

Help Center

ASSEMBLE YOUR TEAM

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Introduction

A project as big as a Giving Event demands planning and collaboration to achieve the highest level of success. Your initiative kicks off a concerted effort around charitable giving for your organization, so you need to carefully communicate the value of your work in order to capitalize on the momentum.

It's a time to be hyper-focused on your fundraising with heightened challenges, storytelling, and engagement, but preparing for this sprint starts far before the actual event, and continues beyond it in order to keep new and old donors alike invested in your cause.

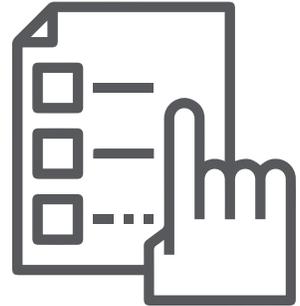
Building the right team is the first and most important step in your game plan. It's impossible to successfully complete an undertaking as vast as an initiative by yourself, and those working with you will help keep you motivated and bring fresh ideas. The people you bring in for this effort will help to organize your initiative, spread the word, and build your donor base, all while maintaining strong enthusiasm and momentum in a process that has many moving parts. Your team members' involvement is a substantial investment on their part and yours, so think carefully about who to ask and why you need them.

When assembling your team, remember to identify the roles you need, assign people to specific roles, confirm key dates and milestones for the group to reference, and inspire the team with the Giving Day brand and mission.

IDENTIFY / ASSIGN / CONFIRM / INSPIRE



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Identify the Roles You Need

There are a few essential positions that every team will need to fill, although who fills these roles may look different depending on your team, project, and resources. You may need to combine several positions into one, or add a role that is not listed here; you may end up with smaller sub-teams under the umbrella of your main team. Personalize the roles and duties to best fit your project and optimize your team's productivity.

Whatever your launch team looks like, think critically about what work needs to be done and how it can be delegated to various team members. Think also about what kind of time commitment you can reasonably expect from each of your team members.

[DOWNLOAD STAFFING TEMPLATE](#)

CONSIDER THE FOLLOWING ROLES AS A STARTING POINT:



Project Lead/Project Manager/ Team Leader

This person is in charge of the direction of the project and the team as a whole. *Key responsibilities include:*

- Determining the vision and setting goal(s) for the overall initiative
- Delegating tasks
- Leading meetings
- Maintaining a project plan, including progress status
- Communicating between team members, staff, volunteers, and other involved parties



Story Curator

This person determines the story of your campaign and organization. The narrative they craft should be compelling. They can expect to work closely with your Marketing Lead and Content Collectors to ensure that all stories are ready to go in a timely manner and are told in a way that moves people to act. *Key responsibilities include:*

- Writing copy
 - Collecting visual media
 - Conducting interviews
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Marketing Lead

This person takes the vision and goals of your overall initiative from the Project Lead and shares them with the world. They should expect to work closely with your Project Lead and Social Media Lead. *Key responsibilities include:*

- Making your initiative known and visible
 - Using a combination of social media, email, direct mail, media mentions, advertising campaigns, and event promotion
 - Planning the communications schedule
 - Increasing awareness through any and all channels
 - Employing clear Calls To Actions (CTAs)
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Social Media Lead

This person runs your campaign's social media accounts. While this position would be easily combinable with the Marketing Lead, it might be helpful to have multiple team members working in this role, especially if they have expertise with specific forms of social media. If you have a small team of social media gurus, elect a point person to ensure consistency across the various platforms or involve a volunteer or brand ambassador.

Facebook and Instagram are the most influential for promoting your fundraising and are must-haves, but other platforms can be useful if you have content to fit the medium and an audience that you know is active on them. The Social Media Lead should expect to work closely with the Project Lead, Marketing Lead, and Content Collectors. *Key responsibilities include:*

- Drafting or collaborating on content
 - Executing best practices for timing and framing of content
 - Interacting with your network to maximize engagement
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Matches and Challenges Coordinator

This person reaches out to potential large gift donors to organize matching contributions or challenges. Some donors may stipulate how they would like their gift to be used, but if not, it is up to the Matches and Challenges Coordinator to determine how that gift could most effectively motivate increased giving. For challenges, consider engagement, new donors, total donors, and total donations as possible goals to unlock a challenge gift. This person should expect to work closely with the Project Lead and Stewardship Ambassador, as well as the Marketing and Social Media Leads to promote the challenge once a donor has been secured. *Key responsibilities include:*

- Maintaining a database of current and previous large gift donors
 - Reaching out to potential large gift donors
 - Determining matching and challenge criteria
 - Promoting challenges and matches leading up to and during your Giving Day
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Stewardship Ambassador

This person plans and creates the stewardship journey for your donors. Depending on your organization it may be a full time role, a partial role, or an additional responsibility assigned for your initiative. *Key responsibilities include:*

- Creating a Stewardship timeline for follow-up communication post event, X number days following, and up to 6 months afterwards
 - Identifying the best channels through which to thank donors
 - Creating copy for the thank you message or working with others to deliver a personalized experience
 - Determining visual content to go with the thank you message, such as a video, photo, or carousel of images
 - Maintaining segmented lists
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Content Collector

This person works with video and photography to provide visual materials for your initiative. It is important to have this person for any events that will fall in the days or weeks leading up to your initiative, as those events allow Content Collectors to take pictures or recordings of people actually engaging with your organization. Content Collectors may also be able to compile promotional videos or gather quotes from those who interact with your project or projects. This role lends itself to a small team rather than an individual. Your Content Collector(s) should work with your Project Lead, Story Curator, Marketing Lead, and Social Media Lead to provide and curate imagery and videos for your initiative. *Key responsibilities include:*

- Taking photos or video at events
- Curating photos from previous events, if archives exist
- Gathering photos from volunteers or participants

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Assign the Right People

When assembling your team of in-house people, don't assume that each role on your team must align with an existing job title. Think of this project as an opportunity to shake things up for people who may have skills that are not otherwise being utilized. If you know that someone in your organization enjoys photography outside of work, or tells incredible stories, or writes touching thank you notes, ask them to get involved as a Content Collector, Story Curator, or Stewardship Ambassador. Your volunteer base, while not best suited for leadership roles in your project, can also be invaluable as members of a sub-team working on outreach or awareness.

While each role requires different skills, all benefit from having people who are organized and enthusiastic. With all of the moving parts involved in a big initiative, it's important to keep track of who has been contacted and what still needs to be done. Since most of the exciting action will happen upon launch, having people who are excited about the project can keep your team's morale and momentum strong, even when most of what's happening at a given stage is the necessary but less exciting legwork to make the big moment a smashing success.

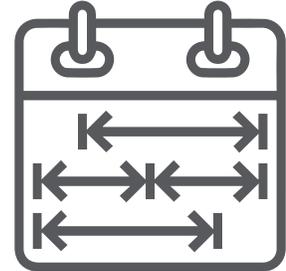
How you bring people into your team can be as important as who you bring in. Ask people directly whether they would be willing to fill a particular position on your team, and let them know up front what the expectations are for the role they might take on. By asking them directly, you let them know that you want them specifically, rather than any warm body as a placeholder. A direct ask also communicates that you have considered their talents and how they would best benefit this project.

Explain the initiative and its value if they aren't already aware, as well as your overall goals. Let them know specifically what the role you're asking them to take on entails. Making them aware of the expectations up front serves to minimize dropouts late in the game. People know how much time and energy they can commit to the project as individuals; it can be easier to sign up for a big project if the expectations placed have defined limits, particularly if you're asking rather than assigning.

These limits and definitions are a way of showing respect to their time and yours, especially if this is project would be taken on in addition to other work commitments. Make it clear that the time commitment will increase as your event approaches, but take care to keep the expectations within reason.



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Confirm Key Dates & Milestones

Once you have your team assembled, set out a calendar of key dates and checkpoints. Some dates will be firm and may be set even before the team is fully formed, but others may be more flexible. Be sure to include deadlines for your:

- Official Launch
- Soft Launch
- Story submissions
- Written and visual content submission
- Story and content approvals
- Formalized outreach calendars for social media
- Email blasts
- On-page updates
- Stewardship campaigns

Not all teams opt for a soft launch, although we have observed the practice of a soft launch for select supporters and community members ranging anywhere from one week up to three weeks prior to the big event. When it comes to scheduling meetings and deadlines for content, work with your team to keep everyone involved in the process. It's especially important to involve your Marketing and Communications team early to coordinate approval and expectations.

Set regular meetings that all involved parties can attend. Depending on the many activities your team may be juggling in the months leading up to your Giving Day you may start with monthly meetings that grow more frequent or you may choose to have weeklies at the onset and then lessen the frequency over time once the various pieces start to take shape. Most likely there will be an opportunity to bring the team together weekly anywhere between four to six weeks pre-launch.

[DOWNLOAD SAMPLE WEEKLY MEETING AGENDA](#)

Weekly status reports are another way to keep communication flowing in the months leading up to the project. This technique keeps everyone in the know and will highlight topics that may merit an all-team meeting. That said, some roles will be more collaborative or more dependent on work from other parts of the team regardless of your meeting schedule. For example, social media and marketing cannot share the story if there is not yet a curated story to tell. That story may be dependent on pictures and quotes.

Make sure the schedule you devise does not leave part of your team scrambling for key information. It's critical to schedule the communication cadence so that the marketing team can plan on deploying messaging months, weeks, and days prior to the big day. Content creation can be assigned due dates of completion well in advance of the event so that when those key dates arrive on the calendar they just need to send it to the right list on the right channel.

Work backwards from your launch or launches to determine deadlines for the different components of the project. If one piece cannot begin without another having been completed, budget ample time in the schedule for that work to be done and done well. Let your team have a say in these deadlines where possible and hold them to the schedule you set as a group.



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Inspire Your Team!

The team you've built for your event should already be comprised of people who are enthusiastic about your fundraising efforts, but it never hurts to have a good morale boost. Keep the branding of your initiative focused and present to keep the team's energy high and the goal in mind. This should be an effort that represents the mission of the organization as a whole as well as the initiative's specific vision. It should be a rallying force for your team.

The mission, vision, and brand of your organization overall should already unify your goals, impact, and identity through recognizable images and taglines. A strong sense of pathos is crucial when it comes to making your passion for your values stand out. Incorporate existing branding into this particular initiative, but don't hesitate to add a more specific note, image, or detail to really emphasize your specific goals for this fundraising.

Your mission statement should evolve slightly each year as you make progress toward your broader goals or refine your efforts; think of this as a step in this direction. An initiative should allow your organization to make tangible strides toward those big goals. What will this success allow you to do? Devise a more specific mission statement and goals for this initiative to help you to focus your direction and branding. Employ a tagline, hashtag, or graphic with this initiative that will allow you to spotlight the benefits and importance of donating now rather than later.

NEXT STOPS: CREATE A POWERFUL ONLINE FUNDRAISING MISSION, VISION, AND BRAND