UCSF

# Together at UCSF

## Fundraising Toolkit

# Contents



# Purpose of This Toolkit

We hope this toolkit serves as a guide for developing a successful fundraising campaign. Remember that creating your fundraising page is only part of the journey; defining your donor network, creating and executing your marketing plan, and thanking your donors are also crucial to success.

Fundraising can be challenging, yet the payoff is incredibly gratifying, meaningful, and impactful. We are always looking to improve the fundraising journey and the support we provide. If you would like to see additional information here, email Karolina Zatz at karolina.zatz@ucsf.edu with your comments and specify "Personal fundraising toolkit feedback" in the subject line.

# Create Your Fundraising Page

## Naming your campaign title

When you begin working on your fundraising campaign, one of the first steps is to brainstorm a strong campaign name that conveys its purpose. Make it stand out and make it impactful. The goal is to get people interested in reading more about your campaign.

## Writing your fundraising story

Your story describes the reason you're fundraising for your cause. Inspire your network to give by making your story personal and meaningful. Communicate why your cause matters and how donations will make an impact. You can also upload images and videos in this section.

### TIPS

- Keep your description to four or five paragraphs. Your target audience can lose focus and interest if the description is too long.
- Put yourself in the shoes of your target audience and ask the questions: *Why would people want to donate to my campaign?*
- Be authentic and personal in telling your story to generate empathy. Communicate why your project matters.
- When possible, detail how donations will be used. People are more likely to contribute if they know how their money will make an impact.*
- Include photos. Images, especially with people who play a role in your story, are a great compliment to words.
- Include news or social media coverage on your project if you have it. This adds credibility.

### Link donations with their relevant impact

Apathy is your enemy. If donors don't believe their support will make a difference, they won't bother to give. Linking your suggested donation sizes with their real-world impact reminds your audience that even a small donation can help heal, care, discover and educate. This also gives donors a way to judge their purchasing power. In other words, a $25 gift will mean more and seem like a smarter choice when the donor sees that this will vaccinate three children against a deadly disease. It allows them to feel like they are making an informed "purchasing" decision.

Details about the impact of specific gift sizes can be wound into written appeals like emails, but they can also be powerful concepts for visual CTAs. You can even create a custom sidebar for your fundraising page with icons representing the impact of different gift sizes. – *Source: Classy.org*

### If you are raising money for a research project (your own or someone else's), we recommend:

- Introducing yourself and any collaborators on your project.
- Describing the research/project and its expected outcome and impact on health. Why is it so important? How does your project contribute to UC San Francisco's mission of advancing health worldwide?
- Making your pitch personal. Tell a compelling story of why you are passionate about your work and this project in particular. Put yourself in the shoes of your target audience: Would you be moved to support this campaign?

#### HERE ARE SOME EXAMPLES WE LOVE:

- 4th Annual Robin's Ride for Breast Cancer Research
- Raising Money to Cure Breast Cancer

*To view examples of our current and past personal fundraising campaigns, please visit together.ucsf.edu.*

## Images and video

Use attractive visuals – like images or video – to paint a picture of need and hope.

### A helpful tip if you plan to use video:

Like your written case for support, your short pitch video (1–3 minutes) should be personal, clearly express your goals and intentions, give potential contributors a sneak peak of your project, use appropriate media (slides, photos, background music to set the tone), and end with a call to action. You're not just asking for money; you're inviting people to join you in solving a problem.

# How to create your personal fundraising page

## Start at together.ucsf.edu

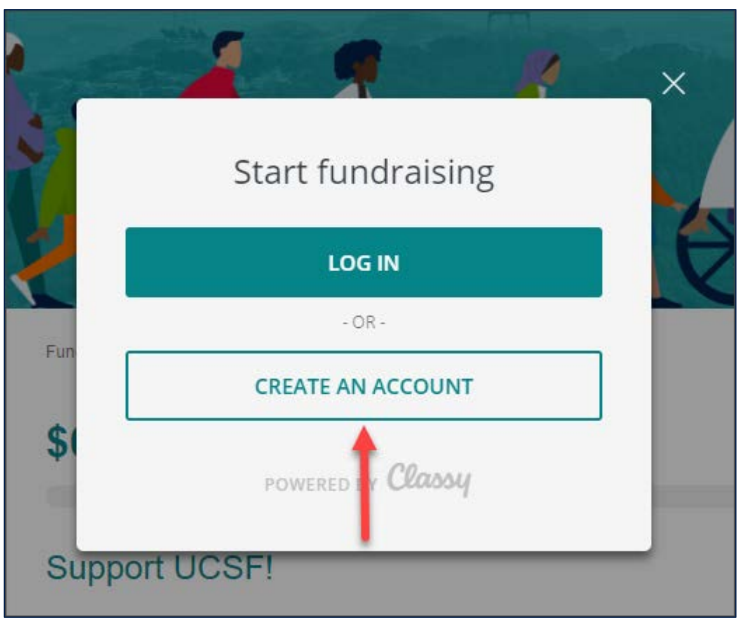
Go to together.ucsf.edu/start-your-fundraiser and choose your fundraising tactic. Then tell us about your relationship with UCSF, and let us know if you are fundraising for UCSF or UCSF Benioff Children's Hospitals

*Note: if you are a UCSF student or staff, you will be asked to complete a personal fundraising application. Your application requires approval from your department/division head before a fundraising campaign can be created. Our staff will follow-up to create your personal fundraising page.*

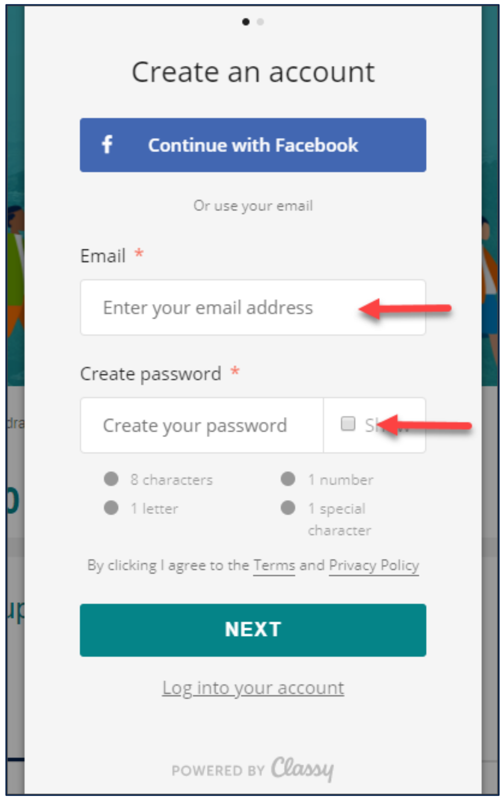
## Create your fundraising page

To create your fundraising page:

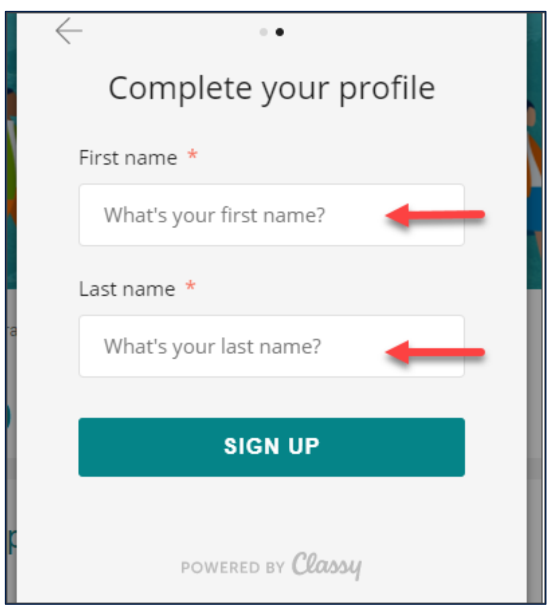
1. If this is your first time creating a fundraising page on Together at UCSF, please create an account. If you are an existing user, simply log in.
2. To create an account, select **Create an account**.



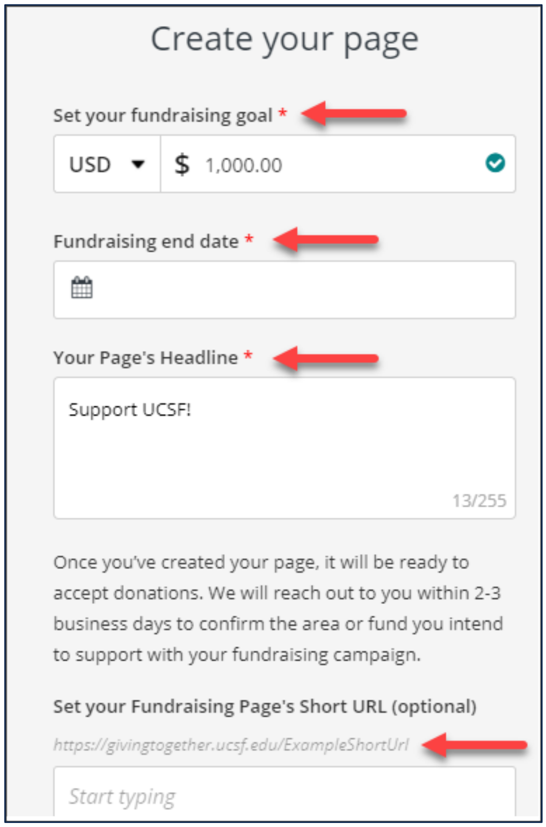
3. Enter your email address (you log in with this email, and all notifications are sent to this email) and create a password.



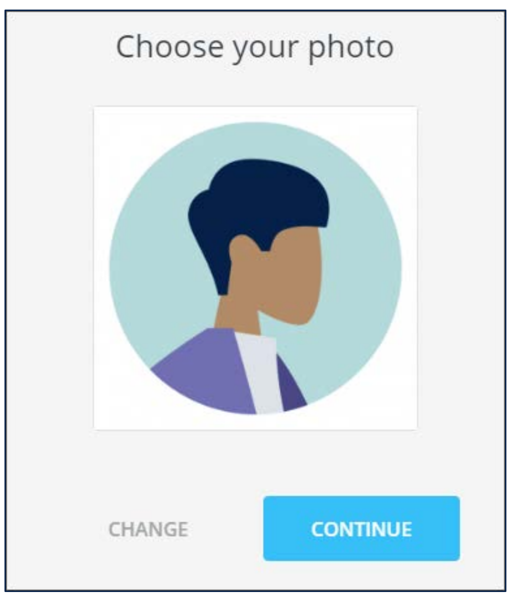

4. Enter your first and last name.



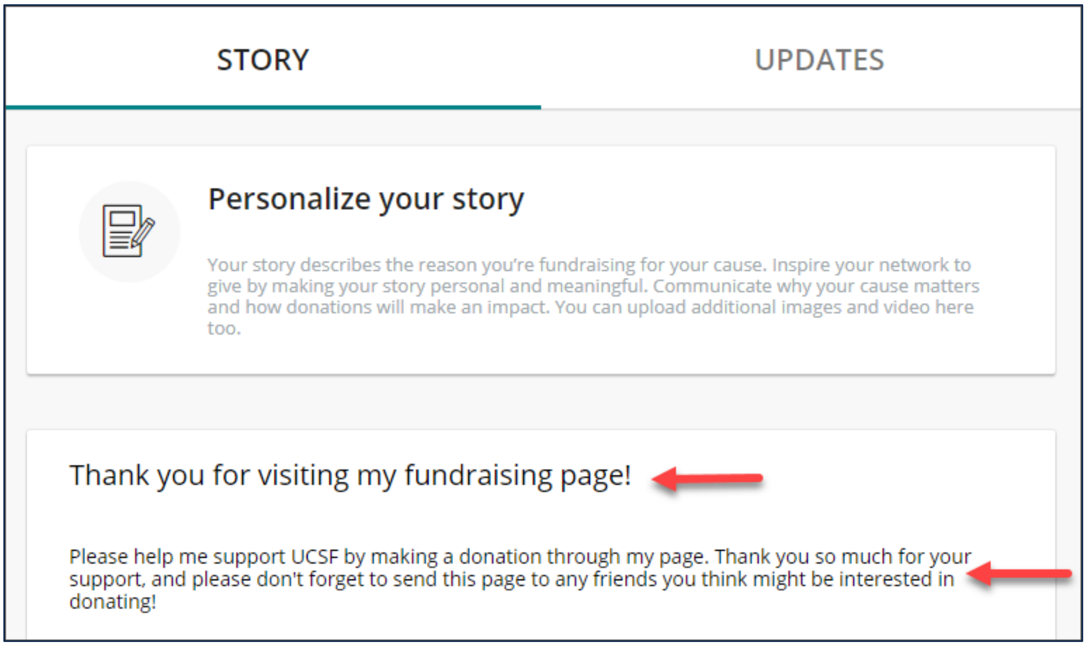
5. Specify your fundraising goal, end date, and page headline (the title of your fundraiser). You can also specify a short URL for your campaign if you want.



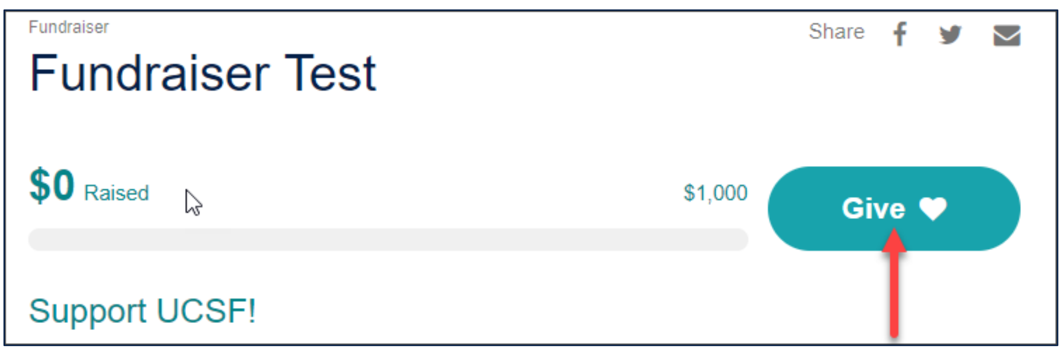

6. Upload your fundraising page photo. If you choose not to upload a photo, the default image you see displays as your photo.



7. Create your story. Your story describes the reason you're fundraising for your cause. Inspire your network to give by making your story personal and meaningful. Communicate why your cause matters and how donations will make an impact. You can also upload additional images and video in this section.




8. Make a donation to seed your campaign, and consider asking your closest family and friends to contribute as well. Having existing donations in your campaign when you publicize it to your larger network helps motivate others!



# Spread the Word

## Identifying your donor network

To identify your network, ask yourself the question: *who is my crowd?* These are the individuals you will reach out to with requests to give and to help you spread the word about your campaign.

Take 10 minutes to map out your personal connections to individuals, organizations, professional associations, and social networks. Use the table below or create your own.

| INDIVIDUALS | ORGANIZATIONS | PROFESSIONAL ASSOCIATIONS | SOCIAL NETWORKS | OTHER |
|---|---|---|---|---|
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Next, write down the resources each of your connections represents. Resources include money, the ability to share your campaign, potential campaign collaborators, access to other significant networks, etc. Some connections may represent multiple resources.

EXAMPLE:

| CONNECTION | RESOURCE |
|---|---|
| Jane Smith | Likely to give $100, likely to share campaign with her personal network |

# Launching Your Fundraising Campaign

## Soft Launch: Start pre-campaigning and seed your campaign with donations

Before your campaign goes live, let your networks know that your campaign is on the horizon. **Encourage your inner circle to contribute as soon as you go live,** so your campaign gains instant traction. Send an email, call and text friends, hold events, and remind attendees when you are launching. Remember, you're not simply asking people to contribute their money. You're inviting them to collaborate with you.

The goal is to build a base of donors and dollars relatively quickly. Other donors will follow as people give to campaigns that look like they'll succeed.

## Hard launch

When your project is live and accepting contributions, get people excited about your campaign, and get commitments from your closest allies to spread the word for you through their networks.

Consider throwing a launch party to engage with your colleagues, friends, and family about your campaign, express your gratitude, have fun, and encourage contributions at the party!

For your best potential contributors or marketing partners, seek one-on-one meetings – on the phone or in person – to describe your project and how they can support you by contributing or circulating your campaign.

# Staying Connected

## Why setting weekly fundraising goals can encourage your community, and how to do it

We all need a little positive reinforcement from time to time. Acknowledging and celebrating important milestones and accomplishments in your campaign encourages your community to keep working toward the goal. While you should definitely update donors and fundraisers on the campaign results when it's over, you can highlight incremental wins along the way to keep spirits high.

To keep your community focused along the way, **consider setting weekly goals**. This makes your appeals more urgent and also gives you a chance to celebrate a new milestone every week. Posting to social media is a quick and easy way to spread the news that you are already halfway to your weekly goal or that a fundraiser just reached the $1,000 mark. When you do so, be sure to tag and thank your most recent contributors! They'll likely be thrilled to be recognized, and they might help to amplify your message to new audiences, too.

Between incremental campaign goals and the successes of individual fundraisers, you will have plenty of opportunity to spread some good news.

## Use personalized email to reach out

Email is the most efficient way to directly reach out to people in your network. In your email:

- Explain the project succinctly.
- Make a personal ask for their contribution.
- Include a link to your campaign.
- Ask your network to spread the word.
- Thank your contacts for their time and support.
- Add your campaign link to your email signature.

*Avoid spamming your email network*. People are far more receptive to a one-on-one personal ask. Although this might take a little longer, it will likely result in more contributions. Personalization can be as simple as including their first name, and a quick introductory line that references a shared interest, recent get-together, or other personal moment.

## Don't underestimate the power of offline contact

Think of ways you can spread the word locally and offline. Local media outlets – print, TV, and radio – are always hungry for good local content, and your campaign is a great story!

## How to follow up with people who don't respond to your initial ask

By setting internal fundraising goals (e.g. $200 by end of week two, $400 by end of week four) you accomplish two things:

1. You create more urgency when you ask friends and family for support.
2. You give yourself a reason to follow up.

TIPS

- Reach back out to non-responders when you're approaching one of your internal goals. If you set a few internal goals, you can plan on sending a couple of follow-up emails. People can easily miss your initial outreach.
- Include progress updates in your follow up messages and consider including inspiring stories or personal anecdotes you have about the cause.
- Remember to continue using social media! Social media is a softer medium for communicating with your contacts and it's more acceptable to frequently post updates on those channels.

## Leveraging social media

Social media is a great way get your preexisting network excited and connect with individuals and organizations who might be interested in your campaign.

Use your accounts on Facebook, Twitter, LinkedIn, Instagram, etc. to create a buzz.

### Best ways to use Facebook and Twitter to fundraise

- Set internal goals (e.g. $200 by the end of week two, $400 by the end of week four). Use your social media accounts to give updates of your progress toward each goal and ask for people to help you get over the next hurdle.
- Don't make every post an "ask". Share inspiring news stories or other positive anecdotes about the cause too! And say "thank you!" publicly to those who have helped to drive your campaign forward.
- Leverage existing accounts. If you do not already have a presence on Facebook or Twitter, or do not plan to use it following your campaign, do not create a new account for the sole purpose of campaigning.
- Save time by scheduling your social media posts across platforms with a product like HootSuite.
- If you are a UCSF faculty or staff member, please visit our Social Media Guidelines for additional guidelines on social media best practices, and UCSF rules and regulations.

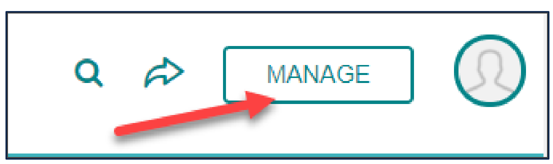
For more on effective social fundraising techniques, see this informative article from Classy.

# Manage Your Campaign

## How to edit your personal fundraising page

Editing your fundraising page is simple. First, visit your fundraising page and log in.

When you are on your fundraising page, click the **Manage** button in the upper right corner.




This puts you in edit mode. From here you can edit your story, image, page headline,


fundraising end date, and goal.

## Asking for donations

You can use the templates under the "Email" section of your fundraising page to draft emails asking your network for donations or thanking your donors. Together at UCSF provides a template for you to draft your email, which you can then copy and paste into your personal email account.

Sending these emails from your personal email account means they're more likely to be opened and read!

1. Log in to your Together at UCSF account.
2. Click the **Manage** button in the upper right corner to go into edit mode.


3. Select **EMAILS**.


4. If you are drafting an email to ask for donations, click the **Ask for donations** template. You can use the default text as a guide, but we encourage you to personalize the text to your campaign. Include why you are fundraising and how donations will make an impact. Don't forget to keep the link to your donation page!
5. Once you've drafted and reviewed your text, copy and paste it into your personal


email, along with an appropriate subject line, and send it from there.

Emails that come from your personal account are much more likely to be received, opened, and read by your personal connections.

## TIPS FOR ASKING YOUR NETWORK FOR DONATIONS

- Make your story honest and personal to inspire prospective donors.

- Create a sense of urgency to encourage your prospective donors to contribute immediately rather than waiting.
- Consider sending personal asks, especially to those in your network who are likely to contribute more.
- Ask your friends and family to forward the non-personalized part of your email to their networks.

For more tips, see this informative article from GoFundMe.

## Thanking your network

Thanking your donors is just as important – if not more! – than asking them for donations. It's a crucial part of strengthening donor relationships and goes a long way towards keeping retention rates high.

One of the top reasons donors stop giving to a cause is because they never got thanked.

Be intentional about how you show donors sincere gratitude. A thoughtfully crafted thank you could be the difference between losing a donor and keeping them around.

### TIPS FOR CREATING EFFECTIVE DONOR THANK YOU MESSAGES

- Add a personal touch. While donors should receive an auto-receipt following their gift, this is your opportunity to communicate a heartfelt thanks to your supporters for their contributions. Express sincere appreciation and convey authenticity by adding a personal touch to your outreach.
- Handwritten letters can go a long way toward establishing a meaningful connection with donors. In a recent survey, nonprofit technology firm Software Advice found that most donors preferred personalized letters to other follow-up methods. To keep your follow-up timely, make sure donors receive your letter within two weeks of making their gift.
- When thanking donors, consider highlighting a short story about a beneficiary or a telling statistic about your cause to assure donors that their contributions will be used effectively.
- If you have a large number of donors, it might not be realistic to follow up every donation with a personal note. In this case, you can still use email to thank supporters in a more individualized fashion.
- Your organization might not be able to send personal notes to every donor, but it's still a good idea to build special follow-up strategies for those who give larger gifts.
- Draft a thoughtful weekly, bi-weekly, or monthly post for Facebook, Instagram, or Twitter – or another favorite social network! – to publicly thank the donors who have made a difference in your campaign.

Try setting different threshold amounts for certain types of outreach. Based on their gift amount, you can segment donors into tiers and follow up accordingly. For example:

- Large gifts ($400+): Donors receive a handwritten letter
- Mid-size gifts ($200–$399): Donors receive a personalized email and shout-out on social media
- Smaller gifts ($1–$199): Donors receive a personalized email and/or a public shoutout on social media

*Source: Classy.org*

If you are thanking your donors, click the **Thank your donors** template in the Emails section of your fundraising page. You will see default text to help as a guide. We highly encourage you to personalize your thank you messages.

### TIPS FOR THANKING YOUR DONORS

- Celebrate what your donors did and what they're helping you accomplish. Highlight the impact of their gift.
- Thank you messages should have a positive, can-do tone, with a message of hope and action. Remember, your email or letter is about your donor's gift and how it helps.
- This is not the time or place to ask for another gift. Stick to your focus: celebrate your donors, the heroes of your story, and the work you've already accomplished.
- Ask yourself the question: Does this make the donor feel anything?

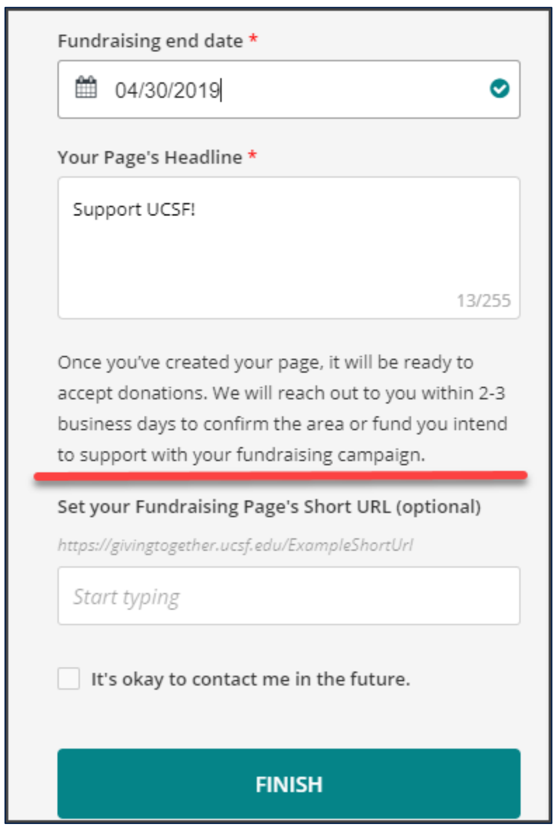
# Frequently Asked Questions

## Can I create more than one fundraising page?

Yes, you can create more than one fundraising page on Together at UCSF. We do not recommend running concurrent fundraising pages. Each fundraiser requires time and attention. However, if you complete one fundraiser and want to start another (either for the same cause or a different cause), you can!

## I want to fundraise for a specific area within UCSF. How do I let you know what I want to fundraise for?

When you create your fundraising page, you see a note letting you know that UCSF's personal fundraising team will reach out to you to confirm the area or fund that you intend to support with your fundraising campaign.

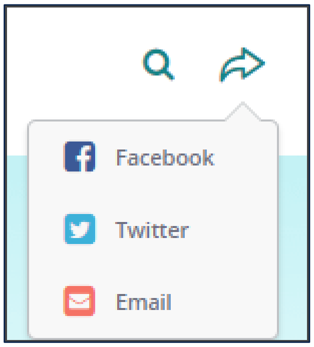



## Can my fundraising page continue accepting donations after its end date?

Yes, your fundraising page can continue to accept donations even after its end date! There is nothing you need to do to enable this.

### Is there an easy way to share my fundraising page through social network accounts like Facebook and Twitter?

Yes! You can do so directly from your fundraising page. Simply log in to your fundraising page, and click on the arrow icon in the upper right-hand corner:




Select the channel through which you would like to share your page and simply follow the steps!

### One of my donors made a monthly donation. How can they change their donation amount or end their recurring donation?

To change their donation amount or end their recurring donation, your recurring donor has two options:

- They can contact Together at UCSF at together@ucsf.edu
- They can log in to the account they created when they made their donation. Once logged in, select the circle in the upper right hand corner with your initials, then select "View Profile" under the UCSF icon. From here, click on "Donations". This will display your list of donations. Select the recurring donation you would like to update or cancel.

### One or more of my donors would like to donate to my campaign via check. How can they do this?

Donors can send their gift to:

UCSF Foundation
PO Box 45339
San Francisco, CA 94145

Please instruct your donors to include the name of your fundraiser in the memo line.

# Questions?

Contact Karolina Zatz at karolina.zatz@ucsf.edu.