Peer-to-Peer Fundraising Toolkit

Included inside:

- Peer-to-Peer Campaign Planning Worksheet
- Peer-to-Peer Participant Email Templates
- Peer-to-Peer Participant Social Media Templates

START

Peer-to-Peer
Campaign Planning
Worksheet

Peer-to-Peer Campaign Planning Worksheet

Use this worksheet to start brainstorming and planning your next peer-to-peer (P2P) campaign! As you work through each section with your team, you'll outline all the logistics details, define your goals and objectives, craft your messaging and theme, and create a marketing strategy that engages participants and donors.

Let's Talk Logistics

When it comes to a well-run P2P campaign, it's all in the details. Use this section to shape your list of needs for events, team responsibilities, engagement, and technology. Logistics are super important—what you plan now will create a seamless experience for your participants and donors and minimize the chances of oversights and last-minute issues.

Campaign Start & End Dates

What is each team member's responsibility? Who is in charge of each aspect of the campaign?

Will our campaign involve an event? If so, will it be in-person, online, or hybrid? What will we need to make the event happen (venue, entertainment, food, livestream platform, etc.)?

Which channels will we use to connect with participants and other supporters?

- ☐ Email
- ☐ Direct Mail
- ☐ Text Message
- ☐ Instagram
- ☐ Facebook
- ☐ Threads/X
- ☐ YouTube/TikTok/Other video platform

Who will manage each channel?

[Text box]

What methods will we use to keep participants engaged?

☐ Leaderboards   ☐ Prizes for top fundraisers

☐ Weekly check-ins   ☐ Social media shout-outs

☐ Milestone celebrations   ☐ Personal thank-you messages

☐ Mentors or coaches   ☐ Bonus: Hand-written notes

Assessing Technology Needs

Review your current technology to determine whether you have what's required to support your P2P campaign. Identifying these gaps early on helps guarantee a user-friendly experience for your supporters and prevent roadblocks in the execution phase!

☐ Do we currently have a fundraising platform that supports P2P campaigns?

☐ If so, does the platform integrate with our CRM and email marketing tools?

☐ Can participants create personal fundraising pages? If so, is the process

☐ user-friendly? Is the fundraising platform PCI-compliant and secure?

☐

Other:

_____

_____

Identifying Potential Fundraisers

Running a successful P2P campaign relies on recruiting passionate and motivated participants to raise funds for your nonprofit. Use this section to identify **who** you'll reach out to and **how** you'll invite them to participate.

Which individuals or groups can we reach out to that are likely to participate in and promote our campaign?

☐ Current supporters (Donors and volunteers)

☐ Board members and staff

☐ Corporate partners

☐ Community groups (Schools, clubs, churches, etc.)

☐ Influencers

Which channels and tactics will we use to invite potential participants?

- ☐ Personalized emails
- ☐ Direct asks (via phone or in-person conversations)
- ☐ Webinar or virtual kickoff
- ☐ Provide incentives
- ☐ Issue a friendly challenge
- ☐ Social media outreach

Goals and Objectives

When it comes to a well-run P2P campaign, it's all in the details. Use this section to shape your list of needs for events, team responsibilities, engagement, and technology. Logistics are super important—what you plan now will create a seamless experience for your participants and donors and minimize the chances of oversights and last-minute issues.

What are we asking participants and supporters to do?

What specific initiative will this campaign support?

Total Fundraising Goal

Default Individual Participant Goal

Default Team Goal

How will we keep track of results? What reports and analytics are available to help us optimize and evaluate the campaign?

[   ]

Fundraising Assets and Resources

To create a cohesive campaign and support your participants, you'll need to create a few assets and resources first. The list below (which may not include everything your specific campaign will need) will help you determine what you need to set up or create for your campaign and participants.

☐ Campaign branding
☐ Campaign site with sign-up pages
   ☐ Bonus: Campaign overview video
☐ Participant fundraising pages
☐ Donation receipt and thank-you message
☐ CRM workflows for new donors

☐ Participant toolkit
   ☐ How-to guide
   ☐ Talking points
   ☐ Sharable graphics
   ☐ Ask email templates
   ☐ Social media templates
   ☐ Thank-you templates
   ☐ Short promotional video

Other:

_____

_____

_____

Marketing Strategy

Before marketing your campaign, think about the who, what, and why behind it. This will help you develop compelling messaging that effectively reaches the right people.

Developing Your Key Messaging and Theme

How much do you want to raise? What are the tangible outcomes that will be possible when you reach your fundraising goal?

[   ]

Who are the real people or communities benefiting specifically from this campaign?

What emotions do we want to evoke with this campaign? (e.g., hope, urgency, belonging, gratitude)

What impact statements will you use? (e.g., "With your support, we can ensure every child in our community has the school supplies they need to learn and thrive in life.")

Can you tie specific donation amounts to tangible items or outcomes? What are they?

This may not be necessary for your campaign, but it's a powerful tactic if you can make it work for you. Will a $20 donation pay for a month of food for one of the cats in your shelter? Can a $75 gift buy a chair for your new facility? Helping your donors visualize what their gift can achieve is very compelling!

Gift Amount	Impact Statement

What overall theme or slogan best represents this campaign? *List options based on your answers to the questions above and choose one.*

Marketing Tasks and Assets

Successful P2P campaigns require a few marketing activities that help you with storytelling, engagement, and crafting strong appeals that get results.

☐ Real-life stories or testimonials to illustrate the impact

☐ Story prompts for participants

- ○ Why do you care about this cause?
- ○ How did you first get involved with this organization?
- ○ Do you have a personal experience related to this issue? ("This cause matters to me because...")

☐ Fundraising challenges or milestones to drive participation

☐ Clear, urgent, and inspiring asks

Calls to Action

A great call to action (CTA) inspires participation and donations. In the section below, think up a few action-driven CTAs to encourage different segments of your audience to donate, sign up to participate, share the campaign, or take other important steps.

_____

_____

_____

_____

Use the questions below to evaluate and refine your CTAs.

☐ Are our CTAs simple, direct, and easy to understand?

☐ Are the action(s) the actions we want people to take clear in our CTA?

☐ Did we use strong action words like "Join," "Give," "Share, "Act Now," etc.?

☐ Are CTAs visually attention-grabbing on fundraising pages and emails?

☐ Is it easy for supporters to complete the actions?

Example Promotion Timeline

One month (or more!) before launch	Identify people you'd like to ask personally to participate	Build a plan that addresses where and how you'll recruit participants	Create talking points for how and why someone should participate	Create assets you and your participants will use to promote your event
Two weeks before launch	Share teaser posts on social media to build anticipation	Send an email to participants with instructions, marketing assets, and encouragement		
Launch week	Send a launch announcement email and publish social media posts	Engage with participant posts on social media (like, comment, and share)	Share a fundraising challenge to drive participation	
Mid-campaign	Share progress updates	Highlight top fundraisers or leaderboard rankings	Share impact stories on social media to show how donations are making a difference	Engage with participant posts on social media (like, comment, and share)
Final week!	Send "last chance" emails and social media posts	Share milestone updates	Send "thank you" emails and follow-up surveys (if applicable)	Share participant appreciation posts on social media

Peer-to-Peer
Participant Email Templates

Peer-to-Peer Participant Email Templates

Customize these email templates and share them with your peer-to-peer participants! Simply insert your campaign details (in blue) and leave the rest (gray) up to them. Encourage participants to keep track of their fundraising goal progress to provide updates and add their personal stories and reasons for supporting the campaign.

EMAIL #1

✉ **Kickoff**   — ↗ ✕

To

Subject   I'm fundraising for [Campaign Name]! Will you join me?

Hi [First Name],

I hope you're doing well! I'm reaching out to you because [Organization Name]'s [Campaign Name] launches today, and I'm a part of the fundraising team. This cause is really important to me because [Personal reason for supporting].

I have a $[Goal amount] goal to hit by [Deadline Date], and I'd love your support! Every donation means a lot and directly supports [Impact statement].

Here's how you can help:

Donate today. Any amount you can give will make a difference! Use my fundraising page to give here: [Fundraising page link]

Spread the word. If you can't donate right now, that's okay! You can still help by sharing my fundraising page with your friends and family or on social media.

I appreciate any support you can give. I'm excited to see what we can accomplish together for [Campaign Name].

Best,

[Your Name]

EMAIL #2

Mid-Campaign Reminder

To

Subject   I'm **[Percentage]**% to my goal! Will you help?

Hi **[First Name]**,

In case you haven't heard, I'm raising money to help **[Impact statement]**. Thanks to my community's generosity, I've already raised $**[Amount]** for **[Campaign Name]**!

This cause matters to me because **[Personal reason for supporting]**. Every dollar raised helps to:

- **[Impact statement]**
- **[Impact statement]**
- **[Impact statement]**

If you haven't had a chance to donate, there's still time to help me reach my $**[Goal amount]** goal. But not much—only **[Number of days]** left to give! You can donate here: **[Fundraising page link]**

Thank you for supporting me on this journey. Together, we're making an impact!

[Your Name]

EMAIL #3

Progress Update — ⤢ ✕

To _____

Subject   Amazing progress! Can you help me reach the finish line?

THANK YOU for your incredible support of my **[Campaign Name]** fundraiser for **[Organization Name]**! We've already raised $**[Amount]**, and we're inching closer to my $**[Goal amount]** goal.

We're also one step closer to **[impact statement].** That's a reason to celebrate!

A few updates:
- **[Recent achievement or milestone you've hit]**
- **[Brief statement about how you've been inspired throughout the campaign]**
- We're only $**[Amount]** away from hitting my fundraising goal!

But this race isn't over yet! With just **[Days/weeks]** left, I need your help to finish strong.

You can support me today by donating on my fundraising page or sharing the link with your friends and family: **[Fundraising page link]**

I really appreciate your support. I can't wait to hit that goal and make a real difference for **[Organization Name]**!

With gratitude,

[Your Name]

EMAIL #4

Final Push

To

Subject   Last chance! Please help me hit my goal

Hi **[First Name]**,

Time is running out to support **[Campaign Name]**! There are only **[Days/Hours]** left for me to raise $**[Goal amount]** for **[Organization Name]**. I'm SO close to hitting my goal, but I need your help to get there!

Any amount you can give makes a real impact. Your donation today will go directly towards helping **[impact statement]**.

Here's how you can help me reach my goal by [Deadline date]:

- Donate now: **[Fundraising page link]**
- Forward this email to someone you know
- Share my fundraising page link on social media

We have a chance to be a part of something amazing. Will you help me reach the finish line before time runs out?

Thank you for your generosity and support!

With gratitude,

[Your Name]

✉ Thank You — ↗ ✕

To _____

Subject Thank you from me and **[Organization Name]**!

Hi **[First Name]**,

I'm so grateful for your support during my **[Campaign Name]** fundraiser for **[Organization Name]**. Thanks to you and other generous donors, we helped **[Impact statement]**!

Together, we accomplished:

- **$[Amount]** raised to support **[Organization's mission]**
- **[Milestone reached, such as surpassing your goal by 10% or reaching your goal before the deadline]**
- **[Specific outcome or impact statement that aligns with the amount participants raise]**

I couldn't have done it without you! Your generosity inspires me, and I can't thank you enough for joining me on this journey.

Want to stay involved with **[Organization Name]**? You can follow their work here: **[Organization website/Social media]**.

Again, thank you for making a difference!

[Your Name]

Peer-to-Peer
Participant Social Media
Templates

Peer-to-Peer Participant Social Media Templates

Share these ready-to-use social media templates with your peer-to-peer fundraising participants to help them engage their online community. **Simply insert your campaign details (in blue) and leave the rest (highlighted) up to them.**

Encourage your participants to personalize their posts by adding their personal stories and reasons for supporting the campaign. To maximize their impact and effectiveness, encourage them to post regularly on various social media platforms, tag friends and family, tag your organization, and always include a direct link to their fundraising page.

Template

Exciting news! 🎉 I'm fundraising for [Organization Name]'s [Campaign Name] to help [impact statement]. I have a goal to raise $[goal amount] by [date]!

Will you join me in [impact statement]? Donate today to make a difference: [link to fundraising page]

Example

Exciting news! 🎉 I'm fundraising for Agloe Nature Center's Fund the Forest 5K to help their critical forest conservation efforts continue. I have a goal to raise $[goal amount] by March 31!

Will you join me in supporting forest resiliency and healthy outdoor spaces for all? Donate today to make a difference: [link to fundraising page]

Parkersburg
Sleepout Example

Template

I need your help! 📣

I'm fundraising for **[Campaign Name]**, a cause that means so much to me. I'm passionate about it because **[personal reason for supporting]**.

Every dollar makes a difference, and your donation can help **[impact statement]**. Join me in making a change! Donate here: **[link to fundraising page]**

Example

I need your help! 📣

I'm fundraising for Herdyn County Ends Hunger, a cause that means so much to me. I'm passionate about it because **[personal reason for supporting]**.

Every dollar makes a difference, and your donation can help provide warm meals to hundreds of children and families in our community. Join me in making a change! Donate here: **[link to fundraising page]**

Template

Only **[number of days]** left to help hit my $**[goal amount]** fundraising goal for **[Campaign Name]**, and I need your support! Your donation helps **[impact statement]**.

If you can't donate, please help by sharing this post. Let's come together and make a lasting impact! Donate now: **[link to fundraising page]**

Example

Only **[number of days]** left to help hit my $**[goal amount]** fundraising goal for Herdyn County Ends Hunger, and I need your support! Your donation helps make sure none of the children and families in our community go without food.

If you can't donate, please help by sharing this post. Let's come together and make a lasting impact! Donate now: **[link to fundraising page]**

One purpose. One night. One community.
Working to end youth homelessness.

Template

I'm participating in the **[Campaign/Event Name]** to raise funds for **[Organization Name]**. But I need YOUR support!

I challenge you to donate today! Even $10 makes a difference. Who's in? Comment "Challenge accepted!" Donate here: **[link to fundraising page]**

Example

I'm participating in the Fund the Forest 5K to raise funds for Agloe Nature Center. But I need YOUR support!

I challenge you to donate today! Even $10 makes a difference. Who's in? Comment "Challenge accepted!" Donate here: **[link to fundraising page]**

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Template

Did you know that **[insert a fact related to your service group]?** Join me in supporting **[Campaign Name]** to **[impact statement]**!

Donate today to help me reach my $**[goal amount]** goal: **[fundraising page link]**

Example

Did you know that **1 in 5 kids in the U.S. don't have enough food?** Join me in supporting Herdyn County Ends Hunger to **provide children in our community with the food they need to grow and thrive**!

Donate today to help me reach my $**[goal amount]** goal: **[fundraising page link]**

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Template

Friends, I'm only $**[dollar amount]** from hitting my $**[goal amount]** goal for **[Campaign Name]**! Can you help me cross the finish line? Let's **[impact statement]**.

Together, we can make a difference. Donate today: **[link to fundraising page]**

Example

Friends, I'm only $**[dollar amount]** from hitting my $**[goal amount]** goal for Run for Rescues! Can you help me cross the finish line? Let's help our local injured furry friends get the support and healing they need.

Together, we can make a difference. Donate today: **[link to fundraising page]**

parkersburg sleepOut

One purpose. One night. One community.
Working to end youth homelessness.

Template

Together, we raised $**[dollar amount]** for **[Campaign Name]**! 👏

Because of your generosity, **[impact statement]**. Thank you for joining me in supporting **[Organization Name]**!

Example

Together, we raised $**[dollar amount]** for Agloe's Pet Adoption Day! 👏

Because of your generosity, many local furry friends have been united with new families, and hundreds more will receive the care they need as they await adoption. Thank you for joining me in supporting Agloe Animal Center!