High Impact Professionals - Running a Fundraising Campaign at your Organization

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Overview

Are you considering running a fundraising campaign or charity drive at your organization?

You are in the right place! This document provides an overview on how to run a successful fundraising campaign, which we believe is an excellent way to multiply your impact, keep you engaged with the ideas of effective altruism, share them with other people and gain relevant EA career capital.

If you would like to chat about what running a fundraising campaign could look like for you, reach out to us.

Charity Drive Process

Below you will find a step-by-step process on how to organize charity drives in your organization. Is based on past experience in other companies and has 4 macro steps.

1. Get company on board
2. Prepare
3. Execute
4. Wrap Up

Get company on board

The first macrostep is to get approval from your organization to host a charity drive, below this is broken down into smaller steps.

Gather allies

This is a very important first step, allies can help you define a good strategy, get the company on board, organize the campaign, etc. HIP is definitely on your side and willing to support the best we can, but we think it is important to have insiders as well which know the company context better and can more actively support you. It helps both having “peers” that can do some work and “superiors” that can give advice and support in promoting the initiative.

Define strategy

Once you have some allies, is it time to define the best strategy to present the idea to the company. Does the company’s vision or values include something about doing good? Maybe doing good will give the company an edge when it comes to competition? (can be the case in an industry where consumers care about positive impact). Maybe doing good will allow the company to attract better employees? Try to identify what the company could be receptive to and build your pitch around it.

Get company approval

Once the strategy is set, it is time to ask the company. The right strategy really depends on the company environment so you are probably the best judge of it. In general it seems to pay off to have a top-down approach, i.e. try to reach out to the highest ranking person in the organization you feel comfortable contacting and ask for endorsement or greenlight. Once you have support from the higher ups, it is then easier to convince others. If you don’t have a strong relationship with the executive team, the head of the HR department would probably be a good starting point.

Optional: Set up payroll giving

Ask if the organization is willing to set up payroll giving so that donations can come right out of employees’ paychecks. This isn’t strictly necessary and requires a bit more time and cooperation by the company, but we think it really helps remove barriers to giving, encourages people to donate more and will build in giving as a part of the organization, allowing future benefits to accrue.

Prepare Campaign

The next session covers the preparation of the campaign, it is pretty straightforward once you get the gist of it and HIP is happy to help.

Define charities

What charity do you want to support? In EA there are quite a few charity evaluators which can give you a number of effective charities to support. While it is good to have a lot of choices, all these options can be quite daunting and confusing.

You want to make it as easy as possible for people to donate, so 2 important aspects here:
1. Pick cause areas with which people are already familiar with
2. Limit the number of options

For example Global Health & Development, Climate Change and (maybe) Animal Welfare seem to be on everyone's radar, while EA Meta, AI Safety and Biorisk seem more complicated.

In terms of the number of options, we suggest 1 to 3 cause areas and 2 to 4 options. If you have a single cause area, you might want to give 2-3 options within that cause area. If you have 2 or 3 cause areas, you want to select one top charity per cause area.

Find below a summary of the charities per the 3 base cause areas, you can find a more detailed analysis here.

Cause Area	Recommended Charities	Evaluators
Global Health & Development	1. Malaria Consortium (SMC) 2. Against Malaria Foundation	1. GiveWell 2. *The Life You Can Save*
Climate Change	1. Clean Air Task Force	1. Founders Pledge
Animal Welfare	1. Good Food Institute 2. The Humane League	1. Founders Pledge *2. Animal Charity Evaluators*

Define how money will be transferred

This is an important logistical factor, and again the goal should be to make it as easy as possible for people to donate. The easiest for people would be to donate through the company directly (payroll giving), but it also requires a higher level of support from the company. If this is not possible, check the regranting organization in your country which would allow you to donate tax-free. And consider ways to make it easier for people to donate, like having a terminal for people to make donations with their credit cards.

You also want to think about tax receipts if the donations are not going directly out of the company

Prepare outreach strategy

At this point you want to think about your outreach strategy, this includes deciding the content, the means of communication and frequency of your outreach efforts. In the past we found a good correlation between outreach efforts (reminders, etc) and increased donations, so this point should not be underestimated.

A good starting point for the content is the analogy of the drawing children presented in Peter Singer's book The Life You Can Save. Here you can find a short clip about it. Is there anything else that is specific to your work environment and that can be used in your messaging?

In terms of means of communication and frequency, it seems helpful to start with a pitch, follow up with some reminder message or email, and conclude with a last call message and a thank you after the campaign is done. Some key questions here are

- Are there already all-hands meetings in which you can pitch the campaign? Or do you need to organize something separate? Can you do it during working hours?
- How can you promote the campaign? Can you use the company emails? Do you have an internal chat?

In terms of frequency, a message every few couple of days seems like good timing. Possible messages are reminders that the campaign is ongoing, an in-depth presentation of the different charities you support, some updates on the reaching of donation milestones (5k, 10k, 15k, etc), a last call that the campaign is about to end, etc

Execute Campaign

Once the strategy is set, it is time to start your campaign, below a the few steps required

Start campaign with kick-off pitch

A good way to start is to give a company-wide pitch (if possible, might be less applicable to bigger organizations), explaining why we should give and the charity you are supporting.

Schedule a meeting and take colleagues through some simple ideas of effective giving, like the idea that some charities are 100x more impactful than others.

Present great donation opportunities to your organization. These could be context-specific if you are in a certain industry, but in general picking GiveWell charities, or having a combination of Global Health and Development, Animal Welfare, and Climate Change charities works well. Make it clear how people can donate and that you would like to track donations so people should tell you when they are donating. Note that this is much easier if payroll giving has been set up.

Enact your outreach strategy

During the fundraising it seems to pay off to keep the attention on the fundraising, provide some more details and encourage people to donate. This is done by regular communication.

Examples of messages are:

- Send general reminders etc
- Explain the charities more in detail
- Communicate about the reaching of milestones ($5k, $10k, etc)
- Last call a few days before the end of the campaign

It also works to reach out to people you think might be interested individually. It helps to have a mailing list and allow people to unsubscribe (there is nothing more annoying than receiving regular email about something you are not interested in)

Thank everyone at the end of the campaign

At the end is important to thank everyone for their participation and contribution, celebrate the reached milestones and maybe remind people of what was achieved (# of lives saved, tons of CO_2 averted, etc)

Wrap Up

Once the campaign is over, the biggest part is behind you and you can almost sit down, pat yourself on the back and relax. But before you do, three more things

Ensure payment (for payroll giving)

It seemed straightforward but it already happened in the past that the money came back and didn't reach the organization. So you really want to make sure the money reaches the intended destination.

First, you want to get the payment coordinates and understand which is the best method with the lowest fee (for lower amounts usually credit card, for bigger amounts usually bank transfer). A good starting point is the charity website, If unsure, reach out to the organizations and ask

Second, you want to ensure that the payment reaches the organization. Give the payment information to the accounting department (if done through the company) and ensure payment goes through by asking for payment confirmation by the company and a reception confirmation from the non-profit.

Impact Evaluation

It is important to be able to evaluate your results after your campaign. This means measuring:

1. The counterfactual amount of money raised by the campaign - if you have payroll giving setup at your organization, this should be easy enough to track. If not, you'll have to ask people directly or put it in a google form where they can register their donations. Tell them this is so that you can find out how much you raised in total.
2. The number of people brought to EA through the campaign - this should be obvious as you will be the one shepherding promising people into the movement.
3. The number of hours you worked on the campaign - you don't have to be exact, but this will give you a sense of how much your time is worth running the campaign and what the opportunity cost of doing something different is. Also, try to capture the counterfactual - if you would have been volunteering at an EA org with the free hours you put into the campaign, then it is more costly than if you wouldn't have done anything impactful with the hours.

Retrospective

When everything is said and done, take a step back and reflect on how it went.

- What went well? What didn't go so well? What should we keep moving forward? What can be improved? What are the main lessons learned?

- How much money was raised? Which causes were more popular? How much time did we spend on the campaign? What is the cost-to-benefit ratio? Can we optimize anything?

Success is reached through successive iterations, it is essential to learned the most out of each one of them

Important Factors

Below is a list of factors that we believe are important for the success of a charity drive in an organization.

Major Factors

Timing

We think that picking the right timing is essential for the success of the campaign. The end of the year is an excellent period, there is a reason why they call it the giving season. Another good timing is when there is a salary increase like a bonus or raise. If people get a 5% raise, they can still be net positive even if they donate 1% of their income. We had a very good experience when there was a combination of the two, a bonus at the end of the year.

Make it easy for people

It seems that there is a correlation between how easy it is for people to donate and the number / amount of donations. The important aspects here:

- create a system that only requires a few clicks to donate
- Select a limited number of effective charities / cause areas

Set up payroll donations

Related to the point above, setting up payroll giving is one of the easiest ways for employees to donate. Moreover it comes with some benefits, like being automatically tax-free and advantageous in some jurisdictions for the social charges

Lead by example

We really believe that being an insider helps a lot in making the campaign feel more relatable. Moreover, being open about your donations and leading by example w can really encourage others to do the same.

Some people believe that one shouldn't brag about donations, but studies have shown that being open with your donations can inspire others to do the same.

Supporting your own initiative also gives a strong signal that you believe in what you are doing, that you are putting your money where your mouth is.

Your donation can also help set the norm about the donation amount, are we talking about donating 10$, 100$ or 1000$? With your donation, you can signal what is the normal amount of donation.

Putting all of this into perspective, during a fundraising event all the co-organizer donate the whole 3000$ bonus they got at the end of the year. A colleague was so inspired by our move that decided to donate all of his bonus straight away. Another one who was probably not so much into donations, mentioned that he could not donate after the move and donated himself as well.

This to show the power of leading by example and setting the norms

Co-organizer

We think it really helps to have a co-organizer, it helps in defining the strategy, preparing and executing the campaign, it forms the first line of supporters. Connected to what was mentioned above, the combined example of the co-organizers is much stronger than the one of only one individual