



**Fundraising**

**Team Leader Guide**

**2009**

Follow these easy steps to start your  
Online fundraising and team recruitment!

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# Team Leaders

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## Recruiting People

Team members can be anybody—friends, family, co-workers, or neighbours.—and whether you’re an individual, corporate team or a team of family and friends, just be sure to ask everyone you know to join your team! It’s the key to successful fundraising!

## Raising Money

Fundraising comes more naturally when you make it personal. Be willing to tell your story. You can post your story on your team’s webpage. Don’t forget to ask everyone who sponsors you if their employer offers matching gifts. This is a great way to double or even triple your fundraising efforts!

## Having a Great Time!

Being a team leader is an opportunity to share a great experience with friends and family members, or co-workers. It’s always great seeing a community coming together for a common goal and the accomplishment of a unique personal challenge! As a team leader, it’s up to you to remind your teammates of why they registered and keep them motivated to make the best of their fundraising attempts. Make it fun and remember enjoying the success together along the way can be a joyous celebration of how far you have come as a team!

## Goal Setting

Establishing a goal is a perfect way to maintain motivation as well as give you and your team a benchmark for success. We encourage team leaders to set goals for themselves and their teams, while keeping these tips in mind:

- Goals should be realistic, but significant; if it requires hard work to attain, it will be a source of more pride for your team.
- Don’t arbitrarily set a goal without input from the team. Having them believe in the goal from the word “go” will make your job as team leader that much easier.
- Don’t forget to set both a personal and a team fundraising goal. Lead by example.
- Set a goal for team size as well as collective fundraising. Recruiting more team members can mean more substantial fundraising!
- Don’t keep your goal a secret! Use-email, team pages, and even internal company intranets, social networking sites and newsletters to communicate goals.

## Be a Successful Team Leader

There are four key elements to becoming a successful team leader.

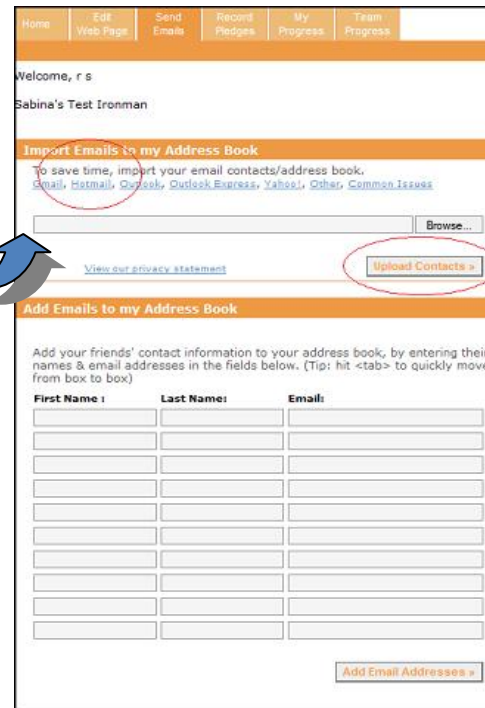
1. Set a great example
2. Create a team fundraising page
3. Recruit team members
4. Rally the team!

## Encourage team members to use their online pages

Once you see what the tools can do for you, encourage your team members to use them. Make it fun by giving incentives to your team members to fundraise online. Be creative and ensure that your team not only reaches their goals, but has a great time in the process.

### Recruit members online

Have people join your team from your team page, or just send them a registration link via e-mail. You can also download your contact list from most of the popular email services directly into the tool.



The screenshot shows a web interface for a fundraising tool. At the top, there is a navigation menu with links: Home, Edit Web Page, Send Emails, Record Pledges, My Progress, and Team Progress. Below the menu, a welcome message reads "Welcome, r s" and "Sabina's Test Ironman".

The main section is titled "Import Emails to my Address Book". It includes the text: "To save time, import your email contacts/address book." followed by a list of email services: "Gmail, Hotmail, Outlook, Outlook Express, Yahoo!, Other, Common Issues". There is a text input field and a "Browse..." button. A red circle highlights the "Browse..." button. Below the input field is a link "View our privacy statement" and a button "Upload Contacts >".

The next section is titled "Add Emails to my Address Book". It contains the text: "Add your friends' contact information to your address book, by entering their names & email addresses in the fields below. (Tip: hit <tab> to quickly move from box to box)".

First Name :	Last Name:	Email:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

At the bottom right of the form is a button "Add Email Addresses >".

## Team Leaders Fundraising Area

Teams are made up of individual fundraisers. Teams have their own fundraising sites, managed by a team leader. The team leader has access to the site to make changes, and all team members can see the site information. One of the most important roles for a team leader is to set a great example, so use your own fundraising page and send out lots of emails requesting donations and encourage your team mates to do the same.

### Team Pages

Team sites are automatically created when, during the registration process, an individual opts to Start a Team. This participant is then designated to be the Team Leader. Only the team leader has special access to customize the team fundraising page, by logging into their password-protected account. All team members can view the team page, but only the team leader can make changes to the name and description. Every time the team adds a new member, the member's fundraising results are added to the team's Web page.



My Web Page | Team Web Page

**Team Web Page Link**

Team Web Page Link:  
http://www.gifttool.com/athon/OurTeamPage?ID=15&AID=519&TID=2579

**Update Team Name & Goals**

Update your team name, group affiliation, fundraising goals and the number of team members you plan to recruit:

Team Name: Megan's Fan Club

Team Fundraising Goal: \$2,500.00

Team Recruitment Goal: 6

**Update Donation Message on My Fundraising Page**

Customize the message that is displayed to your friends & family on your team fundraising page. To save your changes, click the 'Save my changes' button below. To preview your changes click the 'Preview Page' above.

Team Page Headline:  
Welcome to our team fundraising page

Team Page Message:

Here is where you can change the teams' name, fundraising goal and team recruitment goal. Further down, you can customize the team page message.

### Team Pages - Features

It's really important to add a team photo. They are also shown on the team listing page. This adds a personal touch to your team page, and allows donors to feel more connected to the participants on the team.



Megan's Fan Club - Welcome to our team fundraising page

Team Name: Megan's Fan Club | Run for the Cause Starts: Jan 17, 2009  
Team Leader: Susan Smith

**Team Progress**

Our Goal: \$3,000.00

We have raised: \$1,100.00

Donations which will continue each month: \$0.00 | 36.67% achieved

**Megan's Fan Club**

**Sponsor a Team Member:**

- Brenda Anderson
- Lisa King
- Megan Johnson
- Robyn Sindair
- Susan Smith

[Join Megan's Fan Club](#)

[Join Megan's Fan Club](#)  
[Do you want a page like this?](#)  
[Bookmark this page](#)

**Our message:**  
We are participating in the Run for the Cause and we are asking friends and family to help support us in our fundraising.  
This cause is very close to our hearts. We all benefit from the each step that is made. As a team, we have participated in this event for the past 4 years. Please help us reach our fundraising goal.

Team pages are setup a lot like personal pages. There is a headline, the teams' message and a thermometer showing the fundraising progress. Each member is listed separately so people can choose which team member they would like to sponsor. There is also a link people can click on if they want to join your team.

## Team Account Areas

When the team leader logs into their password-protected account area, their team results are listed on the [Team Progress](#) tab, and on the [Home](#) tab summary area. Each member's fundraising efforts are also added to the team progress report so that team members can see the results of all team members, and view their standing in relation to their teammates.

Welcome, r s  
Sabina's Test Ironman  
My Team: rs team **8 fundraising days remaining**

**My Progress**

<b>Fundraising Goal:</b>	<b>\$2,500.00</b>	<a href="#">Change</a>
Credit Card Donations:	\$0.00	<a href="#">View</a>
Confirmed Pledges:	\$0.00	<a href="#">View</a>
<b>Total Amount:</b>	<b>\$0.00</b>	
% Achievement:	0.0%	
Pending Pledges:	\$0.00	<a href="#">View</a>
Recurring Monthly:	\$0.00	
<b>Emails Sent:</b>	<b>0</b>	<a href="#">Send More</a>

**My To Do List**

**Create Web Page**

- [Customize my fundraising page](#)
- [Customize team page & goals](#)
- [Change my profile & goals](#)

**Send Emails**

- [Ask friends to make a pledge](#)
- [Ask friends to join my team](#)
- [Send emails to my team members](#)
- [Send follow-up emails](#)
- [Send thank-you emails](#)

**Manage Pledges**

- [Record pledges personally collected](#)
- [View my progress reports](#)
- [View team progress reports](#)

**Message Board**

From	New	Total
0 GritTool Sandbox (another account)	0	0
Your Team Leader	0	0

**Team Progress**

<b>Fundraising Goal:</b>	<b>\$20,000.00</b>	<a href="#">Change</a>
Credit Card Donations:	\$0.00	<a href="#">View</a>
Confirmed Pledges:	\$0.00	<a href="#">View</a>
<b>Total Amount:</b>	<b>\$0.00</b>	
% Achievement:	0.0%	
Pending Pledges:	\$0.00	<a href="#">View</a>
Recurring Monthly:	\$0.00	
<b>Recruitment Goal:</b>	<b>10</b>	<a href="#">Change</a>
#Team Members:	1	
% Achievement:	10.0%	<a href="#">Send</a> <a href="#">Email</a>
<b>Emails Sent:</b>	<b>0</b>	<a href="#">Change</a>

You decide when your team needs a little extra push of motivation. Log in at any time to view their progress

## Team Emails

All team members have the option to send email to their team members or just to the team leader. The system sends to the team members' email addresses used at registration time, without revealing those addresses to the sender. Team members can also use the email tool to send invitations to join the team.

Welcome Susan Smith  
Run for the Cause

Select Template Create Message Mailing List

**Send an Email**

Use your address book below to select those friends who should receive this message.

[Add Email Addresses](#)

[Check All](#)

Recipient Name	Include	
All members in my team	<input type="checkbox"/>	
All team leaders in my group	<input type="checkbox"/>	
Recipient Name	Email Address	Include
-- No addresses added yet --		

[Back](#) [Cancel](#) [Send Emails](#)

The most motivating leaders send encouraging messages periodically to remind their teammates of their goal

### Recap Summary

So remember, as team leader you can set a great example! Use your own fundraising Page and team pages, send lots of emails, request donations, recruit new members and rally your team!

### Be a Successful Team Leader

**1** Use your Fundraising Pages ←

**2** Send Emails ←

→ Request Donations

→ Recruit Team Members

→ Rally the Team

## Good Luck!

We wish you all the best with your online fundraising!