ACTIVE Giving - Fundraiser Guide

WELCOME TO ACTIVEGIVING

ACTIVE Giving is designed to make your fundraising effort a total success. The software is efficient and easy to use. You can even customize your fundraising page to best reflect your cause, while infusing your own individual touch and personality.

ACTIVE Giving's success stems from the simple contribution collection process. You won't need to gather checks or addresses; instead donations are collected online. Family, friends, co-workers, and other donors may contribute online using a credit card and automatically receive immediate email confirmation and a tax receipt email. The system tallies all the contributions, dynamically tracks all top contributors and fundraisers, and reports all donation data.

The process is extremely simple, so get started right away!

We hope you enjoy ACTIVE Giving and we also wish you lots of luck with your campaign!

GETTING STARTED

To create your personal fundraising page, visit the primary campaign page for the cause you wish to fundraise for.

Example: active.com/donate/CAMPAIGNURL

Click **Become a Fundraiser** to create an ACTIVE.com Passport Account (email/username and password) to begin creating your page. Once you have created your page, you'll want to log back in from time to time to make edits, send emails, and check reports. Here's what you should do:

1. Visit http://www.active.com/donations
2. Login with your ACTIVE.com Passport email/username and password
3. To begin personalizing your page, click on **Customize My Webpage**

CUSTOMIZE MY WEBPAGE

The **Edit Campaign Details** tab allows you to customize your webpage with as much detail as you would like. These details provide basic structure for your fundraising page.

- **Enter Fundraising Details**
  - ο Tagline: slogan for your fundraising campaign
  - ο Welcome Message: description of your personal involvement in the fundraising cause and a note to your contributors
- **Add an Image**
  - ο Upload Images: a logo or image to personalize your fundraising webpage
    NOTE: *Width cannot exceed 800 pixels*
- **Set a Goal**
  - ο Goal Amount: a dollar amount you hope to raise
  - ο Goal Date: the end date to your fundraising program
- **Display Options**
  - ο Show Total Donations Collected: shows the total dollar amount you raised
  - ο Show Top 5 Contributors: shows the name and amount of your top 5 contributors

NOTE: *Click Save & Finish to ensure all your changes are stored. You can also click Preview to see how your additional information affects your campaign page before you save your changes*

The **Change Layout Design** tab shows you a screenshot of each webpage layout option. Click the radio button above the screenshot to best match the needs of your webpage.

NOTE: *Always click **Save & Finish** - you can also click Preview to see how the additional information affects your campaign page*

The **Set Color Scheme** tab gives you complete control over the color and font shown on your campaign page. Select a color tile and the palette will show up. If you know the HTML design color you desire, enter the HTML color code in the space provided.

SEND EMAILS

Send an Email
- To: (Recipient's Email Address): enter email addresses separated by commas in the box provided or input addresses from your address book
- Save New Contacts: check the box to save the email addresses entered to your email address book
- Template: use the email template provided in the drop down box for prewritten standard communication messages
- Create/Edit Templates: click the link to write and save new messages to use in the future.
- Subject: topic of email message
- Your Message: use the text box to create a personal message to your fundraisers or contributors

NOTE: *If you click Send Test Email, you can send the message to yourself – then click Send Email to send a message to your contacts (all emails automatically include a link to your campaign website)*

Manage Address Book
- Add New Contact Name: name and email address for new contact
- Import Your Email Addresses: import all your email addresses from Outlook or a *.csv file
  NOTE: *By clicking on the **Click Here** link, a wizard appears providing step-by-step instructions on how to import your email addresses)*
- Current Address Book: all current contacts stored in Address Book
- Edit/Delete Contacts: click the links to update contact information

NOTE: *Click **Close Window** to save updates*

Create/Edit Templates
- Template Name: name used to store email template. Be specific so you can easily distinguish the template in the future
- Template Subject: stored email subject line to be automatically imputed into your emails when using template
- Template Message: enter a customized message about your fundraising campaign

Edit/Copy Email Templates shows all templates stored in your campaign email tools. All templates can be edited by clicking on the template name and copied by clicking the copy link.
NOTE: *Click **Mail Sample** to save the template and receive a copy via email*

Sent Mail stores all outgoing messages and recipients. Click on any sent email to view Date, Subject, Emails Sent, Delivered, Undeliverable, Pending, or Details of your sent mail.

Sent Items						
Date	Subject	Emails Sent	Delivered	Undeliverable	Pending	
Feb 28, 2005	Thank You!	2	2	0	0	DETAILS

General Donation Report

- Donation Summary: a real time summary of your daily progress
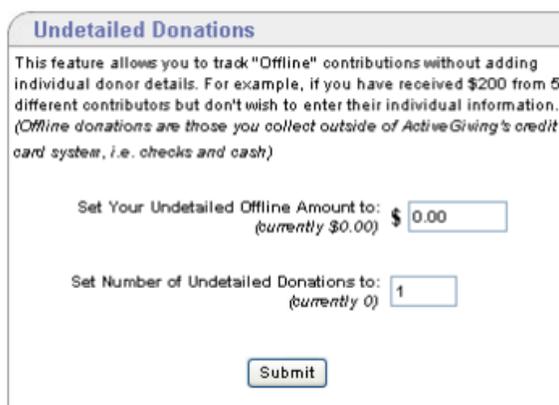
TRACK OFFLINE DONATIONS
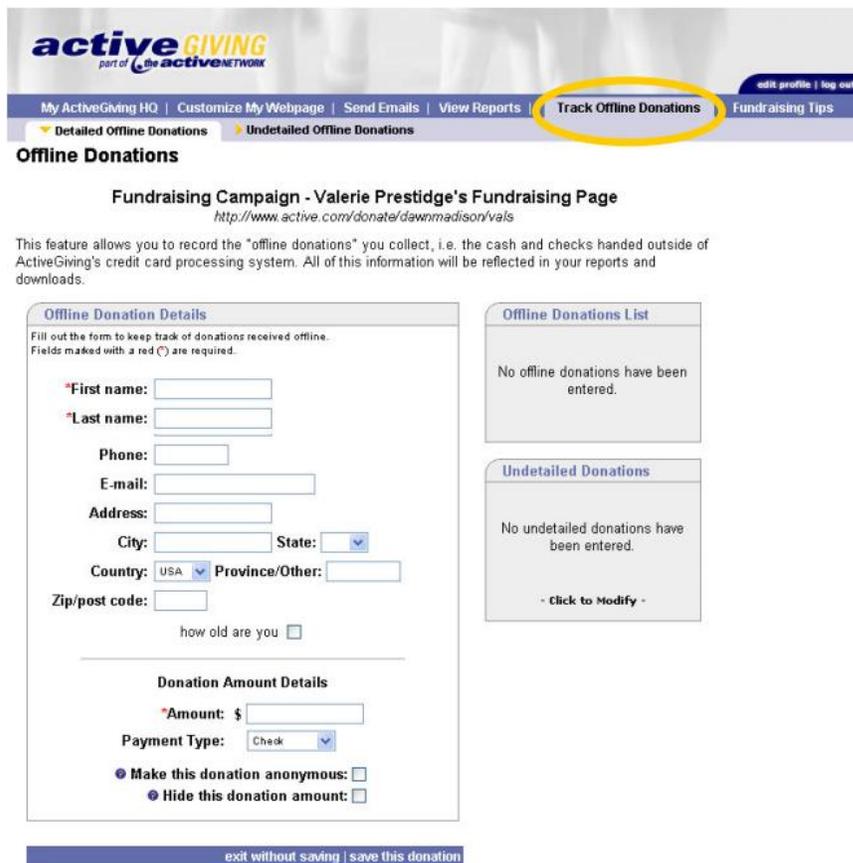
Detailed Offline Donations
- Offline Donation Details: donor information for contributors who submitted cash or checks
- Offline Donations List: all offline donations by name and amount

Undetailed Offline Donations
- Enter the dollar amount given by offline contributor without specifying name, address, etc.

Update Undetailed Donations

CREATE TEAM

If the organization that created the donation campaign allows for fundraising teams, refer to the following instructions to create a team fundraising page.

NOTE: *Besides organizing fundraisers into groups, there are no major differences between team and individual fundraising pages*

1. Visit the main campaign page
   EXAMPLE: *http://www.active.com/donate/CAMPAIGNKEY*
2. Click **Become A Fundraiser**
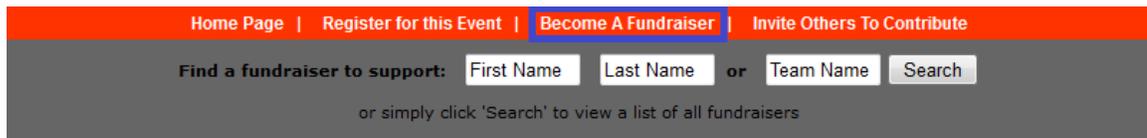
3. Once the page refreshes, click **Create a Fundraising Team**

   NOTE: *If you are not already logged in, you will be prompted to login or create a new ACTIVE.com Passport account*

4. Complete the following fields:
   a. Fundraising Page Details
      i. Enter Title
      ii. Enter web address
   b. Team Fundraising
      i. Are you creating a team fundraiser? **Yes**
5. Click on **click to continue > >**

TIPS FOR SUCCESS

Customize and personalize your page

Your personal webpage is a chance to customize your fundraising message to your family, friends, and other donors. Generally speaking, people contribute to your cause based on the personal message you convey. It is important to spend time customizing your fundraising page to send the right message.

- Include a personalized message
- Upload images
- Pick a template to best match your logo
- Use colors to personalize your page
- Remember, a more compelling site leads to better results!
- Promote your donation page

Make sure people realize how easy it is to donate online. Your webpage and emails give people an immediate link to take action. They won't have to fill out a form, buy a stamp, or write a check. They also automatically receive a confirmation email with tax deduction information.

TIP: *Once you've logged in to your fundraising page, click **Invite others to donate** link to send emails to your contacts*

Have a plan and stick to it

The most effective way to achieve your fundraising goal is to create a detailed plan outlining the steps you'll need to complete to meet your objectives.

- Set a goal
- Start early to give people ample time to donate
- Educate your donors about your cause
- Stress the benefits of contributing
- Follow through by sending emails
- Send Thank You notes
- Ask BIG before going small
- Stay positive and remember the reason you're fundraising
- Never feel guilty about asking for donations
- Ask, ask, ask

Doing something simple can make a big difference! Place your fundraising link in the signature line of your email. With no extra effort, every email you send is another opportunity to fundraise and spread the word about your cause.

Or, post your fundraising link on a tear-away flyer and hang it in the break room at work with a picture connected to the cause. Your co-workers can tear off your web address and go back to their desks to check out your efforts and donate to your cause.

EMAIL IS KEY

Email is the key to a successful online fundraising campaign because dynamic links in your email letter offer donors direct access to your fundraising page. You also catch the donor online and at the computer so they can immediately contribute at the point of interest. Most importantly, email allows you to reach all of your family and friends without the hassle of postage, returned mail, and bounced checks. So make your email campaign count!

Email Tips and Guidelines

Here are some tips and guidelines for writing an effective email:

- Make it Personal
- Use Humor to gain donor interest
- Keep It Short
- Ask and make expectations clear
- Educate Donors on your cause
- Provide Suggested Donation Amounts
- Set a Deadline for donations
- Include the Web Address for your fundraising page

Email Tracking

Make sure you keep a record of all your solicitation emails and a list of the recipients. This will help you follow-up and send reminder emails in an organized manner. Also, remember to send thank you emails to show your appreciation!

NOTE: *Reach out to family members, co-workers, and your community for support. You'd be surprised how many people want to help a great cause!*