



FUNDRAISING TOOL

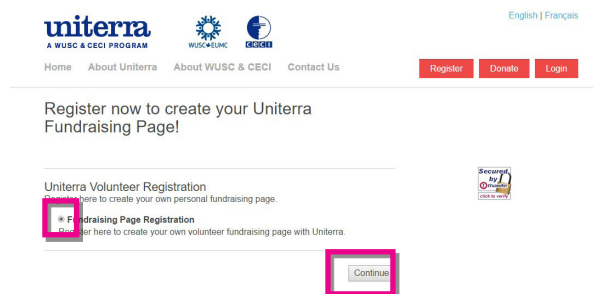
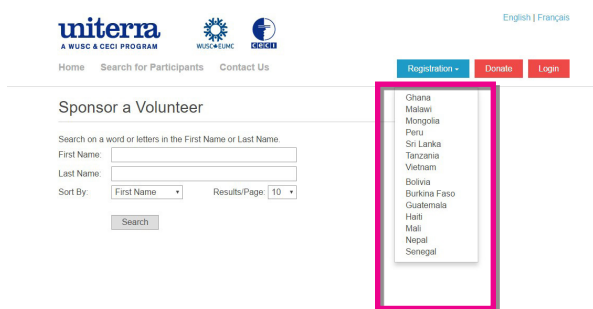
HOW TO SET UP YOUR
FUNDRAISING PAGE WITH RAISIN

Part A: Getting Started

STEP 1

If you are volunteering in one of the following countries (Ghana, Malawi, Mongolia, Peru, Sri Lanka, Tanzania, Vietnam), click on the following link: wusc.akaraisin.com/uniterraen. Then click on REGISTER start creating your own fundraising page.

If you are volunteering in one of the following countries (Bolivia, Burkina Faso, Guatemala, Haiti, Mali, Nepal, Senegal), click on the following link: ceci.akaraisin.com/uniterraen. Then click on REGISTER start creating your own fundraising page.



STEP 2

Click on the “REGISTRATION” drop-down and then select the host country for your placement from the drop down list.

STEP 3

Click on **Fundraising Page Registration** and hit the **CONTINUE** button

STEP 4

Complete the Registration form.

- Note that * indicates a required field.
- Please be sure to indicate an “alternate email address” if you have one, so we can always have a way of getting in touch.
- Please be sure to enter your fundraising goal - \$1500 – that way you will be able to track your progress!

Participant Centre Access Information

Create a username and password to access the Participant Centre.
An e-mail will be sent to you with your login information.

| | | |
|---|--|---|
| Username:* | <input type="text" value="mgodwaldt"/> | (6 - 20 characters) |
| Password:* | <input type="password" value="*****"/> | (6 - 12 characters) |
| Repeat Password:* | <input type="password" value="*****"/> | (6 - 12 characters) |
| <input type="button" value="Previous"/> | | <input type="button" value="Continue"/> |

Create your username and password for the **Participant Centre**. Please be sure to note this down, or email it to yourself so you don't lose it (a copy will also be emailed to you once you have completed the registration process). The **Participant Centre** is the space where you will be able to track progress, send emails to potential sponsors, send thank you letters, connect via social media etc.

Register - Individual

Donation

Donations of \$20.00 CAD or greater will automatically receive an electronic tax receipt

I'd like to make a donation in the amount of (CAD):

(This amount will be applied towards your fundraising goal)

STEP 5

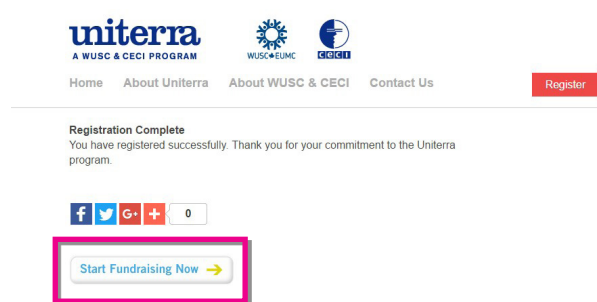
Confirm that your information is correct, and click **CONTINUE**. If it is not correct, you can choose to **EDIT** to revise it.

STEP 6

When your registration is complete, you will see a screen like below indicating that you have successfully registered. You will also receive a confirmation email from the Program Officer (Volunteer Relations & Communications), which will include your username and password for the **Participant Centre**.

CHECK YOUR SPAM FOLDER IF YOU DON'T RECEIVE IT.

Click on **START FUNDRAISING NOW** and you will be taken to the **Participant Centre** to begin to design your page. Or, you can exit and complete the page at a later stage. You will be able to log back in by going to the confirmation email from the Program Officer (Volunteer Relations and Communications) and then clicking on "Participant Login" in the email. Note that you can only login with Facebook once you have set up that feature in the **Participant Centre**.



Congratulations on creating your Fundraising Page – Now let's put it to some good use!!

Part B: The Participant Centre

The Participant Centre is essentially your Fundraising Dashboard. It is the place where you can:

- Design and set up your fundraising page
- Manage your fundraising efforts
- Email contacts to request for sponsors
- Send personal thank you letters
- Enter off-line pledges

The screenshot shows the Uniterria Participant Centre dashboard. At the top, there are logos for Uniterria, WUSC & CECI, and CECI. Below the logos are navigation links: Home, About Uniterria, About WUSC & CECI, Contact Us, and a highlighted Participant Centre button. A row of icons represents various features: Personal Page, Address Book, E-Mail Centre, Get Social, Follow-Ups, Donation History, Enter Offline Pledges, and Online Help. Below this, a greeting reads 'Hello Melissa Godwaldt' with links to 'Edit Profile / Personalized URL' and 'Logout'. The main content area is titled 'Welcome to the Participant Centre' and includes a sub-header 'Launch Your Fundraising Campaign' with a list of steps: 1. Customize your Personal Page, 2. Import your contact list into your Address Book, 3. E-mail family and friends to solicit donations using the E-mail Centre, and 4. Embed your Fundraising Badge into your blog or external sites by copying the link for Fundraising Badge. Another section titled 'Manage Your Fundraising and Enter Offline Pledges' lists: 1. Monitor individual responses, send e-mails and thank donors using Follow Ups, 2. Track donations using Donation History, and 3. Enter and pay for Enter Offline Pledges. A final section 'Need Help?' suggests using Online Help or Contextual Help.

Best Practice

The more personal your page is, the more likely people are to support you. Include personal anecdotes, photos and details about your mandate. Note that you can even change or update these along the way!

Before going any further, be sure to record your fundraising page URL, so you can share it outside of Raisin. At the top of the **Participant Centre** page, click on **Edit Profile/Personalized URL**. Scroll to the

bottom of your profile and it will give you the option to copy or even personalize your URL to reflect your own name for example. You can even shorten your URL by using bit.ly to make it more convenient for sharing.

This screenshot shows the 'Manage Contacts in Your Address Book' section of the Uniterria Participant Centre. It includes a heading 'Manage Contacts in Your Address Book' with a 'Help' link. Below is a sub-header 'Create a mailing list to ask for support. Responses will be tracked in Follow-ups. Your address book is private and only accessible by you.' At the bottom, there are three buttons: 'Quickly Add Contacts', 'Manually Add Contacts', and 'Manually Import Contacts'.

STEP 1

Design your fundraising page! Click on the **PERSONAL PAGE icon** to start to design your fundraising page. You will immediately notice some editable fields including:

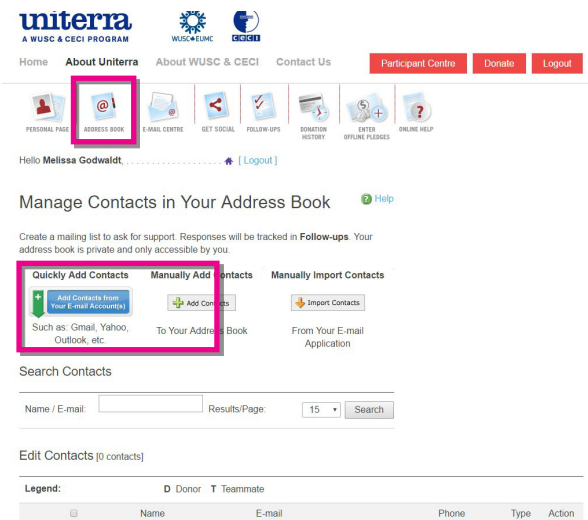
- Your fundraising title page
- Your personal photo
- Your fundraising homepage text – we have included some template text – feel free to modify it as much or as little as you wish. You can change fonts, colours etc. If you know HTML, you can even get more creative. Be sure to click UPDATE once you have finished editing your text. Have fun with your page – make it engaging and educational.

This screenshot shows the fundraising page design interface. At the top, there are navigation icons for Personal Page, Address Book, E-Mail Centre, Get Social, Follow-Ups, Donation History, Enter Offline Pledges, and Online Help. Below this, a greeting reads 'Hello Melissa Godwaldt' with links to 'Edit Profile / Personalized URL' and 'Logout'. The main content area is titled 'Welcome to Melissa Godwaldt's page' and features a large 'Donate Now' button. Below the button, there is a progress bar showing 'ACHIEVED \$0.00' and 'GOAL \$1,500.00'. At the bottom, there are social media sharing icons for Facebook, Twitter, Google+, and Email, along with a '0' count for '# OF DONATIONS'.

STEP 2

Click on the **ADDRESS BOOK** icon to add contacts to your personal address book so you can email your contacts and ask them to view your fundraising page and sponsor you! Using the Address Book icon, you can manually add contacts to your list or import entire lists from your email applications. Unless you want to import all the contacts from your email provider, the best way is to select “Quickly Add Contacts” and select the contacts that you would like to include in your fundraising requests.

From the **ADDRESS BOOK**, you can also edit your contacts and even link to the **EMAIL CENTRE**, which is also the next icon in the **PARTICIPANT CENTRE**.

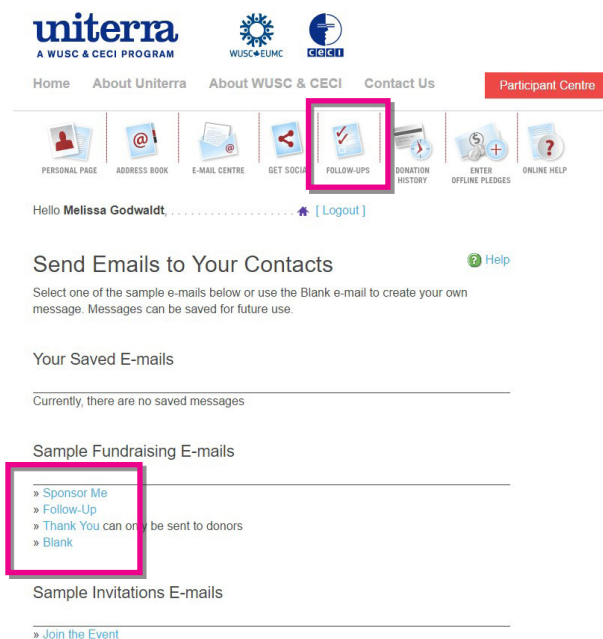


STEP 3

Start to send messages about your fundraiser by clicking on the **EMAIL CENTRE** icon. Here you can draft letters to your contacts and ask them to support your fundraising efforts. In the email centre you will find that we have designed some sample letters that you can modify and send to your contacts. Click on one of the Sample Fundraising Emails to see sample text we have drafted for you. Modify the letters – and get personal! Share details about your upcoming or current mandate and discuss details about your mandate and experiences so far.

Whenever you see something like

[%ContactFirstName%], it indicates a **MERGE FIELD**, which will be populated once you send the letter. Merge fields are helpful when you are sending a bulk amount of emails because they will populate the letter with things like people's first names, your fundraising goal, how much you have raised so far, etc. Monitor merge fields closely before sending your email message. You can also send follow-up messages, thank you messages or design our own message from scratch. Always send yourself a test message first – to make sure everything is set up the way you want it!



Personalize your email signature with your Fundraising Badge! Your **FUNDRAISING BADGE** is a neat feature that allows you to communicate your fundraising progress graphically. Your badge contains your goal, how much you achieved thus far and a percentage achieved. Your customized **FUNDRAISING** badge will appear at the bottom of an email if you select “Include my fundraising badge”. Here is a sample of what it will look like:



STEP 4

Follow-ups are key in fundraising!! The **FOLLOW-UP** Icon is essentially a dashboard of your outreach efforts. From here, you will be able to see every contact you imported into your fundraiser, as well as how many emails you have sent them and whether those emails were opened with a click, if they visited your fundraising page and if they chose to donate. It is a very effective tool for managing the outreach part of your fundraising efforts.

Follow-Up on Your Emails & Thank Donors

Follow-Ups helps you track and monitor your campaign's email & donation activities so you can target your communication for best fundraising results!

Filter / Search Contacts

Filter Contacts By: All Contacts

Name / E-mail: Results/ Page 15

Search

Follow-Up Status (3 contacts)

Legend: Send a Thank You E-mail Send a Follow-Up E-mail Donor Teammate

| Name & E-mail | To Do | Type | E-mails Sent | | E-mails Open | | Page Visits | | Donations | |
|--|-------|------|--------------|------------|--------------|------------|-------------|------------|--------------|------|
| | | | # | Last | # | Last | # | Last | Amount (CAD) | Last |
| Cécile Robert crobert@wvusc.ca | | | | | | | | | | 0.00 |
| Melissa Godvaldt msgodvaldt@gmail.com | | | 1 | 2016-07-04 | 1 | 2016-07-04 | 1 | 2016-07-04 | | 0.00 |
| Olivia Yahaut oyahaut@wvusc.ca | | | | | | | | | | 0.00 |

E-mail Selected Contacts E-mail Filtered Contacts Export List

Best Practice

Follow-Ups are critical! Sometimes an email will arrive at a time when a potential donor is busy, and then it just gets lost in their inbox. A follow-up email a few weeks later might mean the difference between a great donation or nothing at all. This fundraising platform allows you to carefully track every message you send! Use it!

STEP 5

Get Social!!! The **GET SOCIAL** icon allows you to connect your Uniterra Fundraising Page with your social media. One of the first things you can do is link your fundraising page with Facebook.

Home ABOUT UNITERRA ABOUT WVUSC & CECI CONTACT US Participant Centre

PERSONAL PAGE ADDRESS BOOK E-MAIL CENTRE GET SOCIAL FOLLOW-UPS DONATION HISTORY ENTER OFFLINE PLEDGES ONLINE HELP

Hello Melissa Godvaldt, [Edit Profile / Personalized URL] [Logout]

Get Social!

Share your fundraising efforts using facebook auto-posts. The post will help increase awareness and raise funds!

Increase donations through facebook

A post with a link to your fundraising page will be published to Facebook on your behalf each time you receive a donation – the Donor name will not appear. [See example](#)

Facebook: Click Connect and then check Auto-Post:

Connect

Create your auto-posts and increase donations

- ☐ Donation Received [Edit](#)
- ☐ 25% Fundraising Goal [Edit](#)
- ☐ 50% Fundraising Goal [Edit](#)
- ☐ 75% Fundraising Goal [Edit](#)
- ☐ Goal Reached [Edit](#)

Share your fundraising page

Facebook Twitter Google+ 0

If you are using the computer that you normally use for Facebook, click on the **FCONNECT** button and it should bring up your Facebook account. If not, you will just have to enter your Facebook login and password.

Once you are connected through Facebook, you can use Facebook as your login protocol and you can also create automatic Facebook posts when you receive a donation, or when you reach certain targets in your fundraiser. You can also use the icons at the bottom to share your Fundraising Page through Facebook, Twitter or other social media mechanisms.

STEP 6

Track your progress! The **DONATION HISTORY** icon provides you with a clean snapshot of your fundraising progress thus far. It allows you to see your goal, number of donations, total funds raised to-date, change your fundraising target, re-issue tax receipts and much more.



Hello **Melissa Godwaldt**..... [Logout]

From Event: **Uniterra Volunteer Fundraising (Current)**

Donation History [Help](#)

Watch your campaign grow!

- Monitor your progress
- Update your Fundraising Goal
- View Donation History details
- Re-issue Tax Receipts

Personal Progress

Summary

Your Fundraising Goal (CAD):
(Suggested Goal: 1,500.00)

Total Number of Donations:
Total Amount Raised (CAD):

Search Contacts

Name / E-mail: Results/Page:

Donations (0 record(s))

No donations have been made yet.

[E-mail All Contacts](#)

STEP 7

The Uniterra Raisin fundraising platform enables you to enter **OFFLINE PLEDGES**. Which means, if you get a donation from a donor in the form of a cheque or cash, you can still enter it into your fundraising page and it will reflect in your fundraising total, and count toward your goal! You can enter all of the donor information and the donation amount and then mail their cheque (or a cheque from you if it is cash) to WUSC or CECI and we will confirm the donation on your fundraising page once the cheque has been processed.



Hello **Melissa Godwaldt**..... [Logout]

Enter Offline Pledges [Help](#)

Add cash or cheque donations to your campaign! The donor will receive their e-tax receipt (if applicable) and you will help save on administrative costs for the event.

Add/Edit Donors

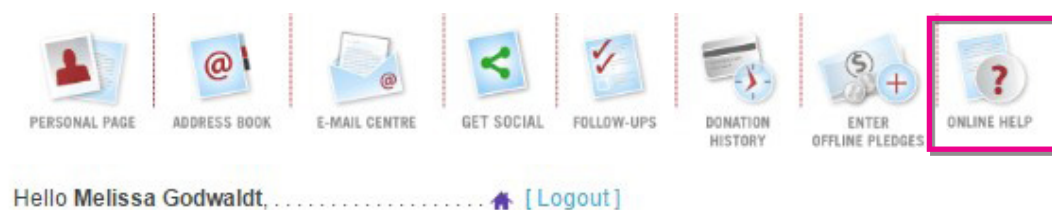
| | |
|---|--|
| User Type: * | <input type="radio"/> Individual <input type="radio"/> Organization Representative |
| First Name: * | <input type="text"/> |
| Last Name: * | <input type="text"/> |
| E-mail: * | <input type="text"/> |
| Organization Name: | <input type="text"/> |
| Country: * | <input type="text" value="Canada"/> |
| Address: | <input type="text"/> |
| City: | <input type="text"/> |
| Province / State: * | <input type="text" value="Select..."/> |
| Postal Code / ZIP: | <input type="text"/> |
| Phone: | <input type="text"/> |
| Donation Amount (CAD): * | <input type="text"/> |
| Payment Type: * | <input type="text" value="Select..."/> |
| Honour Roll Options: * (Selection will appear on Your Personal Page) | <input type="radio"/> Show My Name and Amount <input type="radio"/> Show My Name Only <input type="radio"/> Show My Name as Anonymous (amount will show) <input type="radio"/> Other (Custom) |
| <input type="button" value="Add Donor"/> | |

Be sure to fill in all of the fields marked with an *, or else it will not let you add the donor.

Part C: Need Help?

SOURCE 1

The ONLINE HELP might already have the answer for you! The ONLINE HELP icon provides an overview for each section of the Participant Centre (Personal Page, Address Book, Email Centre, Get Social, Follow-ups, Donation History, Enter Offline Pledges). You can click on “**Address Book**” for example and it will bring up several dozen Frequently Asked Questions that might address your question.



SOURCE 2

Email or call WUSC or CECI for help. If you tried the online help and you can't find the answers you are looking for – take a screen shot that illustrates the problem you have encountered and send a detailed message to WUSC or CECI using the contact info below:

WUSC

volunteerfundraising@wusc.ca
1-800-267-8699

CECI

donsweb@ceci.ca
1-877-875-2324