



Partners In Health

ENGAGE

Fundraising Lead Manual

2016-2017



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Introduction

Why are we here?

Each year, malnutrition kills more than 3 million children worldwide. And every day, nearly 800 women die in childbirth. Needless, completely preventable deaths like these are driven by poverty and inequality. At Partners In Health, we believe that health is a human right, and we work to deliver high-quality health care to the poorest of the poor.

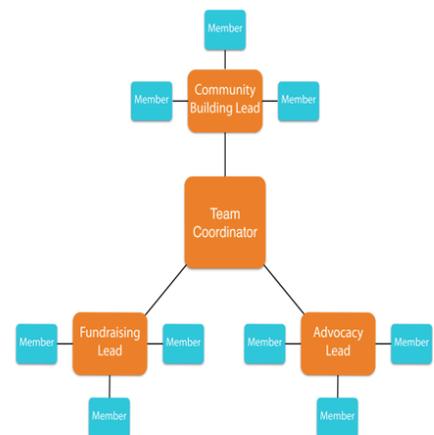
But the right to health—to not die in labor, to not die from starvation—will only be won through the work of a broad social movement of committed individuals. This is why we've built PIH Engage, a grassroots network of volunteer community organizers. Teams all over the country have committed to advocate for global health policy change, to educate the public about global health equity, and to generate unprecedented resources to support Partners In Health's lifesaving work.

How are we structured?

In order to be more effective in achieving our goals, we employ a formalized *shared* leadership structure for PIH Engage teams. A leadership team offers a structured way to work together interdependently, recognizing and leveraging the unique talents of the individuals who make up the team. Team structures also help create strategic capacity—the ability to work creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. Leadership teams have clear missions and goals that all team members work towards through collaboration, creativity, and commitment. Leadership teams are also essential in providing a foundation from which an organization can expand its reach, as no one person can singlehandedly create an organization of massive scale.

Most importantly, your team structure must be *interdependent*. An interdependent leadership structure not only capitalizes on an individual's unique skill set and resources, but creates an environment of both support and accountability. Effective interdependent leadership takes the form of a “snowflake” as shown here:

Each team will have an Advocacy Lead, Community-Building Lead, and Fundraising Lead, in addition to a Team Coordinator who will oversee the other leads and the rest of the team members. Having four designated leaders will allow tasks to be divided easily and equally. Additionally, because each leader has a distinct role, the National Team in Boston will be able to provide specialized training to each of the different lead types through webinars and coaching calls.





Your role as a Fundraising Lead

As Fundraising Lead, you will focus on growing the number of new donors to Partners In Health to fund PIH's work. You will oversee all of your team's fundraising efforts, taking charge when necessary, but also enabling the leadership of other members of your team. Over the course of the year, you will spearhead your team's personal fundraising campaign, and also take charge of larger fundraising events, like Strides in Solidarity. In order to achieve the team's fundraising goals, you should help recruit 3-5 fundraising team members to help plan and execute fundraising events and campaigns. The Fundraising Lead will also attend online training webinars led by the PIH Engage National Team in Boston.

Why do we fundraise?

Grassroots fundraising allows Partners In Health to carry out its life-saving work in 10 countries around the world. Partners In Health is unique because we are able to operate on a fairly large scale while utilizing predominantly personal donations. In fact, 61% of PIH's total revenue in fiscal year 2015 came from individual donors. It is in no way an exaggeration to say we would not be able to continue our work without fundraisers like you. Additionally, fundraising provides an opportunity to engage people in the movement for global health equity. When people donate, they become a part of the cause. They might become regular donors or attend future events, all because they were invited to participate in an event or personal fundraising campaign by a team member.

Resources for Your Success

It is critical to remember that you are not alone in this work! You are part of a large network of advocates around the country fighting for health equity, and we have years of experience that we want to share to help you continue this work.

To access team materials, webinars, slides from Training Institute, and information about past fundraising events, go to engage.pih.org and click on the Resources tab. You can access these resources at any time during the year, and you should direct team members to our website so that they can use these tools as well.

Throughout the year, the National Team will also hold webinars and other training sessions that are critical to our campaign, so please keep up to date on emails and RSVP to those events as necessary. Our data shows that teams in regular contact with the National Team through these means are significantly more successful in achieving their fundraising and advocacy goals throughout the year.

As always, if you have any questions or want to check in, your National Team Coach is always available and wants to work with you! That's what we're here for!

Leading Your Fundraising Team

Setting Goals

It is absolutely critical that, before doing any sort of fundraising, your goals are clear. It is helpful to set an overall fundraising goal for the year, as well as a specific goal for each fundraising campaign your team takes on.

Why set goals?

Goal-setting lays down the foundation for the year, creating shared purpose and commitment that will drive your campaign forward. Without this vision, it's very difficult to plan ahead and craft a truly cohesive campaign where each piece contributes to your broader purpose and goals. A thoughtfully chosen target gives your team something to strive for, and will help group members better understand the scope and scale of what you are trying to accomplish. A good goal will also push team members to remain motivated throughout your campaign. With a specific goal set, members of your team can hold each other accountable for continuing to work and fundraise until you reach (or surpass!) your goal. Additionally, setting a clear goal will push your team to define specific, small steps to reaching that goal, allowing you to be more organized and efficient.

How do we set goals?

Goals should be set in a methodical, mathematically realistic (but ambitious!) way—simply pulling numbers out of the sky is not a reliable strategy for developing a meaningful fundraising goal. Instead, it is helpful to break down how specific, smaller amounts of money will be raised and by whom. On the following page, you will find examples of worksheets used to set clear fundraising goals for two large campaigns: a Strides in Solidarity walkathon and a personal fundraising campaign. Notice the specificity of the goal-setting process; a number is not simply decided upon at random. Instead, the goal is broken into several small parts, which all add up to a coherent, realistic, ambitious final goal.

When should we set goals?

You should get together with team members at a retreat to set your own goals for each piece of your year-long fundraising campaign, which can then be added together to create a year-long fundraising goal. This target amount should push you and your team members to be diligent in your fundraising efforts throughout the year.

Event name: Strides in Solidarity Walkathon

	Goals	Totals
Participant Registration	(<u>100</u> # of participants) X (\$ <u>15</u> registration fee) =	\$ <u>1,500</u> Total from Participant Registration
Participant Personal Fundraising (if relevant)	(<u>20</u> # of participants who fundraise) X (\$ <u>50</u> amt each fundraises) =	\$ <u>1,000</u> Total from Participant Fundraising
Business Donations (if relevant)	(<u>2</u> # of businesses that donate) X (\$ <u>100</u> + \$ <u>400</u> each donates) =	\$ <u>1,000</u> Total from Business Donations
Total		\$ <u>3,000</u> Total Money Raised

Event Name: Personal Fundraising Campaign

	Goals
Number of Participants	(<u>10</u> # of participants) X
Number of Contacts	(<u>20</u> # of contacts) X
Amount Requested	(\$ <u>25</u> amt each donates) =
Total	\$ <u>5,000</u>

Then, combine the goals for each campaign into one overall goal.

Event Name/Type	Fundraising Goal
Strides in Solidarity	\$3,000
Personal Fundraising	\$5,000
TOTAL	\$ <u>8,000</u>

Setting Expectations and Responsibilities

As a Fundraising Lead, it is your job to lead and manage a fundraising team, not to do all the work for every fundraising campaign. This distinction is important. Your ability to enable others to take responsibility for key elements of the campaign is crucial to your team's success. If you try to do everything yourself, you will not only get frustrated and exhausted, but your team will suffer from the lack of teamwork, as you will certainly have to prioritize certain important tasks at the expense of other, equally important tasks. Therefore, sharing responsibilities is not just fair, and better for your mental health, but critical to the overall success of your campaigns.

Create a Concrete Work Plan

As a Lead, managing your team and trusting members with important tasks can be stressful. The best way to avoid this stress and ensure tasks are accomplished on-time is to establish a concrete, specific work plan. It is okay to start with a few general ideas. You should create a work plan for the whole year first, outlining what you will focus on in each month, season, or semester. Creating this breakdown is simple, and will keep you on track with your year of campaigns. Additionally, you should establish general work plans for each campaign far in advance. For example, if you are hosting a large event, you might decide that you need to secure a venue by 12 weeks before the event, begin finding corporate sponsors within 10 weeks of the event, etc. You should also designate a point person to take charge of each event or campaign.

Focus on the Details

Eventually it becomes necessary to “zoom in,” setting deadlines for smaller, more specific tasks. Once it gets closer to the event, help the point person assign team members to oversee smaller duties. Doing so creates a sense of responsibility for each person involved, making team members more likely to actually complete the work they say they will complete. Take into account team members' skills, abilities, and interests when figuring out who should do what, and make sure everyone feels comfortable with the tasks and workload assigned to them.

Set Deadlines

Setting a date by which something needs to be done may seem overly controlling, but doing so will push your team to avoid procrastinating and lower the chances of a team member dropping the ball. For example, if a team member has volunteered to get plastic cups for your Strides walkathon, don't just tell them to do so. Give them a specific date by which they need to purchase the cups, and check in with them. Be sure to continually revisit and expand upon your workplan at every meeting in the lead-up to your fundraising campaign or event.

Involve Your Entire Team

When tasks need to be completed, the members of your smaller fundraising team should end up doing a great deal of the work, but not all of it; your entire Engage team should be involved in each fundraiser. Your fundraising team should plan all the logistics for your events and campaigns, but use the full power of your PIH Engage team to maximize your fundraising. Make sure every member attends every event, and brings 5 friends. Work with the entire team to help with recruitment for your events. And, make sure every member sets up a personal fundraising page and participates in individual fundraising. After all, fundraising campaigns are a huge part of your team's overall mission.

Keeping your team engaged: Ladders of Engagement

Recruiting members and establishing relationships are just the first steps in building up a strong team. It is essential that these relationships continue to grow, enabling individuals to grow as leaders. A ladder of engagement offers a visual representation for this approach, with each rung representing a more progressive action leading to a higher level of engagement. The ladder of engagement is not just a recruiting tool. You and your leadership team should be using this concept for each campaign that takes place throughout the year. It will allow you to see who is expressing interest and showing initiative with respect to the work of the three team leads (Fundraising, Advocacy, and Community Building) and thus incorporate them into the work of those campaigns. And, it will allow you to provide a wide range of ways people can get involved with your PIH Engage team – they can choose which actions matches their level of commitment at that moment in time.



How to use the PIH Engage Ladder of Engagement

The ladder of engagement offers you a powerful technique in building a strong team. It allows you to identify individuals who are taking initiative and that are willing to commit to a greater level of responsibility. By tracking members through the ladder of engagement you can make tailored “asks,” helping that individual to grow as a leader as well as build the overall team capacity. Below is an example of the ladder of engagement in practice:

- Level 0: individual signs up on the PIH Engage website
- Level 1: individual attends a one-on-one with leadership team member
- Level 2: individual attends team events/fundraisers/etc.
- Level 3: individual is an active member of the team, contributing to planning, and executing team events/fundraisers/etc.
- Level 4: individual is a leadership prospect

How Do We Fundraise?

As a PIH Engage team, you won't just throw one big event and call it quits: your fundraising campaign will last the whole year. A typical year-long campaign involves planning (and potentially a small event) in the fall, a personal fundraising campaign in the winter, and a larger event in the spring. It is important to keep this campaign arc in mind as you plan for the year ahead. The rest of this manual will elaborate on the two major types of fundraising you will execute: event fundraising and personal fundraising.

Personal Fundraising

What is Personal Fundraising?

You have likely seen (or donated to) a personal fundraising campaign in the past. A personal fundraising campaign involves a group of people (in this case, your entire PIH Engage team) setting up online fundraising webpages and asking friends and family members to make donations. Each team member will have their own online fundraising page, and, accordingly, will target their own network of connections when asking for donations.

Why Personal Fundraising?

The main goal of any fundraising campaign is to of course raise money for a worthy cause. However, fundraising also offers a unique opportunity to engage outsiders in meaningful work for the first time. Done right, Personal fundraising accomplishes both of these goals. Ideally, everyone on your team will participate and feel invested in the campaign, creating a sense of shared responsibility. This will lead to hundreds of people hearing about PIH's mission and values for the first time, and lots of new resources will be gathered to bolster the right to health movement.

When you execute a personal fundraising campaign, most of your donations will come from friends and family, and, accordingly, you will have to ask each of these people to donate. Doing so offers a opportunity for important conversations; if friends and family are going to donate, they will need to know why you are so passionate about PIH's work. Hopefully, your passion for PIH's work will not only convince these loved ones to donate to PIH once, but foster a feeling of connection to PIH's work that lasts a long time and leads to further donations or deeper engagement.

Story of Self and Public Narrative

In your conversations with potential donors, you will need to utilize public narrative. At PIH Engage, we feel it is critical for each team to develop their own public narrative. A public narrative is built off of three different “stories”: a Story of Self, a Story of Us, and a Story of Now.

- A “Story of Self” communicates the values that called you to lead in this way, in this place, at this time
- A “Story of Us” communicates shared values that anchor your community, values that may be at risk, and may also be sources of hope
- A “Story of Now” communicates an urgent challenge you are calling on your community to join you in acting on now

Together, these three stories form a coherent public narrative. Before starting a personal fundraising campaign, it is important to nail down your story of self and your team’s public narrative so that you can share them readily with potential donors, allowing them to understand why you, and your team, are invested in PIH’s work. A detailed worksheet, which will guide you through the process of forming a public narrative, can be found on the Resources page of our website (engage.pih.org).

Holding a Successful Campaign: Top Ten Tips for Achieving Personal Fundraising Glory

1. **Your campaign starts now:** You are running a personal fundraising campaign, not just a personal fundraising page. A successful fundraiser begins planning their campaign’s timing and strategy long before a link to a fundraising page appears on Facebook.
2. **Set an ambitious goal:** Setting an ambitious goal will push you to work harder during your campaign. If you hit your goal, raise it higher to keep donors involved.
3. **Write letters:** Writing a well thought-out fundraising letter and sending it via snail mail to family and friends shows your deep level of commitment to your cause, and shows that you care about each individual you are contacting for a donation. Your extra effort will often be rewarded with significant donations to your campaign.
4. **Ask in person (if you can):** Meaningful connections can be formed through quick conversations, and in-person asks often lead to long-term commitments. Make sure to give good context when asking—don’t just pester people for money—discuss why PIH’s work is meaningful first. Then, invite them to join you, and PIH, through a donation to your fundraising page.
5. **Use social media for reminders, but don’t expect it to fundraise for you:** There is a big difference between 500 people seeing a link you post, and 500 people receiving a personalized letter, email, or text from you. More personal is always better, and a link appearing in a sea of other links is about as impersonal as it gets.

6. **Exhaust all of your networks:** By inviting your network to donate, you are inviting them to be part of a movement. Everyone wants to participate in meaningful projects—lots of people are just waiting for the invitation.
7. **They aren't just donating to PIH, they are donating to you:** Be sure to stress why PIH's work is meaningful to you. Don't just talk about maternal mortality in Rwanda; talk about how fighting maternal mortality in Rwanda has influenced you, the members of your PIH Engage team, and your community.
8. **Connect to a larger movement:** You likely aren't running a marathon or hiking Everest with other team members as part of your personal fundraising campaign. However, you still have a team with an overarching goal: a successful winter fundraising campaign. Be sure to share your team's overall goals with potential donors. Additionally, your team is a part of an even bigger network: PIH! Discuss the magnitude of and importance of PIH's work with potential donors to ensure that they feel they are a part of PIH's success by donating. Make your campaign creative, personal, and fun!
9. **Follow up:** Don't just ask once! Plan strategic pushes at different points in your campaign. Start with letters and in-person asks, then follow up with polite reminder emails. Don't update your network daily, but be sure to share how the campaign is going. People are forgetful, and often a little reminder goes a long way!
10. **Write Thank-You notes:** The best practice is to thank donors twice—once with a brief note, text, or email immediately after their gift is made and again after your campaign is complete. Donors will want to know about the impact your campaign has made, and be sure to keep them updated about other opportunities to donate or take action in the future!

Event Fundraising

Why host an event?

Fundraising events present several opportunities to support PIH's work. First, events bring in donations that would not have existed otherwise. In addition to the simple benefit of raising money, though, there are several other positives to hosting an event. First, it gets your whole team involved. Events are a challenge to plan, and every member of your team will need to be involved to pull it off, which builds your team's camaraderie and sense of shared purpose. Additionally, every event requires attendees, and many of these attendees may be completely unfamiliar with Partners In Health and PIH Engage. Hosting an event provides a great opportunity to loop new people into the PIH network. Attendees should learn about PIH's mission and model at your event, and many may get more involved in the future, joining your PIH Engage Team, starting their own, or volunteering at future events. Additionally, some of your attendees will end up giving to PIH regularly in the future. Because of these indirect benefits, the impact of events goes far beyond the amount of money raised.

What kind of event should I have?

Different events work for different teams. Many PIH Engage teams have found success by throwing a Strides in Solidarity walkathon. Meanwhile, others have been successful with everything from happy hours to benefit concerts. There are plenty of great small and large-scale options that a team of any size can pull off. Feel free to get creative, but make sure whatever event you choose is appealing to the community you are in, and has money-raising potential.

Best Practices for Fundraising Events

Secure the Venue: Spaces available to the public for rental tend to get booked up months in advance, especially for weekends. Find and reserve a venue before doing anything else.

Stick to a Budget: Don't lose focus and spend a ton of money trying to make your event the most popular or the coolest ever. It is important to have a fun and unique event, but remember to keep your eye on the final goal. Avoid any and all unnecessary costs. Try to get as much of your supplies or event costs donated as possible. For example, if your event participants will be exercising and need water, don't go out and buy water coolers. Talk to a coach or an athletic trainer about letting you borrow theirs for the day, or get a local grocery store to donate bottles. Little things add up!

Secure Sponsorships: Obtaining local business sponsors is a great way to offset your costs and make more money on event day. Visit businesses in your area and ask them to contribute. Focus on businesses that are an important part of the community, or are involved in the activities your event will feature. Additionally, ask for a specific amount of money for a specific benefit in return. For example, if you were hosting a 5K run, you could tell Bob from Bob's Sporting Goods that \$150 will put BSG's logo on the event program, \$500 will place it on the event t-shirt, and \$1,500 will make his store

a “Presenting Sponsor”, allowing the logo to appear larger than all the other sponsors’ on these materials.

Make Sure People Come: Getting people to show up to an event is a long process and requires effort on your part. Be sure to make the event seem engaging and encourage enthusiastic future attendees to invite friends. Invites can certainly be sent through email or other digital means, but remembering to ask people to come in person is just as important. Keep track of who is coming to your event and utilize the PIH Engage website to gather RSVPs (visit engage.pih.org to post your event to the public) Follow up with those who say they are coming to get them excited for the event and to ensure they actually attend. A common rule of thumb in community organizing is to get commitments from potential attendees on three separate occasions. This greatly increases the chances of them actually attending.

Organize Volunteers: Volunteers are critical to the success of many events. If you are going to have volunteers at yours, you must put some effort into organizing and training them. Make sure you assign volunteers specific roles ahead of time, and don’t be afraid to turn aspiring volunteers away if you already have enough—encourage them to participate in the event instead. Eager participants are more helpful than volunteers with nothing to do!

Relax and Host an Awesome Event: Even with excellent planning, there will be issues on event day. Try to relax, and don’t overreact! You, your Team Members, the volunteers, and all the participants are on the same team. Always have a Plan B, and know who you can rely on to help out when something goes wrong at the last minute. Additionally, make sure your mission is front and center throughout the event. Provide several opportunities to donate and have an engaging speaker make a direct “ask” for donations near the end. Follow up with your attendees in the following days, letting them know how much was raised and how they can get more involved in the future.

Utilize Donor Thank You Forms: Be sure to have donor thank you forms on hand at all events, so that you can capture donors’ information, allowing for follow-up. If you don’t capture their contact information, we will be unable to thank them or ask them to get more involved. As soon as a gift is made, have the donor fill out a form. An example form is provided on the following page and more can be printed from the resources page of our website (engage.pih.org).

Report Back Right Away: We want to know how your event went! You or your Team Coordinator should report back to your coach as soon as possible. Hearing from you allows us to learn from your experiences. If something worked, we want to know so that other teams can replicate it, and if problems arose, we’d like to figure out how to avoid them in the future. You should also fill out and mail a Donor Reporting Form as soon as possible. An example form is provided at the end of this document, and, like the Donor Thank You Form, you can print more from the Resources page of our website (engage.pih.org).



Donor Thank You Form

First Name

Last Name

Address

City

State

Zip Code

Email

() _____
Phone Number

\$ _____
Amount Donated

Building the **Right to Health** Movement
Join us: engage@pih.org



Donor Thank You Form

First Name

Last Name

Address

City

State

Zip Code

Email

() _____
Phone Number

\$ _____
Amount Donated



Donation Reporting Form

Please include this form with all cash/check donations that you send to PIH.
Please also bring cash to the bank and convert it into a cashier's check before sending it to PIH.

For proper acknowledgement, please provide us with names, addresses and amount for all donors that give cash. Use one *Donor Thank You Form* for each cash donor.

**Mail all donations to:
Partners In Health
c/o Ortal Ullman
800 Boylston St, Suite 1400
Boston, MA 02199**

Date:

Your Name:

Your Team:

What was your event?

If you would like these funds to be added to the total for your online donation page, please specify the URL of the page to which it should be added:

https://donate.pih.org/page/outreach/view/_____

What is the title of the above page? (E.g. "Sheena's Fundraising Page")

What is the name and email associated with the above page? (Who created it?)

Name:

Email:

Total amount included in this form (do not include online donations for this event): \$_____