causeway

Cause Resource Guide

Explore a series of mini-toolkits that cover some of the most foundational aspects of your cause.

OVERVIEW

Strengthen Your Organization

A new nonprofit has a long list of organizational resources that they need to have in order to get their organization up and running. While it's best to hire the experts when you can, we know that can be not exactly a budget-friendly option. This guide will give you access to lots of resources to help you strengthen your organization's structure and processes. While not an exhaustive list, this guide includes many of the items that will be needed for a solid footing to execute the big goals you set for yourself. Use the templates and examples provided below to be on your way to building a solid foundation for your organization.

How To Use This Guide

This guide includes a series of mini-toolkits that cover some of the most foundational aspects of your organization. Use the examples and templates provided in the toolkits to help you build out your internal processes and structures. Everything is free for you to use and make your own!

IMPACT

You've found your cause, planned your solution, and implemented your program. But how do you know if it worked? Measuring impact is one of the most overlooked tasks when building a social cause. The reason for this is easy to understand: social entrepreneurs can be overwhelmed with immediate needs, and much less with preparing for life after the solution. But consider the consequence – if you don't take the time to define what success looks like, how do you know when you've achieved it?

Having organized data about the impact your cause has can not only help you evaluate the ways you're spending time and money but also help you get funding and support. Every activity you do with your clientele is an opportunity to measure something. If you wait, you'll miss out on great feedback that can better your organization and tangible ways to show your impact. You can't go back in time to get that information later, so start now! Use our Impact Measurement Toolkit to build a system to measure the results of your cause. Not only will this give you hard numbers to report to potential funders, but it will ensure that you are always learning and constantly improving the work you do and the ways you serve your clients.

You'll learn how to build:
- Logic Models
- Outputs and Outcomes
- Evaluation Plans
- Surveys

IMPACT MEASUREMENT TOOLKIT

Whether you're just starting out with your pilot, or you've been up and running for a while, this impact measurement toolkit has everything you need to make sure that you are properly measuring the impact of your cause and your work so you can make adjustments and strengthen your organization along the way.

Measuring Success

So many times we've seen causes make the mistake of waiting to start measuring impact until after they have piloted and got their project up and running. It can happen either because they don't know where to start, or because they were too busy handling other things (understandably). However, it is a huge missed opportunity because you cannot regain the initial data, and the data you collect in the beginning is an important tool to help you gain more support to grow your cause. Use the steps below to create a full impact and evaluation plan for your organization.

Logic Models

Also known as a theory of change, logic models are a great way to lay out the impact you want to have and to test if your theories are correct. Use thisLogic Model Activity with instructions and examples to help you create your own version for your organization.

Collecting Outcomes and Outputs

Outcomes: Once you have completed your logic model, the great news is that you've already done most of the hard work. Now you just need to select which of the items from your logic model you're going to measure. We recommend starting out with just three outputs and three outcomes. Write them down. Select the ones that feel most important to demonstrate the impact of your cause. What tells the story best? What do you need to know, or be keeping track of? For your outcomes, try to focus on selecting from the short-term impacts. Those will be the easiest to measure.

Once you have chosen which outcomes you want to measure, you can then create a survey for your clients. When someone participates in one of your programs, give them a survey to measure the change in them over time. You can administer a pre and post-survey with clients you plan to work with for an extended period of time (for example, participants in a 6-week class). Or you can administer just a post-survey for people that will have a lower level of interaction (for example, a one-time event). Use this Survey Template to help you create a survey for your cause.

There are lots of ways to administer surveys, but the two most common options are online surveys or paper surveys in-person. If you opt for an online survey, there are great tools out there that make it easy.

Online Survey Tools:
- Typeform
- Survey Monkey
- Zoho Survey
- Survey Gizmo
- Survey Planet

Outputs: Outputs are much easier to measure than your outcomes, but you'll want to have a system in place to keep track of them. Check out thisOutputs Tracker Template. There are so many things you can track with your outputs, so try to keep it simple at first and only record the things that are most important to your organization. If you want to track attendance, always remember to have a sign-in sheet at your events and programs. That way, you can also collect email addresses to stay in touch with people afterward.

Evaluation Plans

When things get busy planning an event, and you are trying to manage a million different things, the last thing you want to think about is what and how you are going to measure impact at the event. It's much easier to plan this in advance and already have a system in place. Evaluation plans are a roadmap for what and how our organization will measure impact, and also when we will evaluate the data we collect. There is no sense in collecting all this data if you don't plan to use it to make your programming better! Use this Evaluation Plan Template to create your plan. Look at the examples if you need help.

MARKETING

This is so often an area where nonprofits operating on a low budget suffer the most. There are so many free resources out there on marketing for your cause but it can be difficult to know where to start. If marketing isn't your gift, this can be especially challenging. While ideally, you look to hire a professional to help you with your branding and marketing, we know that's not always possible when you're just getting started. But in the beginning, a little can go a long way to get your message out there in a way that is easily understandable and appealing. We've seen firsthand how a decent brand and communications plan can transform an organization's presence and recognition. We've developed a Marketing Toolkit that will help you make use of some simple tools and tricks to make sure your organization has what it takes to get the word out there and portray your cause in a way that really reflects who you are.

You'll get examples and tips for:

- Mission, Vision, and Values
- Social Media and Outreach
- Communications and Marketing Plan
- Quick and easy branding tools

MARKETING TOOLKIT

One of the most common needs we see with causes is help with marketing and communications. While in the beginning this can be a DIY job, we know that in the long-run this job is better left up to the professionals. Use this toolkit to help you get started marketing your cause, but work toward being able to bring a professional onboard to really bring your cause to the next level.

Messaging

Mission and Vision
Start with your Mission and Vision. The goal here is to get something on paper. If you're just starting out, it does not need to be perfect—in fact, it will definitely not be perfect, and that's okay. Use our Ten Minute Mission and Vision activity to get started. You can always change it later! If you have writer's block, set a timer, and just challenge yourself to get something on the paper. If you want to refine the messaging you already have, and also create the values for your organization, use our Mission Vision Values Activity.

Elevator Pitch
You walk in an elevator and run into an acquaintance. They ask you what you're working on. Can you succinctly tell them about your cause before they get to their stop? An elevator pitch is a brief description of your cause that can be said comfortably and confidently in less than 60 seconds. Use the Craft Your Elevator Pitch Activity to help you convey your idea clearly and effectively.

Branding and Outreach

Make a plan to communicate with your audience. Creating a plan does not mean that your need to hire a professional PR firm. You only need to have an idea of when and where you are going to share the information for your programs so that people show up! Especially if you are trying to reach a particular demographic, you

need to make sure that you are promoting the event in places where that audience will hear about it. You can use this Branding and Messaging Worksheet to help you come up with a simple plan.

Outreach Strategy

The ways that you will promote your cause depends a lot on the nature of what you are doing. Maybe you only need 10 people, or maybe you need 200 people. No matter what, it is important to try to have some people at your programs that you do not already know. If you're just starting out, your outreach can stay pretty grassroots. Ask friends to recommend people who fit your target audience, put out a call on social media, go network at local community events, reach out to organizations who work with your target audience, and put up flyers in places that you know your audience goes. We've learned, nothing goes farther than personal emails. So take a couple of hours to sit down and write a few heartfelt emails to people in your network asking them to point you towards people who might be a good fit for your programs. Take a moment to write out your strategy using this simple Communications Plan Template.

Branding

When you're just starting out, It's tempting to want to have a solid, professional logo and brand nailed down, but this is a trap. Good branding takes time, money, and requires a deep understanding of what exactly your cause does. Don't jump the gun on investing in a professional brand until you've had time to test out your cause and have a solid understanding of your audience. But with that said, good design can go a long way towards attracting attention to your cause. There are so many online tools with design templates where you can choose images that represent the energy of your cause, without committing to a brand that should last you a lifetime. Create custom graphics on Canva, send e-invites with Paperless Post, or create a quick temporary logo with Fiverr or TailorBrands to support your cause.

If your programming includes events for more than a handful of people, it's important to have a place online where they can easily access information about the event. Similar to the branding trap, it might be tempting to build a fancy custom website. If you or someone on your team has experience in web design and can do this quickly and easily, go for it! But if it is something that is going to take a lot of time and money, we suggest an easier solution like posting on Eventbrite, or using a landing page template from Squarespace or Mailchimp. Even a simple Facebook event can go a long way in the early stages.

Social Media

For causes with limited funds, social media is your best friend. It is a free way to access lots of people. You can create a page for your cause with one photo and a brief description of your vision. You can create a Facebook event for your programs and ask friends to share it. If you have even $20 to spend on advertising, Facebook allows you to boost your event, and choose a really specific target audience that you would like to reach.

CROWDFUNDING

If you are wondering, why should I crowdfund? One of the greatest benefits of crowdfunding is that you can raise money while simultaneously raising awareness about your cause. A good marketing strategy goes hand in hand with a good crowdfunding campaign and allows you to share your cause with so many people. It is a great option when you're just starting out and looking to build some momentum around your project and gain much-needed funding and support.

In 2010, Causeway started as a local crowdfunding platform to help Chattanoogans raise money and rally volunteers for their causes. In a little over five years, we helped raise half a million dollars on our platform. With lots of experience crowdfunding and helping causes build a strategy for their campaigns, we have pooled all our best resources and advice together in this Crowdfunding Toolkit. We'll be honest though, pulling off a successful campaign requires dedication. Use our toolkit to get the most out of your efforts.

You'll learn how to:
- Create your Team and Project Budget
- Set a Realistic Goal
- Build Your Prospects
- Craft a Compelling Story
- Make Your Marketing Plan
- Launch and Run Your Campaign

CROWDFUNDING TOOLKIT

With our roots in crowdfunding, Causeway has helped causes raise half a million dollars through our crowdfunding platform. After years of experience building strategy and plans for campaigns, we've collected our best tips and tricks for running a successful crowdfunding campaign in this toolkit. Follow the steps below to help you reach your campaign goals!

Overview

There are so many free resources out there about crowdfunding. It can be hard to know which to use and what works best for you. We've compiled a list of all of our favorite tools and resources here to help you make crowdfunding a little easier.

Choose a Platform

Crowdfunding platforms have gone through many iterations since they began a decade ago. Recent consolidations have shrunk the options available, but below are a few that we suggest. They all have their pros and cons, just choose the one that works best for you.

- Classy: [pro:beautiful interface, con: costs money]
- GoFundMe: [pro: free for causes,con: reputation for raising money for individuals]
- Kickstarter: [pro:easy to use, household name, con: must hit goal to receive money]
- IFundWomen: [pro: supportive community, beautiful interface, con: only for women-run organizations]

Gather Your Team

Start by putting together your team. Assign roles – who is going to do what? Campaigns run by a team raise over three times as much than campaigns that choose to work solo. Read more about assembling a team to run your crowdfunding campaign.

Create Your Budget

How much money do you need to make the project happen? Know exactly how much you'd like to raise, and what the least amount is you need to still make the project happen. Consider sharing your budget openly on your campaign page. Conveying how you plan to spend the money will help build trust and credibility with your donors. Use thisSimple Budget Template to help you get started.

Set Your Goal

Once you know exactly how much you need, you can set your goal. Use thisGift Range Calculator to help you estimate the number of donations, prospects, and various donation sizes you'll need. This is

just an estimation, but it can help you to understand what you will need to hit your goal. Make sure your goal is realistic.Learn more about choosing the right number for you here: How to pick your crowdfunding goal.

Develop Your Prospects

Now that you have an idea of how many prospects you'll need and how much money you'll need to raise, you can begin to compile your list of prospects. Use your team to help you with this. Combine your networks and expand your reach. Now would also be a good time to connect with your board and see who they know that might be willing to support your cause.

One idea is to divide your prospect list into categories, brainstorm everyone in your network under each category, and determine the realistic, potential amount that could be raised from each group. For example:

- **Individuals:** parents, PTA, neighbors, family members, board members, friends
- **Foundations:** local, national, mission-aligned; what are the projects typically funded, amount typically funded? Is there a matching potential?
- **Businesses:** local, mission-aligned; who has the potential for sponsorships, potential for in-kind?
- **Government:** school board representative, city council, commissioner
- **Other Organizations:** mission-aligned, partnerships, churches, neighborhood associations

Craft Your Story

You already have a great cause. Think about how you can make your story sound more compelling. Add interesting personal touches that make your campaign stand out. Do you have something tangible that your cause is creating with the money raised? Donors love to be able to see what their money is going to. It helps give them a better idea of the impact your cause is having. Use pictures, videos, and storytelling to help bring your cause to life. Did you know thatcampaigns with videos raise 4 times as much moneythan those without?

Create a Calendar and Marketing Plan

Before your campaign goes live, you're going to want to have a plan established. In a study done by Indiegogo, they found that 42% of funds were raised in the first and last 3 days of the campaign. For this reason, you're going to want to make sure that you've put together a marketing plan. Not only can it help ensure you bring a lot of traction right at the beginning of your campaign, but also it can really help tokeep the momentum goingduring the middle of your campaign. Make sure you are posting updates and responding to comments on your page. This is a great way to keep the momentum going!

Launch Your Campaign

Once you've got your team, your budget, your donors, your story, and your plan in place, then you are ready to launch your campaign. Read this great article with expert tips on how to create your crowdfunding campaign. The most important thing is to keep the momentum going and stick to the marketing plan. Consider a "soft launch" to bring in big donations before you announce your campaign publically. A good rule of thumb is to have 30% of your donations raised within the first week of launching your campaign. Also, consider a countdown toward the end of your campaign to drive in the final donations.

Thank Your Donors

When your campaign is finished, you'll want to acknowledge your donor's gifts with a tax receipt and thank you note. Even if you are not a 501c3 or have a fiscal sponsor, you should still send your donors a personalized thank you note. A good tip is to include a call to action in your thank you note and invite them to join you at your next event or subscribe to your mailing list. The goal is to let them know how much you appreciate them, but also to keep them engaged with your cause.

FUNDRAISING

When we ask our causes what they need the most, the number one response is always money. Fundraising can be very time consuming and keeps you from doing the things that you really want to be doing – working with the people your organization serves. We always encourage the nonprofits we work with to think about ways they can

earn money outside of just grants and donations. Is there a special skill set or talent that your organization has that can be sold as a product or service? We want to challenge you to think creatively about this. Having more than one funding stream will always help you to be more sustainable.

We've created a Funding Toolkit for small nonprofits that they can use to develop a plan and hopefully save you some time when your team organizes their fundraising and development strategy.

You'll get free resources like:

- • Budget Template
- • Grant Template
- • Development Plan Outline
- • Sponsorship Packet Outline
- • Acknowldgement Template
- • Donor Database Tips

FUNDRAISING TOOLKIT

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Budget

Personally, we love a good spreadsheet, but we know that's not everyone's cup of tea. Use this Budget Template to get organized and figure out exactly what is cost to run your organization. The first step in getting funded is always knowing exactly what you need. Saying on budget can be difficult with both your organization and your personal finances, but good budgeting habits can be life-changing. Online apps can make it easier. Check out EveryDollar, YNAB, or Mint for a few options.

Fundraising

We hear causes say all the time that they need help with fundraising. While this is true, it's definitely not realistic or even necessary to have thousands of dollars to get started on your cause. Starting

small is the best way to test your idea, and strengthen it as you grow. You can use our Pilot Guide to help you do that. But once you're ready to scale up your organization, funding is necessary to make that happen. Grant writing can be a DIY job in the beginning, but we recommend, when you can afford it down the road, to hire a professional. Below are a few resources to help you get started. We suggest putting together a development committee on your board, or invite some ad hoc fundraising all-stars to join, and collectively write your annual development plan. You need to put a plan in place to know what you're aiming for, and set the targets for how much money you need to or would like to raise. Your development plan should be the who, what, where, when, and how of your fundraising strategy for the year. Use this Development Plan Template to help you get started building your own.

Grants can be hard to come by, and writing them can be time consuming. We suggest putting together a standard template that you can use over and over again for your organization. Customize the grant based on your research of the foundation, or grantor, and the program you're applying for, but have a set boilerplate for your organization's history, background, and impact. Use this Grant Proposal Outline as a starting point. If you're looking for sponsorship, check out this Gratefull Sponsorship Packet as an example. Consider hiring a designer for a really polished look that you can use for years to come.

A note on grants and donations: We always encourage the nonprofits we work with to think about ways they can earn money outside of just grants and donations. Is there a skillset, or talent that your organization has that can be sold as a product or service? We want to challenge you to think creatively about this. Having more than one funding stream will always help you to be more sustainable.

Systems and Structure

When the money starts rolling in, you're going to need a good system in place to make sure each donation is being recipeted properly and accounted for. Consider using a donor database to store all your donor information and the grants received. Check out Little Green Light or Apricot for a few good options that are affordable. Use this Acknowledgement Template to receipt your donors.

Again, in the beginning you can do a lot of this yourself, but it's best

if you're working toward hiring a professional to help you with your fundraising, bookkeeping, and other accounting needs.

OPERATIONS

Having a solid system of processes and procedures in place means that when your organization grows, you'll be prepared and ready to handle whatever comes your way. Greatly depending on your personality, we have seen that when it comes to operations, you either can't wait to tackle it, or you are cringing in fear. We have attempted to take out some of the guesswork and share as much as possible to help you create a structure that works. This toolkit is certainly not exhaustive, but we've included examples that should help your organization get on the right track and have lots of your bases covered. Use the Operations Toolkit for some additional resources to help you build out your processes and get a firm footing.

You'll get examples and tips for:

- Writing a Strategic Plan
- HR Materials
- Board Development
- Policies and Procedures

OPERATIONS TOOLKIT

Having a system of processes in place means that when your organization grows, you'll be prepared and ready to handle whatever comes your way. This toolkit is certainly not exhaustive, but we've included examples that should help your organization get on the right track and have your bases covered.

Get Organized

Use the resources below as a guide. You are welcome to use any of the resources for your organization as is, or customize them and make them your own. These resources below are all available for you to use at your own risk. Consider getting legal advice to look through and review your policies to make sure they are correct for your organization.

Strategic Plan

If you have big plans for your organization and are ready to scale and grow your cause for a sustainable future, check out our Sustainability

Guide. The guide will help your team articulate your goals and come up with a roadmap for how to get there. Here is the Roadmap Workbook for you to begin your journey planning for the future.

Human Resources

Any growing organization needs good human resource policies in place for employee retention. Create a culture that sets up new hires for success by giving them the onboarding materials they needed to thrive in your organization. You can use this Onboarding Checklist as a template to guide your internal process. Also, check out our Employee Handbook as an example. You are free to use those resources as your own, but consider getting legal advice to make sure the policies are right for your organization and location. We also created a Reference Guide for New Hires that answers some frequently asked questions and gives new hires a central place to access important documents when they're just getting started.

Board Development

Another commonly asked question is how to set up your board for success. There are lots of free resources online that can help you manage and engage your board. However, check out our Dream Team Grid to help you create a diverse and multi-talented team. Set up committees with your board members and provide them with Job Descriptions so everyone has clear expectations for what their responsibilities will be.

Additional Policies and Procedures

Again, this is certainly not an exhaustive list, but feel free to use any of the policies and procedures below as an example for setting up your own.

- Financial Policies
- Governance Policies
- Conflict of Interest Policy
- Board Member Statement of Understanding