



POWER IN COMMUNITY

Building Movements Through Peer-to-Peer Giving

WEBINAR



Housekeeping

Questions → Drop them in the **Q&A box** at any time.

Chat → Watch for **helpful links**, **quick polls** and **casual conversation**.

Reactions → Show us how you feel. We love seeing your engagement!

Polls → We'll launch a few during the session — jump in when they appear.

Replay → You'll get the **recording** after the webinar.

Community → Please help us keep this a safe, respectful space for everyone by engaging with kindness and care.

Give Lively introduction



Free for nonprofits

Give Lively does not charge nonprofits for use of our platform.



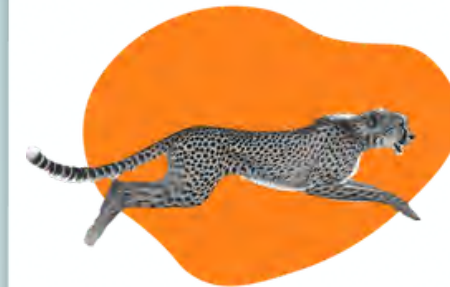
Values-driven

Our platform supports nonprofits that make the world a better place.



Secure & transparent

We feel strongly about privacy, security and transparency. At every level of what we do.



Speedy & frictionless

We offer streamlined payment forms and quick, seamless donation disbursement.

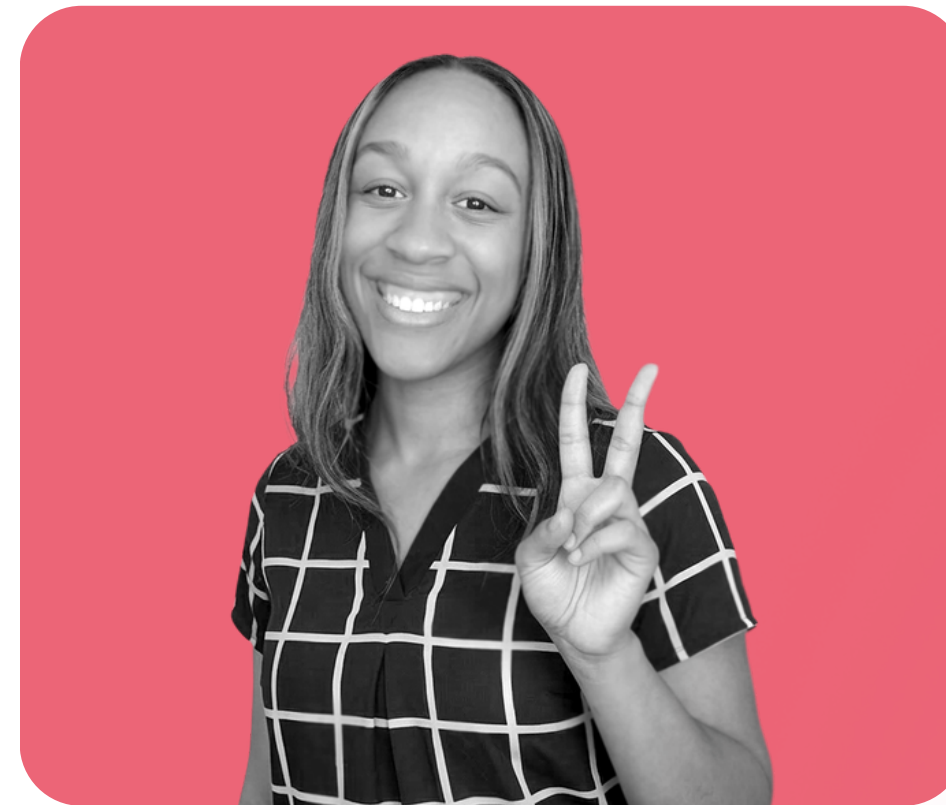


Introductions



Amy Truong

Member Success
and Growth Lead



Jada Moore

Senior Solutions Architect

What We'll Cover Today

Phase : Set the foundation

Phase : Recruit and onboard fundraisers

Phase : Keep the momentum going

Phase : The final push

Phase : Stewardship

Plus your **P2P Fundraising Toolkit**



PHASE 1



Set The Foundation



What you need to do
before a single
fundraiser signs up.

Define Your Campaign/Message & Goal

Give your donors a story to connect with

“We need to raise money”

This campaign story falls flat for donors. It's vague uninspiring and doesn't give your supporters a reason to fundraise.



Define Your Campaign/Message & Goal

A strong campaign story is SMART

- **Specific:** Who you're helping and what will happen, so donors can imagine it.
- **Measurable:** A dollar goal or # of people served; unit of impact.
- **Achievable:** A realistic goal considering your nonprofit's capacity and supporters' network.
- **Relevant:** How does it connect to the mission and timing? A specific program? A need? anniversary?
- **Time-bound:** A deadline creates urgency.



Campaign Message Examples

with some of our amazing Give Lively members

NICST (National Institute of Canine Service and Training):

“We're raising \$50K to train and place 5 service dogs with people living with diabetes so their dog will notify them before a dangerous blood sugar drop ever becomes an emergency.”

Unite to Light: “We're raising \$5K to put 500 solar lights into the hands of students, midwives and disaster survivors — because no child should stop learning when the sun goes down and no mother should deliver a baby in the dark.”

Texas Archive: “We're raising \$10K to digitize 200 deteriorating film reels before they're lost forever so the stories of Texas communities, families, and history are remembered.”



Campaign Message Formula

Keep your message honest, clear, & compelling

We're raising _____ to _____ so that/because _____.

The formula every time is:

dollar amount + number of people + the "so that" or "because" statement that names the benefit/transformation

The "so that" is where the emotion lives.

That's what donors remember, what fundraisers retell, and what makes someone stop scrolling and give.



Anatomy of a P2P Model

One goal. Multiple lanes of giving.

Individual Fundraisers: Personal pages, personal asks, with a personal "why." Example: *"I'm walking for my grandmother."*

Teams: Families, friend groups, departments, all fundraising together. Example: *"Grandma Betty's Warriors — 10 cousins, one goal."*

Company & Community Partners: Businesses, studios, orgs fundraising as a group or corporate team. Example: *"The 5 AM Orange Theory Fitness class vs. the 3 PM class."*

Community Activations: Give-back days, charity classes and pop-ups that drive dollars and awareness without individual pages. Example: *"Local coffee shop donates 10% of Saturday sales."*

Sponsors: Can fund campaign costs so more dollars go to the mission, and gain visibility through branding, recognition and alignment with your cause.

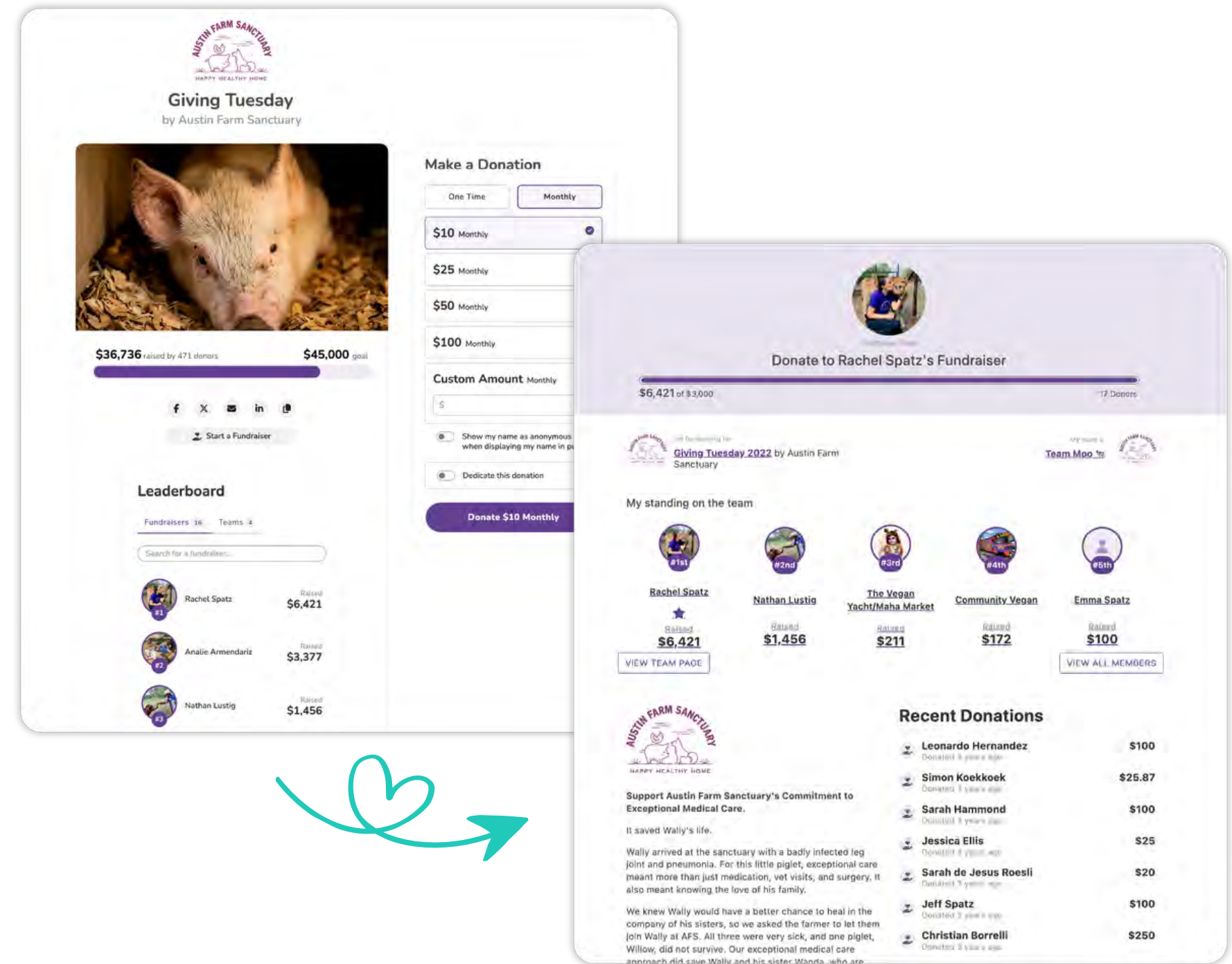
You don't need to activate every lane. Start where your capacity is and layer in additional lanes as you grow.



Set Up Campaign Infrastructure

Step by step and repeatable framework

1. Build your Campaign Page
2. Enable P2P and/or Teams option
3. Enable the Leaderboard
4. Create your own P2P page and test the donor experience
5. Begin building out a P2P Fundraising Toolkit





Recruit & Onboard Your Fundraising Participants



Who you recruit
matters more than
how many you recruit.

Decide Who You're Recruiting

Activate your network & community

Board Members

Built-in accountability & network reach

Donors (past or current)

Proven commitment to your cause

Volunteers

Already invested in your mission

Company & Community Partners

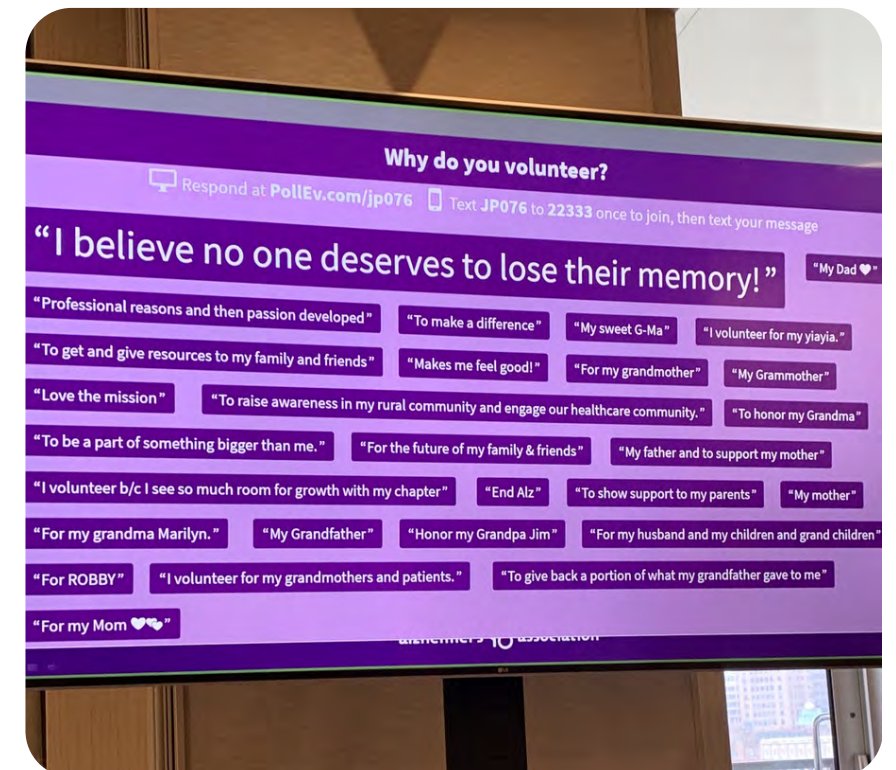
Established networks and built-in visibility

Constituents

Have a powerful “why” story to share

Ambassadors/Champions

Engaged + community connected



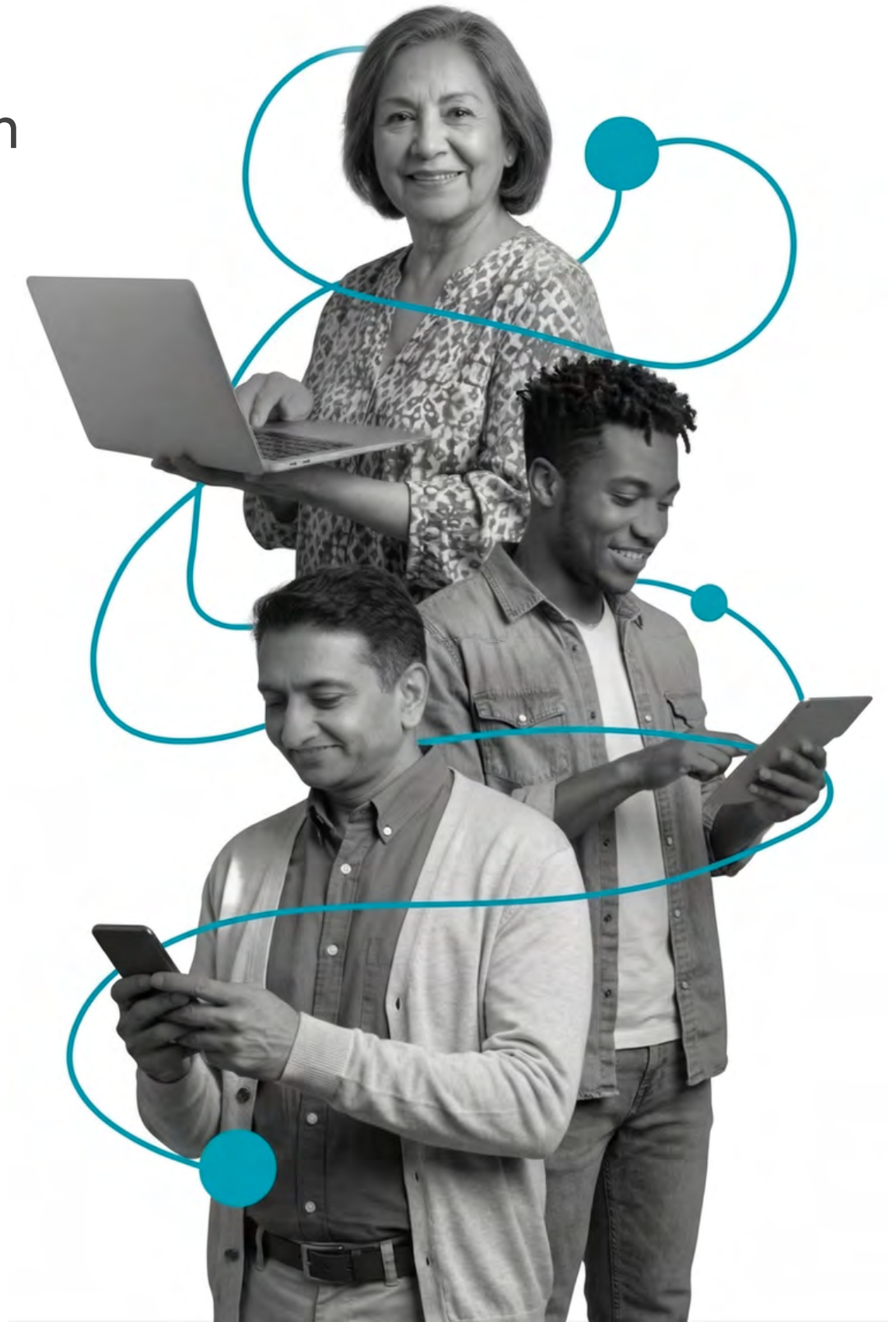
Make The Ask Personal

A human touch goes a long way

1. **Mass Email:** generic, easy to ignore, and no personal connection
2. **Personal Invitations:** specific and make them feel valued

Key Principles:

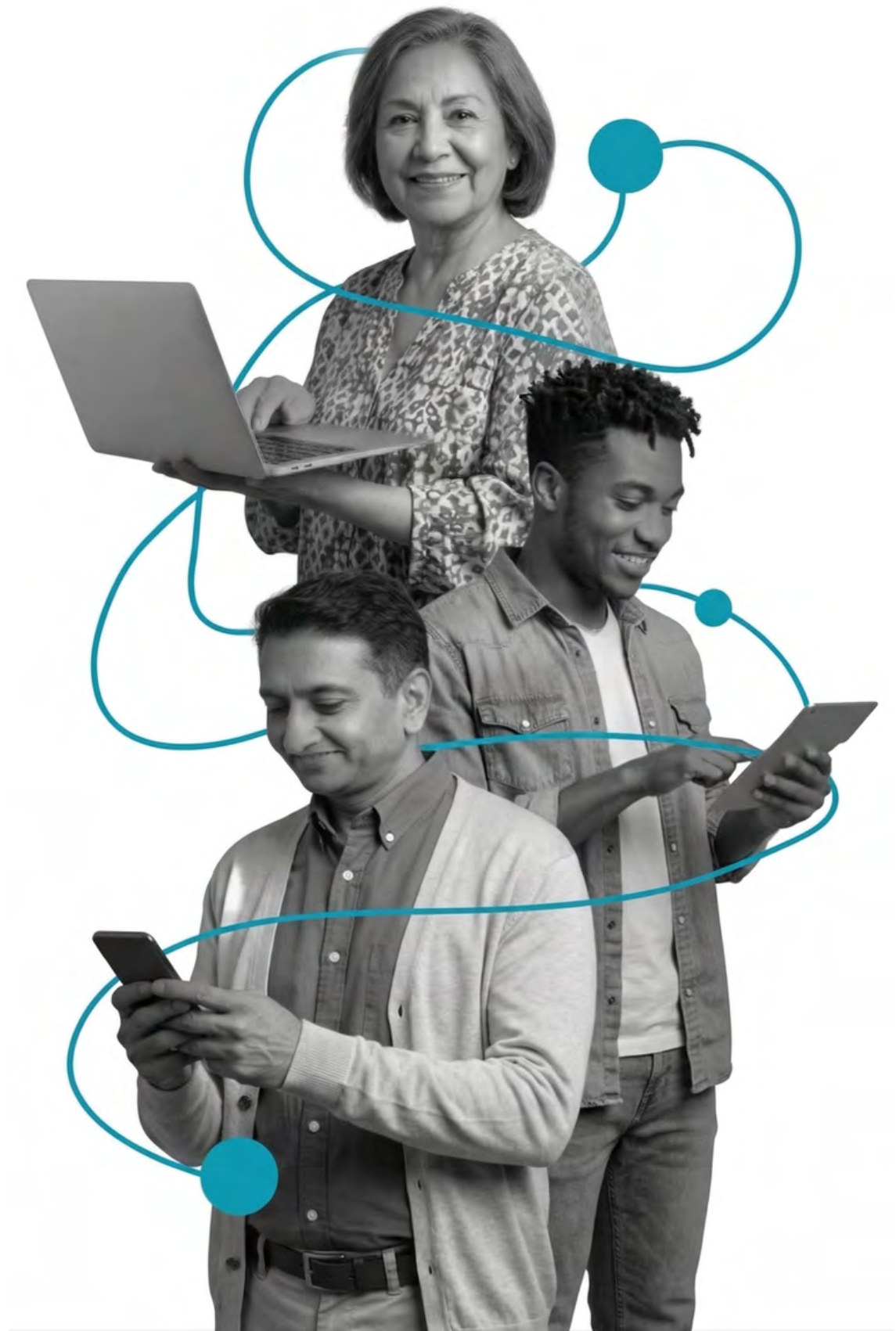
- In-person, phone call, or personal email
- Tell them specifically why you're asking them
- Name what makes them uniquely right for this
- Start with the strongest circle



Build Your Fundraising Toolkit

Give your fundraisers everything they need, so they have guidance.

1. **Mission one-pager** — your "why" in a snapshot
2. **Email and text templates** — ready to personalize and send
3. **Social media assets** — graphics, captions, hashtags
4. **Fundraising tips** — what top fundraisers always do
5. **Campaign timeline** — when to do what
6. **FAQ for fundraisers** — answers before they have to ask



Host Your Kick Off

Rally your fundraisers around the mission

- In-person (party!) or Virtual
- Campaign Goal & Story
- Set up Give Lively P2P page
- Ask if they plan on an activity
- Set timeline expectations
- Lead with their own gift
- Get them EXCITED

**SHARE
YOUR WHY**

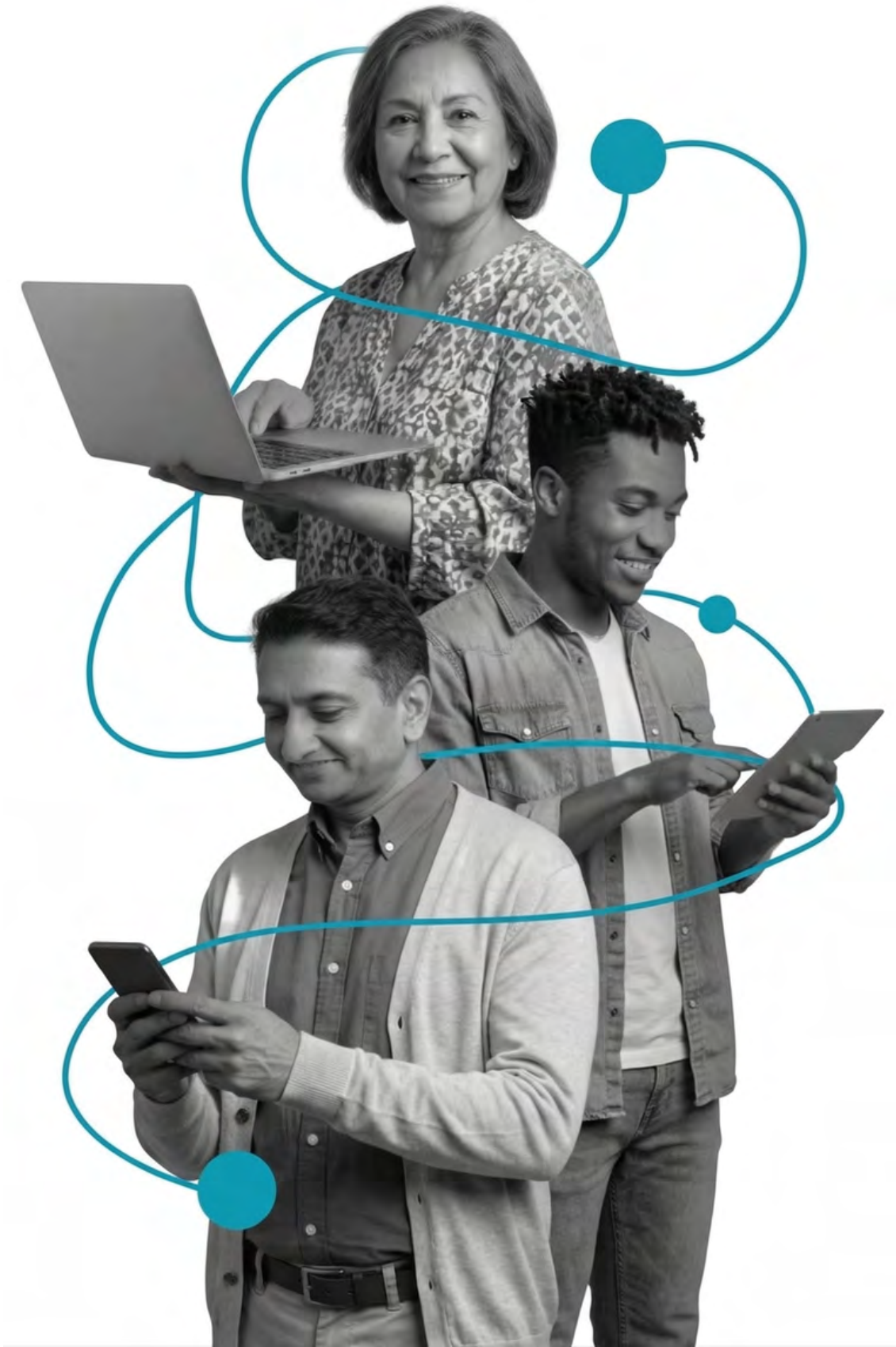


Fuel Your Fundraisers

Your fundraisers said yes. Now give them ideas to keep going along with social media.

- **Challenge Campaigns** — ride 100 miles, read 50 books, run 50 miles
- **Birthday Fundraisers** — "In lieu of gifts, donate to my page"
- **Gatherings & Dinner Parties** — gather friends, tell the story, share the link
- **Bake Sales & Pop-Up Sales** — low-barrier, community-facing, great for families
- **Social Media Takeovers** — go live, share daily updates, post countdown content
- **Employer Match Drives** — remind donors to check if their company matches gifts

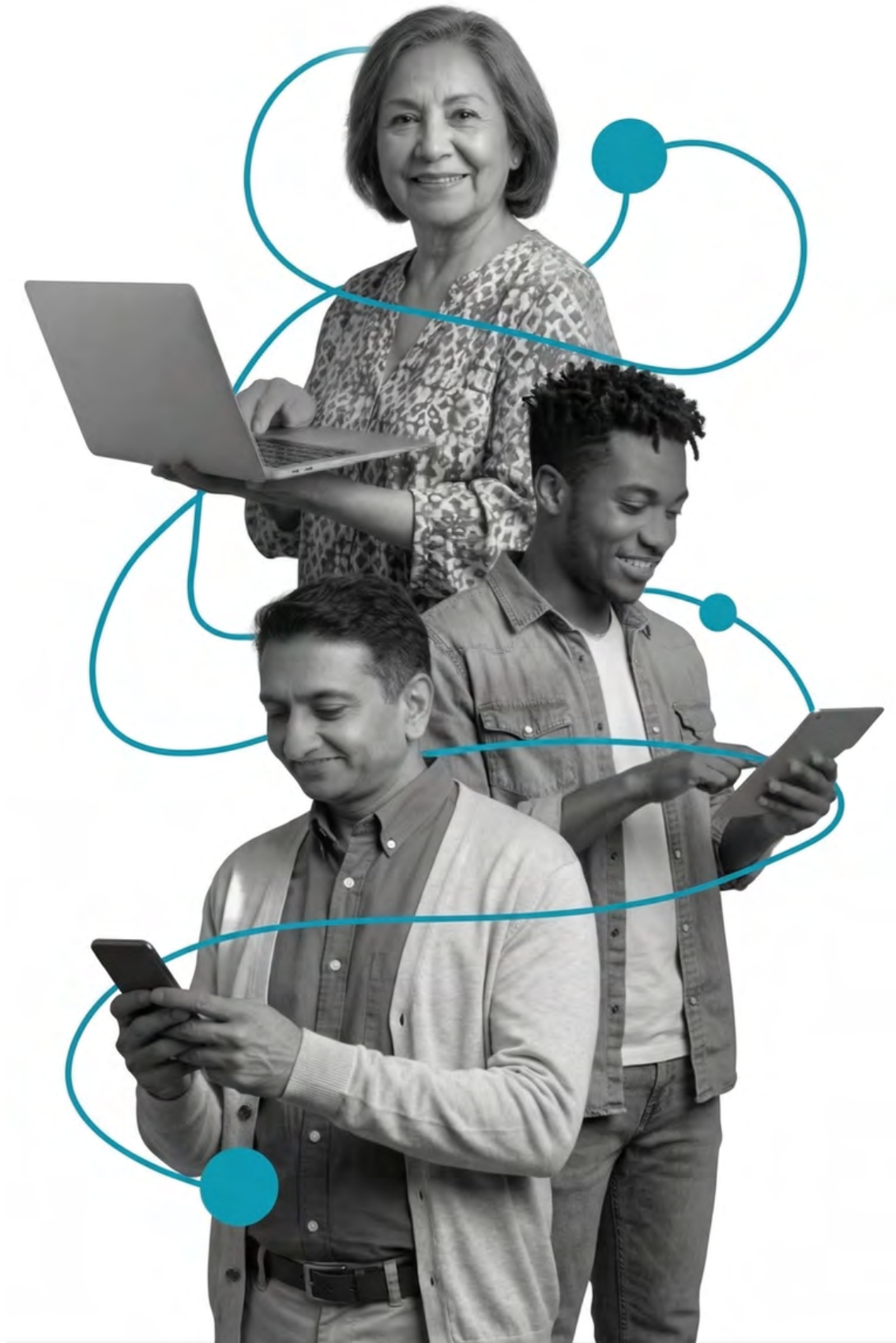
*The more ways your fundraisers can ask, the more times they'll ask.
Give them ideas so they can keep going and keep it fun.*



Get Your Board On Board

A successful P2P campaign starts at the leadership level.

- Set a board goal of 100% participating (not dollar amount)
- Reframe the ask - they're sharing, not selling
- Lead from the top
- Set up their P2P page or host a working session/meeting
- Pro tip: Email plus trick
 - Email: givelively@gmail.com → givelively+tom@gmail.com
 - givelively+pam@gmail.com
- Have them make the first donation





Keep the Momentum Going



Most P2P campaigns lose steam in the middle. Here's how yours won't.

Mid-Campaign Playbook

Weekly Check-In

Insider updates via email and/or text and the occasional phone call. Top fundraiser shoutouts, give fresh content to share, or one clear action step

Leaderboard Love

Celebrate different wins and creative ways to shoutout fundraisers

Milestone Moments

Share milestone moments with fundraisers and the public.

Follow Up Tools

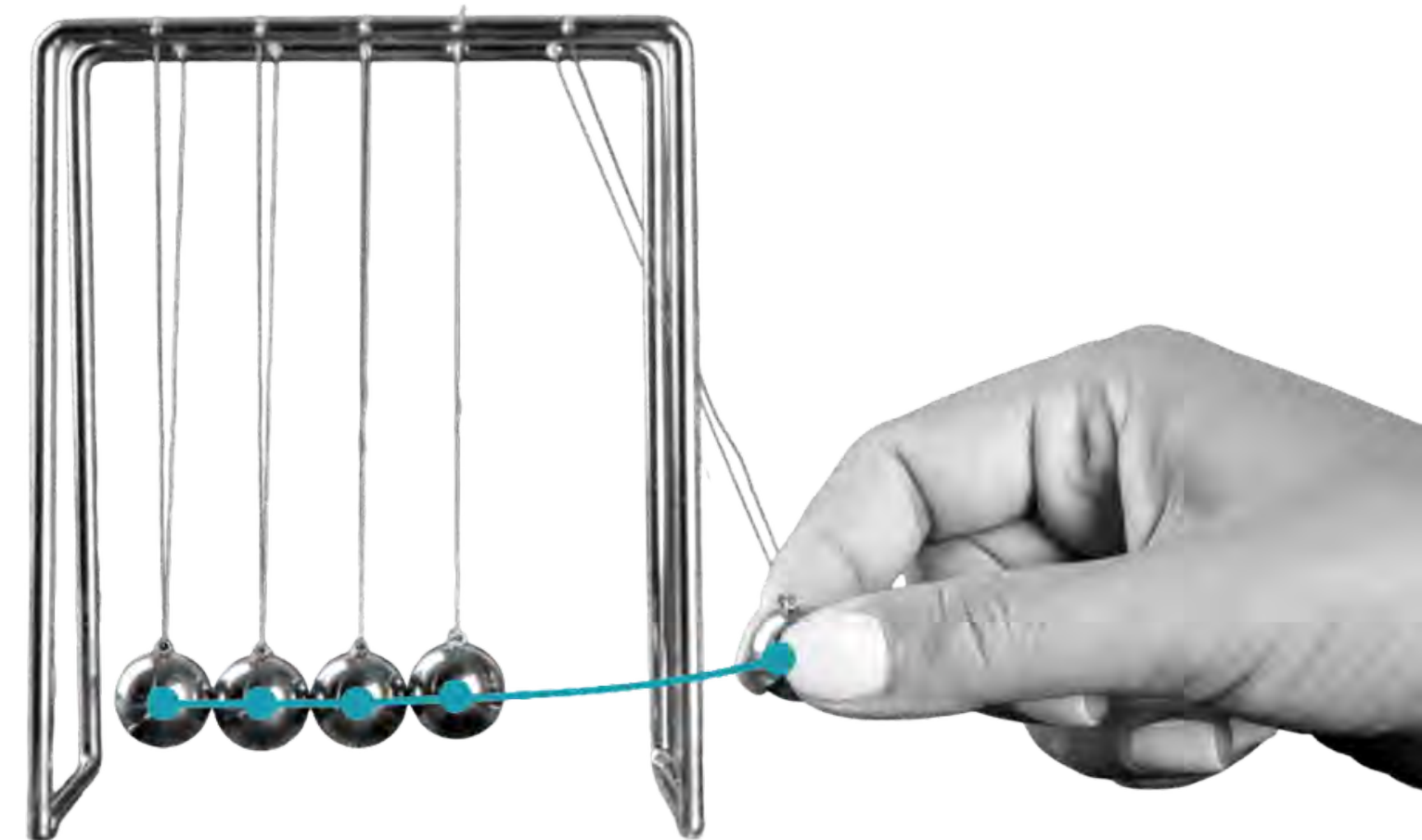
Give them mid-point and final countdown instructions and templates



When Fundraisers Are Quiet

Here are some things you can do to keep the conversation going

- **Offer any support or help** like a coaching call, to get started
- Warm, no guilt – **acknowledge they're busy**
- Low-barrier action - **give them something small to do**
- **Reinforce they matter, provide encouragement,** and you're excited to have them participate



PHASE 4



The Final Push



Now is the time to build
on your momentum.

Closing Strategy

For Your Fundraisers & Donors

- Provide a “final push” email and/or social media template: short, urgent, and a reminder of their “why”
- Encourage direct texts and DMs or phone calls
- Frame it as: “We’re so close!” or “Help me cross the finish line!”
- Remind them: most donations come in the last 48 hours!

For Your Organization

- Board, staff, and other champions can share and amplify fundraiser pages
- Cross-promote on all your social channels
- Tag fundraisers and thank them on social media by name
- Get it as visible as possible!



PHASE 5



Stewardship



Stay engaged with
your donors.

The 3 levels of peer-to-peer stewardship

You Steward the Fundraisers

- Thank every fundraiser personally within 24-48 hours
- Share final campaign results + impact
- Personal note from ED or Development Director/Lead (no mass emails)
- Stewardship Event (if possible) - keep it a low lift

Fundraisers Steward Their Donors

- Have a thank-you template to send to all donors & have them add a personal note
- Gratitude should come from them, not the org
- Encourage them to share results and impact

You Steward the New Donors

- Add them to your donor list and note the connection
- Begin a gentle welcome e-mail series or stewardship series to deepen engagement
- NO ask





P2P fundraising is a relationship strategy, not just a revenue strategy



Now is the time to steward
and deepen relationships

Debrief and Look Back

Lessons learned to take with you into the next year

- Which fundraisers were most successful? Why?
- How engaged was the board? What observations or feedback did they have?
- Where in the process did people tend to drop off or disappear?
- Can the timeline or the cadence be improved?
- How were your email metrics and social media metrics?
- What did your followers and subscribers like or engage with the most?
- What do we need to add to the fundraising toolkit to be more helpful next time?
- How was the kick-off? What can we change next time?
- Was there a stewardship event or follow up to all participants and donors?





Q&A

Next Steps

Thank you for joining us! Here's what happens next:

Attend a live or on-demand platform demo

See how Give Lively's free fundraising products can power your campaigns.

Join Give Lively Grow

Receive one-on-one strategy sessions, practical tools and guidance to uplevel your fundraising and meet your goals.

Sign up for our Breakthrough newsletter

Receive timely advice, actionable resources, nonprofit wisdom and fundraising product updates.

Stay connected

Follow us on socials for tips, webinars and nonprofit success stories.





Thank You!