that requires fundraising.</p>
Potential Setbacks	<ul style="list-style-type: none"> Will lead to smaller participation numbers. Program must be clearly defined in advance of the campaign launch. Organization staff must “sell” fundraising in addition to promoting the campaign. 	<ul style="list-style-type: none"> Success relies heavily on staff to motivate fundraisers and encourage revenue. You will have to make an investment in incentives to motivate participation. Can your budget handle that? 	<ul style="list-style-type: none"> It’s very difficult to know what level of revenue this type of campaign with generate. Makes budgeting and setting goals for your campaign difficult.
Major Issues	<ul style="list-style-type: none"> You will encounter participants who will not meet their 	<ul style="list-style-type: none"> You will have campaign participants who do not meet their 	<ul style="list-style-type: none"> Most likely the majority of your participants

	<p>minimums or will challenge the commitment. Handling these objections requires a staff commitment to enforcing these minimums.</p>	<p>suggested goal, which will require a decision on how you want to handle this as an organization.</p>	<p>likely won't raise funds.</p>
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Some additional questions to ask yourself as you define your format:

1. If you choose a fundraising minimum, what is that amount? Will you require your campaign participants to reach that goal in order to participate?
2. Can your budget support a suggested goal or raise-what-you-can model, specifically if the participants don't achieve the standard you set?

Once you choose your format, you can start working on ways to market your campaign.

Solidify Best Practices

An important step towards building a solid, sustainable P2P fundraising campaign is to set best practices. This requires the bringing together of staff, key stakeholders, and organizational leadership to review your program and its components in order to come to a consensus on standards you wish to uphold for your campaign. This planning session is an investment of time, sometimes a whole day, but it is an essential step towards creating a strong P2P campaign.

Here are some questions to help you lead the discussion:

- What is the purpose of this campaign? Is it brand awareness, revenue generation, constituent gathering, or something else?

- Why is it important to have “rules?” Is it to protect the mission, to ensure continuation of the services of the nonprofit, uphold the status of the campaign, or something else?
- What rules do you need to uphold the purpose of the campaign?
- How will the organization handle complaints, objections, and frustration? Who will lead that communication?
- What will the organization do if the best practices are not followed?

Once you have set your expectations and your best practices you can move forward knowing that you have created a foundation for your campaign. As you grow your campaign and learn from past experiences, check in on your best practices and make sure they remain useful. One of the best parts of creating your own P2P campaign is that it’s an ever-evolving entity that gives you the opportunity for reevaluation. You’ll learn better ways of handling processes, making improvements, and evaluating your work.

P2P Pro Tip

Along the course of your growing campaign you’ll encounter roadblocks. Maybe it’s participant retention, unclaimed revenue, or not enough “over the minimum” extra funds. Instead of reevaluating your whole program (which may not be needed) focus on one area of opportunity for improvement and adjust your best practices surrounding that one issue accordingly. Then move onto the next issue.

Testing the Waters for Your Campaign

As you are building out your P2P fundraising campaign, remember to get feedback from dedicated volunteers, key stakeholders, and other donors. In most P2P campaigns there are a passionate group of constituents who want to help shape the future of your campaign. Make sure that these constituents:

1. Feel connected to the campaign and your organization.
2. Are encouraged to share new ideas.
3. Remain committed to the campaign from start to finish.

Here are some ways to gather feedback and ideas from your constituent base:

- Online surveys to evaluate past campaigns and/or get thoughts on new campaigns (free online tools can make this easy)
- Host a focus group to present your campaign and hear live feedback

- One-on-one outreach by phone to key constituents
- Social media polling

Executive Tip

Create an advisory board or committee for your P2P campaign. Also consider recruiting a passionate volunteer to your organization's Board of Directors as an advocate for your campaign.

Another way to evaluate your campaign is to conduct a SWOT (Strengths, Opportunities, Weaknesses, and Threats) analysis.

This exercise can be performed by organizational staff or with focus groups as a means to open up communication and get buy-in from key stakeholders. The Chapter Resources section at the end of the book includes a sample SWOT analysis for you to use.

One final thought on feedback: always remember to take it with a grain of salt. Passionate, motivated volunteers will always push the limits with their expectations. There may also be times when a given suggestion does not meet the best practices or direction of your campaign. Handle these situations with care but be sure to handle them.

You should make it clear that while feedback is always appreciated, it does not mean it will be automatically acted upon. Listen to feedback and use it to strengthen the campaign, but don't feel as if you need to act on every detail. You are the owner of your campaign and its success - do what you and your organization feel is best for the future of your program.

Building Your Tools: Website, Registration, Fundraising Pages

Building out your website, registration platform, and fundraising pages will take a bit of planning before you even reach out to vendors. Here are some tips and guidelines to follow as you plan how to translate your campaign's objectives into an intuitive online experience.

Campaign Website

A good P2P campaign website is a one-stop shop where interested participants can learn about the campaign, make an emotional connection through words and pictures, and be able to easily register for the campaign and/or donate to the cause.

At a minimum, your website must include:

- Campaign specifics (date, time, detailed location, general campaign timeline)
- Enticing photos of previous successful campaigns so that an interested participant can “feel” the excitement of the experience.
- A short, but compelling, description of your campaign.
- A form to capture an interested participant who may not be ready to take the leap into registration.
- Clear calls to action with “Register” and/or “Donate” buttons
- Social media links

Build your site and then get feedback from dedicated volunteers and the general public. You will be very familiar about the site that you are creating, so familiar in fact that you may miss an important detail or an obvious need. So make sure to have extra sets of eyes review your site and gather feedback that you may have missed.

Participant Registration

Registering heightens the level of commitment for participants. A registration system should keep a database of your participants, gather needed information about them, track their progress, and help you plan your campaign based on numbers of actual expected participation.

In some cases, you may want to gather information through your registration process that you may not need immediately, but might need down the road if a participant continues to support your organization.

For example, you may want to optionally ask where the registrant works, which is a data point that could possibly inform matching donation and/or recruiting strategies. The Chapter Resources section includes a worksheet with a checklist of data that you may want to collect during the registration process.

Fundraising Pages

RallyBound’s integration will make it possible for you to automatically set up your registered campaign participants with a personal fundraising page. This is critical - if it’s something you are not currently doing I highly recommend making this addition. Your

participants will be very excited when they register for your P2P campaign and they will want to share their excitement right away.

By immediately giving your participants a fundraising page they likely begin their fundraising within the first few days of registration. The longer it takes, however, for them to take the next step (i.e. fundraising), the more likely they will fall through the cracks. Capitalize on their initial passion by having your fundraising pages integrated and set to automatically generate upon registration and you will see an exciting spike in fundraising.

So, you've integrated... great! Next, set up your default or sample fundraising pages so that your participant receives a fully-functional, self-explanatory site from the start. Through RallyBound you can set your default text and pictures for your campaign so your fundraisers only need to edit if they wish to personalize.

At a minimum, your default fundraising pages should include:

- Your organization's logo and a compelling photo.
- A write-up which should reinforce your mission yet sound like it's coming from the participant.
- Details about your mission and what the funds raised do for your organization.
- A donation ask.

The fundraising website, registration process and online fundraising options were important when YSC and the Elizabeth Glaser Pediatric AIDS Foundation (EGPAF) both chose RallyBound as their fundraising partner. Both organizations have also seen large increases in their fundraising since switching to RallyBound.

YSC saw a 43% increase in donations as well as a 23% increase in the average fundraising for their East Coast ride. EGPAF found that their year-over-year fundraising increased by 52%.

YSC and EGPAF are great examples of programs that recognized the need for a stable, more consistent site, made the change, and are seeing great return on investment. By following these best practices, you should see the same.

Chapter 3: Marketing and Recruitment

Getting the word out about your fundraising.

P2P fundraising campaigns require a marketing and recruitment road map for campaign management. This topic alone could be its own book as marketing campaigns vary in length, cost, and size. After you've mastered the basics outlined in this chapter, you can grow your marketing and recruitment as your program grows.

Starting Out Tip

With a new P2P fundraising campaign, planning your campaign timeline should be the first thing you do. Take the time to review your campaign from start to finish before you dive into the smaller details.

On average, the length of a P2P campaign is anywhere from 4 to 6 months including launch, recruitment, kick-off, fundraising, and donor recognition. As you prep your timeline, work backwards from your campaign end date - e.g. if your campaign ends in September and you are working off of a 6-month campaign, you should plan to launch in March. There will likely be a few months of overlap between recruitment and fundraising outreach, but that is normal for a P2P program and is very manageable when you plan ahead.

Here's a sample of how your campaign timeline should look:

Timeline	Activity
5 to 6 months to campaign end	Launch
4 months to campaign end	Recruitment
3 months to campaign end	Recruitment & fundraising
2 months to campaign end	Recruitment & fundraising
1 month to campaign end	Fundraising & campaign preparation

1 month after campaign	campaign wrap up and thank you notes
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These are averages - as with everything, you may need to adjust your timeline based on the needs and priorities of your organization. This chapter will focus primarily on the part of the timeline from 5 months out to 2 months out: launch and recruitment. In later chapters we will focus on fundraising and how that plays a critical role in the success of your campaign.

P2P Pro Tip

If your campaign timeline sounds different, looks different, or feels different, that's OK! Don't recreate the wheel if you have a timeline that's working for your campaign. Just make sure you've allocated plenty of time for fundraising.

Announcing Your Campaign

When it's time to share your P2P campaign to encourage awareness as well as participation, there are a variety of ways to market it. Below are some of the most common ways nonprofits market their P2P campaigns, broken down by cost.

Free or Low Cost Marketing

The beauty of P2P is amplifying your donor's voices so you don't need to invest in costly marketing programs. Yet there are a few "must-do's" that you should invest in.

Email Campaign - House Files

A house file email campaign is an absolute requirement for your P2P program. Your current constituents are your most passionate supporters, they already know about your mission and its importance, and they are the most likely to join your effort. Launch your campaign to this group and see some immediate excitement and registration.

Individual Outreach

Personal outreach to constituents and interested participants is very important. Since P2P campaigns are based on solid relationship building, this outreach gives you the opportunity to develop a connection with your potential fundraisers from the moment of their first interest.

Consider hosting call nights, having a webinar or video conference for question and answer sessions, writing personal emails, or meeting with interested supporters in person (if possible).

Grassroots Marketing

This type of marketing refers to free opportunities in your community where you can spread the word about your campaign. Grassroots marketing comes in many forms, from tabling at community fairs or campaign expos, to partnering with a local store willing to promote your campaign, to handing out flyers in neighborhood gathering places. Potential grassroots activities are only limited by your creativity.

Grassroots marketing is time and labor intensive, but the payoff will be brand recognition and general awareness of your campaign. This is a great way to use volunteers or board members who aren't comfortable with fundraising. Consider conducting at least half a dozen such campaigns throughout your campaign timeline.

Free publicity

If your organization has any relationships with local media, consider asking local TV or radio personalities to support your campaign with news coverage. Try to tie it to their existing giving calendar for maximum success.

Paid Marketing

Direct Mail

Some of the larger, well-known P2P campaigns advertise their program through direct mail. If you do not know much about this type of marketing, do some research before embarking on this long and potentially tedious process. While direct mail can be effective, it can also be costly to a new or growing program. Only proceed if you are ready to invest a large chunk of your budget to direct mail.

However, a nice alternative to a direct mail campaign is a postcard mailer to your in-house file. This option does not require purchasing lists and it targets your desired demographic.

Digital Advertising

Digital advertising is widely used in today's P2P campaigns and includes paying to boost the reach of social media posts and search engine marketing, as well as other ad networks and formats online. Digital ads can be very cost effective for reaching a broad audience. In addition, you should also consider applying to free online ads programs for nonprofits.

Print Advertising

While print advertising is still an available marketing option that may help reach certain supporters, the reach of print is quickly diminishing. Only spend funds on print ads after you've exhausted other options. Make sure that you ask your existing corporate partners about piggybacking their existing ads.

Executive Tip

This section has outlined marketing tools at an extremely high level - there are many marketing subcategories, some which are very new, that it has not covered. If your staff are not familiar with some of these more advanced ways to market your campaign, you might want to consider hiring one of the many outside marketing firms that specializes in nonprofit P2P fundraising campaigns.

Campaign Leads: Management 101

The goal of marketing and recruitment is to build a solid list of people interested in your organization and that may commit to participating in your campaign.

Commonly referred to as a "lead," this is anyone who reaches out with an interest in your campaign. Did they submit an online request for more information? Did they call you and ask about your campaign? Did they send you a direct request for more information? If so, they are a lead. These interested parties should be communicated with throughout your recruitment period until the point that they either commit to participate or ask you to stop contacting them.

As you are generating these lists of potential donors, you need to track your leads. Your tracking system can be as simple as an excel spreadsheet or as sophisticated as a donor database or customer relationship management (CRM) system. When you gather information on your campaign leads make sure you are getting quality contact information. This important step will make follow-up easy and is also valuable for subsequent years of your program.

You should be tracking the following:

- First and Last Name
- Email address
- At least one phone contact option
- Address
- Date of outreach
- How they heard about your campaign
- Whether they've registered
- What their connection, if any, they have to your cause and/or your organization

In the Chapter Resources section, you'll find a simple tracking spreadsheet that you can use to get started.

You should also schedule a timeline of communication for your leads. As a rule of thumb, we've found that once a week by either phone or through a general or personal email is an ideal frequency to reach out to your leads. Your potential participants will need multiple prompts to try to get them onboard, so account for that in your plan.

YSC has seen an increase in registered riders for its Tour de Pink ride since it implemented a communication plan. The plan includes building a solid marketing database and tracking communication to interested participants.

In the Chapter Resources section you'll find a sample recruitment communication strategy to help with your campaign lead management. Included in this document is a general timeline as well as some generic examples of outreach tactics, including follow-up emails and phone messages. Get creative with your communication and make it your own. This is your opportunity to spread the word about your exciting, fun, and rewarding P2P campaign.

Tracking Recruitment Progress

Remember in the first chapter when we talked about setting recruitment and participation goals for your P2P campaign? It's time to pull out that goal worksheet and put it to good use tracking your progress. Not only do goals help you stay focused, they can also guide you in tracking the status of your campaign. You should be tracking goals at least weekly, if not daily.

If recruitment is going well and campaign participants are rushing through the door... great, keep up the good work! If you are you close to your goals, but having trouble finding those last few participants, take a look at your marketing efforts and see if there is something you can add. If you can find some room in your budget to push a small, digital campaign, perhaps you can send out one more constituent mass email or have a call night to build excitement. Being close to your goals is a great place to be - take a moment to congratulate your team, then get back to work finding those last few registrants.

If you are not meeting your recruitment goals, however, it's time to evaluate the status of your program and determine the next steps for your campaign. Ask yourself what can be done to increase the viability of your program. If recruitment is slower or lower than anticipated, you should also look at cutting costs for the campaign or marketing. Make sure to not panic, but plan for alternative solutions.

General Tip

Lower than anticipated recruitment does not mean an unsuccessful overall campaign. The next chapter will focus on managing the fundraising portion of your campaign, which can help offset low registration numbers, and allow you to reach your overall revenue goals.

If organizational staffing is hindering your ability to solidly recruit participants, you may want to consider following a model that Friendship Circle's Team Friendship found particularly helpful. Team Friendship uses its program alumni to help with recruitment: they choose alumni to lead their efforts and give them the title of "Team Captain."

This coveted role is taken very seriously by the alumni and they commit to taking a hands-on approach to growing their team. Each captain is responsible for recruiting a certain number of new participants per campaign. Because of this structure, Friendship Circle says that it's able to grow 100% year-over-year.

Always keep your organization's leadership aware of the status of your program. Have open and accurate discussions on the direction of the campaign as it relates to your goals and keep leadership aware of progress, especially if you are having trouble hitting your recruitment milestones. Your leadership team will likely want to assist in your recruitment efforts and they will appreciate the accurate and honest update.

Chapter 4: The Fundraising Stage

Getting your supporters out there and all working towards their goals.

The purpose of your P2P campaign is to raise funds for your organization. You have worked hard on the strategy for your campaign and have marketed your program - now it's time to start fundraising.

I recently read a short quote about P2P campaigns which I find to be very accurate: "Peer-to-Peer is Person-to-Person." P2P fundraising is all about the personal touch, starting with the organization, and trickled down to the participants and then their donors. Personal interaction is what's going to set your campaign apart.

A common mistake that nonprofits make is to assume that fundraisers are actively fundraising on their own for their goals. Sadly, most of the time this is not the case and they are waiting for the organization to guide them through their experience. What will set your P2P program apart, specifically as it relates to revenue generation, is going to be the motivation and communication you provide to your fundraisers.

Let's jump in and talk more about how to put the "person-to-person" into your P2P fundraising campaign.

Supporting your Campaign with Staff or Volunteers

Great P2P fundraising programs succeed because of the people that work on them. The world's largest P2P programs are successful because they dedicate full-time staff to their campaigns. Additionally, they provide opportunities for training, development, and learning as well as the autonomy to add creative elements that will enhance the program.

If your organization has the resources, you should consider investing in a full-time staff member that can lead your P2P experience. In many ways, being a P2P fundraising professional is similar to a position in sales. Just like a sales job, your staff should be able to "sell" the campaign experience, to tell a story about your organization through the mission, and not be afraid to hear the word "no."

Executive Tip

If you already have a full-time staff member working on your campaign make sure that your staff member is not only a great campaign planner but is comfortable with the "sales" aspect of fundraising. If they need professional guidance, consider sending them to sales training.

P2P staff should possess the following qualities:

- Attention to detail
- Passionate
- Driven by goals
- Knowledgeable
- Able to work independently
- Make quick decisions
- “Sales” minded
- Customer service focused

If your organization doesn't have the resources to maintain a full-time staff member for your campaign (and don't worry, you are not alone), consider the following options for your program:

Split Staff Time 50/50

If you have a staff member in your organization who works on something for part of the year consider splitting his/her time with your P2P program. This is a popular alternative to a fully dedicated P2P staffer.

Hire a Consultant

Many organizations outsource their fundraising program to third-party nonprofit professionals. Consultants could be a good investment of time and money for your organization if you don't have a staff member who can run your campaign. You'll want the firm or professional you choose to understand your goals, your voice, and your passion and then let them do what they do best - increase revenue for your campaign.

Executive Tip

Remember, you can teach people about your organization and how to represent it faster than you can teach someone how to be a good fundraiser.

Use a Volunteer Team

Some organizations choose to have a group of volunteers run their campaign, overseen by a representative of the organization. There are pros and cons to this staffing model:

Positives of Volunteers

- A volunteer is a true “peer” for your new participants.
- Volunteers generally donate their time.
- Volunteers have passion for your organization.

Potential Negatives of Volunteers

- Even the most committed volunteers will not give you 100% of their time. Volunteers are usually balancing their own job, families, life, and maybe even fundraising for other organizations.
- While you can motivate volunteers with a revenue goal, you can't hold them accountable for it.
- If you are considering investing in professional training, you will need to weigh whether such an investment is warranted for a potentially noncommittal volunteer.

Turning Fundraising Zeroes into Fundraising Heroes

Congratulations, you have a network of people ready to fundraise for your cause! These individuals are excited to be part of your P2P program and they are anxious to get started right away (before they lose interest). They may be a seasoned fundraising veteran or new to the space - regardless, they are waiting for you to tell them what to do.

In order to empower participating fundraisers, you need to provide them with a few essential tools:

1. A personalized fundraising website with a login and password.
2. A fundraising toolkit detailing ways to get their personal campaign started, as well as standard procedures for your specific program.
3. A list of ways to raise funds that includes real-life examples (sample emails, social media posts, flyers, etc.).

Host a fundraising meeting (or webinar) to answer questions and promote a culture of fundraising. Plan your fundraising meeting (or webinar) within the first two to three weeks after participants register for your campaign. If your campaign has rolling registration, perhaps consider having a monthly time designated to fundraising.

P2P Pro Tip

Even if you already have a great fundraising kit for your participants, with fundraising strategies and technology constantly changing, you should read and update your kit about every 3 months to keep it fresh.

Next, create a communication plan to determine when and how often you should be speaking to your fundraisers through mass email, social media, and on a one-to-one basis:

Type	Frequency	Specifics
Mass email	Every 2 weeks	Create an email that you can send to fundraisers that highlights top fundraisers, provides tips and tools, updates them on campaign information, and keeps them motivated for your mission.
Social media	At least once per week	Post updates, articles, mission stories, and fundraising tips through your social media channels.
One-to-one	Once a month by email, phone or postal mail	Check out the next section to learn about "Personal Best fundraising."

Motivating Fundraisers to Achieve their "Personal Best"

Many years ago I was asked to manage a large number of P2P fundraisers at one time. My goal was to raise over \$500,000 with one program and I knew the only way I was going to make that goal was with superstar fundraisers.

The task was daunting and I had to figure out a way to motivate every fundraiser as a group that would make them feel like an individual. Difficult task, to say the least. It was during this time that "Personal Best" fundraising was born. It's a concept that I used then and still teach today because it works so well.

Personal Best fundraising allows you to categorize your fundraisers into distinct groups based on their fundraising habits. It requires that at least once every month you evaluate the current status of your fundraisers.

Then, based on the status, you communicate with them once a month by email, phone, and postal mail. While this plan takes time, it's a great way to make your campaign more personal. Let's take a more detailed look at this strategy.

Categorize your Participants

Each participant has certain characteristics that apply to them. These characteristics help you identify your individuals as belonging to either "Stop and Act," "Cautiously Optimistic," or "Great" participant categories. You can use these categories to segment your participants for your monthly communication:

Participant type	Characteristics
Stop and Act	<ul style="list-style-type: none"> ● Is only 0%- 25% towards their minimum or goal ● Has not made fundraising progress in over 2 weeks. ● Is a "ghost" participant - little to no communication ● Has not personalized their fundraising page
Cautiously Optimistic	<ul style="list-style-type: none"> ● Is 25%- 50% towards their minimum or goal ● Shows forward progress, even if it's slow ● Is occasionally communicating ● May or may not have personalized their page
Great	<ul style="list-style-type: none"> ● Top fundraisers ● Have reached their minimum or is very close

	<ul style="list-style-type: none">● Is actively engaged● Communicates often● Have personalized their fundraising page
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Communicate for Fundraising Success

In the Chapter Resources section you'll find a diagram that outlines ways you can communicate personally to your fundraising participants.

The goal of this diagram is to outline the three main ways you should be communicating on a monthly basis, by personal email, personal postal mail, and a one-to-one phone call. These touch points are meant to serve as your personal connection with your individual fundraisers so make them count. The diagram gives you some tips for getting started, but be creative and come up with ways to make your outreach more personal and meaningful.

To Auto-respond or Not?

Many organizations today use so-called "autoresponders," or emails that are automatically sent at a certain time or "triggered" by certain actions, to communicate to fundraisers and donors. Autoresponders can be used to encourage your participants to raise more when they reach a certain point, to share your mission, and or can be used to congratulate your fundraisers when they reach a goal.

However, be careful not to over-automate your campaign. If you're not careful this practice could quickly remove some of the individuality of your fundraising effort.

P2P success lies strictly in the relationships your organization builds with its campaign participants. While autoresponders can be very useful, carefully consider how much they should be used. There is no substitute for going the extra personal mile to thank a participant in a more "human" way.

Track Your Progress

Getting personal with your campaign fundraisers requires that you continually track your progress and interaction with them. Keep notes on your conversations, track what you've

sent them via email, watch their fundraising progress steadily rise, and make sure to celebrate their success.

Here are some weekly stats you should track on your campaign fundraisers:

- The number of personal calls made to fundraisers
- The number of postal mail notes sent to fundraisers
- The number of personal emails sent to fundraisers
- Funds raised each week
- Percentage of revenue to overall campaign goal
- Number of active fundraisers, dropped fundraisers, and anticipated participation

The Chapter Resources section contains a sample tracking document that you can use to get started. Keeping a weekly record will allow you to see trends and be able to run forecasts for your campaign.

P2P Pro Tip

If you are already tracking your fundraising progress weekly, consider taking a few moments to reevaluate what you currently track to see if there are opportunities to add new metrics into your system.

Chapter 5: Put the “Fun” in Fundraising

Helping your participants to enjoy supporting your organization.

Fundraising participants are often scared to ask for donations. Asking for funds is not an ability everyone excels at, and it is against many of our social norms. However, it's the job of your organization to help guide campaign participants to a place where they are comfortable asking for the support you need.

Your organization should provide solid fundraising promotional materials and constant support, but above all, you need to make fundraising fun! A great P2P professional will encourage, motivate, and congratulate fundraisers by creating a “culture of excess.” Through incentives, integrating your mission, and hosting contests, your campaign participants will learn how much fun it can be raising funds for a great cause.

Create a Culture of Excess

Many P2P programs only focus on getting participants to reach a fundraising minimum or small goal that will sustain their participation in the program while, of course, adding some additional revenue to the campaign. You should go beyond this and encourage campaign participants to not only meet but exceed their goals by a substantial amount.

Creating a culture of excess starts with your own mindset, a change in your fundraising vocabulary and a belief that raising beyond the initial goal is not only possible but expected. The first step in driving excess fundraising is communicating that:

1. P2P fundraising isn't a chore.
2. All campaign participants have the potential to meet and exceed their fundraising goals.
3. It's not “if” a goal is met... it's “when” a goal is met.
4. Meeting a goal doesn't mean that fundraising is completed. Keep going, always strive for more.

Excess or over the minimum revenue should be expected for your P2P fundraising campaign. In some cases, it will be the difference between making your budget or not. By creating a culture of excess for your program, you'll set the standard that fundraisers are

expected to do the best that they can and raise as much as they can, no matter the minimum goal.

Executive Tip

When creating your budget, make sure that you add a line item for “in Excess” or “Over the Minimum” revenue. My suggestion is to start low, for example: an average of \$250 per participant, and raise it as you develop a history of your fundraising potential.

Incentivizing Your Campaign

Fundraisers love being rewarded for a job well done. For this reason, it’s important that your P2P campaign has an incentive program. There are two main types of incentives: usable and experiential.

Usable Incentives: Something that can be branded with your organization’s logo and worn or used by your overachieving fundraiser. The type and quality of the product should improve as the participant’s total fundraising level grows.

Experiential Incentives or Gamification: Non-tangible items that enhance the participant experience. These items could also be related to your mission, perhaps as a direct result of the fundraiser’s work.

Here are a few examples of usable and experiential incentives:

Usable Incentives	Experiential Incentives
<ul style="list-style-type: none">● Acknowledgement plaque● Accessories (socks, towels, mats)● Hats● Backpacks● Clothing● Outerwear● Fitness Trackers● Buttons/Pins● Tablet PC	<ul style="list-style-type: none">● Recognition at group campaigns● VIP party● Add-on’s to events, such as free parking● Mission-based outing or item● Meet-n-greet with top organizational leadership● Early bird dinner● Family meeting spots

When creating your incentive structure, be careful of the fair market value of your incentives.

You should also strategically choose incentive levels so you are stretching fundraising potential while at the same time creating goals that are attainable. Incentive goals could increase by a percentage (20%, 40%, 60%, 80% over goal) or by a dollar amount (\$250, \$500, \$750, \$1,000 over goal). Your incentive levels should begin at the fundraising minimum or at an amount you have identified as the minimum needed for participation.

Another great addition to the incentive structure is a large prize for the top fundraisers for your campaign. The top fundraisers will be the people who raise the most during the fundraising period - they are your best advocates for your cause. Consider highlighting the top 3-5 fundraisers with a separate and special prize for reaching this milestone level.

Once you've set your incentive levels, you have to immediately share them with your participants. Promote the incentives with a flyer or with samples at in-person events as often as possible to generate excitement and a desire to earn the prize. If possible, make levels cumulative, so the more a participant raises the more incentives they receive. Give incentives to participants as soon as they are earned, so they can enjoy them before the end of the campaign as well as to encourage others to earn incentives as well.

EGPAF is a great example of offering mission-driven incentives. In 2015, EGPAF offered its top fundraiser a trip to Kenya to see its organization's work in action. According to EGPAF, because of this offering, the top fundraisers (one trip was originally offered, but it was eventually extended to two participants) went from "a few thousand dollars" to raising over \$15,000 each in one year.

P2P Pro Tip

If you already have an incentive program, consider stepping it up a notch by acquiring an apparel sponsor for your program. This is a great way to get brand name items at a reduced cost. Your participants will appreciate the items and you'll save some expense budget for other things.

Integrating your Mission

P2P fundraisers want to do something good for a cause they support - that's a big part of why they have joined your campaign. However, an unfortunate assumption that many

organizations make is that participants know why they are fundraising, which is often not the case.

Combat this assumption by integrating your mission into communications to your fundraising participants. Arm your fundraising participants with knowledge of your organization which they can share with potential donors. Frequently remind participants about your mission and how important their involvement is to its success.

Here are some simple ways that you can integrate the mission into your fundraising efforts:

1. Create a one-page document with an overview of your organization. Include your mission, your main service programs, and 3-5 impact statements that show your mission in action.
2. Show participants how funds they raised work for your organization (ex. \$50 pays for a mammogram, \$125 can provide a meal to a family, \$500 buys a new piece of research equipment, \$1,500 build a new classroom for students).
3. Arm your participants with snippets of information that they can give donors to show how their donations will support the cause.
4. Every week during your campaign, remind participants about the great things your organization is doing to support its mission. This could include an explanation of a program they are helping to fund, a cutting-edge researcher, or a recent program that was a success for your organization.
5. Share personal stories of your mission in action. Stories of survival, rising above, being supported by the organization, or triumph after loss serve as great connections to your mission. A personal story will resonate with your participants and motivate and inspire them to continue to support your organization.

Executive Tip

Aid your P2P staff by helping to connect them to researchers, service leaders, or contacts in your industry that can be a reflection of your mission. If that's not possible, offer to pick up the phone and call participants who are doing great or could use a boost. You are a respected reflection of your mission and hearing from you would be an incredible boost to a participant that needs inspiration.

Always remember that the work your organization does to support your mission is the main way you can motivate participants. By using your participant's desire to make an impact, you'll see a higher level of connection and a deeper desire to raise funds for your campaign.

The Spirit of Competition

Everyone loves a small dose of friendly competition, so add it to your fundraising campaign as a way to generate excitement and boost participation. Fundraising contests are an increasingly popular way to grow revenue during the fundraising period.

First, secure items that you can use as your competition prizes. Make sure your prizes are worth “fighting” for. Electronics such as fitness trackers and tablets are more expensive, but they will likely drive participation over items of lesser perceived value. Again, remember the fair market value rules and make sure they are well articulated to your prize winners.

If you don’t have extra budget to purchase items, donated gifts such as gift cards, apparel, hotel stays and dinners are a strong alternative. Choose items that match the environment of your program (i.e. are you’re organizing a running event, have a local running store donate a free pair of shoes). Offering a well-thought-out prize is key to holding a successful contest.

Next, set up your contest schedule and rules. Give your contest distinct start and end dates and make sure you have a way to track the winner. Contests can be held weekly, monthly, or over a longer span based on the number of prizes your offering. The more contests the better, so host as many as you can.

Here are some ideas for easily trackable contests:

- Most funds raised in 1-2 weeks.
- Participant who gets the most donations in 1-2 weeks.
- Send 10 fundraising emails on “X” date and be entered into a raffle to win a prize.
- For every \$100 raised during a specific timeframe you’ll be entered into a raffle to win a prize.
- Share your personal story on social media and submit it to the organization and a winner will be picked for a prize.
- Use social media to ask for \$5 donations, and the fundraiser that is associated with the most donations wins a prize.

A final idea for incentives is to consider offering one large group contest. For example, if everyone on a fundraising team raises a designated amount of money in a certain amount

of time then they will all receive a prize. Just keep in mind that group contests take more time to plan and require a prize that makes financial sense to distribute to multiple winners.

Friendship Circle uses weekly competitions frequently in their campaigns, and often sees corresponding fundraising spikes. Team Friendship takes it one step further by offering premium prizes such as electronics. According to Team Friendship, “the more valuable the prize, the harder people will work to achieve them.”

Always remember, fundraising should be fun! As the leader of a P2P campaign, the first step to injecting fun into your program is for you to believe that fundraising is exciting and possible. Next, create a culture of excess by promoting over the minimum fundraising.

At every level, you should add incentives, integrate your mission, and host contests in order to make fundraising more enjoyable. Most importantly, pass on an unmatched passion and excitement for fundraising and you’ll see your program not only meet but exceed its revenue goals.

Chapter 6: The Dust Settles

What to do after your campaign ends.

The days, weeks, and months following your campaign are just as important as all the work you during it. Immediately following your campaign, you'll feel accomplished and you'll be ready for the natural post-campaign-let-down. But you can't stop now. What you do after your campaign is equally important.

This final chapter will guide you through the days following your campaign. We'll talk about the importance of not only the simple thank you, but you'll also understand why post-campaign surveys are a game-changer, and you'll read about the tools you need to prepare for the future of your program.

Follow up to your Campaign

Immediately after your campaign occurs you'll feel accomplished, excited, exhausted, and have a sense of immediate relief that all you've worked hard to achieve has been a huge success.

After you've rested, and before you start on your next project, don't forget that post-campaign follow-up is as necessary as any other part of your work. Your campaign is not over until you have thanked everyone involved, every last dollar has been raised, you've finished your financials, and you've reviewed the campaign for future improvements.

Create a post-campaign follow-up checklist that can be added to your overall campaign timeline. This will help you remember that although your campaign has ended, there is still work to be done.

Your checklist should include:

- A day away from the office to rest in order to keep fresh, excited, and motivational to your fundraising participants.
- Setting your schedule for sending out thanks and recognition.

- Organizing and taking inventory of campaign materials including what's leftover and what can be used again. This can lead to future savings when you don't have to purchase the same materials again.
- Completing your financials to include actual participation numbers, overall revenue generated, and campaign expenses. Reflect your goals and metrics in this report.

Also make an after-action report of all parts of the campaign from the setup, procedures, volunteer management and fundraising. Try to answer the following questions:

- What worked well?
- What didn't work at all?
- Where is there room for improvement?
- What do we need to add in the future?
- What can we do without in the future?
- Where can we work smarter and not harder?

Fundraising Deadlines

Many successful P2P programs allow their fundraising participants to continue fundraising after the campaign, and in fact, they encourage it. Of course, every campaign needs a final deadline, mainly for reporting purposes, but that deadline does not have to be the "last" day of your campaign. Many organizations leverage the excitement generated by their campaigns to drive fundraising after the fact.

To ensure continued donations, extend your official fundraising deadline to one month after your campaign "officially" ends. Post-campaign fundraising is a culture created by your organization. Encourage your campaign participants to share their photos, recap their experience, and to go for one final donation push.

P2P Pro Tip

Does your program offer an option for people to self-donate via a pre-approved credit card in order to reach their goal? If so, your deadline and the communication to your charged participants is critical to ensure you properly process these recommitment payments. Create a separate timeline to frequently communicate with these special participants often to ensure they are supported.

Thanking Campaign Participants

A simple “thank you” goes a long way towards showing your appreciation to everyone who helped to make your campaign a success. Your “thank you” should provide a recap, be heartfelt, and show the impact the campaign has made on your mission.

Below is a post-campaign timeline for you to follow, with a goal of getting out your “thank you” notes as soon as possible. Waiting too long will lessen the power of the acknowledgement, so make sure you act quickly.

When preparing your “thank you” messaging, consider everyone involved in your campaign. Here are some important people to thank, along with when to thank them and suggestions on how to show appreciation:

Who	When	How
Campaign participants	2-3 days after the end of the campaign	General email “thank you” (include a survey), social media appreciation
Campaign volunteers	Within 7 days after the end of the campaign	General email “thank you” (include a volunteer survey), social media appreciation
Campaign committee	Within 2 weeks after the end of the campaign	Personal email and a handwritten note
Top fundraisers	Within a month after the end of the campaign	Personal email and a handwritten note

Make sure that your “thank you” note messages are short and succinct and that they only include appreciation. There will be time later for fundraising reminders, follow-up, and pre-registration for the following year in the months that follow your campaign, so make sure to keep your “thank you” note simply about gratitude and impact. Now is not the time to ask for more fundraising.

Survey Your Crowd

Post-campaign surveys give a perspective of your campaign that comes directly from your participants. Be assured: your constituents will want to share their experience with you. A post-campaign survey should be sent out within one week of the campaign's end while it's still fresh in your participants' minds.

Your survey must be concise (5-10 questions) and have a variety of response options ranging from ratings and short answers, and to opportunities for longer feedback. Make sure your respondents have the option to submit their thoughts anonymously and/or provide contact information so that they can contact your organization directly.

Every P2P campaign is different, so your survey questions will naturally be specific to your campaign. However, all surveys should include questions that address the following:

- Rating the overall experience
- Rating the fundraising support participants received during the campaign
- How the organization can help participants with future fundraising and provide a better experience
- Communication between participants and the organization
- Their most and least favorite parts of the campaign

Create surveys that speak to more than just your campaign audience. Don't forget to also survey your volunteers, committees, Board of Directors, or anyone else with a stake in your campaign. This may mean changing the survey questions based on your audience, but this extra work will go a long way towards receiving on-point feedback.

When you review responses, make sure to have an open mind. If possible, ask a colleague or friend to review them so that you have an outsider's opinion as well. Because you are so close to the campaign and its working parts, you may not be able to have an objective opinion. Other reviewers may give you helpful insights based on their interpretation of responses.

Finishing up the Financials

Part of your post-campaign process should include completing your campaign budget to account for your actual revenue and expenses. Not only will the organization's leadership

be interested in this data but it will also be an important tool for campaign review and planning for future years. Set a stop date, usually about 30 days after your campaign, so that you know exactly when to stop tracking your financials. Make a note of the date you stopped tracking data so that it can be comparable year-over-year.

Start by finalizing your revenue to determine how much your campaign raised. If you've been tracking this on a weekly basis, this will be an easy task. If you've missed a few weeks, then plan a few hours for this activity.

Next, account for all of your campaign expenses. Track all of the expenses you've paid and also add in any anticipated expenses that will apply to your campaign after your financial stop date.

Campaign Revenue	Campaign Expenses
<ul style="list-style-type: none"> ● Registration Fees ● Sponsorships ● Minimum funds raised by participants ● Over the minimum funds raised by participants ● Dropout revenue (funds raised by participants who did not take part in the campaign) ● Event day revenue (raffles, donations, apparel sales, etc.) 	<ul style="list-style-type: none"> ● Venue ● Permits or fees ● Facility set up (tents, rentals, tables, linens) ● Outsourced labor (if any) ● Apparel (T-shirts) ● Incentives ● Food ● Marketing expenses ● Shipping ● Postage ● Misc. needs ● Travel expenses (if any) ● Donor processing fees

The last step is to figure out your net profit and expense ratio. In this case, less is not more. A healthy net revenue percentage (i.e. campaign revenue over expenses) starts around 60% - ideally, aim to have an expense ratio of 70% or higher. Campaigns with a net profit of 50% or under should be reviewed more intensely for future viability.

Successful campaigns in the nonprofit world commit at least 67% of the funds raised back to the organization to be used to further its mission. Raising funds for your cause was the

ultimate goal of your campaign, don't get caught spending too much money and not returning a healthy chunk back to your organization.

Executive Tip

Provide your seasoned P2P staff with your actual campaign budget so they can fill it out directly and return it to you. Having this part of your budget filled out will save you a lot of time as you work through the budget process.

Get Ready for Your Future

Finally, put all of your thoughts into an after-action report that evaluates every segment of your campaign.

This chapter includes a sample after-action report - however, it is just a guide - remember that all campaigns are different. Break down every part of the program, from marketing and launch to participant registration to the event day and everything in between. Review each component by three criteria:

- What worked?
- What didn't work?
- Where can we improve?

P2P Pro Tip

After your campaign, invite a small group of dedicated participants to join you for an evening of honest feedback, prioritization, and planning, the findings of which you can add to your after-action report.

Your after-action report should be completed within a month of the campaign but schedule it for a time that you are able to focus 100% of your attention on the outcome. Avoid distractions, have an open mind, and objectively review each part of the campaign.

The goal of your after-action report is to identify 3-5 major areas of focus for the next year of your campaign. Perhaps it's something you want to change, or see improved, or grow what you already do well. Continued P2P program success is critical for the growth of your program and there should always be something to improve upon, add-in, or change. By consistently reviewing your program, you will set yourself and your campaign up for strong growth in the future.