lighthouse
Member management made easy

Process Guide 1: Using Lighthouse to Fundraise

This process guide is designed to take you through the process from start to finish of fundraising using Lighthouse (and the party's other tools too).

We're starting with Lighthouse because this is intended to be the "source of truth" for donation data across the party.

> Note: This guide is very much a work-in-progress. Please do make sure that you give us feedback on the guide, what could be improved and what you found tricky. We'll keep on working to make this guide the best it can be!

Given the current state of the party's data, it's possible that you'll have donation data in other places - and we'll want to resolve this before embarking on a fundraising campaign. The HQ team can help with this where there are large volumes of data to be transferred - but please do bear in mind that we can't turn it around in a very short period of time.

In this guide, we'll also talk about 4 types of fundraising in this process guide:

💓**Individual Giving: Activation** - which is where you approach someone who has never given before in an attempt to get them to give for the first time.

💝**Individual Giving: Reactivation** - which is where you approach someone who has given you money before, in an attempt to get them to give again.

💕 **Individual Giving: Events** - which is where you run events to raise money from members and supporters. These can be everything from a 3-course meal in a 5* hotel, to a simple meal at a supporter's home.

💖**Major Donors** - which is where you approach someone who you believe is capable of giving a larger sum of money.

Where something is only relevant to one or more of the types of fundraising, we'll indicate that at the start of the section with the text and emoji above.

If you're wanting the quickest and simplest route to raising money, you can just follow the sections relevant to 💓**Individual Giving: Activation** - though the more tailored an approach you can make to your fundraising, the more effective it'll be!

Preparation and planning

Preparation and planning are vital to making this a success. In this section we're going to talk through the steps you want to take before launching a fundraising campaign.

These steps are all about making sure you have accurate data, you know what you're trying to achieve and you've got a good ask - to set you up for success.

Make sure your data is accurate

First, we're going to want all of our donation data on Lighthouse. The party has a number of tools that are approved for fundraising via a Nationbuilder or Prater Raines site, but currently, none of this data is available in Lighthouse.

To do that, we'll need to migrate this data into Lighthouse

> Note: This section is hopefully only temporary. The party is looking to update its email and website offering and as part of that work, with integrating donations with Lighthouse being close to the top of our priority list.

Migrating data from Nationbuilder

To migrate historic donation data from Nationbuilder to Lighthouse, you simply need to email support@libdems.org.uk and let us know which Nation you'd like data migrated from.

It can take us up to 10 working days to start a migration, but once started it's usually completed very quickly.

Migrating data from Prater Raines

To migrate historic donation data from GoCardless to Lighthouse, you simply need to email support@libdems.org.uk - we'll then talk you through the process of supplying us with the data that we need.

It can take us up to 10 working days to start a migration, but once started it's usually completed very quickly.

Manually inputting other data

You can also manually input other data into Lighthouse - so if you have offline, standing order or other donations that you'd like to make sure are listed on Lighthouse.

You'll find the necessary guides to doing this on Lighthouse here:

Lighthouse Guide 2 - Managing Contacts

Lighthouse Guide 7 - Managing Finances

Define your targets

Whilst you're getting all of your data imported, you can start with the high-level planning and the first thing to work out is how much money you need to raise - and by when.

To do this, you'll need to have already created a campaign plan, in which you've costed the materials included in it. That should give you a rough timeline of both when you need things and how much the total needs to be.

You can find out more about creating a campaign plan and using a cashflow spreadsheet here.

When fundraising, it's important to try and raise more than your goal. This allows you to build up a stable basis for reserves, to give your organisation money to fall back on when fundraising is harder and for unexpected expenses.

When setting a fundraising goal, you, want to take the amount you need to deliver your campaign plan and add at a minimum:

- 10% as a contingency for unexpected price rises
- 3% to cover transaction fees on donations

You may also want to consider adding 20-50% on top of that as a surplus to be moved to reserves.

Fundraising is much easier during election periods than outside of them, and you'll tend to find that people are more open to donating and donating larger sums of money in those times.

Paradoxically, you'll most likely need that money 1-2 months before people have really realised there's an election on - so by using fundraising campaigns to build up your reserves, you can bridge the gap at the crucial point early in the election campaign without needing to curtail spending.

You then need to split that target up over your fundraising streams.

For this guide, we're going to imagine that we're running a ward level election campaign and focused only on what we need for the regulated period. This example is exactly that, an example. It doesn't use real figures and hasn't been worked out properly - it's here to give you an idea of how to do this.

In that period, we have calculated our expenses limit and can legally spend a little over £1600 and have then rounded down to that number so that we have a little wiggle room in our budget so that we don't exceed our expenses.

We've also made a campaign plan that involves £1550 of spending on leaflets, canvass cards and posters and have set aside an amount to cover a fair share of local party tools - like their website and email marketing tools.

Important: How much you can spend in an election is defined in law. For more advice on how to calculate your election expenses limit for a given election, please speak to the compliance team.

Of that £1550, we are aiming to generate a 25% surplus, in addition to the 3% for transaction fees and 10% for contingencies. That brings us out to a target of £2,139 - which for ease, we're going to round up to £2,200.

For a campaign, we would expect between 60 and 90% of our funds to come from two of the groups we mentioned earlier - Individual Giving: Reactivation & Major Donors.

The remaining amount is likely to be made up from Individual Giving: Activation and Individual Giving: Events - though especially at a ward level and given enough planning it could be quite possible to raise 100% of the funds from one source alone.

For our campaign, our local party events team have planned 3 fundraising events, each of which they're targeting raising £110 - so that gives us £330 of the target. We're then aiming to raise the following amounts from each channel:

💓**Individual Giving: Activation** - £330 (15%) (30-36 donations of £10+)

💝**Individual Giving: Reactivation** - £770 (35%) (20-24 donations of £35+)

💕 **Individual Giving: Events** - £330 (15%) (3 events, making £110 profit each)

💖**Major Donors** - £770 (35%) (5-8 donations of £100+)

Define your asks

Once we've worked out how much we need to raise and set our targets for each of the fundraising groups, the next thing we need to do is get our message right.

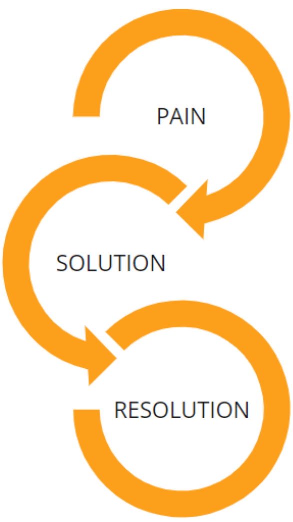
Just like with voters, having a powerful, motivating message is essential for most fundraising.

Why people give

When thinking about this, it's worth bearing in mind why people give to political candidates. Those reasons include:

1. **Because of a personal relationship to a candidate.** These are your candidates' friends, family and co-workers and are most likely to give early on in a campaign. These people are worth treating like a major donor - even if they're only going to give a smaller amount of money.
2. **Because they share your ideology or values.** These are the people this guide is mostly aimed at. These are people who, like you, are Liberal Democrats and share our values. These people are likely to be more approachable early on and will make up the bulk of your donors.
3. **Because they have an axe-to-grind.** These are people who you likely don't know and likely aren't Liberal Democrats. But they really don't like your opponent. If you're running a campaign against a high-profile Conservative, you may well find that appeals to people who dislike the Conservatives are an effective way to raise money. These donors tend to only appear later on in the campaign and only if it's clear that you're the best candidate to beat that opponent. They are also unlikely to exist on Lighthouse - so you're better off using social media to reach these people. We won't therefore cover this group in this guide.
4. **Because they think you're going to win.** Some people like to back winners. These people will tend to show up towards the end of campaigns and will generally be higher value donors. These donors should generally be viewed as an "added extra" and not relied on to fund your core campaign - so we won't be covering them in this guide.

Crafting a fundraising message



Crafting a good fundraising message is the difference between success and failure. When thinking about creating a good fundraising message, it's worth following this framework:

Pain is the first step to a good fundraising message. Here, we define the problem that you have that you need the donor's help to solve. This could be as simple as a strong opposition campaign or a close election.

Solution is the next step - in which you provide someone with a way to resolve the pain point that feels effective and achievable. This could be as simple as funding a leaflet or a letter to voters.

Resolution is where you explain what you need from them to resolve the issue. You're ideally demonstrating here that this person is part of a team that's working together to resolve the issue.

An example of this framework in action would be:

> (Pain) The Conservative-run Council has announced they're closing the High Street Library in Anytown next year.
>
> The Liberal Democrats have a plan to save our library - but the Conservatives are refusing to implement it.
>
> (Solution) The Tories have a majority of just 1 Councillor on Anywhere County Council and if we can beat *Heartless Local Tory* here in Anytown Central, we'll take control of the council so we can save High Street Library.
>
> (Resolution) Your donation of £25 will pay for letters to the key voters who will decide this election so that we can save High Street Library.
>
> Will you donate £25 today {NAME}?

It's up to you to identify what the most compelling local reasons to ask for money are - I am sure that you will have lots - and by using this framework you can tell a convincing story that will help get your campaign funded.

You can tailor what you're specifically asking about either to the point in the campaign you're at, or the person you're asking for money from - you don't have to use the same exact message for everyone, but having a consistent message will help ensure that people hear your fundraising message in volume, over time allowing it to be very persuasive and effective.

Make a plan

So now we know:

1. Who our donors are
2. How much we need to raise and through which channels
3. What our message is

The next thing that we need to do is to write this down. Having a plan and then being able to follow it through is vital to making this work.

You can find an example fundraising plan here.

> Action: Using the items in the previous section and the fundraising plan document, spend some time working through the start of your fundraising plan.

In the fundraising plan, against each group, you'll also note that you can put in your communications plan for each channel. We'll cover this in the "Asking for Money" section of the process guide, so you can leave this blank for now.

Wherever else in this document you find "Action" boxes like the above, you'll be coming back to update your plan.

This will, through the course of working through this guide, let you construct a fully-formed fundraising plan that you can go away and enact.

Plan your audiences

In the previous sections, we took a close look at how much revenue we needed from each of our audiences. Of course, in order to do that we need to know who we're asking!

As you'll remember from the start, we have 4 primary audiences for fundraising. These are:

💓**Individual Giving: Activation**

💝**Individual Giving: Reactivation**

💕 **Individual Giving: Events**

💖**Major Donors**

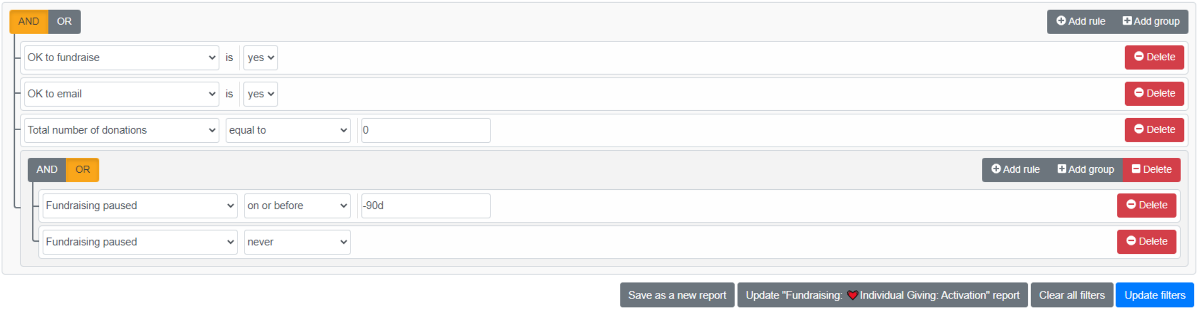
We'll now talk you through the process of creating these groups on Lighthouse. The examples listed in this document can be found on Lighthouse in the same format, so that you can either use those audiences, or modify them to your local party's situation.

Creating an 💓Individual Giving: Activation audience

For this audience, we want anyone who has never given us money before. With activation our primary goal is to get these people to make a donation - so we're generally looking to ask for smaller value donations - as we know that once someone has donated once, they're more likely to do so again.

For this, we're creating a very simple filter, with the following criteria:

- Okay to fundraise is yes
- AND Okay to email is yes
- AND Total number of donations is equal to 0
- AND (Fundraising pause date is not set OR Fundraising pause date is on or before (relative date) -90d)



You'll find this as a saved report on Lighthouse called "**Fundraising: 💓Individual Giving: Activation**"

There aren't really that many changes that you could make to this audience - it's pretty straightforward. It'll also, usually be your largest audience.

It's important to note that this group will contain members, supporters, Ds & Ps and prospects - and whilst members have obviously given before, in the form of their membership subscription, if they haven't made a donation before, then we're treating them as if they're in the activation group (though they are more likely to be activated!).

You'll also note that we're removing people who have paused fundraising from the Liberal Democrats. This is a really sensible step - as these people have told us they can't give right now - so we should respect that.

You might also want to remove At Risk members, given we want them to renew their membership - though this is optional (this step is removed in the default filter, so you'll need to add removing At Risk members to a local version).

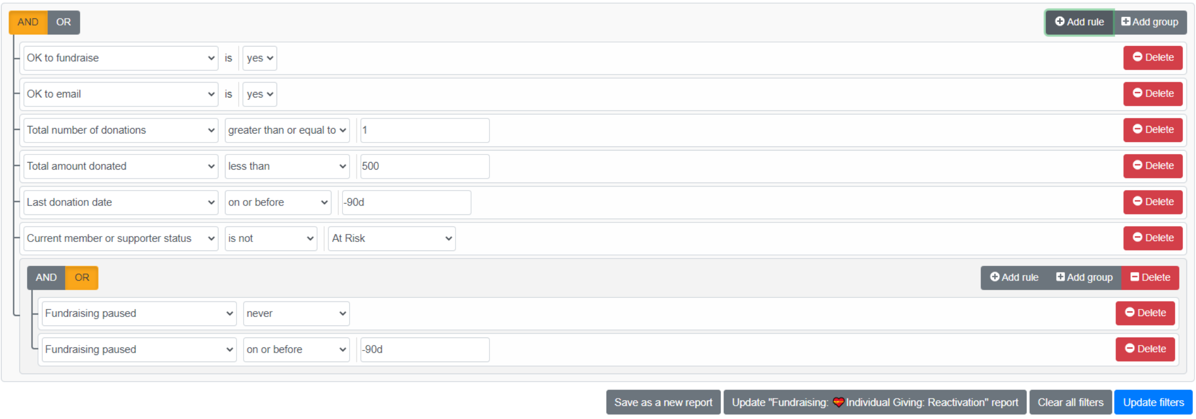
Creating an 💝Individual Giving: Reactivation audience

For this audience, we want people who have given us money before. With this group, we're taking a look at people who have made donations before and our primary goal is to get them to give again.

With this group, we have some limited information on their past giving and we can use some automatically generated fields that are available in Lighthouse to ask for an appropriate amount based on that history.

For this, we're creating a slightly more complex filter, with the following criteria:

- Total number of donations is greater than or equal to 1
- AND Total amount donated is less than £500
- AND Last donation date is on or before (relative date) -90d
- AND Membership status is not At Risk
- AND (Fundraising pause date never OR Fundraising pause date is on or before (relative date) -90d)



You'll find this report pre-created for you on Lighthouse under the name "Fundraising: 💝Individual Giving: Reactivation".

The important considerations on if you want to modify this are what you consider to be a "Major Donor". Here, we've set that at £500 - so anyone giving a reportable donation is considered to be a "Major Donor" - but in most local parties this will leave you with very few people!

It's also worth considering how much we think we might need to raise from this group. Going back to our plan from earlier, we needed 6-8 donations of £100+ to meet our £770 target. We probably want at least twice that number of people to ask (and ideally more!) - so we'd probably want to tinker with our threshold until we have enough people to speak to.

The other way to do this is to decide, based on past income what a high value donation is for your local party - you'd normally be talking about the top 10% of all donations and set it at the bottom of that range.

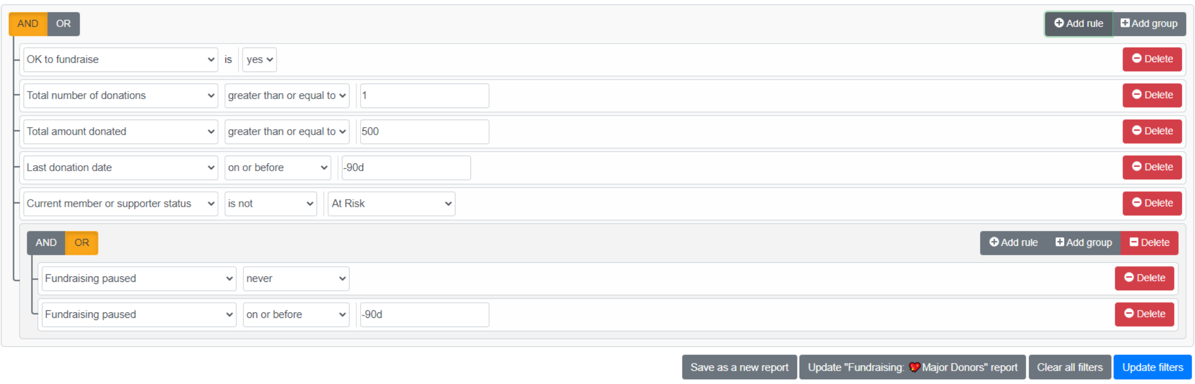
We'd normally not recommend setting that lower than £100.

Creating an 💖Major Donors audience

For this audience, we're taking anyone who was above the cut-off point for our 💝**Individual Giving: Reactivation** audience. This group are the people who are going to get 1 to 1 attention and nurturing as we expect them to give more substantial sums of money.

For this, we're creating a very similar filter to the previous one, with the following criteria:

- Okay to fundraise is yes
- AND Total number of donations is greater than or equal to 1
- AND Total amount donated is greater than or equal to £500
- AND Latest donation date is on or before (relative date) -90d
- AND Membership status is not At Risk
- AND (Fundraising pause date never OR Fundraising pause date is on or before (relative date) -90d)



You'll find this report pre-created for you on Lighthouse under the name "Fundraising: 💖Major Donors". You'll note on this filter we dropped the Okay to email criteria - because for this group, we aren't expecting to send them any emails in bulk. All of our approaches will be on an individual basis.

As with the previous filter, you should set your cut-off point (the third criteria) at the same level. So if you'd said anyone who has given more than £100 was a major donor for your local party, you'd want to create a local version of the filter above where the total amount donated is greater than or equal to £100.

Easy!

Creating an 💕 Individual Giving: Events audience

For this, final audience we are taking a look at members or donors who we think might be interested in attending events.

For this, we're creating our a relatively simple filter and it's very similar to the earlier ones we created. The criteria for this list are as follows:

- Group 1
    - Current active member or supporter is yes
    - AND Ok to email is yes
- Group 2
    - Ok to email is yes
    - AND Total number of donations is greater than or equal to 1
    - AND Current active member or supporter is no

You'll find this report pre-created for you on Lighthouse under the name "**Fundraising: 💕 Individual Giving: Events**".

This is giving us a subtly different audience to the other individual giving audiences. It's narrower and more specific - in that only members, supporters and donors are included.

We also care if we can email them here - as that's how we're going to invite them to our event.

Note: The party is currently exploring options for Events Registration tools and in the future, we hope to have that integrated with Lighthouse - so that you'll easily be able to run two lists here: Events: Activation and Events: Attendees - with the former being people who've never attended a local event before and the latter being those who've attended a local event before - both of whom can get a slightly different treatment.

Asking for money

How to ask major donors for money

This section is mostly relevant to 💖**Major Donors** - those focusing on individual giving can skip this section.

Asking for bigger gifts face-to-face or over the phone can be done using the following five steps.

1. Identify & research your 'prospects'

Members and ex-members, long-term supporters, who you know, previous donors. **Do your homework:** Previous donations, Capacity, Reputational risk, Political interests, Philanthropy, Profession, Family, Hobbies.

2. Plan your approach

Draw up a gift table. Break down your overall target into smaller chunks and work out how many people you need to donate at that level. E.g. for £10,000 you could use the table below.

Amounts	Number needed	Total	No. of prospects
£2,500	1	£2,500	3
£1,000	2	£2,000	4
£500	4	£2,000	7
£250	6	£1,500	15
£100	10	£1,000	27
£50	20	£1,000	35
TOTAL	**43**	**£10,000**	**92**

When looking to engage with prospects, plan relevant, regular, resource effective contact & keep a record of every conversation.

Be prepared for objections and consider objections in advance & share insights instead of dissuading and check you're not defensive.

3. Make the ask

The three things to remember on a strong ask are to have a conversation, not confrontation, be specific & be clear, thorough, professional & informative.

Preparation is key to a strong ask and consider doing these seven steps beforehand

1. Revise background research about the donor
2. Plan a suitable and specific ask (and prepare to switch)
3. Create a visual prompt/proposal for pre or post meeting
4. Practice your ask in advance - key phrases
5. Choose a suitable venue
6. Set expectations for the meeting
7. If others influence the donor, connect with them for insight

There are a number of key phrases that can help engage with the prospect for cold, tepid & warm prospects.

<u>Cold</u>

Broaching the subject: 'Are you considering?'

Make a number real: 'Do you have a figure in mind?'

<u>Tepid</u>

Hunger and imperative: We 'need'....and 'we need it by next week'

<u>Warm</u>

The power of match funding: "We need to find 5 supporters who will give £X, we have 3 already,'

Keep outputs and impact in the narrative: 'When we have raised £X we will be able to do Y and the ultimate impact will be Z.'

4. Close the ask

Follow-up in writing/by email & promptly share requested info. Thank and reiterate the amount and find the easiest way to pay, clarifying if it is one-off or instalments. Finally confirm receipt and top and tail with specific thanks.

5. Look after the relationship

You need to steward the relationship so that they feel looked after and also if you need to go back for more money next year you won't need to do the above steps again. You can do this via regular contact, information and transparency of the campaign.

You can do this through events, coffees, tailored emails, calls, whatsapps, briefings on progress. Find tailored reasons to contact & avoid contacting only for money.

Continue to thank and update even lapsed donors & keep a record of every interaction and donation.

How to use actions to manage follow-ups

This section is mostly relevant to 💖**Major Donors** - those focusing on individual giving can skip this section.

At every stage when you're talking to Major Donors, you want to be keeping track of what you're doing.

There's two reasons for this - firstly, it means if you're not able to continue with the work, someone else will have all of the information they need to pick up where you left off and secondly because it keeps you accountable to your colleagues.

To track our activity, we use Actions in Lighthouse.

These are a simple process that can be associated with most records in the system - though in this case, they're most likely to be associated with a person or a pledge.

Creating Actions

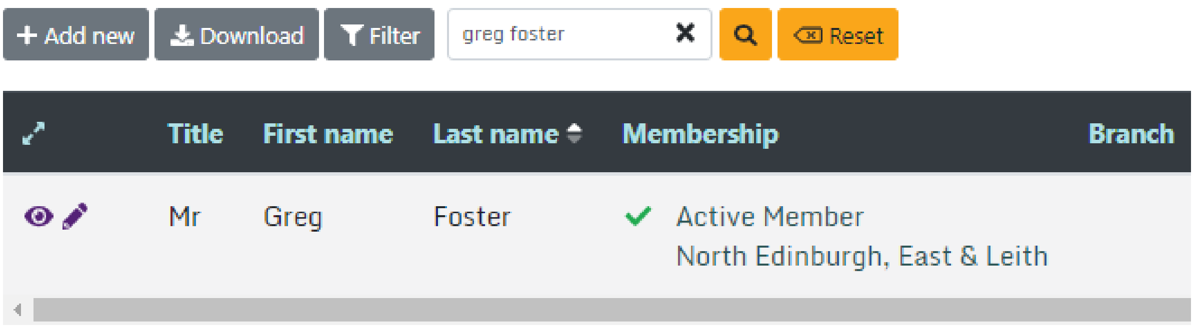
For this example, we're going to create an action for a potential major donor we want to speak to - a person called Greg Foster.

We've established from our 💖**Major Donors** audience that we created earlier that Greg has in the past given donations of £100+ and so we've identified them to be reached out to by our Fundraising Officer, Jane Smith.

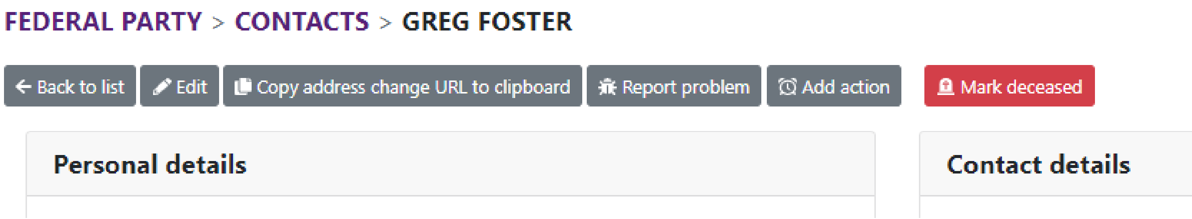
Jane then logs into Lighthouse following the planning meeting where this is agreed and is going to set up Actions to track their work and make it easy to report back on progress later.

To do this, Jane goes to the Contacts page and searches for Greg's name. If the 💖**Major Donors** audience is small, they might also do this by going to reports and running the Report, though if you have more than a few dozen people, it will likely be faster to use the search function.

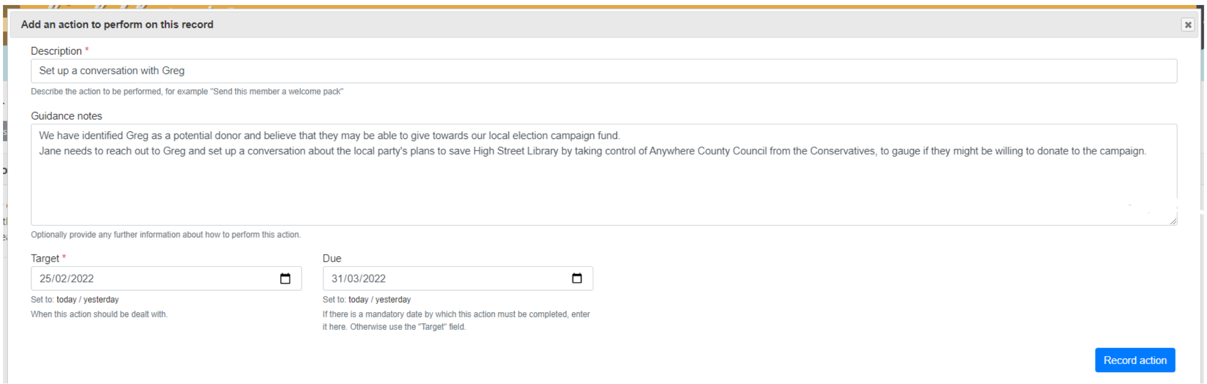
Jane then clicks the eyeball icon to view Greg's Lighthouse record.



On Greg's contact record, Jane then clicks the "Add Action" Action Button



And then enters the details of the action that they need to take.



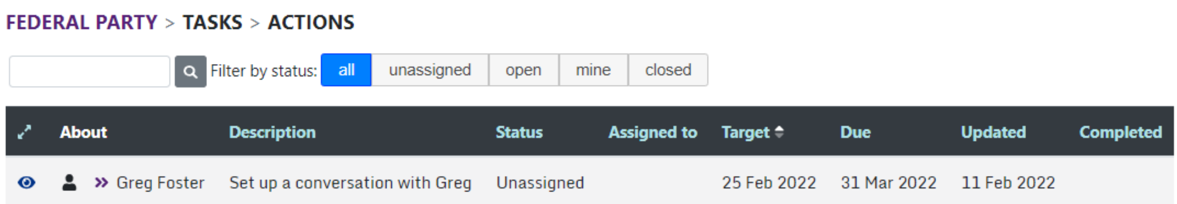
This screenshot is probably a little small! So we'll take a moment to explain what's what:

- Description: is a simple summary of what the action is - in this case, "Set up a conversation with Greg"
- Guidance notes: then allows you to add context, additional information and links to guidance documents (like this one!)
- Target date: is the date you'd like to have this action complete by (this is required)
- Due date: is the date that this action must be completed by (this is optional)

And when you're happy, hit "Record Action"

A new Action record will then be created, which can be viewed in Lighthouse under Tasks → Actions

This page looks like this:



On this page, Jane can see any Actions within their organisation - not just ones that they've created.

They can also search through actions, using the search box (you can search for the record an action is related to or the description) and there's also the option to filter the view by an action's status - letting you narrow this view down to just what you need.

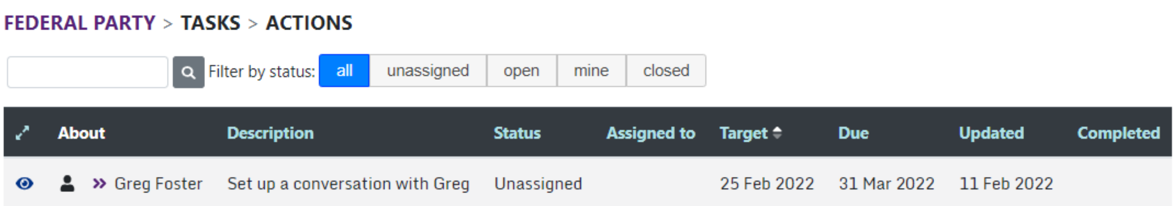
- Unassigned will show you all actions
- Open will show you actions that are in progress
- Mine will show you actions that are assigned to you
- Closed will show you completed actions

Note: Before reaching out to a potential major donor you may want to conduct some basic due diligence checks to make sure that they're actually eligible to donate. You can find out more about the rules on accepting donations here.

Updating Actions

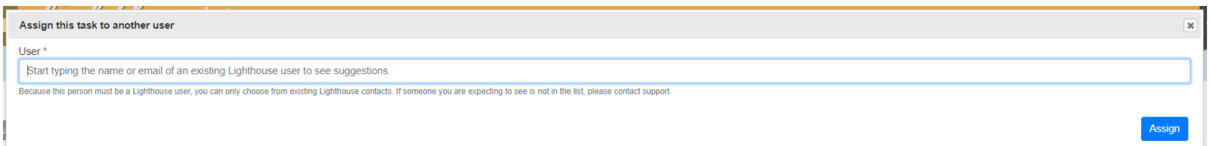
In the last step, we created an action. Since then, Jane has been able to speak to Greg and needs to update the progress on their action.

The first step for this is to assign the action to Jane. This can also be done at the end of the last step. To do this, we're going to click on the eye icon next to the Action we just created.



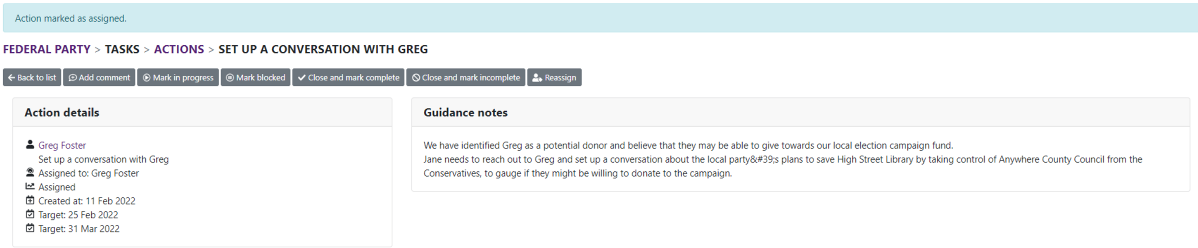
You'll also see a double arrow icon on the list view above - this is the related record icon and would allow you to load up Greg's Contact record, instead of the action.

Once we're in the Action record view, Jane can assign the Action to themselves simply by clicking the "Accept" button. They can also assign it to someone else, by clicking on the "Assign" button.



The screenshot above shows the Assign pop-up, that allows you to search for another Lighthouse User and then assign this action to them.

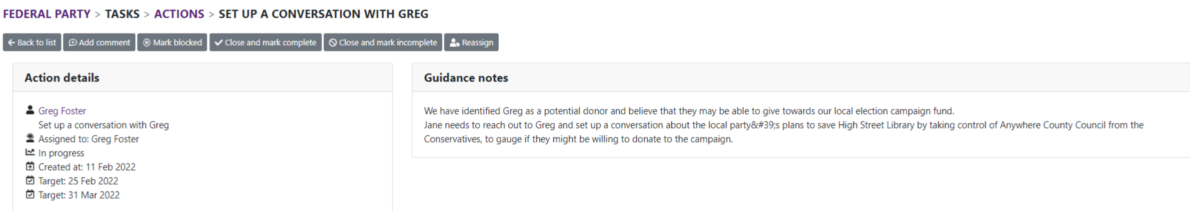
Once the Action has been assigned to Jane, a lot of new options appear:



First, we'll run through the new Action Buttons that have appeared.

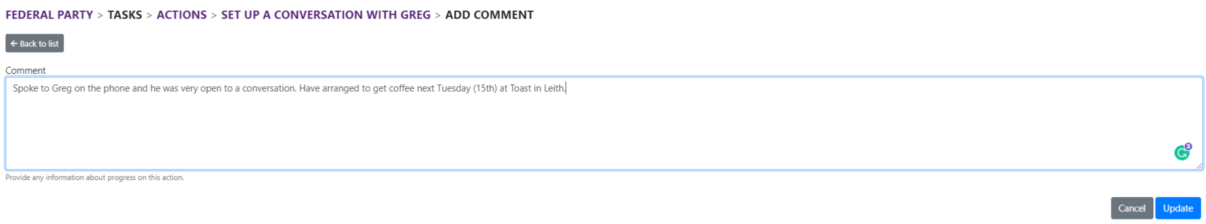
- Add comment - allows you to add plain text notes against this record that let you track progress, make notes on important items you discussed and a lot more.
- Mark in progress allows you to update the action's status to "In Progress" indicating that you are working on it.
- Mark blocked allows you to update the action's status to "Blocked" indicating that something is preventing you making progress on it.
- Close and mark complete allows you to update the action's status to closed and note that you were able to successfully able to complete the action.
- Close and mark incomplete allows you to update the action's status to closed and note that you weren't able to complete the action.

As we know, Jane has been able to call Greg, so they would mark this action as "In Progress" first - to show that they've made a start on this.



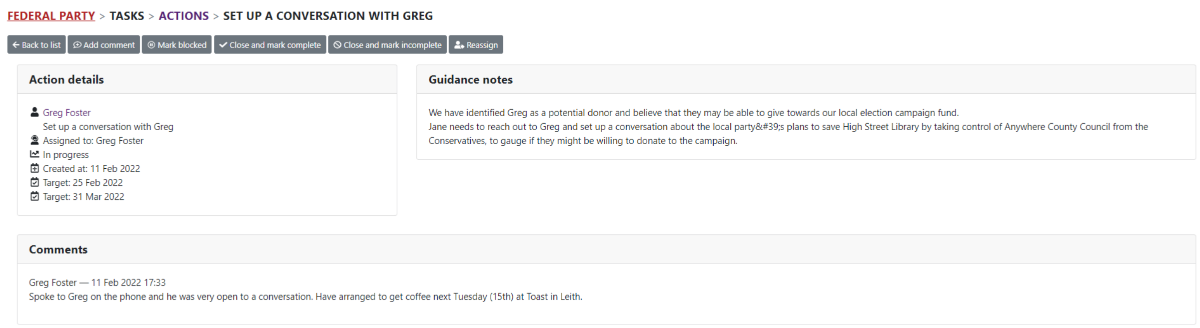
As you can see - the action status has now updated to "In Progress".

Jane had managed to speak with Greg - so they are also going to add a comment to make a record of their conversation. To do this, Jane clicks on the "Add Comment" action button.



Here, Jane is recording the outcome of the conversation - that Greg was open to a chat and that they have arranged to meet in person for a coffee at a cafe named Toast. Jane then clicks update to record that.

The comment is then added to the action, along with who made it and when it was updated, giving you a really helpful structure to follow in terms of the history of this action.



Note: You might also want to record the fact you called Greg on Connect and record any additional information that you collected. To do this, we would log into Connect (ideally in MyVoters), locate his record using Quick Lookup and then use Script view with the current year's Member Activation script for your area (England, Scotland or Wales). This improves the party's data in both databases and keeps a good record of the fact you are engaging with your members.

Resolving Actions

So far, Jane has been working through the task they've been assigned at a great rate. As planned, Jane and Greg meet for a coffee and the conversation goes great! Greg happily writes the local party a cheque for £250 there and then!

When Jane gets home the first thing that they do is update the action on Lighthouse.

As before, Jane is going to add a comment indicating what happened during the conversation, how much they were given as a donation and any other useful notes from the conversation.

Jane will then use the action button “Close and mark complete” to indicate that the Action has been completed successfully.

Tidying this all up - Jane would obviously need to make sure that the Treasurer received the cheque they’d got from Greg and that is logged on Lighthouse.

If Jane has create donations access, then they can do this and you’ll find guidance on entering donations here: Lighthouse Guide 7: Managing Finances

If not, Jane will need to ask someone else with Create Donations access to do this.

Note: When entering donations as part of a fundraising campaign, you want to make sure that they all have the same “Reason for donation” entered as this will let you properly analyse your performance when you come to the end of the process and are reviewing what to do next.

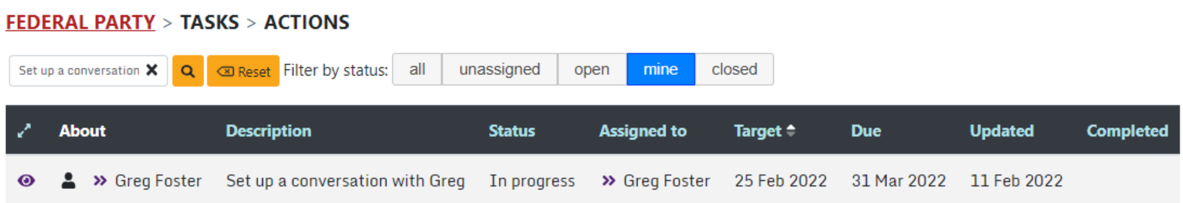
Updating others on progress

We’ve talked through how we can use actions to track the work we’re doing - but you can also use Actions to make reporting back easier.

In the example we’d used earlier, Jane the fundraising officer had been asked to reach out to twelve potential major donors to find out if they’d be willing to donate and they’d created an action for each of them.

As Jane is keeping the actions up to date with their progress, when the next Fundraising committee meeting rolls around and they’re asked to give an update on progress, they can do that easily, by going to the Actions tab and then narrowing the list to their Actions.

If the actions were all set up with a similar description (in our case: Set up a conversation with NAME) then Jane can also use search to narrow the list further.



That’s exactly what Jane has done in the screenshot above. They’ve searched for actions with the description they set and then narrowed the view to those assigned to themselves.

They can now see on a single screen what the status of the actions they've been assigned is and can easily report back to the committee where they're up to.

They also have the notes they've been keeping on the action if there are more questions about why an action has or hasn't been completed.

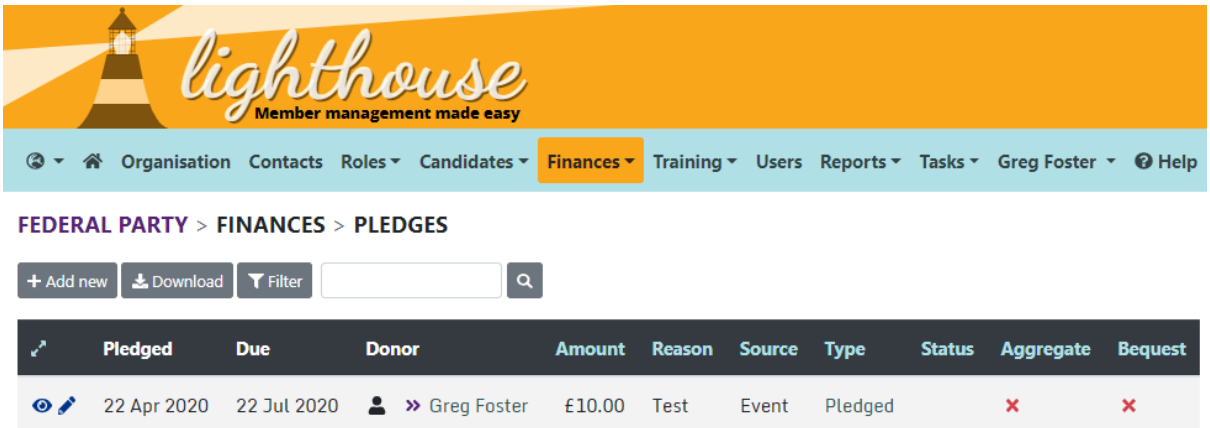
How to use pledges to track major donor offers

> This section is mostly relevant to 💖**Major Donors** - those focusing on individual giving can skip this section.

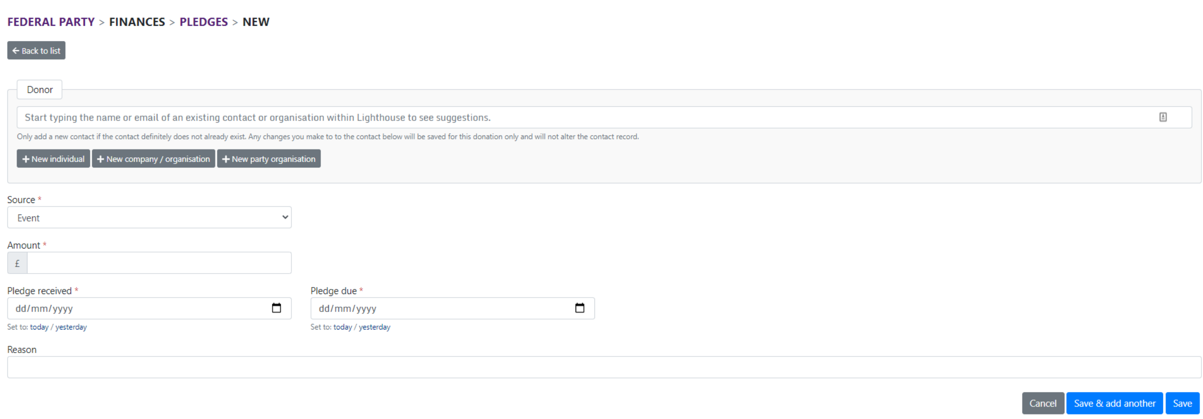
Once you've had your conversations with major donors - and hopefully gotten a promise of (or actual) money, there's a handy little Lighthouse feature called "pledges" that enables you to keep track of what's going on.

Simply put, a pledge is a donation that you think is likely to come in at a future date.

The process of creating them is virtually identical to creating a donation. You'll find them under Finances → Pledges.



To start with, we're going to click the add new button to create a new pledge.



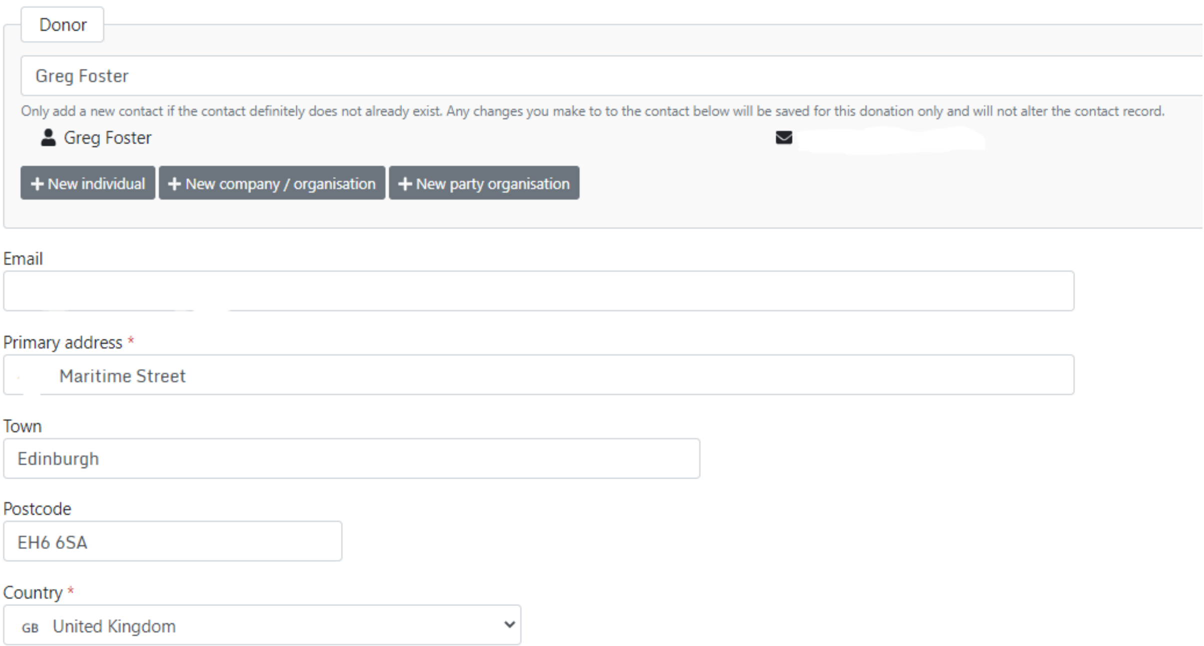
The first thing to do is to search for the donor using the bar at the top. This looks at every record that exists on Lighthouse, not just those in your area, so donors who live outwith your area can be added.

You can also add pledges from companies or party organisations.

And of course, if you can't find the person or organisation that you're looking for, you can use the action buttons below the search bar to create them.

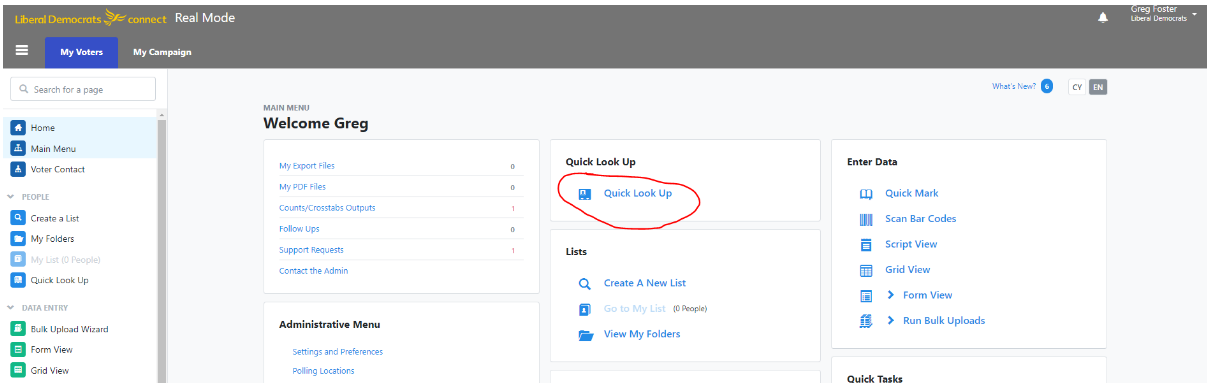
Note: In order to create a new contact or organisation you will need "Create Contacts" permissions within Lighthouse. If you don't have this, then these buttons won't appear.

Once you've added a donor, new fields will appear giving more information about the donor.



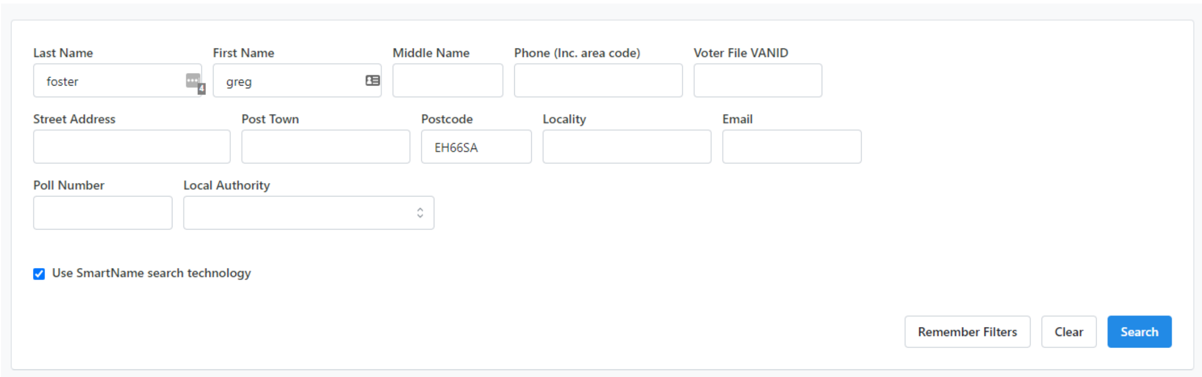
These include contact details and address and allow you to check the donor is permissible on Connect at this stage. Especially for major donors, we strongly recommend that you do this.

To check that someone is a permissible donor, log into Connect (https://connect.libdems.org.uk) and make sure that you're in MyVoters and then select Quick Look Up.

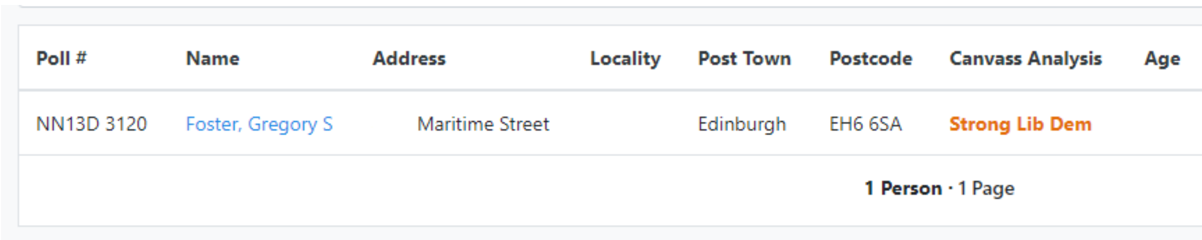


You'll have the information on the donor from Lighthouse, allowing you to easily narrow your search down.

From the information we had earlier on the donor, we could work out the likely local authority, postcode and contact details, allowing us to quickly identify the right person.



It's worth bearing in mind that if some of the information doesn't match between Connect and Lighthouse, providing more information can lead to you not getting a match. For example, if I searched based on email, but Connect didn't have the same email as Lighthouse, it's unlikely I'd find my donor. The fields listed above, first, last and postcode will usually find most people.

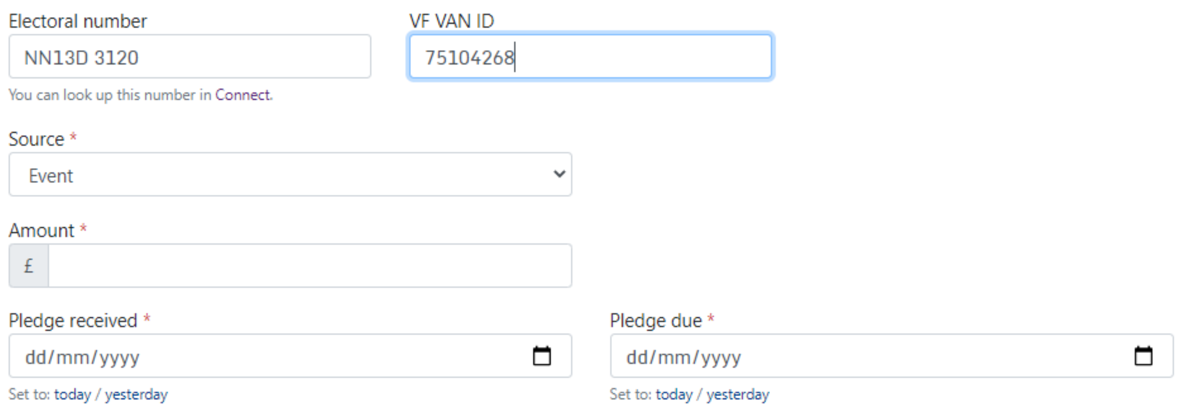


Poll #	Name	Address	Locality	Post Town	Postcode	Canvass Analysis	Age
NN13D 3120	Foster, Gregory S	Maritime Street		Edinburgh	EH6 6SA	Strong Lib Dem	

1 Person · 1 Page

As you can see here, we've found our donor. What we're now going to do is click on their name to load up their profile.

We then need to manually copy across the polling number and VANID to Lighthouse.



Poll # (shown in the Connect screenshot above) goes in the “Electoral Number” field in Lighthouse and Voter File VANID goes in the VF VAN ID field in Lighthouse (as above).

We then need to complete the rest of the required information, the Source, which is the communication method you obtained the pledge via (we’re picking In person for this one); the amount and the date you obtained the pledge (Pledge Recieved) and the date you expect the money to come in (Pledge due).

You can then also include a “reason” for the pledge. For those of you who are familiar with Nationbuilder, think of this like a “tracking code” which allows you to associate donations with a campaign or page and try to use the same code for all pledges or donations associated with a fundraising campaign.

For our campaign, we might use Local Elections 2022 (or a shorter format). Doing this and being consistent will allow you to analyse and report on your performance later on in the campaign and learn from what you’ve done.

Note: Short tracking codes that are easy to type are usually better. We recommend using either an abbreviation and numbers or a single word - so “LE2021” or “locals” would both be ideal. Adding a reason is optional, but highly recommended.

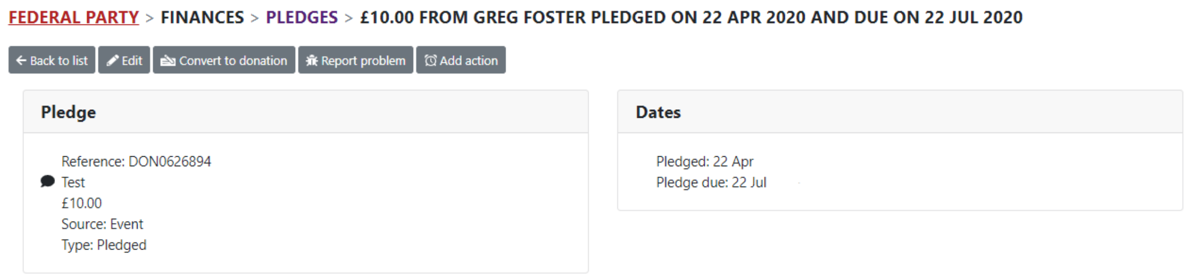
Once you’re done, click save if you’re entering just one pledge, or save and add another if you have more than one to add.

Note: Now that your pledge is in the system, you might want an action to help remind you to follow up on it! Just follow the steps here to do this.

Converting a pledge to a donation

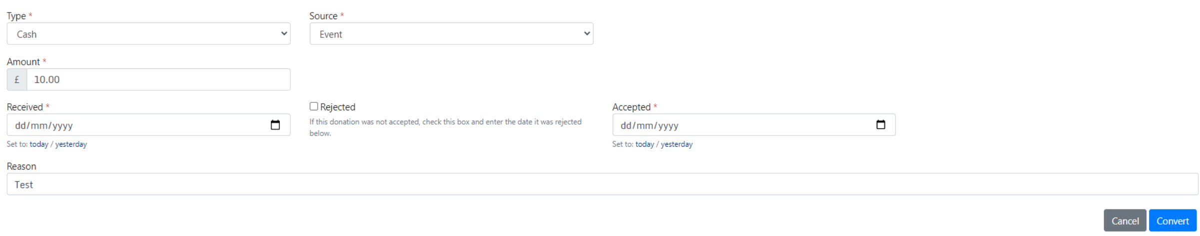
> This section is mostly relevant to 💖**Major Donors** - those focusing on individual giving can skip this section.

Once you've got a pledge recorded on the system, you can easily and quickly convert it to a donation, by clicking the "Convert to donation" action button on a pledge.



That brings up a screen very similar to the one we had for a pledge.

You simply need to check that the details are still correct and recheck the electoral number and VANID from Connect.



You then also need to add some additional information. Type is used for the type of transaction it was - cash, cheque, card etc.

Amount should be updated to reflect the amount received (not the amount pledged) and the received date is the date on which the money entered the possession of the accounting unit, whether in person or electronically.

The Accepted date is the date you did the acceptance checks (so assuming you're following this guide, that's today!) and the reason will be pulled across from the pledge.

You can also mark a donation as rejected, if you've had to return it for any reason.

When you're done, just click convert and now you'll have a donation record that you can report (if needed) on your PPERA return.

How to ask for money via email

This section is mostly relevant to 💓**Individual Giving: Activation** and 💝**Individual Giving: Reactivation** those focusing on major donors giving can skip this section.

Asking for money via email is a slightly different beast to asking for money from major donors. Many of the general principles are the same and we've already done the preparation work in our Fundraising Plan, but some of the techniques are different.

For this guide, we're going to teach you how to run a "crowdfunding" style campaign. The hallmarks of this campaign include:

- A fixed timeframe of a few weeks within which the campaign will be run.
- A clear, single goal for the fundraising.
- A relatively high frequency of communications.

These are best used in the run up to, or during an election period, but many of the same techniques we're going to cover here can be used outside of elections as well.

Setting up a donation page

The first thing that we're going to need is a donation page.

The steps below are going to outline the process of setting one up on Nationbuilder - but this is also possible on other providers. Please contact your website provider to discuss how to achieve this on their platform.

The important things to remember are that your donation page:

- Must comply with the laws and regulations around collecting payments online
- Must comply with electoral law

If you're using a donation page that isn't on Nationbuilder or Prater Raines, it's important that you check that what you're doing is compliant by emailing support@libdems.org.uk.

Creating your donation page

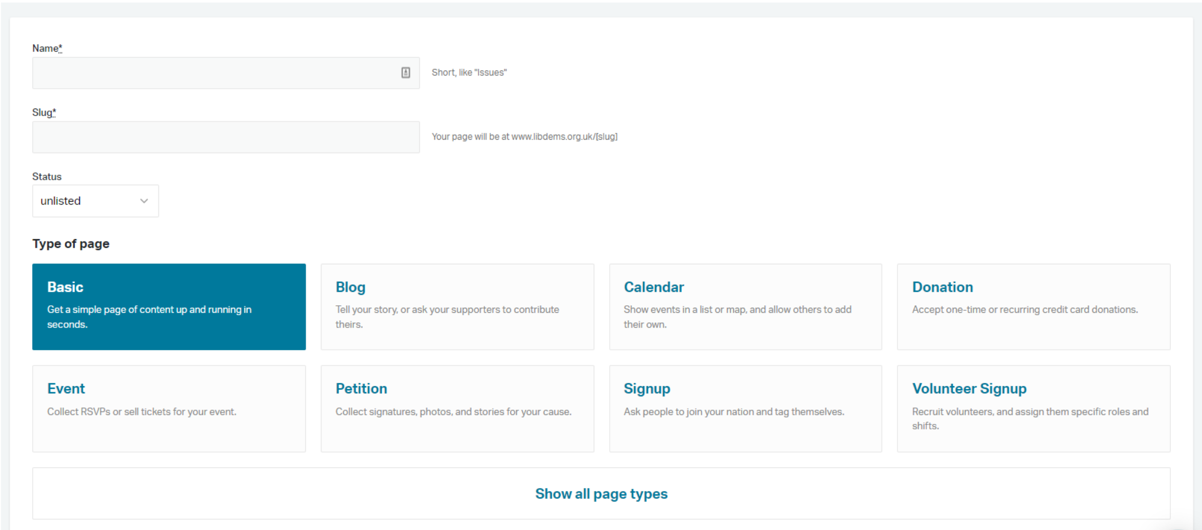
This section is only relevant to Nationbuilder users.

You'll find a more in-depth guide for Nationbuilder Donation Pages on the hub here. But in this section, we're going to give you a step by step walkthrough to creating a page for our campaign.

First, we're going to log into our Nationbuilder site and navigate to Website → the website we want to create our page within.

You'll then want to locate a parent page for your donation page to live under in the site map. We usually recommend that donation pages live under the "Donate" page, which is created as standard.

Click on Donate, then Subpages and then finally, new subpage.



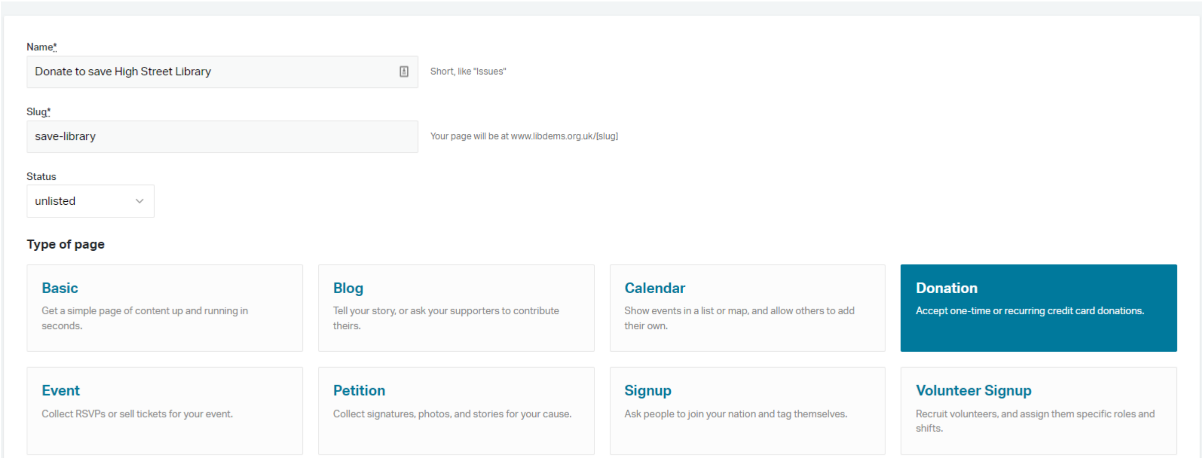
We need to give our page a name. We recommend that this is based on the fundraising message that we already created in our Fundraising plan.

For this example, we're going to use "Donate to save High Street Library"

You then need to give the page a "slug" which is the part of the website address that appears after the slash. As it's likely you'll be putting this on a leaflet or letter, we recommend something that's easy to type.

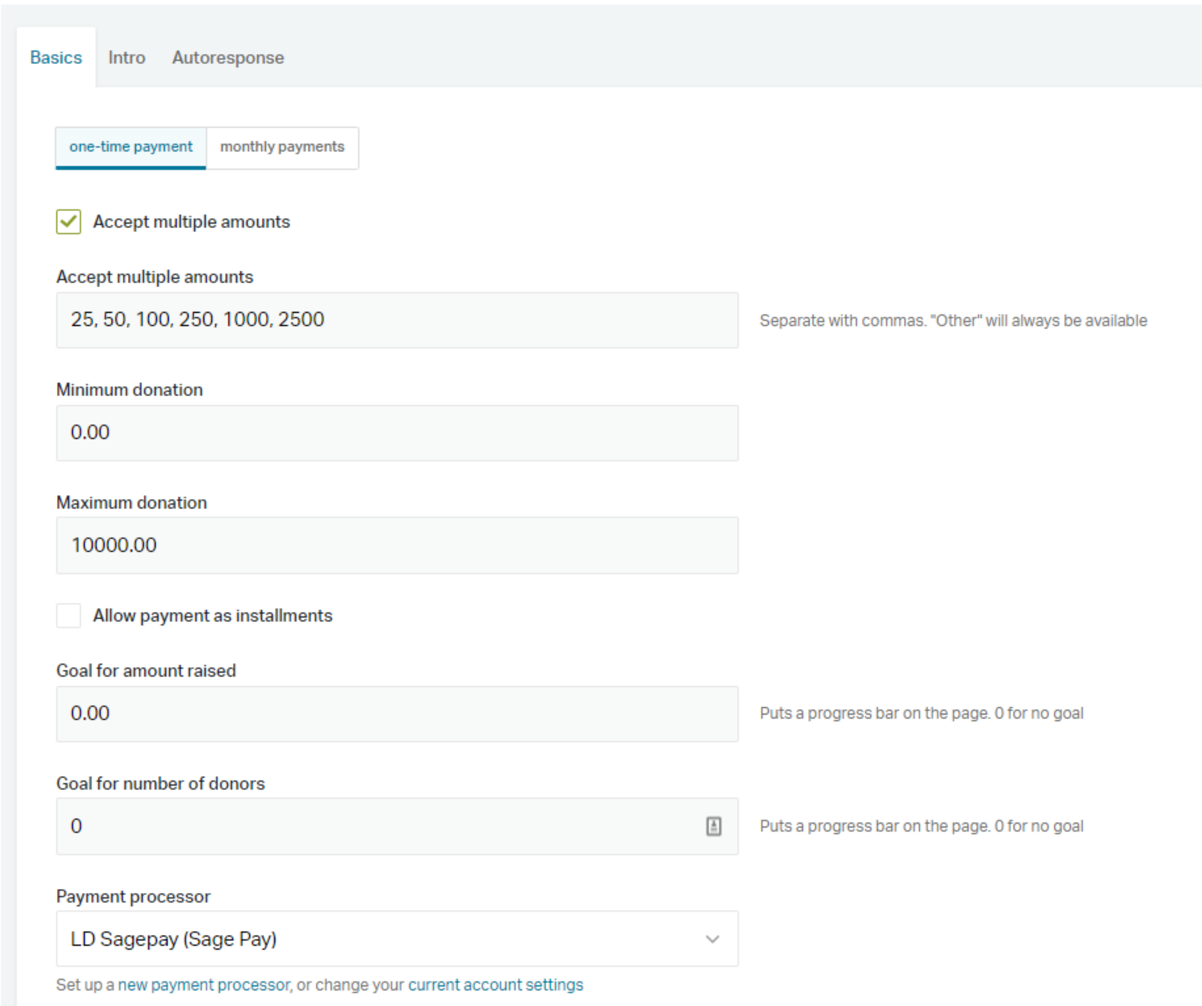
In this case we're going to go with "save-library" - so someone typing the address in would go to "anywherelibdems.org.uk/save-library".

We then need to indicate the page type, which is going to be "donation".



You then also want to make sure that “Include in Top Nav” and “Include in Supporter Nav” are unchecked.

When you’re done, hit create page.



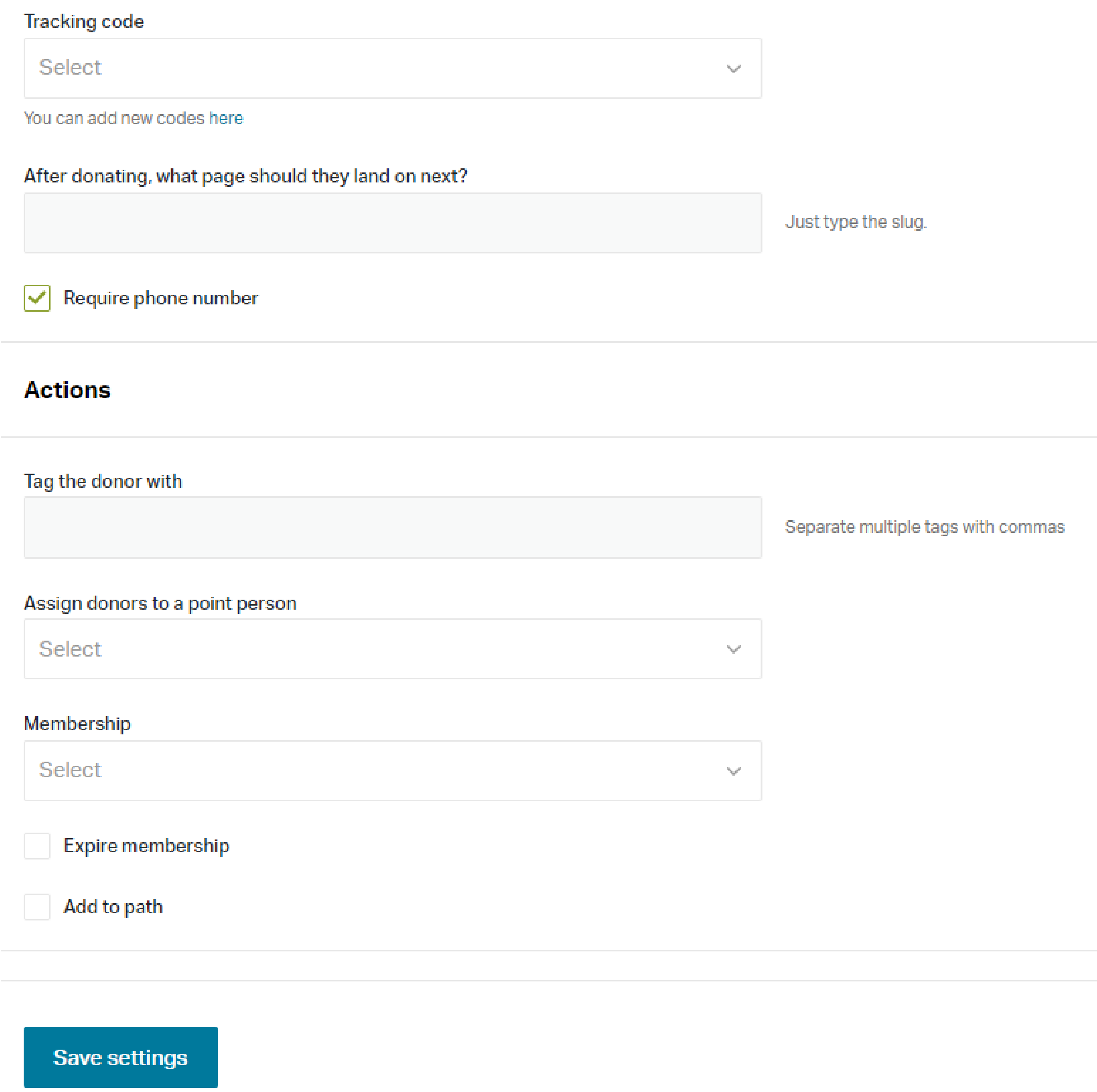
Next, we need to start configuring our page.

First, we want to change the amounts offered on the page. We know from our experience that most individual gifts are between £10 and £100 and through long testing, we know the most effective amounts to offer on a page like this are: £10, £25, £50, £100, £250 and £500.

You can leave the minimum donation amount and we recommend setting the maximum donation amount to £999 - as this reduces the chance that someone accidentally gives £1000 when they meant to give £10.00 - but this is entirely up to you.

You should only have one payment processor on your site - so just use the default one here.

Note: You might want to set a public goal for fundraising, by populating the goal for amount raised field listed above. We recommend not doing this until you have achieved at least 10% of your target though - as seeing there are no donations may put people off donating.



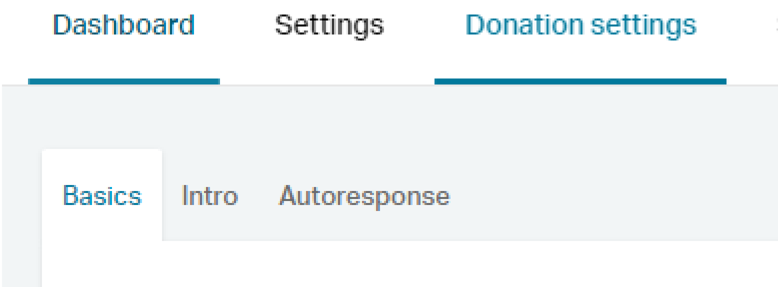
Next, you need to select a tracking code for the donate page. Ideally this matches the "reason for donation" that you're using on Lighthouse.

Leave "after donating what page should they land on next" - as we're going to come back to this.

Uncheck require phone number.

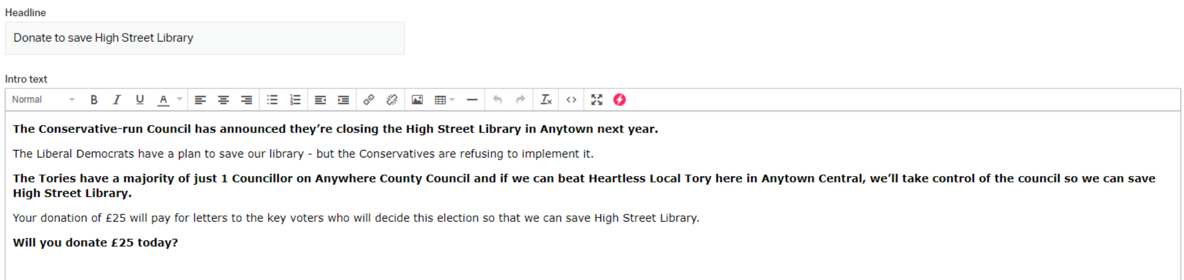
Then we need to make sure that we can easily find donors in the database later. For this we want to add 2 tags. "donor" and "donor_TRACKINGCODE" - where we replace the all-caps section with the tracking code we've already set for this page. This will allow us to exclude anyone with the "donor_TRACKINGCODE" tag from future emails about this campaign later on.

We're now done with this page, so hit save.



We now want to add the text to our page, so we're going to go to Intro.

For this, we're simply going to paste in the "problem, solution and resolution" message we worked on earlier into the Intro Text box, like so:

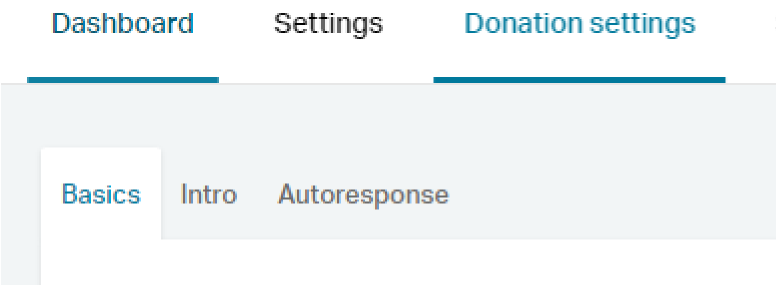


If you're pasting this text in from a Word, Google Document or Email you may want to highlight all of it after it's been pasted (clicking in the box and then pressing Ctrl+A will do this) and then click the clear formatting button, which looks like this:

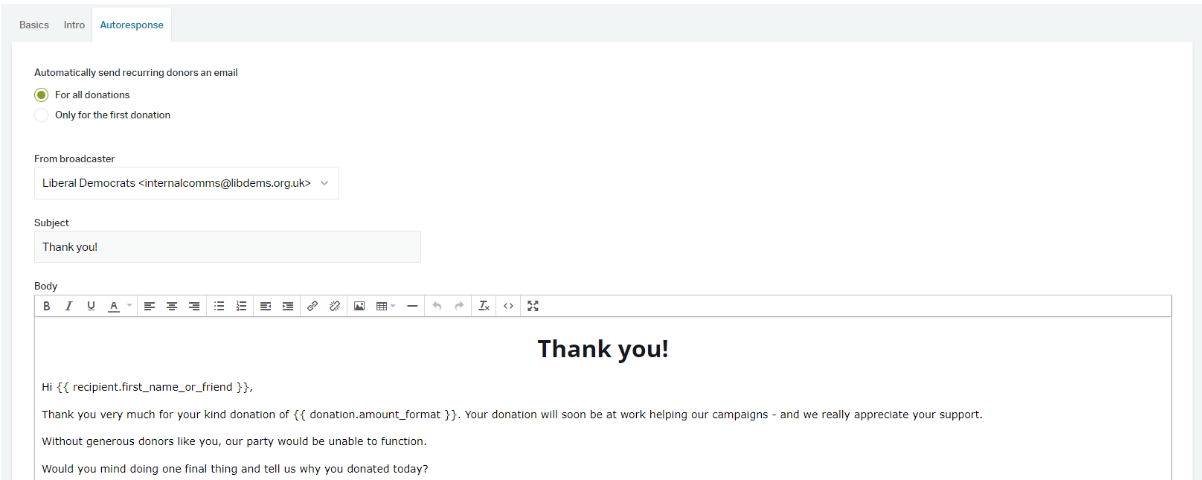
This just makes sure that your text doesn't look weird on the website.

Once we're done with that, you may then want to bold parts of the text, so that someone can get the key message of the page if they just skim it.

Once done, click "Save Intro Text" and then click autoresponse.



Here, you'll have a standard, pre-created autoresponse email which will be sent to anyone who donates. All we want to do here is update this to include your fundraising message again.

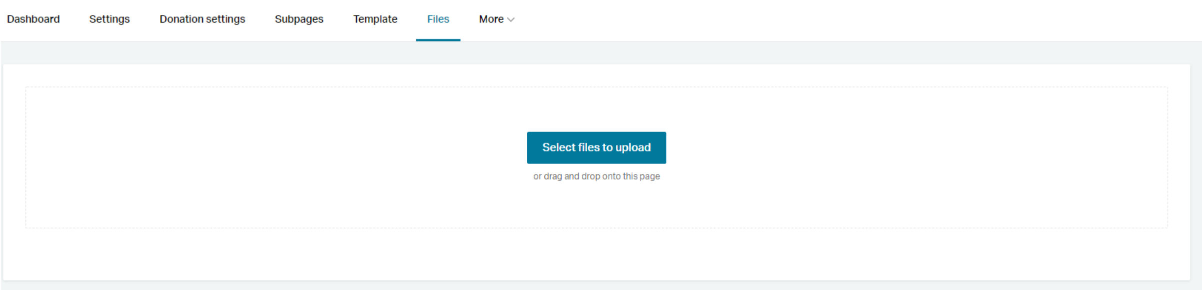


Just edit the text to localise it and hit "save autoresponse email" when you're done.

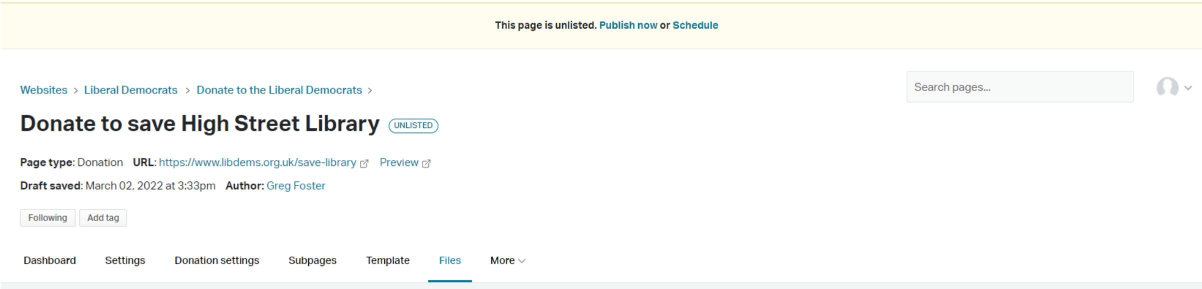
Next, we need to upload a background and social media image for our page.

You can download an affinity template to [create a background image and a social media image on the Hub here].

Once you've created and exported your images in Affinity, you just need to click onto the files section in the page we've been working on and then click "select files to upload"



Just locate the files you created, upload them and then we're going to hit publish at the top of the page.



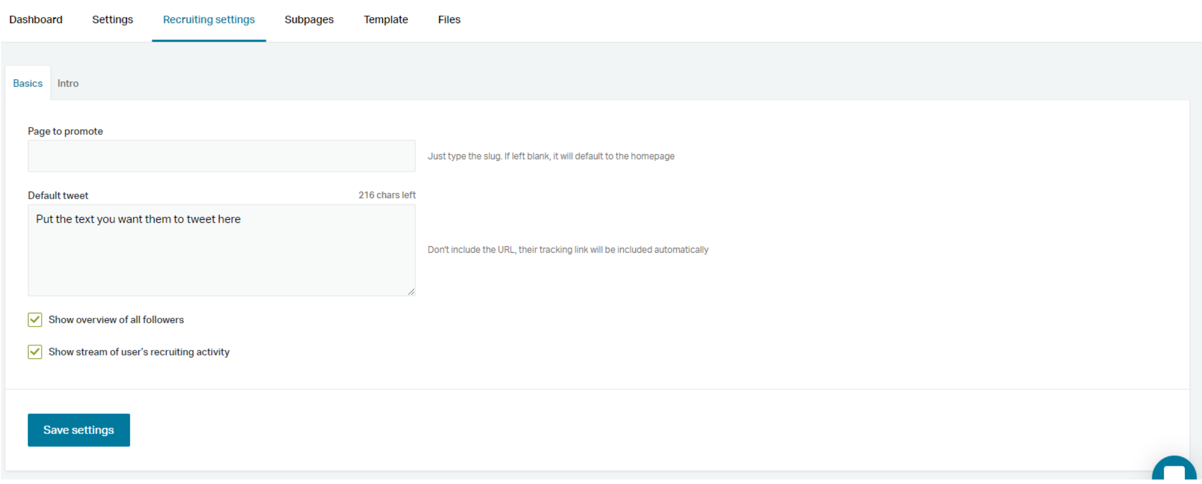
Creating a thank you page

We've now got a way for people to give us money. The next thing we need is to create a page that'll help confirm a donation went through and encourage people to share the fact that they've donated.

This allows your campaign to spread organically on social media and pulls in new people who you don't have on your list, but who share your values.

On the donation page that we just created, we're going to go to subpages and then "new subpage"

We're now following the same process as we did for a donation page, but on this first screen, we're going to name the page "Thank you for donating" and give it the slug "TRACKINGCODE-thanks". We're then going to select the "recruiting" page type. We'll need to click "Show all page types" to get this to appear.



First off, we're going to put the URL of the donation page we just created in the "page to promote" field and we're then going to add a custom tweet in "Default Tweet".

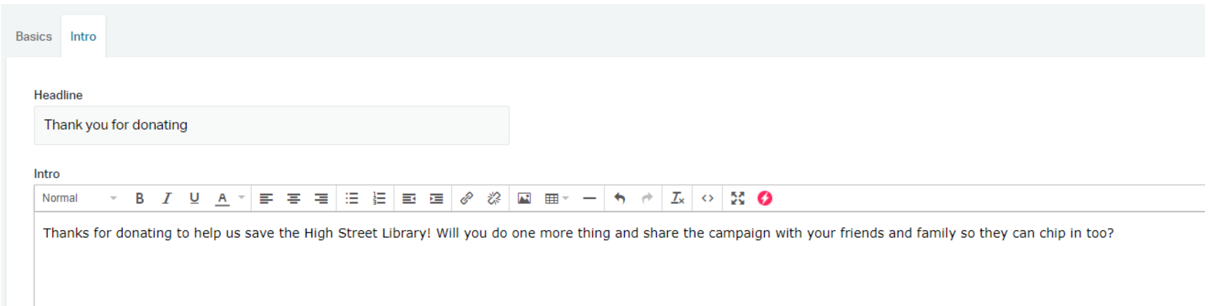
As this is a tweet, we're limited to 256 characters (we also need to include a URL!). An example of a good default tweet for the campaign we're setting up would be:

I just donated to @anywherelibdems campaign to save the High Street Library. Will you join me? Donate £10 or whatever you can afford here:

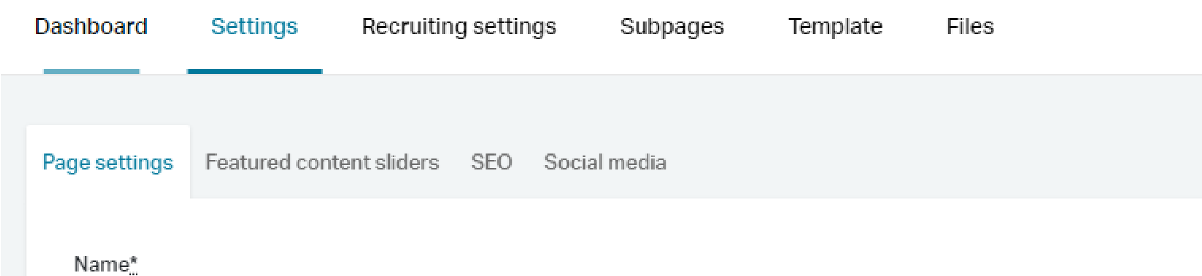
As with all of the other communications we've had in this section, we're making sure that we're reinforcing our core message and including an ask - it's vital that you do this in all of the communications we're sending out.

Next, click where it says "Intro" and add some text thanking the donor for their support.

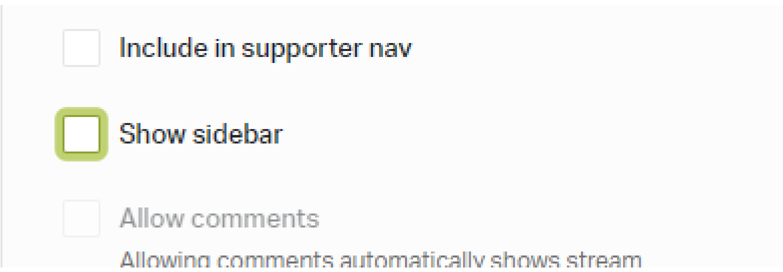
You can re-use the text you used in the autoresponse earlier if you like.



Next, we need to click "Settings"



And then find the setting in the right-hand column that says "Show sidebar" and uncheck that.

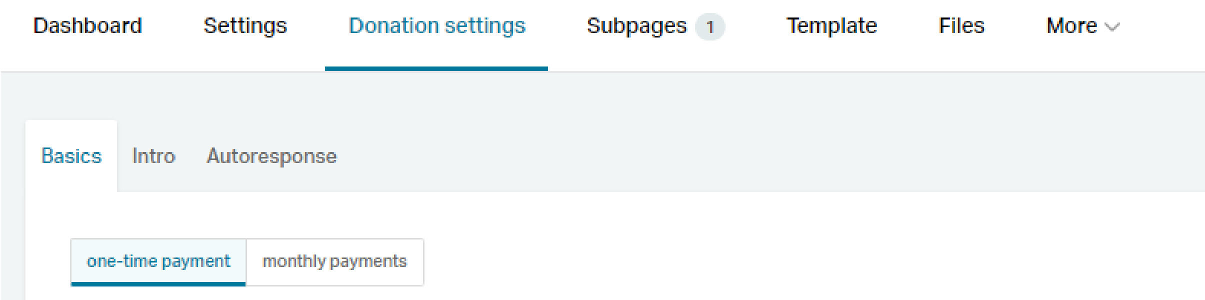


And then click save.

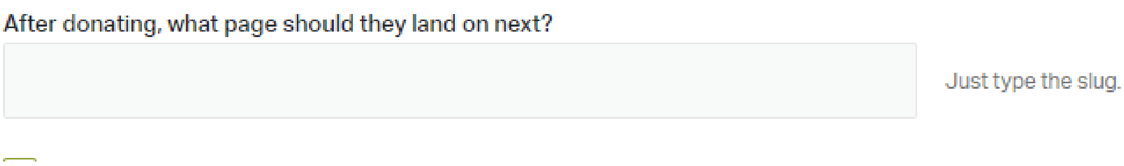
Making sure that people land on your thank you page

Lastly, we need to make sure that when someone donates, they're redirected to our thank you page.

To do this, we go back to the donation page we created earlier and click on "Donation Settings"



And then locate "After donating, what page should they land on next"



In this page, enter the slug of the thank you page you just created and then hit save.

Note: At this stage, you probably want to make a donation like an end-user would, just to test that everything is working as intended and that everything looks great. This will let you catch errors before you go live.

Action: Create a donation page and thank you page for your campaign on Nationbuilder so that we're ready to kick off our fundraising campaign.

Creating a good fundraising email

This section is mostly relevant to 💓**Individual Giving: Activation** and 💝**Individual Giving: Reactivation** those focusing on major donors giving can skip this section.

Email reigns supreme in online fundraising. Globally, it is the number 1 channel for political fundraising from individuals. In both the 2017 and 2019 General Elections, email accounted for more than 70% of donations received by the party.

Any effective individual giving campaign is going to be driven by email - with our other channels supporting it.

Email is so powerful because:

1. Email allows you to build a relationship over time, making it more likely someone will donate when you ask;
2. You can develop a strong understanding of people on your email list so you can choose when and how to ask them for money;
3. Email is free, so if someone chooses not to donate then you haven't lost out financially.

You can get more general advice on email marketing in the party's Email Marketing Best Practice guide, which can be found here.

A good fundraising email starts with the problem, solution, resolution framework that we added to our fundraising plan earlier - because we want to keep reinforcing our main message through all of our communications.

There are also a few other things that you need to consider when writing an email.

Keep it short and clear

Many people check their email first thing in the morning or last thing at night, or when multitasking while watching TV or making dinner. They may not be awake or present enough to engage with long, complicated prose.

200 to 300 words is more than enough for any email, persuasive or otherwise.

You should also use clear language in your email.

This is in part for accessibility. Simple language is easier to understand and easier to read. It is also more effective at driving people to take an action.

You can check if you are using accessible language with this tool: http://www.hemingwayapp.com/

It helps check the complexity of your writing and highlights convoluted sentences, allowing you to write clearly and concisely.

Craft a great subject line

First impressions matter.

Your email can be perfect, but without an engaging subject line it may never be opened.

You should always write 3-5 subject lines and get a second opinion on the best one. To think of some good subject line options, try the following strategies:

Read through your email for a pithy phrase that sums up the email

- Ask an open-ended question, eg “Who do you want to be our next PPC?”
- Add a deadline, eg “RSVP tonight for a free drink with your meal!”
- Try a teaser, eg “Guess who’s coming to join our action this weekend?”
- Be direct eg “Pick up an orphan delivery round this month → ”
- Try a list eg “Four things you can do right now to help us in the by-election”
- Make an announcement eg “The winner of the raffle is…”

And if all that fails, take the main theme of the email and try a subject line generator: https://www.activecampaign.com/free-marketing-tools/subject-line-generator

Aim for subject lines that are short, intriguing, but do not come across as spam.

Remember, you want to make sure that people open your email, but you don’t want to trick them. If folk feel tricked then they’re more likely to unsubscribe, so your email must deliver on what your subject line promises.

Use a persuasive sender

Using a small number of “from names” in your emails will help build the name recognition and reputations with recipients over time - just like delivering a focus every few months does.

Therefore, it is best practice to be proactive in identifying the people you want to have as your regular email senders.

Think about a few people in the party that it is beneficial to have regular emails go out from. Perhaps your prospective parliamentary candidate, to build up their name recognition, and some key members or activists who sit on your local party executive, or who lead campaigning for the local party.

Think about people that will be happy to field questions that might come about from an email. People who will be flexible about approving emails to go out in their name. People who will be easy-going about mistakes that happen in their name, as this will always happen!

And think about diversity. You should send just as many emails from women or non-binary members as you do from men, and you should regularly send emails from some people of colour.

Do not have a slate of only white, male sounding names as the only names that your recipients receive emails from.

For people who have not yet interacted with your local party, you will create an impression that there is only one type of person who joins and is involved in the local party, and it will be more difficult for your local party to attract a diverse group of people to get involved in the future.

Make a clear ask

When asking in email, you know that your audience are most likely opening this on their phone and you're competing with a lot of other very interesting emails in their inbox.

So you need to make it very clear what you want them to do (donate) and very easy to do that. You also need to make sure that you're being polite and ethical.

If you've ever signed up for some US fundraising emails, you'll know that they often try to use guilt or fear to convince people to donate. These kind of emotional asks can be hugely powerful, but for some people they can also be coercive and lead them to donate when it's not in their best interest to do so.

When asking people to donate, it's vital that you're being careful about the tactics that you're using and that you're removing people who don't want to be asked to donate, or have donated recently.

We need to live our values, especially when raising money.

So what does a good and a bad ask look like?

A good ask

> On Thursday 8th June we have a chance to change the direction of our country.
>
> And we really want you to be able to say:
>
> "I helped make that happen"
>
> Donate today and help power our campaign Greg:
>
> **Quick Donate £5**

Why it was good:

- Says why you should donate
- Says how the donation will make a difference
- Clear, direct call to action
- Personal
- Simple button to click to donate

A bad ask

1) Make a donation

You should have received a letter inviting you to make a contribution to the local LibDem campaigns. If you are considering making a contribution to the party, please can I ask that you indicate that your contribution (or 50% of it) is distributed to the campaign? To do so, please contact (Treasurer of), at

Why it was bad:

- The email recipient hadn't had the letter (and never did get it)
- The instructions were complicated
- In the 368 words that came before it, it wasn't made clear why they should donate, or what their donation would do
- The contact email didn't work
- They made it REALLY hard to make a donation.

A great rule of thumb for this is when re-reading your email, try and work out if you would donate if you received the same email. If you think you'd find it hard, then you might want to tweak your ask.

Planning a fundraising campaign

> This section is mostly relevant to 💓**Individual Giving: Activation** those focusing on major donors giving can skip this section.

When planning a fundraising campaign - especially when focusing on people we'd like to get to donate for the first time we need to be prepared to communicate a lot.

Liberal Democrats generally get good open rates, of 40-50% - but even then, this means that half of your audience may not have even opened your email.

Just like campaigning, the only solution to this is to send multiple communications (ideally by multiple channels!)

For a “crowdfunding” type campaign that runs for a week, you probably want to send 5-6 emails. Over two weeks, you’re looking at 10-12. You’d want a similar number over a 3 week campaign and shouldn’t really run a single campaign for longer than 3 weeks.

You also need to bear in mind that you may need to send other emails during this time - so your actual volume might be even higher than this.

Here’s what a campaign could look like:

Campaign/Day	7 day campaign	14 day campaign	21 day campaign
Day 1	Email 1	Email 1	Email 1
Day 2	Email 2	Email 2	Email 2
Day 3		Email 3	Email 3
Day 4	Email 3		
Day 5		Email 4	
Day 6	Email 4		Email 4
Day 7	Email 5	Email 5	
Day 8			
Day 9		Email 6	Email 5
Day 10			
Day 11		Email 7	Email 6
Day 12		Email 8	
Day 13		Email 9	Email 7
Day 14		Email 10	
Day 15			Email 8
Day 16			
Day 17			
Day 18			Email 9

Day 19			Email 10
Day 20			Email 11
Day 21			Email 12

In planning our campaign, we've concentrated emails at the start and at the end.

This follows what we'd expect for a fundraising campaign. Most of your money will come in at the start and at the end. The start, is where the most keen, most enthusiastic people will donate. We also want people to take notice and open at least one of these introductory emails - so we concentrate 2-3 emails in the first few days, so there's regular communication that's more likely to be noticed.

At the end of the campaign, as we near the deadline, you'll notice donations start to tick up as well. This is people who wanted to donate, but put it off because they weren't that close to the deadline.

In the middle, we have an email or two every few days to keep the message going and remind people - but you'd expect the majority of the donations to come in from the first and last emails.

In the grid above, these key sections are highlighted in Green for start of the campaign and red for the end.

Reactivating former donors

This section is mostly relevant to 💝**Individual Giving: Reactivation** those focusing on major donors giving can skip this section.

Reactivating former donors is a complementary process to what you'd do to people who've never given before.

Ideally, this is planned into your communications plan alongside that audience, and can be incorporated into your overall plan.

This group are both more likely to open emails from us and more likely to donate (as they've given before, so we don't need quite so much volume.

The tone of the emails is also different - as you can see in the example included in the next section (email 7).

Emails to donors you're trying to reactivate should always ensure that you're thanking them for their past support and encouraging them to support again - but we shy away from some of the more high-pressure / time sensitive emails at the start (though we might bring these back at the end of the campaign).

If we take a look at our campaigns we mapped in the last step, here's how we might add reactivation into it:

Campaign/Day	**7 day campaign**	**14 day campaign**	**21 day campaign**
Day 1	Email 1 Reactivation 1	Email 1 Reactivation 1	Email 1 Reactivation 1
Day 2	Email 2	Email 2	Email 2
Day 3		Email 3 Reactivation 2	Email 3 Reactivation 2
Day 4	Email 3 Reactivation 2		
Day 5		Email 4	
Day 6	Email 4 Reactivation 3		Email 4
Day 7	Email 5	Email 5 Reactivation 3	Reactivation 3
Day 8			
Day 9		Email 6	Email 5
Day 10			
Day 11		Email 7 Reactivation 4	Email 6 Reactivation 4
Day 12		Email 8	
Day 13		Email 9 Reactivation 5	Email 7
Day 14		Email 10	
Day 15			Email 8

			Reactivation 5
Day 16			
Day 17			
Day 18			Email 9
Day 19			Email 10 Reactivation 6
Day 20			Email 11 Reactivation 7
Day 21			Email 12

You'll see we're sending around half as many emails to the reactivation group as to the activation group - but this drop in volume likely won't affect the revenue and you'll see most of your revenue coming from this group.

Adding in other communications

If you are planning to include direct mail or social media in your fundraising campaign, then you want the Direct Mail to land in the first few days of the campaign - as this gives people a lot of time to return the donation slips and for you to process them.

In a longer campaign, you might also want to add something at the end.

If you're adding in social media, you want to be aiming for 2-3 posts per day on Facebook and Twitter, with more during the key periods identified above.

There's little to no point investing in other platforms unless you personally have a very large following on them - and in those cases, consider what we said in the why people give section and tailor these messages for the personal relationship group - as people who follow you on Instagram or TikTok are most likely to have a personal relationship with you, even if that's just as an internet friend!

Do it all in advance

Doing all of this during an election period sounds stressful. The good news is that you can do all of this in advance. You can set your fundraising campaign up well in advance, schedule your emails and then just let it run without you needing to intervene very often, meaning you can then focus on campaigning!

You ideally want someone in your team who is responding to messages sent in reply to the emails and dealing with queries - but this could be the same person who is managing those replies on social media or from email.

> Note: When setting up the audience for your email, make sure that you have a way to remove people when they say they don't want to donate. It's better to remove these people from the campaign, so they don't get annoyed at you by the repeated asks than it is for them to unsubscribe.

> Action: Create a communications plan for your fundraising campaign.

Fundraising email examples

This section contains 5 example emails that have been used countless times for Liberal Democrat fundraising since 2013 and have been proven over and over. The idea is that you can adapt these for your own use.

We've also added some context around when they're best used in a campaign.

Email 1

This email is sent at the start of a campaign and introduces the idea that the fundraiser needs to raise money. The initial target has been set low, so that it can be easily reached and then extended.

Intended audience: 💓**Individual Giving: Activation**

Subject Line: Help me raise a £3000 fighting fund!

> Dear {NAME}
>
> Help me raise a £3,000 fighting fund!
>
> I am excited to tell you that I have today launched an ambitious new fundraising appeal with the aim of raising £3,000 to help secure a liberal future for Bermondsey & Old Southwark.
>
> Can you help me reach the £3000 target by making a donation today?
>
> << Donation button (s) >>

Labour are pumping huge resources into our area to try to win the seat in the General Election on 7 May. That would end my 32 years fighting for the community in Bermondsey & Old Southwark and give Ed Miliband the victory he wants here.

I am determined to stop that happening, which is why my team and I have today launched this new fundraising campaign.

Labour are funded by huge donations from unions. The Tories rely on large sums being given to them by millionaire donors. We are doing things differently.

This fundraising campaign is going to be financed by you: thousands of people in Southwark and beyond who want to help me secure another five years as the MP for Bermondsey and Old Southwark.

We have never done this before. This is an ambitious 'crowdfunding' campaign asking everybody to donate whatever they can to help us hit the £3,000 target.

Whether you can donate £5 or £500, this is your chance to help. I am very grateful for any support you can give.

<< Donation button (s) >>

Best wishes,

SENDER

Email 2

This email is sent at the start of a campaign, and follows up on the first email to announce that the target has been met and extended. This helps to build momentum behind the campaign, provides social proof that others are donating and makes people feel like they're contributing to a winning campaign.

Intended audience: 💓**Individual Giving: Activation**

Subject Line: What an incredible start!!

Dear {NAME}

This morning I sent out an email about my new fighting fund campaign, with the aim of raising £3,000 to fight off Labour's challenge in Bermondsey & Old Southwark.

I was hopeful this would help pay for extra leaflets, telephone calls and action days in the 3 months left until election day.

I was completely unprepared for what happened next.

I am very pleased - stunned, in fact! - to tell you WE HAVE ALREADY SMASHED THE £3,000 TARGET IN THE FIRST DAY!

It has been an incredible response, and I am hugely grateful to everybody who has made a contribution so far. Thank you.

This is clearly a significant moment for the campaign and will go a long way to giving us the resources we need to win. But of course I am not going to stop there!

We have now decided to DOUBLE the original target to £6,000 to give our campaign a massive boost.

That is an ambitious target, but one I now think we can reach. A £6,000 fighting fund would get us one step closer to levelling out the playing field between me and the union-backed Labour candidate here. It would mean we could go to an extra level of cam- paigning.

If you haven't donated already, now is the time. Please donate what you can today.

<< Donation button (s) >>

Many thanks again for your generous support so far. I will keep you updated about progress!

Best wishes

SENDER

Email 3

This email is sent at the start of a campaign, but only to people who didn't open the first email. This helps to make sure that the maximum number of people have viewed one of the introductory campaigns. The copy is very similar to the first email, as the assumption is that people who haven't opened won't have read it.

Intended audience: 💓**Individual Giving: Activation**

Subject line: Incredible!

Dear {NAME},

Help me raise a £6,000 fighting fund!

I am excited to tell you that I have today launched an ambitious new fundraising appeal with the aim of raising £6,000 to help secure a liberal future for Bermondsey & Old Southwark.

Can you help me reach the £6000 target by making a donation today?

<< Donation button (s) >>

Labour are pumping huge resources into our area to try to win the seat in the General Election on 7 May. That would end my 32 years fighting for the community in Bermondsey & Old Southwark and give Ed Miliband the victory he wants here.

I am determined to stop that happening, which is why I and my team have today launched this new fundraising campaign.

Labour are funded by huge donations from unions. The Tories rely on large sums being given to them by millionaire donors. We are doing things differently.

This fundraising campaign is going to be financed by you: thousands of people in Southwark and beyond who want to help me secure another five years as the MP for Bermondsey and Old Southwark.

We have never done this before. This is an ambitious 'crowdfunding' campaign asking everybody to donate whatever they can to help us hit the £6,000 target - and we've already raised more than £4,000.

Whether you can donate £5 or £500, this is your chance to help. I am very grateful for any support you can give.

<< Donation button (s) >>

Best wishes,

SENDER

Email 4

This email is an email sent in the middle of a campaign, as the initial momentum starts to slow, or at the end to set up the last push to the target. This helps keep things ticking over and keeps trying to sell people on why they should donate.

Intended audience: 💓**Individual Giving: Activation**

Subject Line: £6690

Dear {NAME}

Yesterday Simon and his team took a big risk by doing something we had never done before. We asked people in Bermondsey & Old Southwark and beyond to help us raise a fighting fund of £3,000 to help Simon get re-elected in May.

In just three days we raised £6,690.

It was an incredible feeling for us in the campaigns office to see that money keep rolling in from hundreds of individual donors like you, all making a difference to the level of campaign we can run over the next three months.

I'll be honest, we didn't expect to get anything like as many donations as we did! But the feeling yesterday afternoon was that this could really be a turning point in the campaign for us. Labour are throwing everything at us here, and this money could mean the difference between winning and losing in May.

That's why we are are now aiming to raise a total of £10,000 in just 10 days.

Yes, it is an ambitious target, but I think we can do it. If you haven't already donated, please consider giving just £10 right now - or whatever you can afford - towards our £10,000 target.

If everybody reading this gave just £10, we would reach the £10,000 target by the end of the day.

Will you donate?

<< Donation button (s) >>

Unlike Labour, we can't rely on the unions to give us bundles of cash. That's why we are doing things differently and trying, for the first time, to raise a fighting fund by 'crowdfunding' from supporters.

If you aren't in a position to donate right now, you can still give our campaign a boost by volunteering to deliver leaflets, make phone calls or help in the office. Money is the fuel, and volunteers are the engine of our campaign.

On behalf of the whole Southwark Liberal Democrats team, thank you in advance for any help you can give.

<< Donation button (s) >>

Best wishes

SENDER

Email 5

This email is an email sent at the end of a campaign, to get the final bit of the target into the bank and get the last few people to donate. You could also make bigger note of the time deadline in this email, which would likely make it even more effective.

Intended audience: 💓**Individual Giving: Activation**

Subject Line: We are so close!

Dear {name}

On behalf of Simon Hughes and the whole Southwark Liberal Democrats team, I want to say a huge thanks to supporters for our incredible fundraising success this week. The total amount raised at the time of writing is £9,380.

That means we have almost hit the £10,000 fighting fund target.

I thought this would be a good time to remind you just why it is so important to get Simon re-elected as the MP for Bermondsey & Old Southwark in May.

Not only does he have a record of action over 32 years as an MP, Simon also has three important priorities if he is re-elected:

1. Simon will fight hard for more affordable homes and continue his campaign to stop overseas investors buying up properties then leaving them empty.
2. Simon will protect health services in the constituency just like he did when he stepped in to stop previous Labour and Conserva- tive governments closing Guy's Hospital.
3. Simon will improve transport infrastructure in Bermondsey by leading the campaigns to extend the Bakerloo line, build a new bridge from Bermondsey to Canary Wharf, get a new pier at Rotherhithe, and expand the London Cycle Hire scheme.

That's why we need to raise a fighting fund to make sure Simon is re-elected in May.

The £10,000 target is really close. Can you donate today to get us over the line?

<< Donation button (s) >>

All the money raised goes straight to Simon's campaign, so if we can push it even further beyond £10,000 that will mean even more leaflets, phone calls and action days in Bermondsey & Old Southwark. This is our big chance to raise a substantial election fighting fund for Simon.

Please make a donation of £25 today

<< Donation button (s) >>

Best wishes

Sender

Email 6

Similarly to email 1, this email is intended to be sent at the start of a campaign, but there's a much more clear focus on the time within which donations are needed. This kind of email is ideal for when you're approaching the end of an election.

Intended audience: 💓**Individual Giving: Activation**

Subject Line: We need your help today

{NAME},

At 10pm tonight, I'm meeting with Keith House and my team to sign off the final polling day plan for the Eastleigh by-election.

At the moment, I don't have the budget to run the polling day I believe we need to win on Thursday.

A donation from you before 10pm tonight will be spent on polling day here in Eastleigh. Please give what you can.

<< Donation button (s) >>

As the polls have shown, this campaign is going to the wire. I expect fewer than 500 votes to separate ourselves and the Tories on Thursday.

If we win, we will all have achieved something really special. But imagine how we'd all feel on Friday morning if we lost by just a few votes.

This campaign has been built on the time, effort and donations from thousands of volunteers.

Donate before 10pm tonight and we can finish what we started.

<< Donation button (s) >>

Thank you,

Sender

PS This election could come down to fewer than 500 votes. Every pound donated today will go into the campaign on Thursday.

Email 7

This is an example email for something that you might send out to people who've given before, alongside the emails you're sending to your activation audience.

You'll note a tone shift when talking to past donors, versus our activation audience.

Intended audience: 💝**Individual Giving: Reactivation**

Subject Line: Thank you

{NAME}, as we enter the final days of the election, I want to say thank you.

In the first few days of this election, your donation gave us the confidence to hit the ground running. You well and truly got us off to a flying start.

So thank you, {NAME}- you have given us a fighting chance of changing Britain's future for the better.

But there's still a lot more to do and just [X] days left to do it in. That's why I'm turning to you once again, as one of our most reliable supporters, to help keep our momentum going.

Will you match your last donation of £25 to help us keep our momentum going?

<< Donation Buttons >>

Thank you so much, {NAME}, I'm incredibly grateful for everything you've done.

Your support has let us get off to a fantastic start in this election - and with your continued support, we can finish strong too and elect more Liberal Democrat MPs.

Every donation you make goes directly to helping us win on [POLLING DAY] - so please, match your last donation today.

Thank you for everything you do.

SENDER

Note: In order to produce an email like this, you need to have imported some additional fields to your email tool, as outlined in the reactivating former donors section, either in the form of the "last donation amount", the suggested asks or both.

In Mailchimp, these can be imported as custom fields for your list. In Nationbuilder there are custom fields which can be used for this. You'll need to email support@libdems.org.uk to get the right code to merge them into an email. For Prater Raines, please contact their support team.

Action: Use the templates above (or write your own if you prefer) to draft the emails for your fundraising campaign and then set them up on your preferred email platform.

Handling replies & fundraising pauses

The final element of a fundraising campaign is making sure that you're keeping on top of the replies.

People who reply to your campaign are likely to have questions or concerns that you might need to address. They also might need help making a donation and taking time to handle responses will increase your revenue and also mean that donors feel better about your communications.

Make sure that you know:

1. Where replies to your emails go
2. That you can access this
3. That you can reply from there
4. And test the process from start to finish

You'll also get some people replying to your message to say that they can't make a donation right now. With these people, it's really important that you remove them from your target audience - there's a few ways to do this, including applying a tag or adding them to a fixed list, but the important thing is to make sure people who tell you they can't donate get removed from the list promptly and with as much fuss as possible.

It's also important to discern between people who can't make a donation right now and so should be temporarily suppressed and those who should be permanently removed from emails.

Using social media

Over the years we have found that, most of the time, social media is one of the worst ways to raise money online.

If you have a very large online following already (in the tens to hundreds of thousands of people), that are highly committed to your cause, it can work great. But most Liberal Democrat campaigners don't have that, sadly.

Add a few posts to the your existing social media plan encouraging people to donate alongside other communications that you have planned.

You should definitely not be looking to invest significant time or effort in this and certainly should not do any paid advertising to encourage donations - as this will most likely lose you money.

Crowdfunding platforms

"Crowdfunding" is a term that covers both a fundraising technique (basically in line with what we outlined in the fundraising email examples 1-6 and also a term to cover a large number of commercial sites - like Crowdfunder, Kickstarter and others.

Crowdfunding campaigns often include rewards for donating and usually have a public goal to try and encourage more people to donate.

As a technique, crowdfunding tactics can be highly effective, especially when driven by email - we've even outlined how to do that in this document.

Unfortunately, the same can't be said for commercial crowdfunding sites such as Crowdfunder and GoFundMe.

These sites should not be used by Liberal Democrat campaigners under any circumstances.

There are four reasons for this:

1. Commercial crowdfunding sites do not give you enough information to meet our legal requirements for PPERA returns;
2. Commercial crowdfunding sites do not give you the contact information needed to follow up with donors, thank them and ask them again;
3. Commercial crowdfunding sites generally charge higher fees than Lib Dem donation pages, meaning you keep less of the money you raise.
4. There are no commercial crowdfunding sites on the party's approved suppliers list.

The party provides templates for Nationbuilder that can be used for Crowdfunding and guarantee that you will comply with the necessary rules and regulations.

It's better to be safe than sorry - messing this up could result in thousands of pounds of fines for your local party - and undo all of your hard work fundraising!

Other channels

Post

Post is a great addition to an email campaign. It helps reach members who aren't on email and in this day and age, can actually be more read than an email (especially by younger members who get less post!)

The important thing to remember is that most people will go online to donate - so you need to make sure that you include a prominent web link.

You also need to make sure that you can process returned slips - for this reason we recommend only accepting cash and cheques via the post. Direct people to use the donation page if they want to give by card.

You can find an example fundraising letter and reply slip on the Campaigns Hub here.

> Note: Do not take card payment details from someone on paper and then try and enter them on the front-end of the website itself. This is a violation of the card providers' terms of service and if caught, will result in your ability to take card payments on the website being terminated by your payment provider.
>
> Our donation pages are only set up to allow people to input their own card details.

Phone

It's not currently possible for local parties to take donations over the phone in a way that's compliant with payment providers terms of service.

We have also found in testing that this often costs more than it raises when using a commercial service.

For these reasons, we recommend that local parties don't conduct fundraising telephone calls.

This might be something that changes in the future if we can make some changes to our virtual phone bank technology, but for now please do not do this.

How to run a fundraising event

There's loads of fantastic information on how to run a good event for members in the Boost Guide, so we won't repeat all of that fantastic advice here, we'll just leave you with a few top-tips for running a successful fundraising event.

1. Remember that the main goal of this event is to raise money. This means you need to know exactly what your costs are and how they're being covered.
2. You want people to come to future events - so it also needs to be fun!
3. It's okay to charge a higher ticket price in return for a nicer event - you just have to sell it as being worth the money!

Tracking your performance and reporting back

Once you've kicked off a fundraising campaign, you absolutely need to know how it's going.

We recommend keeping track of this on Lighthouse, using a custom report. If you've got some Excel or Google Sheets experience, you can do some more in-depth analysis of this using some of the more advanced features there.

Tracking your performance

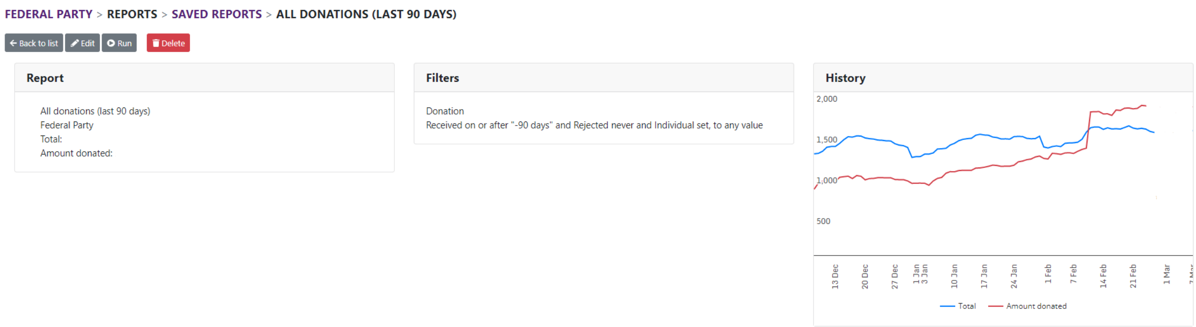
To track our performance, we're going to set up a custom donation report.

To start with, we're going to set up this filter in Finances → Donations

- Received date is on or after the date on which your campaign started.
- Reason is equal to the reason code you've been adding to your donations
- Accepted at any time (to ensure we're only looking at accepted donations(
- Rejected never (to ensure we're excluding donations we rejected)
- Status is Completed (to ensure that we're excluding incomplete or refunded donations)

This gives you a very basic filter that allows us to see the total donations received for our campaign.

If we want, we can then save this report - which will allow us to re-run it through the campaign and will give you an easy summary of the donations to your campaign, along with a graph showing your progress, like this:



We recommend that you also set up a [simple spreadsheet like this one] to allow you to input the numbers over time, allowing you to easily see the impact of your fundraising.

This report + spreadsheet combination will allow you to both keep on top of what's coming in almost live, it will also help you analyse what had an impact during your campaign.

You can also complicate this a little further by creating a separate report for each channel that you're raising money from (simply add a "Source" field to the filter), which will allow you to analyse income by the channel it arrived from - allowing you to more closely analyse the return on investment from each channel.

Tracking your costs

In the example spreadsheet linked above, on the sheet marked "Return" you'll see a column where you can record your campaign costs, as well as a simple way to calculate how much you spent, versus how much you got back.

This will be calculated for you automatically, assuming you don't modify the sheet too much!

To help you benchmark how you're doing, here are a few helpful rules of thumb:

- When running an email campaign, you should be getting between £15 and £30 for every £1 you spend - though your only directly attributable costs would be transaction charges, keeping the overall costs low.
- When running a post campaign you should be getting between £1.50 and £5 for every £1 you spend. Each fundraising letter should cost between £1.20 and £2.

- When running an event you should be getting between £2 and £6 for every £1 you spend.

Reporting back to donors

It is really important to thank people who make donations to your campaigns.

You should say thank you straight away using an autoresponse email with a receipt.

Then say thank you separately. You can follow up with thank yous by phone or on paper, such as a handwritten note or card.

And keep on saying thank you!

You also want to make sure that you give donors meaningful feedback. Make sure that you're updating them on the campaign and making them feel part of the team.

Did they pay for an extra leaflet? Tell them that! Send them a couple of photos of happy Lib Dem volunteers delivering that very same leaflet.

Photos, in particular are a great way to demonstrate impact.

And win or lose, make sure you follow up with the impact their support had. Because if you do this, they'll be more likely to donate again in the future - helping you build up a longer term base of donors to keep your campaigns running.

Reporting back to your executive

Last, but certainly not least, when your fundraising campaign is all said and done, you need to make sure that you're being accountable to your local party.

They'll likely have helped the campaign happen, either with seed money, or by paying for your website and email tool and so you should make sure that they're clear on what their money helped them to do.

We've produced this template for a report back to your exec, which you can complete with the data on the spreadsheet we created here.

We also recommend taking a bit of time to consider some additional questions, to include in the report and make sure that you're learning the lessons of your campaign. Those questions include:

- What subject lines worked best?
- Why did people give?
- When did they give?

- What content worked best?
- What call to action worked best?
- What channels worked best?
- What feedback did we get from people?

Those are included at the end of the template report, with a section for you to add your thoughts to.