Introducing Fundraiser Email: Help Supporters Raise More

10/27/2026

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Agenda

- Empowering Fundraisers
- How to Set Up Fundraiser Email
- How Fundraisers Send Email
- Recommendations for Templates
- Live Demo + Q&A



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SECTION 01

Empowering Fundraisers

Why access, confidence, and consistency matter

Challenges Your Fundraisers Face

Timidity

- Asking people for support can be intimidating!

Lack of a Starting Point

- Many fundraisers have no idea where to start with asks – when, where, or how to make an ask.

Lack of Knowledge

- Your supporters can love your mission and still not feel like they can accurately explain your nonprofit to additional people.

When you give fundraisers tools (like email), you make it easier for them to make an ask. And every ask is a new potential donation.

What Happens When You Give Fundraisers Tools

You Unlock Their Network

- Reach people your organization may not
- The ask is more likely to work from a trusted voice (your fundraiser)

You Reduce Friction

- Provide a clear starting point
- Make outreach fast enough to repeat

You Preserve Mission Consistency

- Keep core messaging and branding aligned
- Retain analytics and reporting



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SECTION 02

How to Set Up Fundraiser Email

Organizer-controlled settings and templates

Set Up Your Fundraiser Emails In Three Easy Steps

1

Enable email

Fundraising >> Emails V2 >> Email Settings

3

Setup Templates

Fundraising >> Emails V2 >> Fundraiser Email Templates

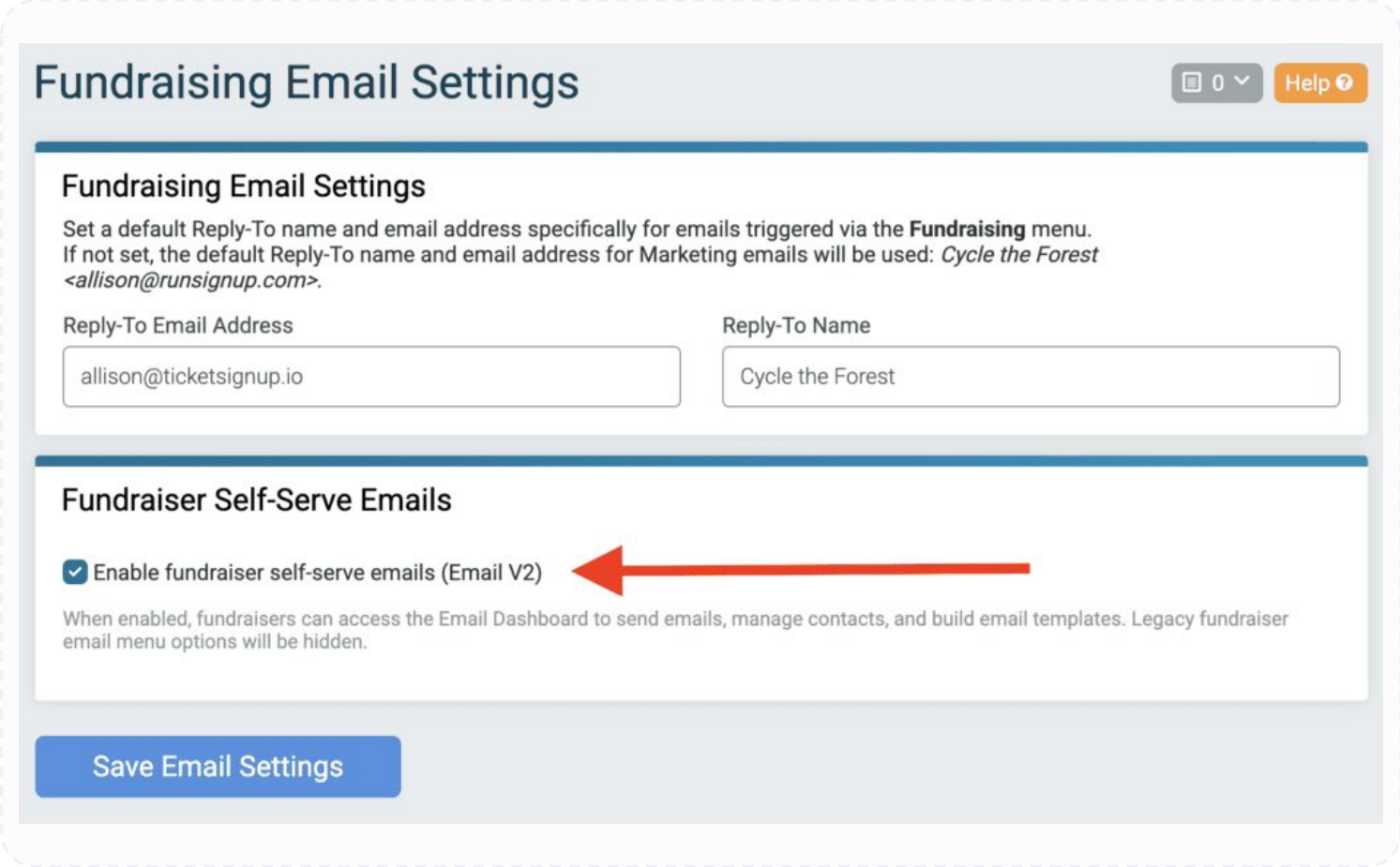
4

Share templates

Choose Fundraiser Self-Serve, then export or create

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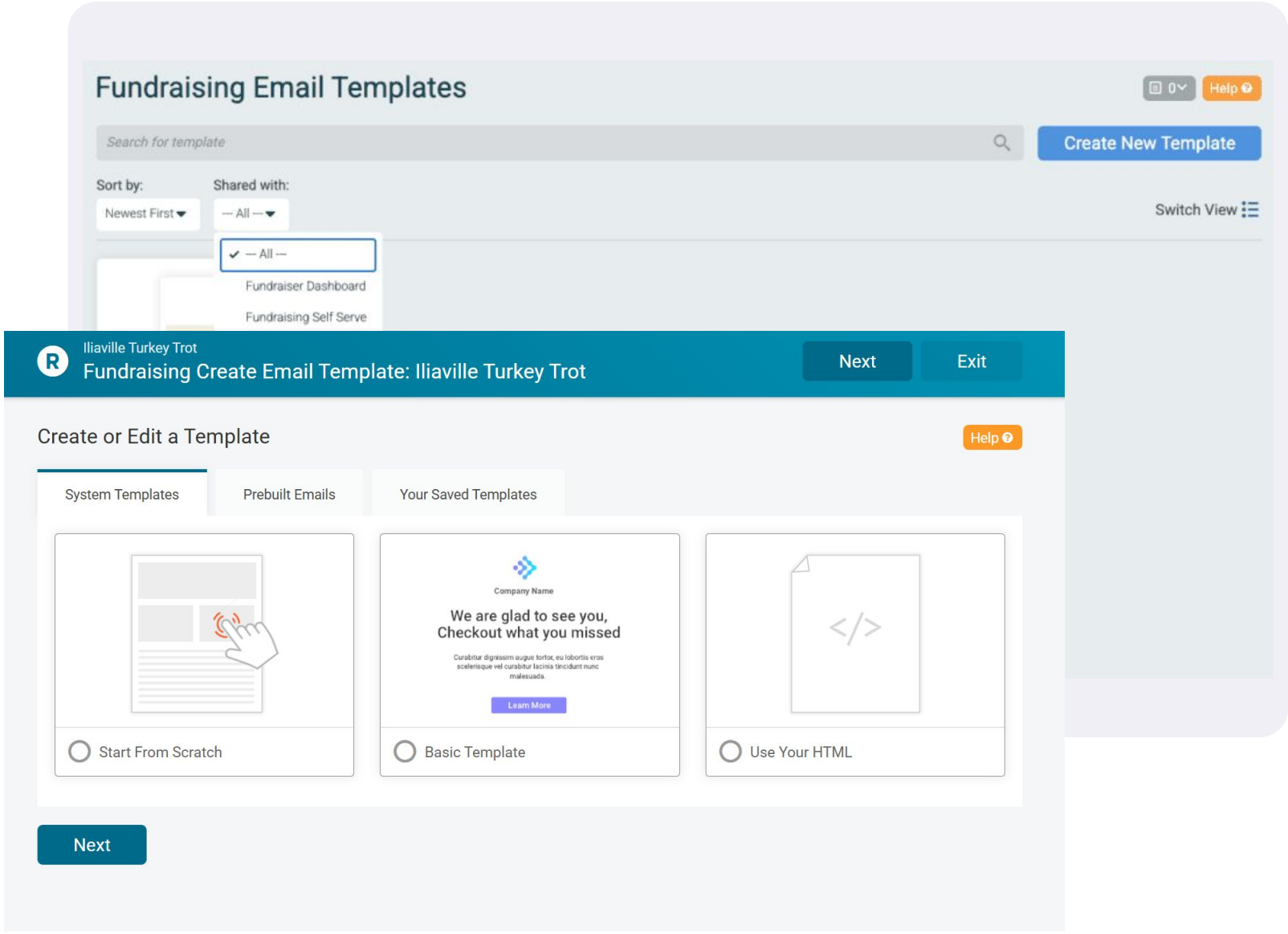
1. **Enable Fundraiser** Self-Serve Email



- Feature is off until you enable it
- Fundraisers see no email tools before activation
- Save Email Settings after checking the box

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2. **Setup** Templates



1

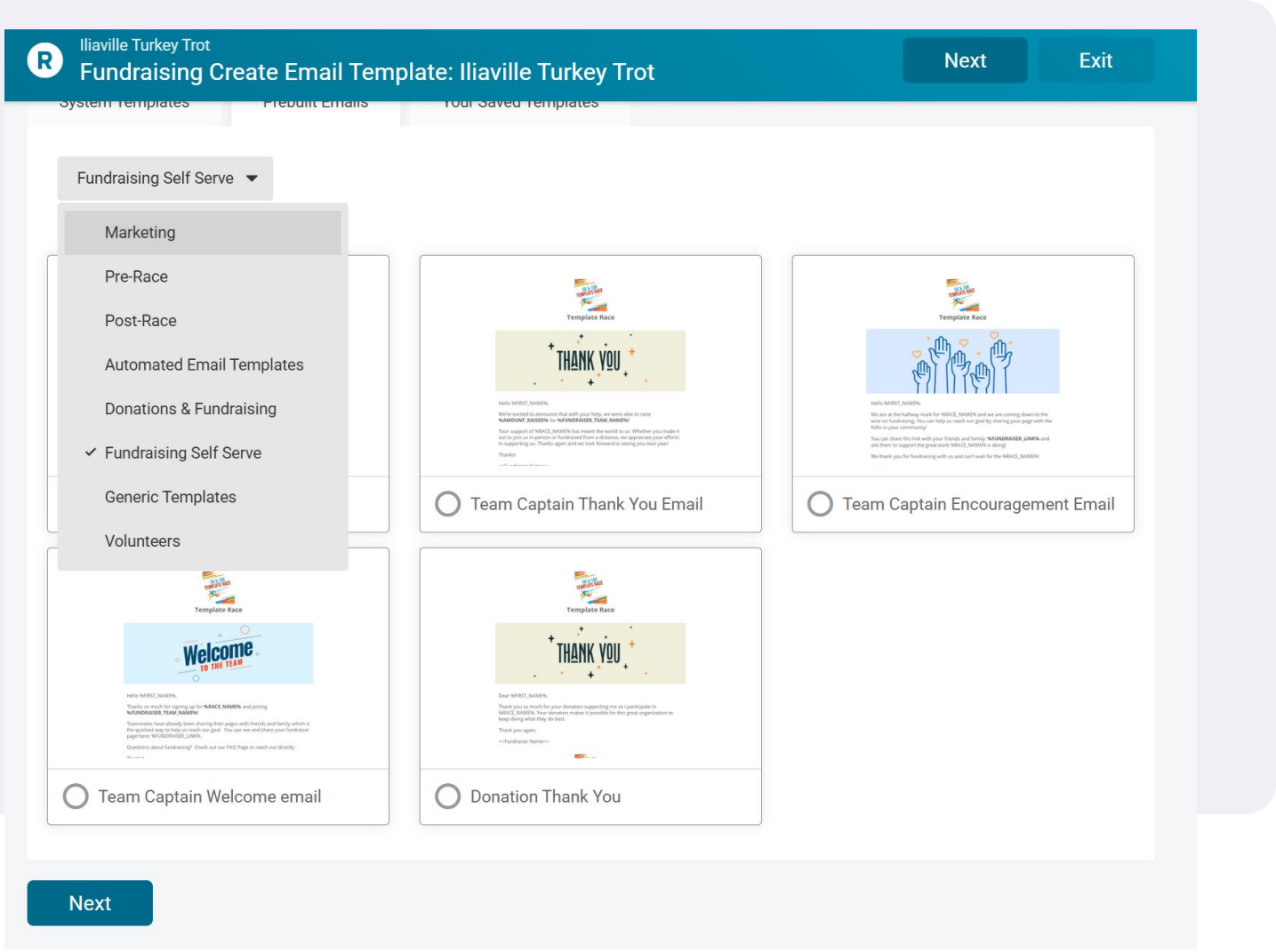
- Click Create New Template

2

- Create a new template or start from a Prebuilt email

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Pre-Built Templates



1

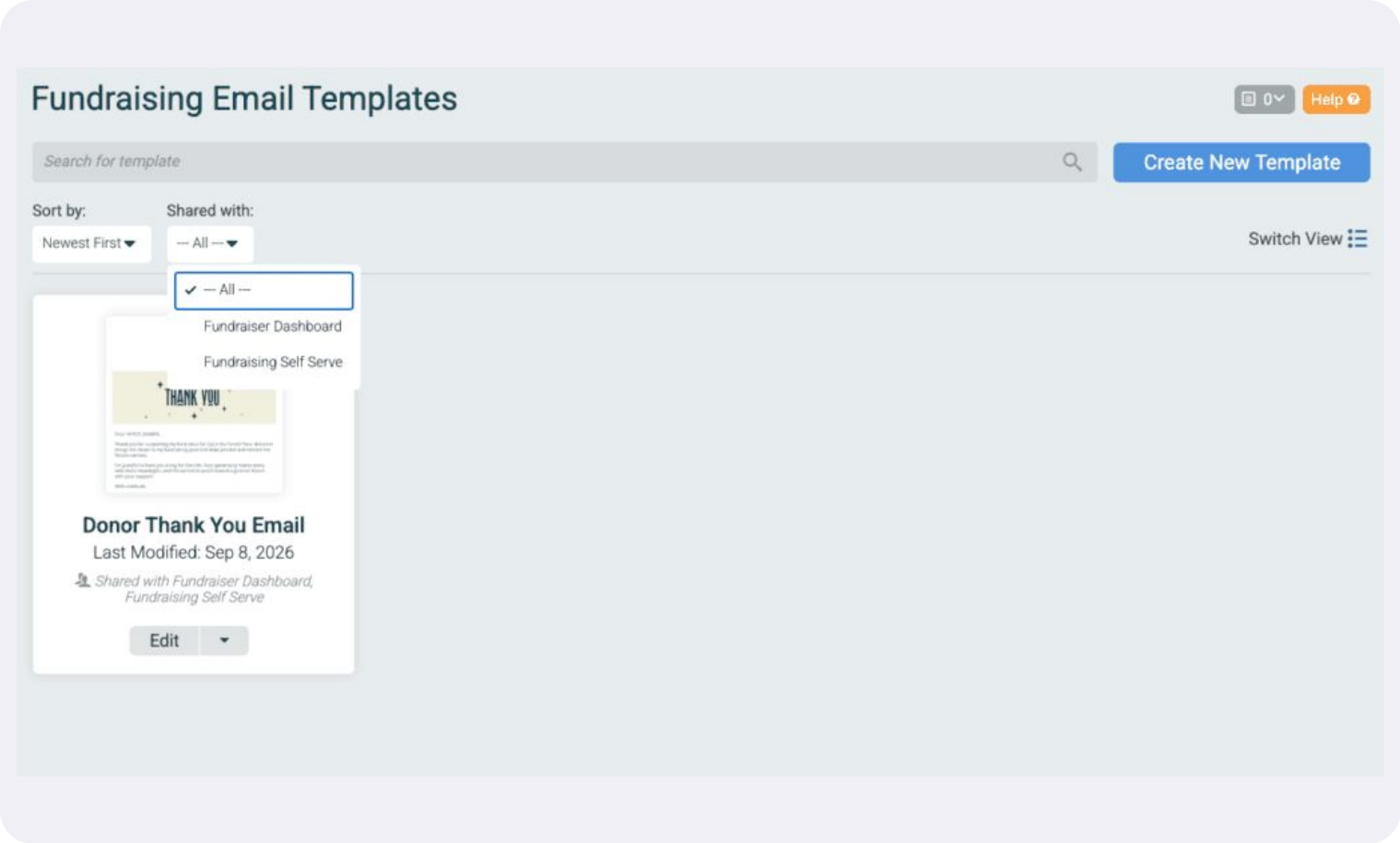
- You can start from pre-built email by selecting “Fundraising Self Serve”

2

- These emails should be customized, but can provide a good starting point for creating your emails.

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3. **Make Templates** Available to Fundraisers



1

- Select All or limit options for access to the Fundraiser Dashboard and/or Fundraising Self Serve Portal

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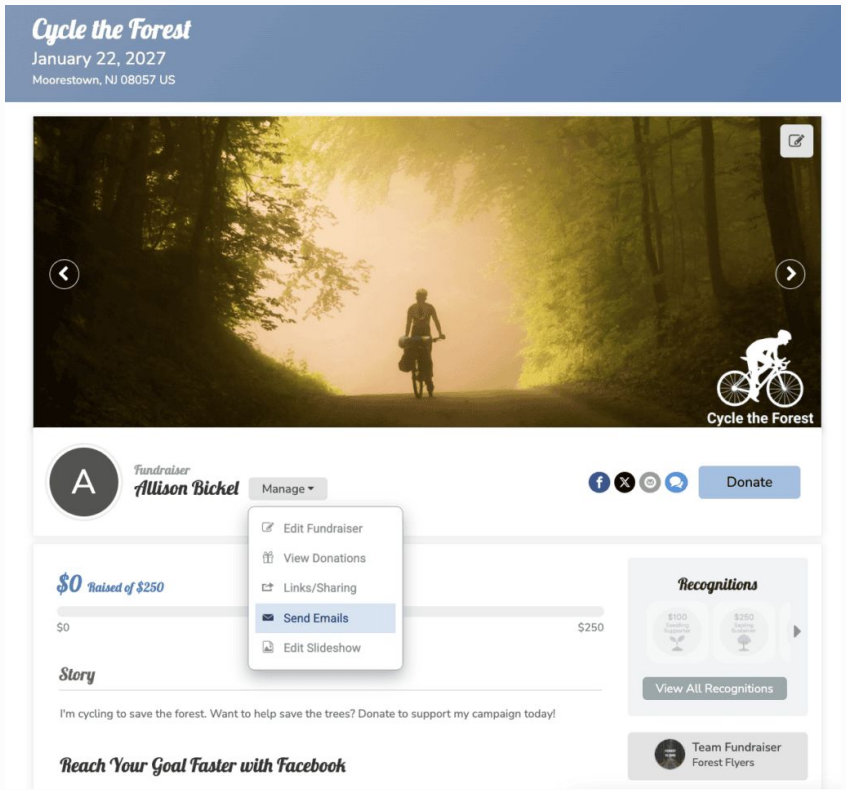
SECTION 03

How Fundraisers Send Email

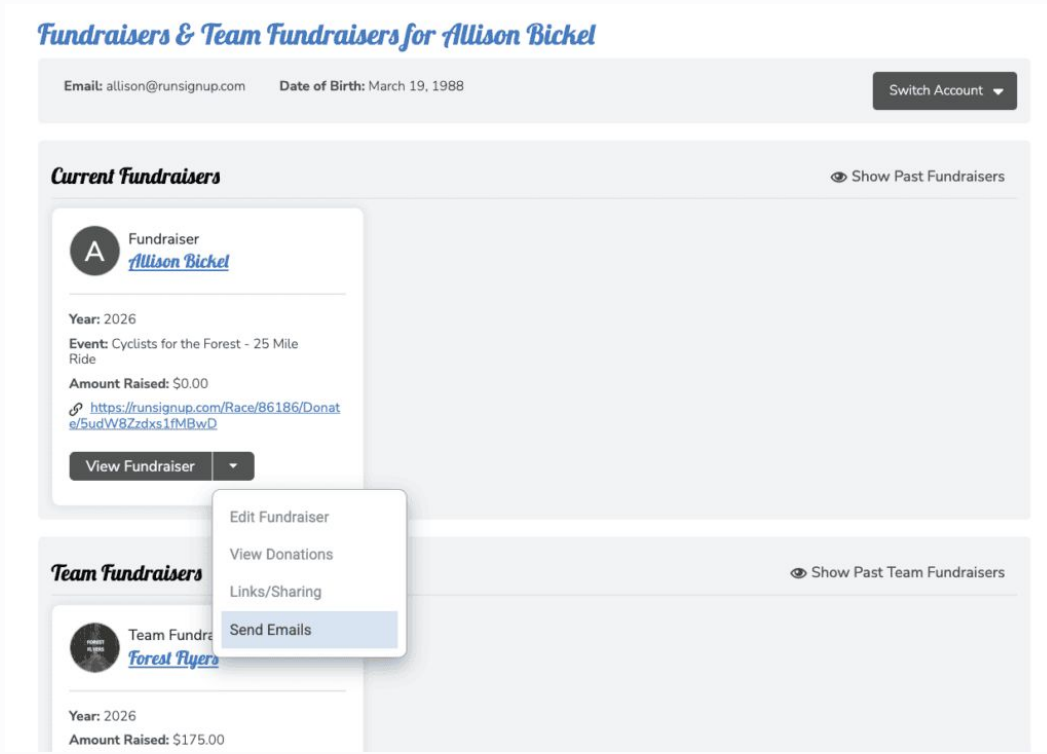
A simple self-serve workflow, from recipients to send

Two Ways Fundraisers Open the Email Dashboard

From the fundraiser page

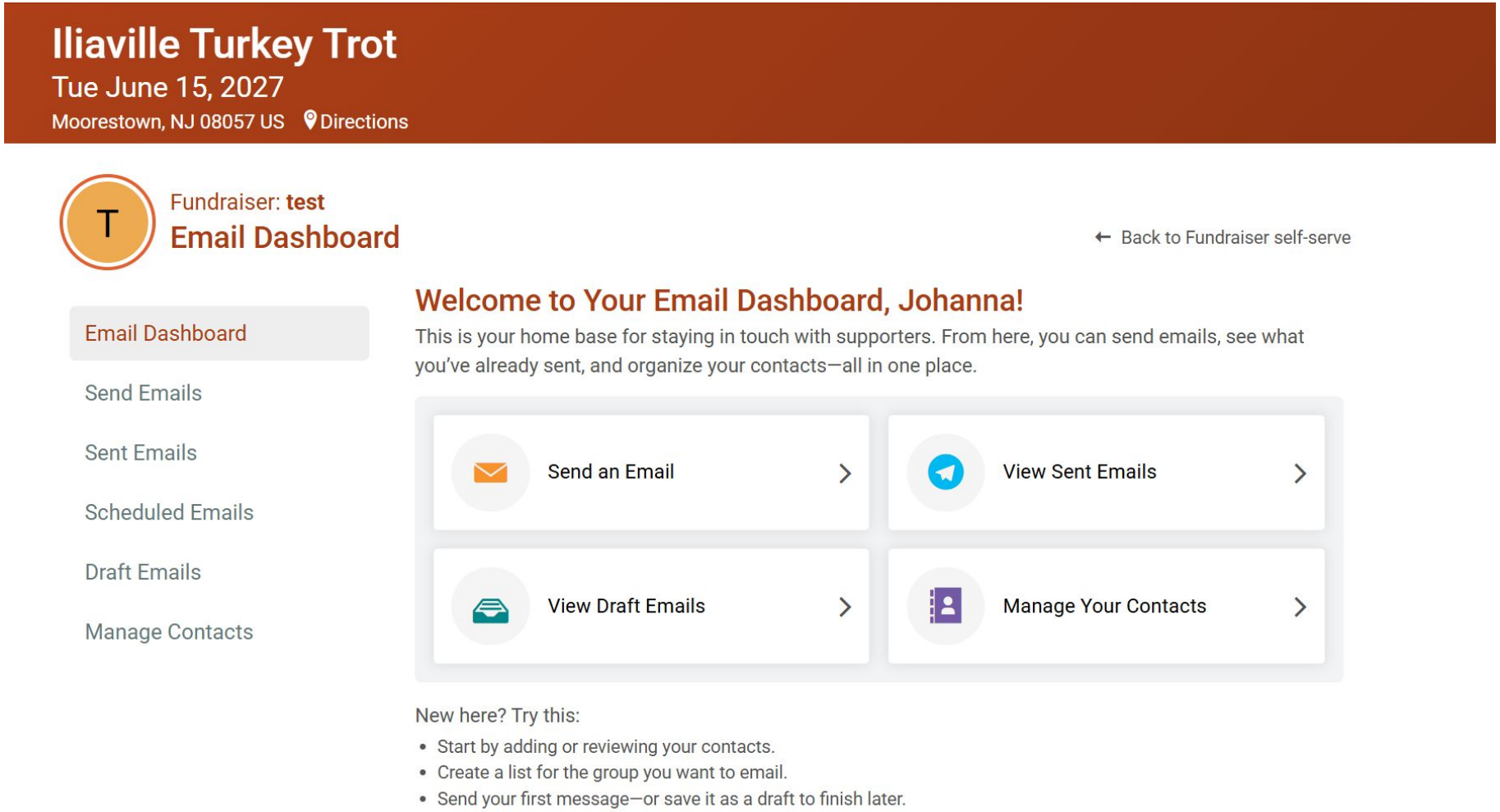


From fundraiser self-serve



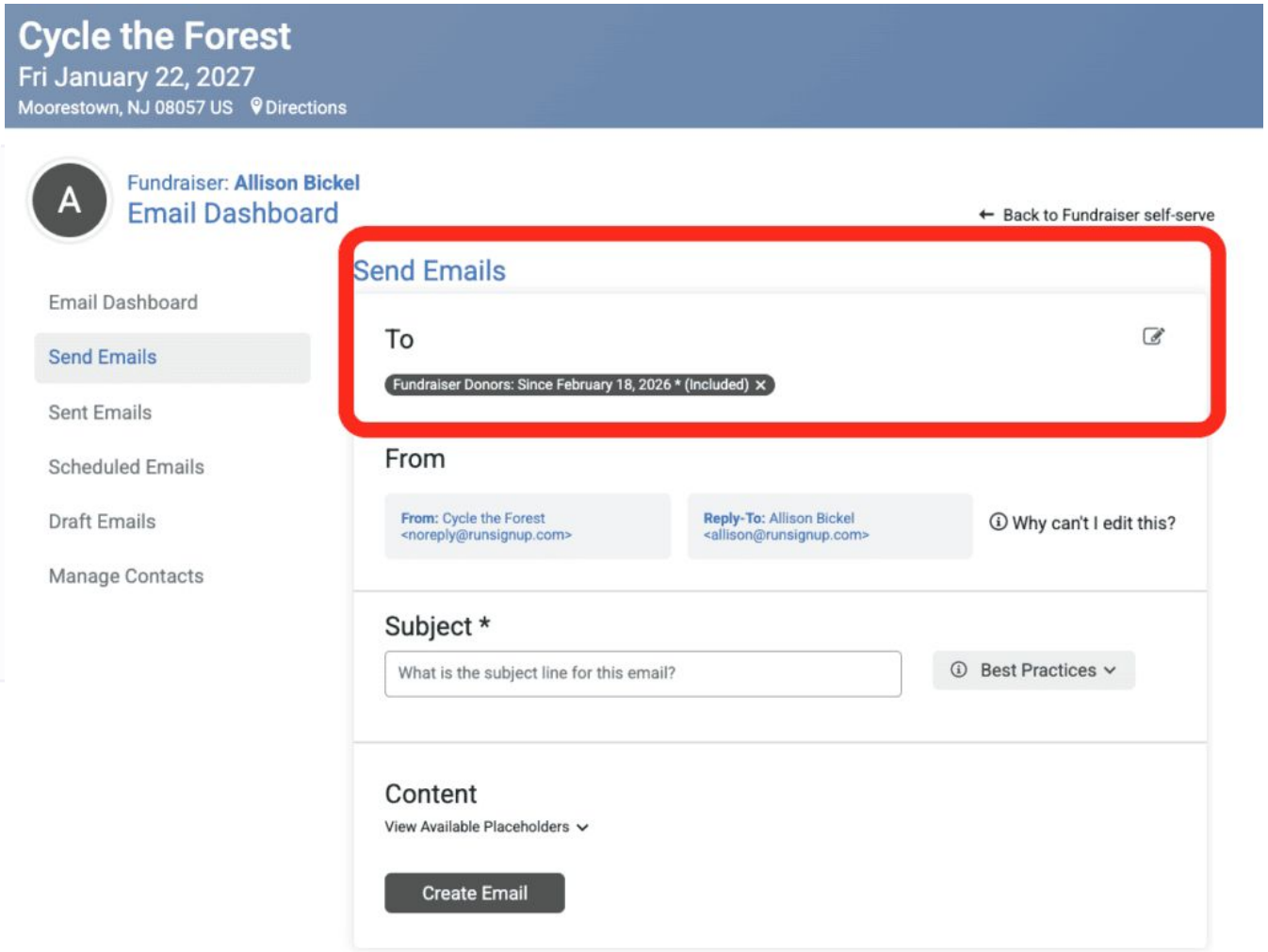
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This Takes Them to their Email Dashboard



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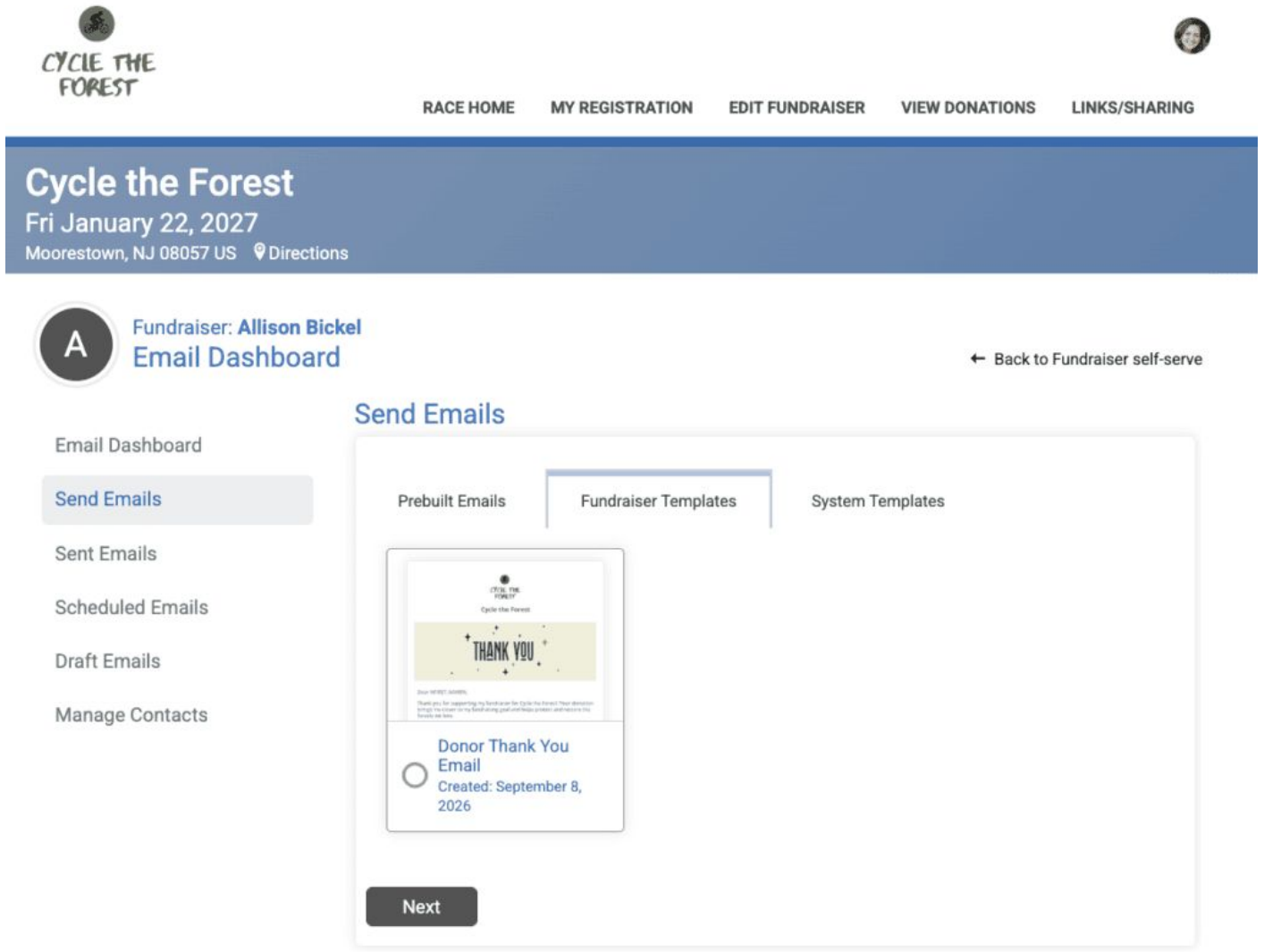
1. **Choose** Recipients



- Use built-in lists or add unlimited custom contacts

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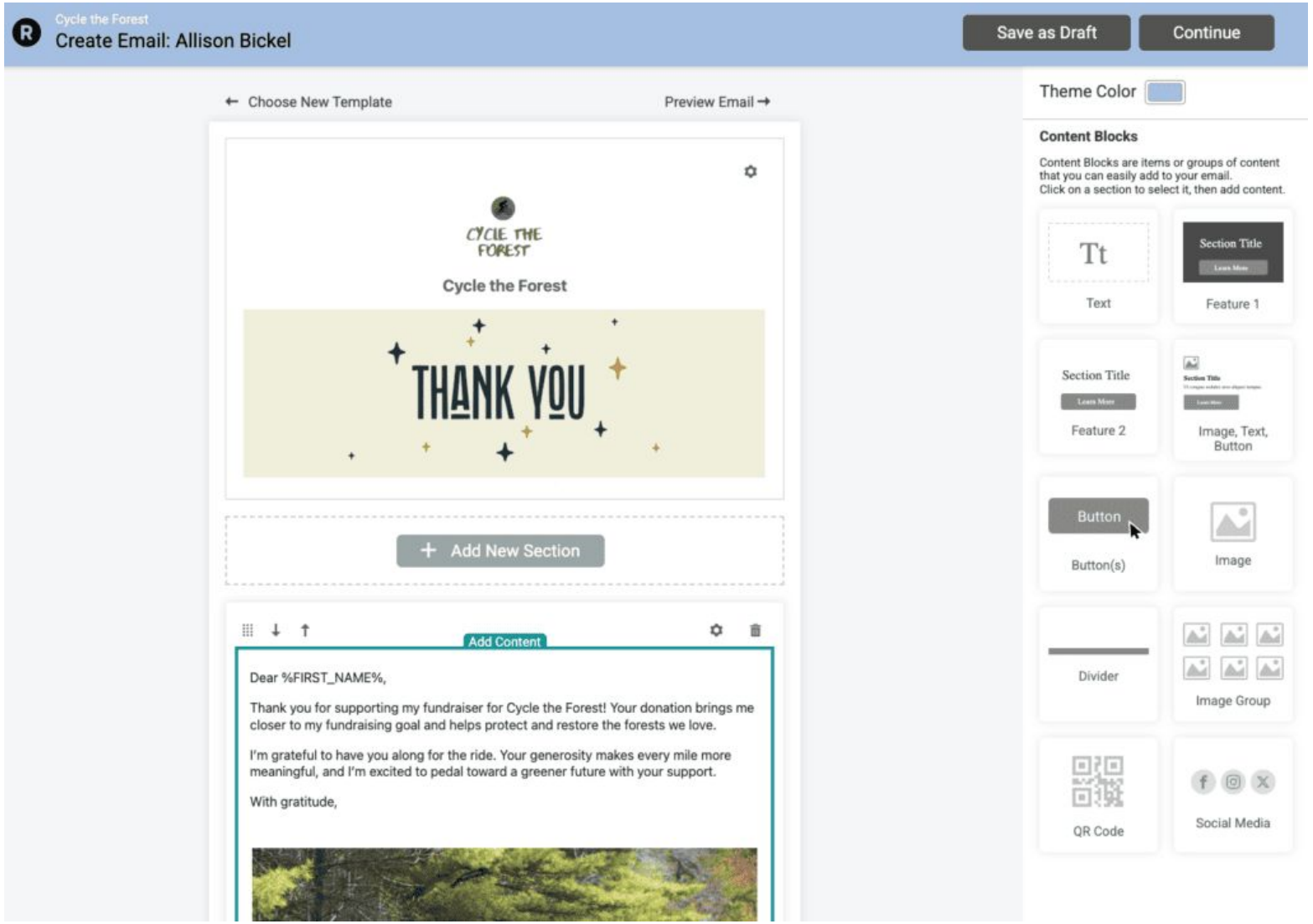
Pick a Template



- Start from an organizer template, a pre-built email, or a blank email (under system templates).

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Personalize and Send



- Edit, preview, send now, or schedule

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Built-In Email Lists

- **Donors**
- Current donors are ready to select
- Team lists aggregate team + member donors

- **Team Members**
- Reach everyone fundraising on the team
- Share tips, encouragement, and nudges

- **Team Captains**
- Coordinate with the people leading the team
- Align timing around key pushes

The Benefits of the Email Dashboard

Fundraisers can:

- Review sent, scheduled, and draft emails
- Schedule ahead or save work for later
- Add a single contact or build custom lists

Fundraisers Have Privacy by Design

- Custom contact lists belong to the fundraiser. Other fundraisers—and even the event organizer—cannot see them.



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SECTION 04

Recommendations for Templates

Give fundraisers a strong starting point—not a script

What every fundraiser template should include

- ✓ •Connect to the mission
- ✓ •Explain the event or campaign
- ✓ •Show how the funds will be used
- ✓ •Make one clear ask
- ✓ •Leave room for personal voice

A practical starter set: three templates

Plan for	Ask	Thank	Update / Final Push
Best moment	First outreach	Right after a gift	Milestone or deadline
Core message	Mission + why you care	Gratitude + impact	Progress + urgency
Primary CTA	Donate now	Stay involved	Help us finish strong
Personal touch	Your story	Donor-specific thanks	Latest progress

Get It Started. Then Turn It Over

1

Turn it on

- Enable fundraiser self-serve email for the event

2

Add templates

- Start with one ask and one thank-you

3

Invite action

- Show the dashboard and encourage the first send

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Live Demo + Q&A

GiveSignup Team

info.givesignup.org

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