

# How to Create a Campaign Role of the Campaign Coordinator



# Schwan's Cares: Running a Successful Campaign



Create Campaign

- 1.) Gather Information
  - Campaign story why are you coordinating this fundraiser?
  - ✓ Team/personal pictures
  - ✓ Beneficiary Information (name & address)
  - ✓ Federal Tax ID #
  - ✓ Fundraiser participant emails
- 2.) Go to Schwans-cares.com and select "create a campaign"
  - Use the information gathered to create a campaign.

Kick-Off & Invite Fundraising Participants

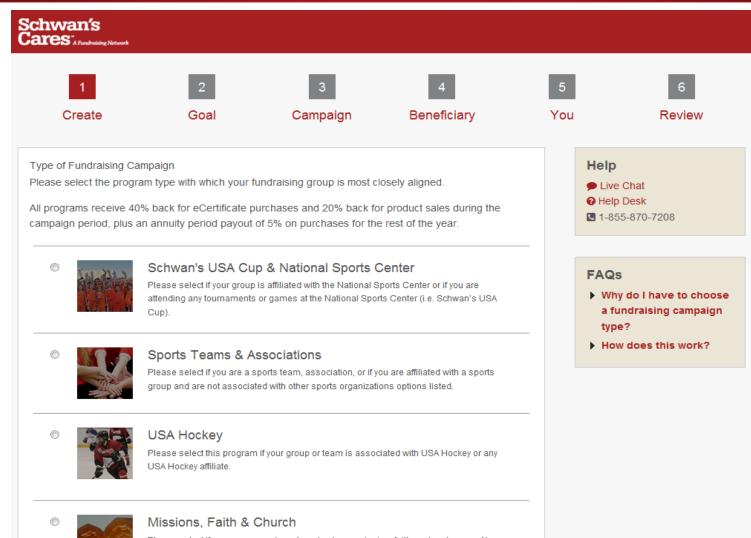
- 1.) Campaign Kick-Off Communication (<u>program flyer</u> & <u>Participant Guide</u>) to let teams, parents &/or kids know what's coming.
- 2.) Invite your Fundraising Participants to join your team. Log into your campaign and access you manage tab. (Step 1 in you Task List)
- 3.) Optional: Post your campaign URL/Participant Guide to website, newsletter, posters, etc.
- 4) Optional: Print Support Guide and hand them out at events. (step 3 in checklist)

#### Manage Campaign

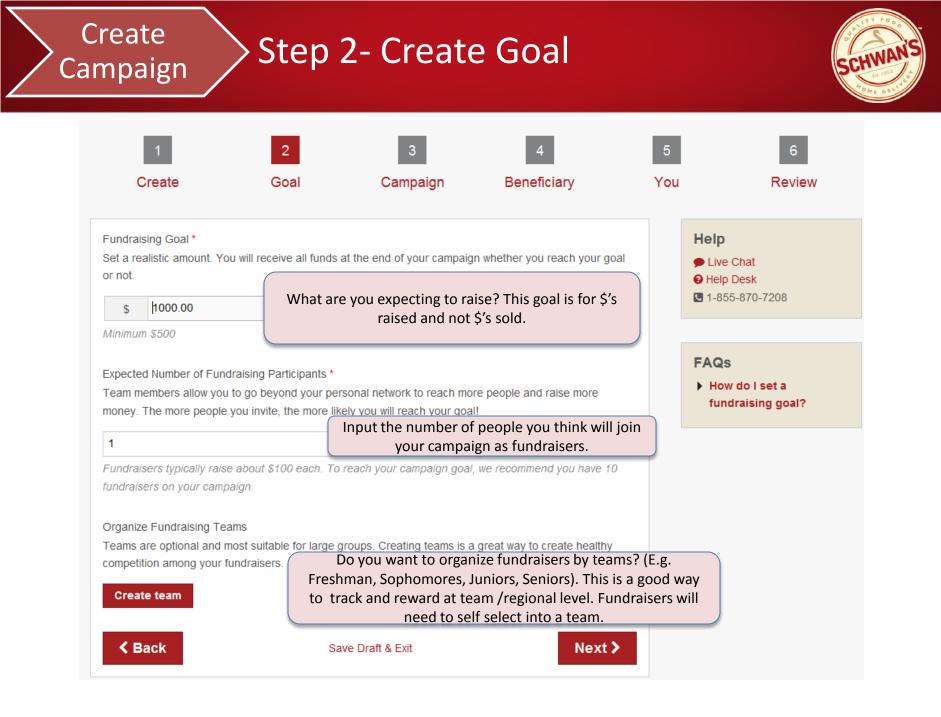
- ✓ Ensure fundraising participants have personal pages created.
- ✓ Motivate your Team
- Monitor campaign activity to ensure fundraisers are engaged and participating.
- Utilize the update feature located in your manage tab. Send out weekly updates by update and to keep the momentum.
- 1-week prior to campaign close date: Remind fundraisers and supporters to support campaign before the 5% annuity period starts.
- Last Day of Campaign: Have your fundraiser send out thank you cards to their supporters to remind them of the 5% annuity period for the rest of the year.

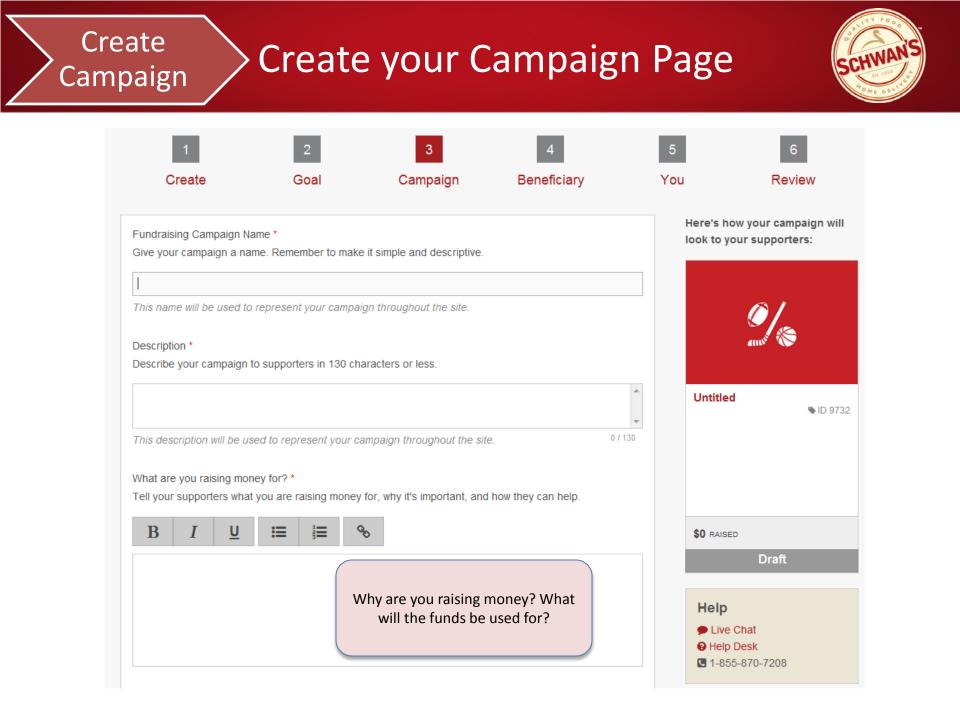
#### Create Campaign Step 1 – Select your Fundraising Program Type





Please select if your group can be categorized as a mission, faith or church group. You may also select this program if the funds that are raised will be going towards a mission, faith or church group.





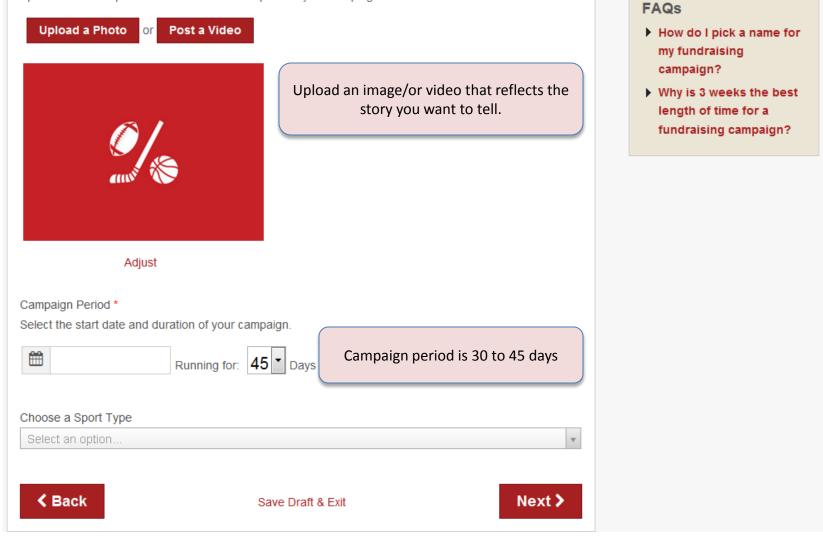
### Create Campaign

## Step 3 – Create your Page



#### Media \*

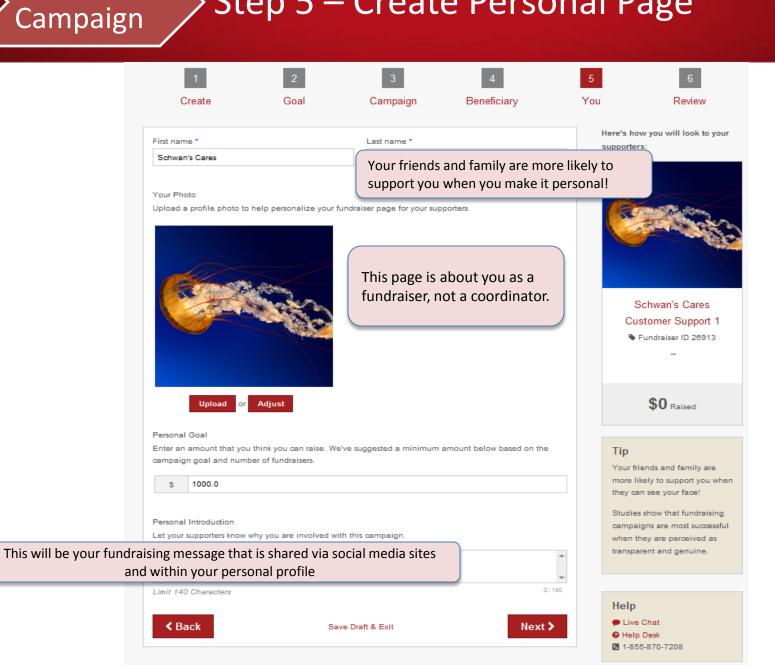
Upload a video or photo that will be used to represent your campaign across the website.

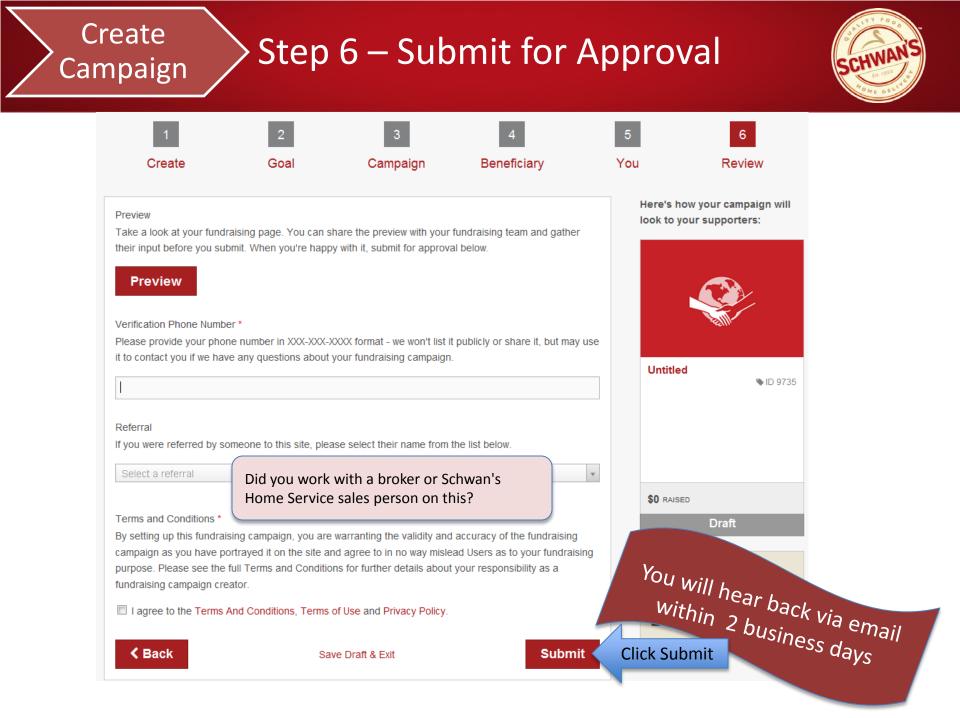


reate mpaign Step 4 – Setup Beneficiary								
1 Create	2 Goal	3 Campaign	4 Beneficiary	5 You	6 Review			
Search for your organization Beneficiary (Payment Det Checks will be made payate) Add Beneficiary	ails) * ble to the organization	community group, search and sent to the address yo	ou list below.	V	<b>Tip</b> Payment details must be accurate in order for your campaign to be approved. We may contact and verify your payment details, so please provide a phone number if possible. Please see the <b>Terms</b> of <b>Use</b> for complete information on eligibility.			
A status s s +	iciary is where th organization.	ne \$ will go. Needs	to		Help Live Chat Help Desk 1-855-870-7208			
City * State / Province * Choose a province					FAQs ▶ Why isn't my organization listed?			
Zip / Postal Code *								
Country *				v				

## Step 5 – Create Personal Page

Create





## Kick-Off

### Invite your Fundraising Participants to Join Campaign



#### There are 3 ways to join a campaign:

1.) Invite via email tool (no approval necessary)

- Log in to your campaign
- Go to your fundraising campaign page
- Click on the Manage tab
- Click Invite Fundraisers
- From the Send Email tab, add contacts and send email
- Click the Invite button
- 2.) "Use Our Template" by copying and pasting it into your personal email (approval required):
- Log in to your campaign
- Go to your fundraising campaign page
- Click on the Manage tab
- Click Invite Fundraisers
- Click Use Our Template
- Copy the provided text and paste it into an email
- Send to all potential fundraisers
- Individual fundraisers will join and the coordinator will receive notifications to approve the fundraisers.

3.) Use the In Person option to print and provide handouts to your individual fundraisers (approval required):

- Print and pass out the participant guide provided in the tab that includes instructions on how to join.
- An individual fundraiser can click the Join Now button to join an existing fundraising campaign. The coordinator will receive notification of the request to join the team by email, and from there you can click to approve.

### Manage 🔪 Campaign /

## Management Checklist



- 1) Ensure fundraising participants have personal pages created.
  - If not, work with them to set one up. See Participant Guide by referring to your Tasklist located in your Manage Tab.
  - $\checkmark$  You will receive an email for approval.
- 2) Motivate your Team.
  - ✓ Refer to your Tasklist to view a list of ideas.
- 3) Monitor campaign activity to ensure fundraisers are engaged and participating.
  - ✓ Reach out to any who may need help.
- 4) Utilize the update feature located in your Manage Tab to send out communication. This message will be posted to your campaign page and emailed out to your fundraisers and supporters.
  - ✓ Provide status updates, % of goals, etc.
- 5) 1-week prior to campaign close date: Remind your fundraising participants and supporters to support campaign before the 5% annuity period starts.
- 6) Last Day of Campaign: Have your fundraising participants send out thank you cards to their supporters to remind them of the 5% annuity period for the rest of the year
  - ✓ See Tasklist and access "Thank You" card.

## Timeline: Based on a 30/45 Day Campaign



Setup Campaign (t-2 weeks)	Await Approval	Await Approval	(Invite Fundraisers to Join Team)			
(Invite Fundraisers to Join Team)	(Invite Fundraisers to Join Team)	(Invite Fundraisers to Join Team)	(Invite Fundraisers to Join Team)	(Invite Fundraisers to Join Team)	(Invite Fundraisers to Join Team)	Day 1 Campaign Start Date! (20/40%)
Day 2 Monitor Site to Ensure Fundraisers are Creating Pages & Sending Invites	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8
Day 9 Send Out Weekly Communication to Fundraisers	Day 10	Day 11	Day 12	Day 13	Day 14	Day 15
Day 16 Send Out Weekly Communication to Fundraisers	Day 17	Day 18	Day 19	Day 20	Day 21	Day 22
Day 23 Send 1-week Left Reminder	Day 24	Day 25	Day 26	Day 27	Day 28	Day 29
Day 30 Last Day of 30 Day Campaign!	Day 31 5% Annuity Starts	Day 32 Send Thank You Notes & Reminder of the 5% Annuity	Day 33	Day 34	Day 35	Day 36
Day 37	Day 38	Day 39	Day 40	Day 41	Day 42	Day 43
Day 44	Day 45 Last Day of 45 Day Campaign!	Day 46 5% Annuity Starts				