

Personal Fundraising Handbook

A guide to using Toronto General & Western Hospital Foundation's
Personal Fundraising website

Contents

- Creating a Personal Fundraising Page 3**
 - Getting started: choose a stream..... 3
- Using your Participant Centre 7**
 - Logging in..... 7
 - Reset your password..... 7
 - Participant Centre home page 9
 - Change your photo 10
 - Personalize your story..... 11
 - Create a custom URL 12
 - Change your fundraising goal..... 13
 - Manage donations 13
 - Enter offline gifts 14
 - Email overview 15
 - Import contacts from your email provider 15
 - Add contacts manually 16
 - Using an email template..... 16
- Making a donation to a page..... 19**
 - 1. Search by Honouree or Event Name 19
 - 2. Search by Page Creator..... 20
 - 3. Search by Team..... 21
 - Making a donation from a page..... 22
 - Donation form tips 22

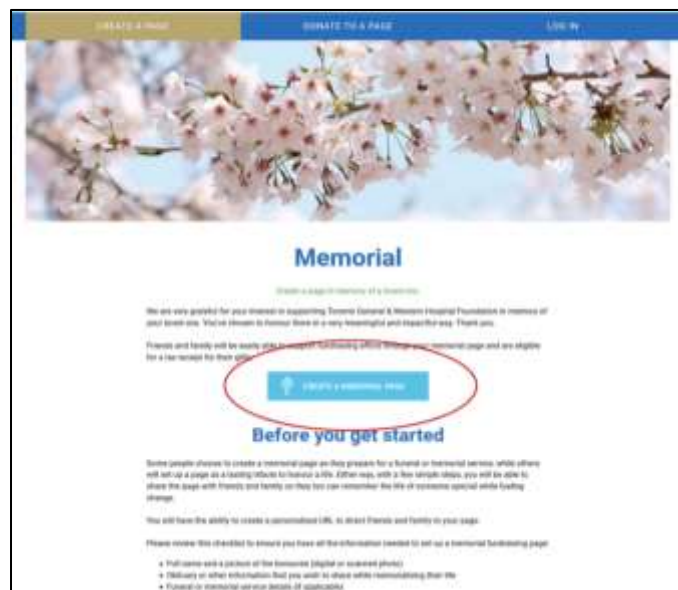
Creating a Personal Fundraising Page

Getting started: choose a stream

We offer three types of personal fundraising pages: Celebrate, Event and Memorial.



- Click on the button for the type of Personal Fundraising page you would like to create. You will be taken to a landing page with more information about the type you've selected.



- Click on "Create a Memorial Page" to be taken to the registration form

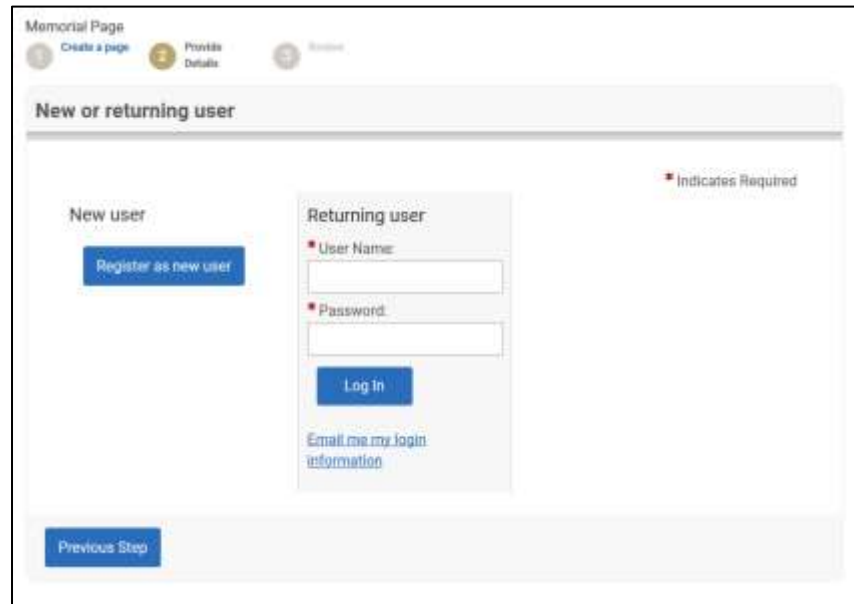
Step 1: Create a page



The screenshot shows the 'Create a page' form in the Memorial Page creation process. The form is titled 'Create a page' and includes a progress indicator at the top with four steps: 1. Create a page (active), 2. Provide Details, 3. Review, and 4. Make Payments. The form fields include: 'Your Fundraising Page Type' with a dropdown menu set to 'In Memoriam' (with a note 'Create a fundraising page in memory of a loved one'); 'Fundraising Goal' with a text input field; 'Personal donation amount' with a text input field; and two checkboxes: 'Yes, make this an anonymous gift' (unchecked) and 'Yes, you can display the amount of my donation publicly' (checked). A 'Next Step' button is located at the bottom right of the form, circled in red.

- Enter your fundraising goal
- You may choose to make a personal donation at this time. If you do so, it will be visible on your personal page, unless you check the “Yes, you can make this an anonymous gift” box.
- Click “Next Step”

Step 2: Provide details



The screenshot shows the 'New or returning user' form in the Memorial Page creation process. The form is titled 'New or returning user' and includes a progress indicator at the top with three steps: 1. Create a page, 2. Provide Details (active), and 3. Review. The form is divided into two sections: 'New user' with a 'Register as new user' button, and 'Returning user' with 'User Name' and 'Password' input fields, a 'Log In' button, and a link 'Email me my login information'. A 'Previous Step' button is located at the bottom left of the form.

- If you’ve previously created a Personal Fundraising page on our site, or made an online donation since November 2018, select “Returning user”
 - You can use the “Email me my login information” link, if you forget your password
- If you’re brand new to our site, click “Register as new user”

Step 2: Provide details con't.

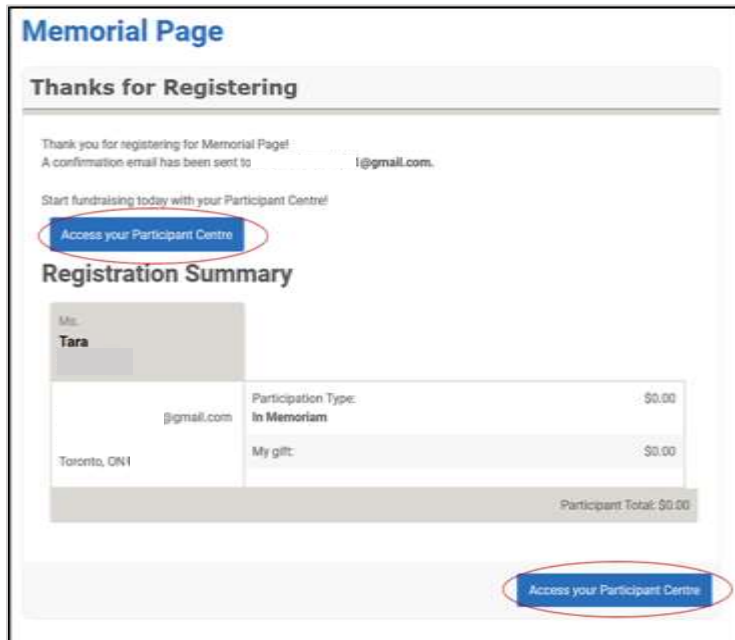
- Complete the registration form; required fields are noted with an *asterisk
- Review and check the box to agree to the Waiver
- Click “Next step”

3. Review

Participation Type	Amount
In Memoriam	\$0.00
My gift:	\$100.00
Participant Total:	\$100.00
Total	\$100.00

- Review the Summary
 - If you are making an additional gift, you will be taken to the payment page
 - If you are not making an additional gift, you will be taken to the “Submit Payment” page
- Click “Complete Registration”

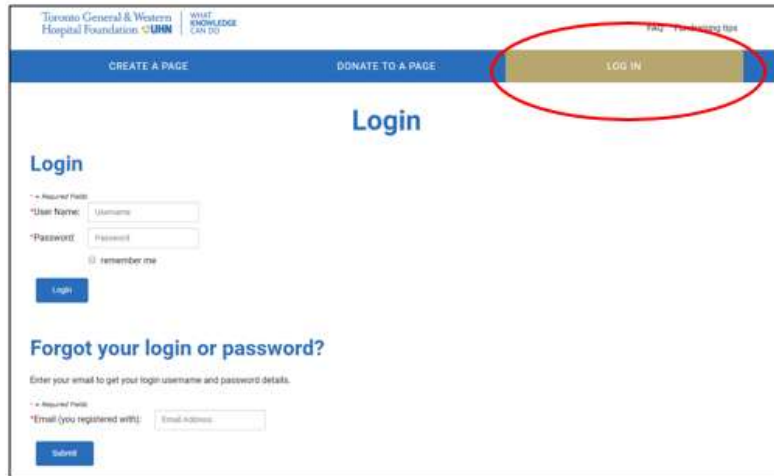
4. You're done!



- To customize your Personal Fundraising page and begin fundraising, click “Access your Participant Centre”. Or you can come back to the site any time to make updates or fundraise.

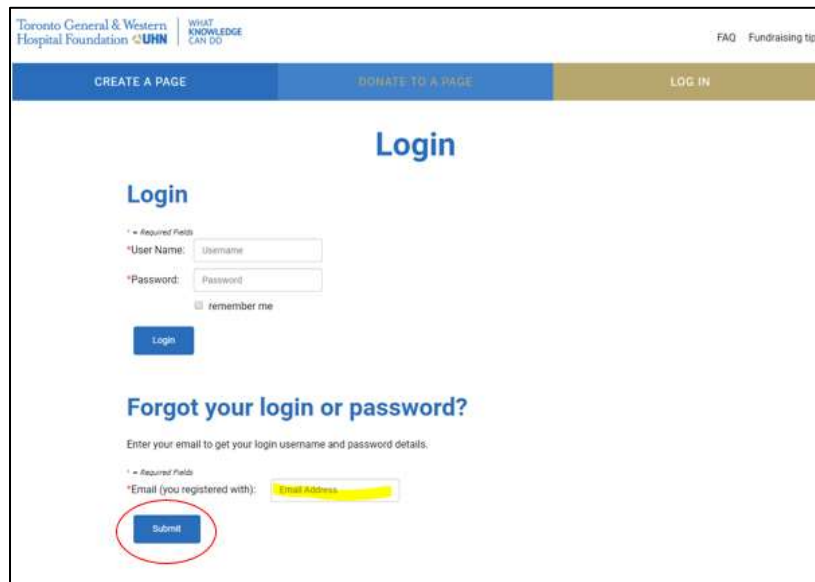
Using your Participant Centre

Logging in



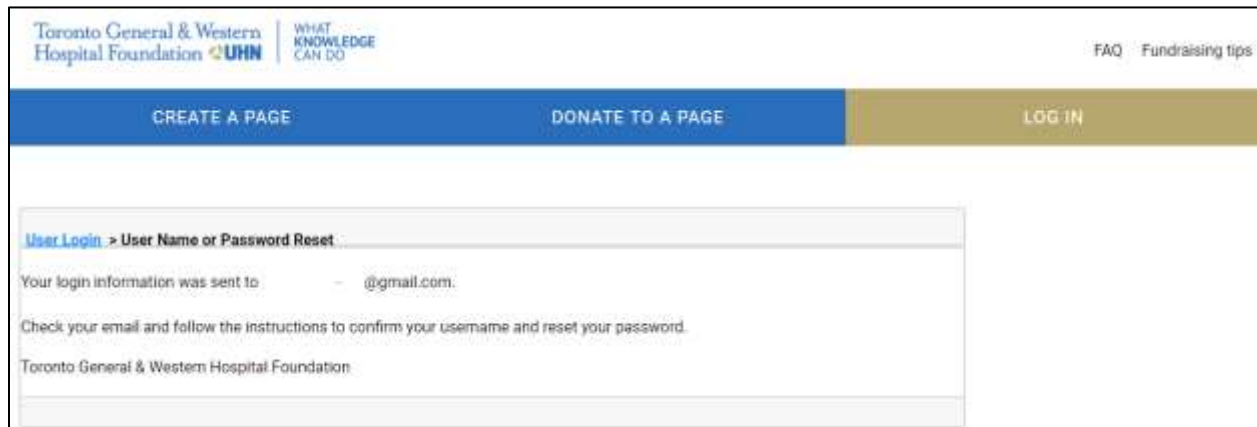
- Visit the Personal Fundraising website and click “Log In”

Reset your password

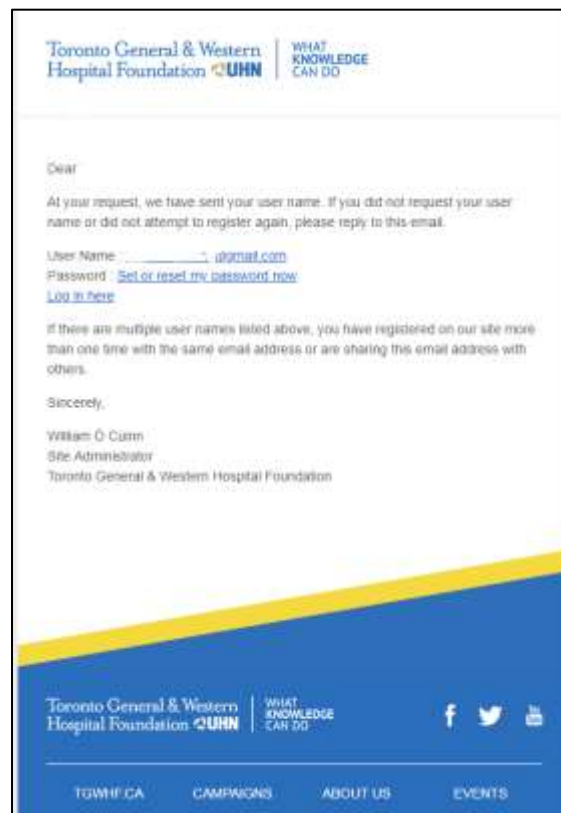


- If you forgot your password, the system can send you a link to reset it
- Visit the Personal Fundraising website and click “Log In”
- Enter your email address and click “Submit”

Reset your password cont....



- The system will send you an email to confirm your username and reset your password



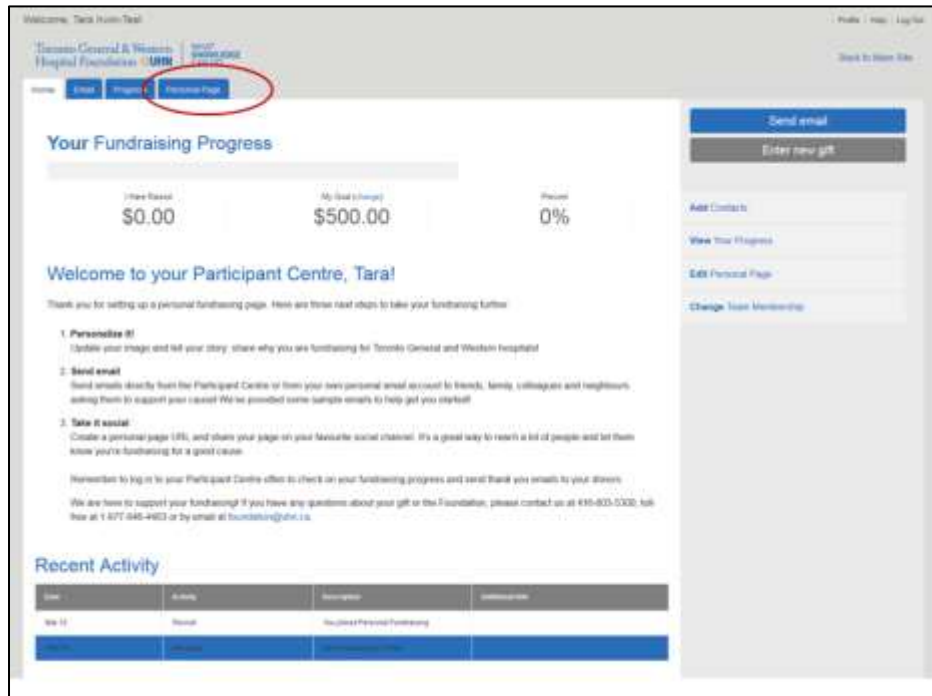
- Click the "Set or reset my password now: link

- Complete the form with your new password and click “Submit”
- The form will redirect you to tgwhf.ca, but simply go back to the Personal Fundraising website and click “Log In” to access your Participant Centre.

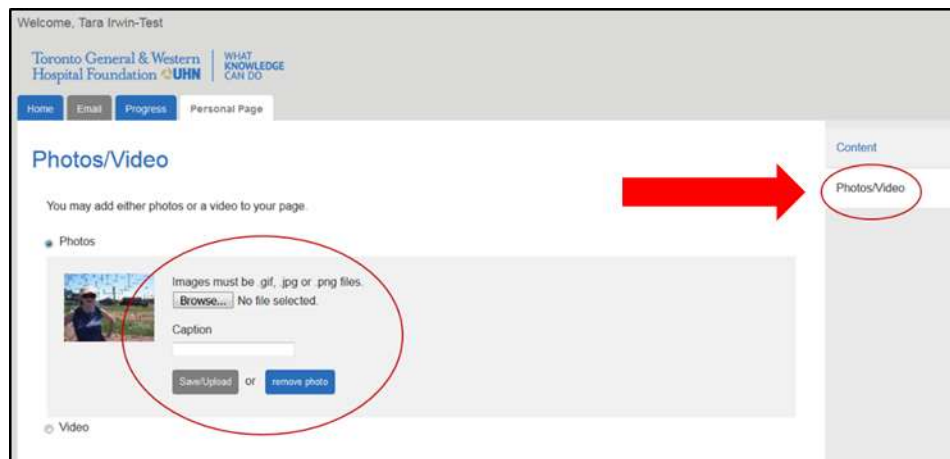
Participant Centre home page

- From the Participant Centre home page, you can access all available tools to customize your page, send emails and manage donations

Change your photo

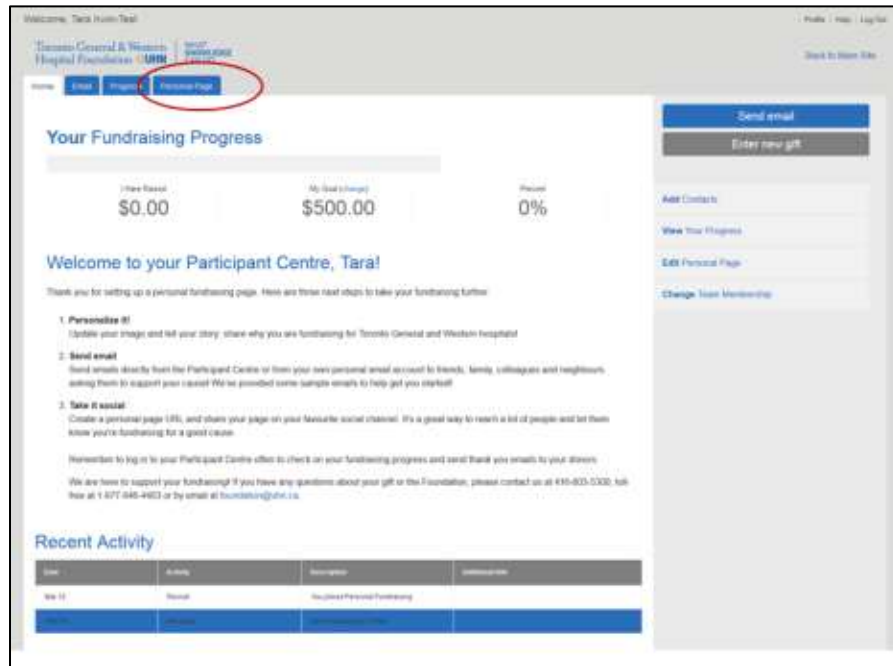


- Click on the Personal Page tab



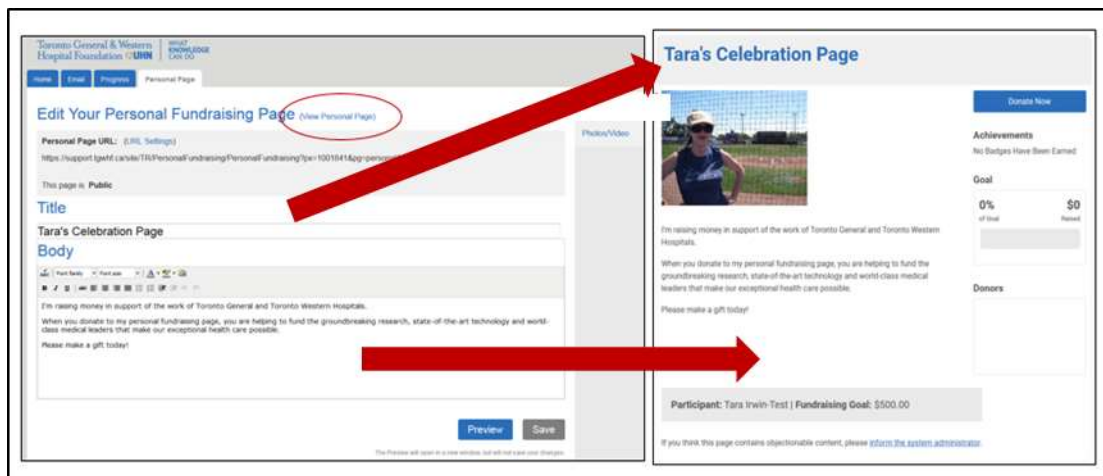
- Click Photos/Video on the right-hand side of the page
- To find an image file saved on your computer, click "Browse"
- Use the Caption field to include a caption below your photo
- Click "Save/Upload"

Personalize your story



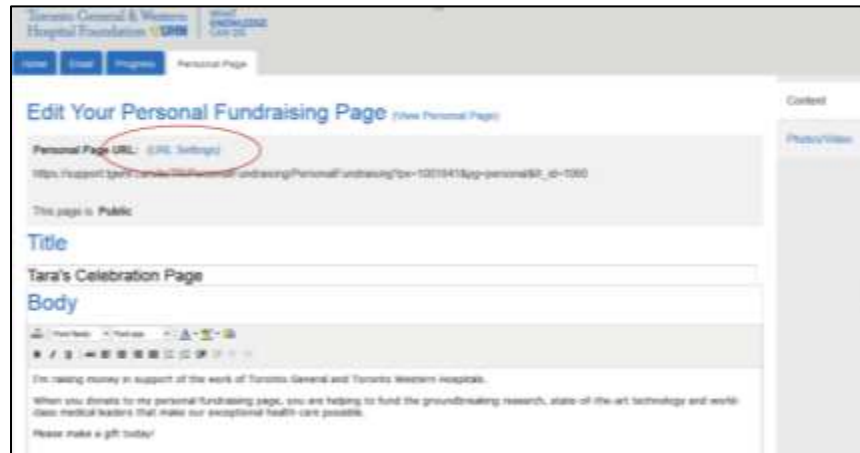
- Click on the Personal Page tab
- Click on “Content”
- Update Title: this is the title of your Personal Fundraising Page
- Update Body: similar to using Microsoft Word, you can update the copy that is displayed on your personal page.
- Click “Save”

View Personal Page



- Click “View Personal Page” and your page will open in a new tab in your web browser

Create a custom URL

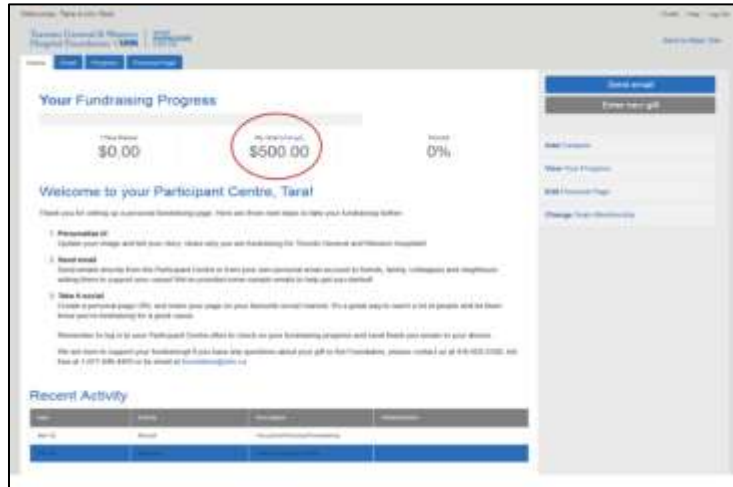


- From the Personal Page tab, click “URL settings”



- Type the desired URL in the space provided
- Click “Save”

Change your fundraising goal



- From the Participant Centre homepage, see My Goal
- Click the “Change link”



- Enter your new goal in the field
- Click “Submit”

Manage donations

If friends or family prefer to give you cash or cheque donations, you can enter these gifts in your Participant Centre to keep track of your progress and update your fundraising totals. See below for details about entering offline gifts.

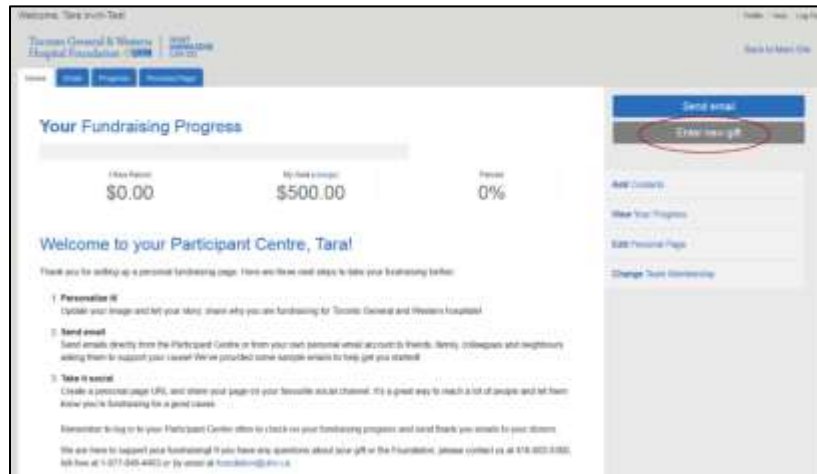
Example: your grandmother wants to support your fundraising efforts, but would prefer to make her donation by mail, with a cheque. Advise her to:

Make the cheque payable to: Toronto General & Western Hospital Foundation

In the notes field include: your name and “Personal Fundraising”

Toronto General & Western Hospital Foundation
R. Fraser Elliott Building, 5th Floor
190 Elizabeth St., Toronto ON M5G 2C4

Enter offline gifts



- From the Participant Centre home page click “Enter new gift”

The 'Enter New Gift' form contains the following fields: *First Name (with 'Tara' entered), *Last Name (with 'Dunn' entered), Email, *Amount (with '\$0.00' entered), and *Payment Type (with 'Pay Later' selected). At the bottom right, there are three buttons: 'Cancel', 'Add', and 'Save and Add Another', with a red circle around the 'Add' and 'Save and Add Another' buttons.

- Enter the donor and gift information (mandatory fields are marked with an asterisk*)
 - Note that this information will be visible on the Donor list on your personal page
- Select “Pay Later”
- Click “Add” or “Save and Add Another”

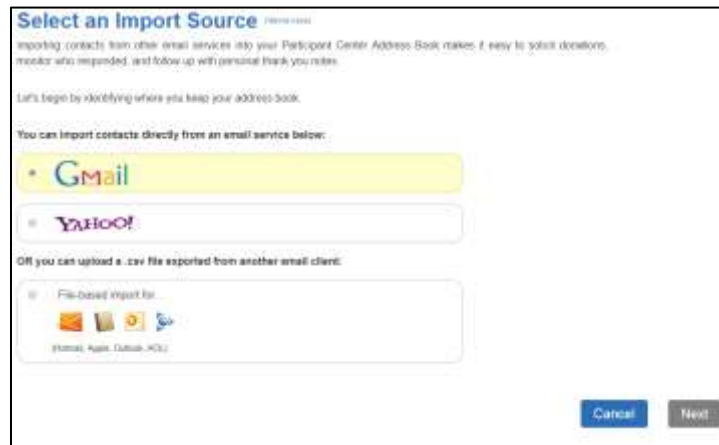
Email overview

You can use the built-in email tools to ask friends and family for donations or send thank you messages to the donors that support your fundraising. Templates are provided, or you can craft your own messages.



- From the Participant Centre home page, select the email tab

Import contacts from your email provider



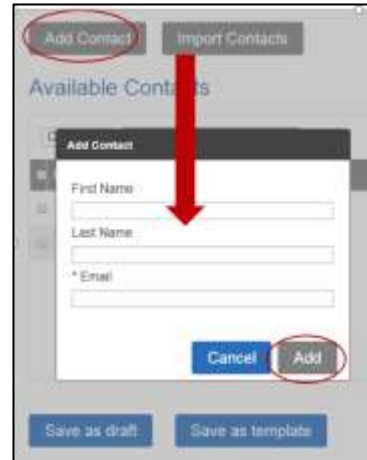
- Click Import Contacts
- Select your email provider and click “next”
- Follow the instructions provided

Note:

TGWHF does not have access to your contact list. Imported contacts are for your personal use only. If one of your contacts makes a donation, TGWHF will receive their contact information, as required for tax receipting purposes and gift impact reporting.

Add contacts manually

- To add contacts manually, click “Add Contact”
- Update the information in the fields provided
- Click “Add”



Using an email template



- Select the type of message (Thank You, Solicitation) and then select the template you'd like to use
- Click “Next”

Using an email template cont....

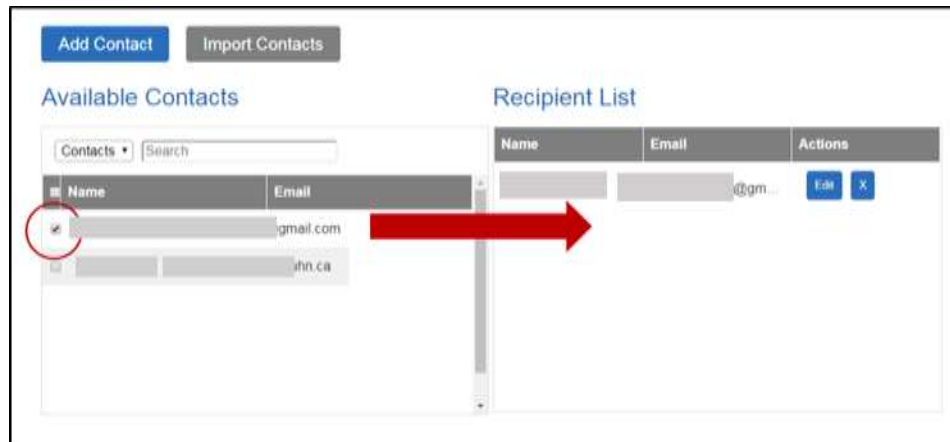
The screenshot shows the 'Compose Message' interface. At the top, there are navigation tabs: Home, Email, Progress, and Personal Page. Below the tabs is a progress bar with four steps: 1. Configure (checked), 2. Compose, 3. Set Recipients, and 4. Preview & Send. The main content area contains a subject line with the text 'Please support me'. Below the subject line is a checkbox for 'Include personalized greeting (What's this?)'. A rich text editor shows the following text: 'Dear [INSERT NAME HERE]. I've set up a personal fundraising page in support of Toronto General and Toronto Western Hospitals. Will you help me reach my fundraising goal by making a donation today? Your tax-deductible gift will help fund the ground-breaking research, state-of-the-art technology and world-class medical leaders that make exceptional health care possible. I really appreciate your support and will keep you posted on my progress. Sincerely, [INSERT YOUR NAME HERE]'. At the bottom, there are buttons for 'Save as draft', 'Save as template', 'Preview', and 'Next'.

- The email message editor works similar to Microsoft Word
- Customize your message: if you like, you can update the subject line and template message
- Be sure to update where it says [INSERT NAME HERE] and [INSERT YOUR NAME HERE]

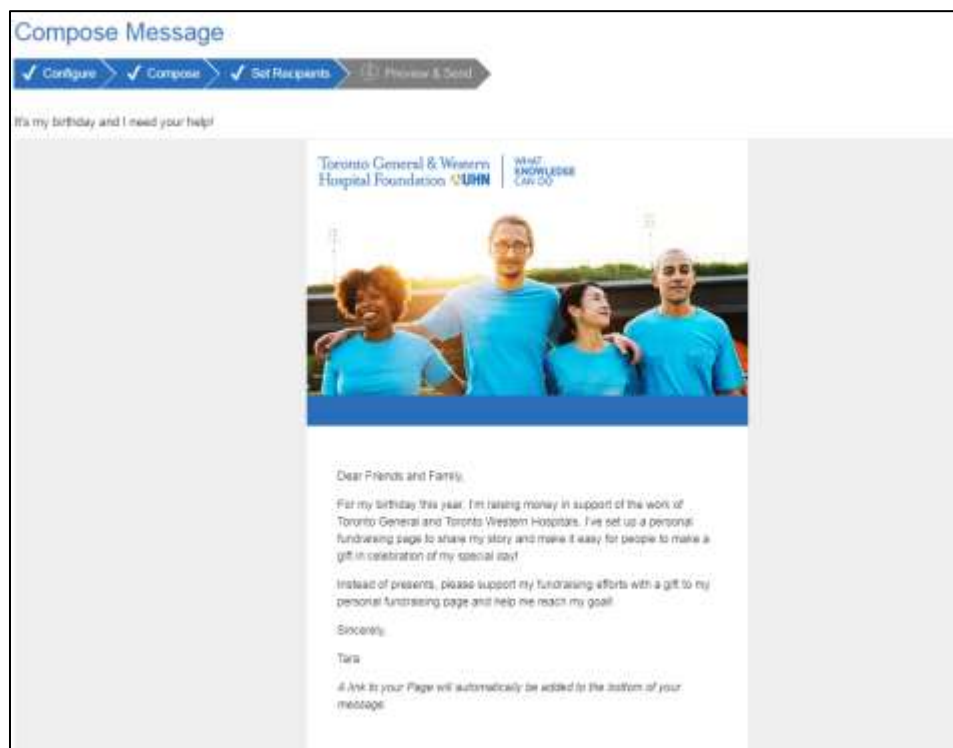
The screenshot shows the 'Compose Message' interface with the 'Preview' button circled in red. A red arrow points from the 'Preview' button to a preview window on the right. The preview window shows the email message as it will appear in an inbox. The subject line is 'Please support my fundraising efforts!'. The body of the message is: 'A message from [name]@gmail.com. Dear Friends and Family, I've set up a personal fundraising page in support of Toronto General and Toronto Western Hospitals. Will you help me reach my fundraising goal by making a donation today? Your tax-deductible gift will help fund the ground-breaking research, state-of-the-art technology and world-class medical leaders that make exceptional health care possible. I really appreciate your support and will keep you posted on my progress. Sincerely, Tara. A link to your Page will automatically be added to the bottom of your message.' At the bottom of the preview window are 'Send' and 'Close' buttons. A red arrow also points from the 'Next' button in the main interface to the 'Send' button in the preview window.

- Once you've updated the template you can preview the message
- Close the preview then click "Next"

Send your email



- Use the checkboxes on the left to include uploaded to your email list



- Preview your message
- Click "Send" and you're done!

Making a donation to a page

Page search

You can search by honouree name, event name, page creator, or team name. From the main navigation click donate to a page.

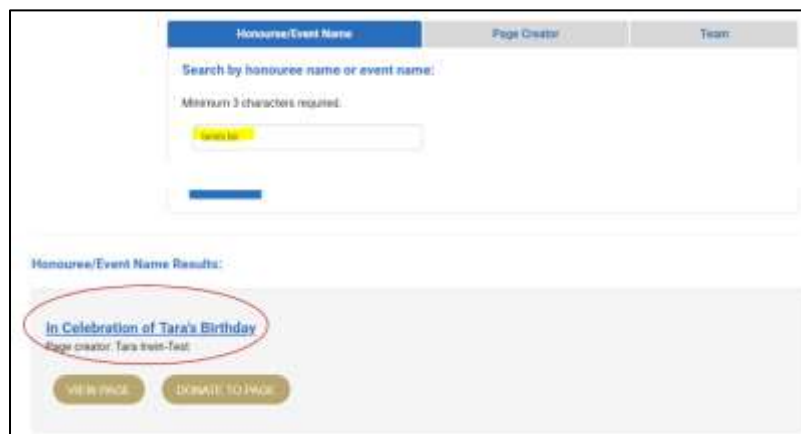
1. Search by Honouree or Event Name



- Search by honouree or event name:
 - For memorial pages, the honouree would be the deceased
 - For celebrate pages, the honouree is the occasion ex. Tara’s Birthday Party, Barb and John’s Wedding Anniversary, Christopher’s Graduation
 - For event pages, search by event name

Alternatively you can leave the field blank and click “Search” to show a list of all pages listed by Honouree or Event Name.

Honouree search results



- To view the page click the link above or the view page button
- To make a donation to the page, click donate to a page

2. Search by Page Creator



Donate to a Page

Honoree/Event Name **Page Creator** Team

Search by page creator's name:
Minimum 3 characters required.

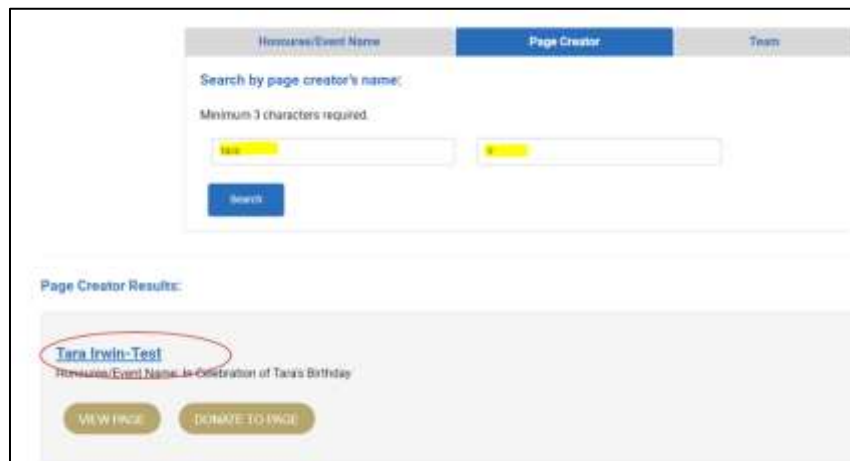
First Name: Last Name:

Search

- If you know the name of the person who set up the fundraising page, search by page creator
 - Enter the first and last name

Alternatively you can leave the field blank and click "Search" to show a list of all pages listed by Page Creator.

Page Creator search results



Honoree/Event Name **Page Creator** Team

Search by page creator's name:
Minimum 3 characters required.

Tara Irwin

Search

Page Creator Results:

[Tara Irwin-Test](#)
Honoree/Event Name: In Celebration of Tara's Birthday

VIEW PAGE DONATE TO PAGE

- To view the page click the link above or the view page button
- To make a donation to the page, click donate to a page

3. Search by Team



Donate to a Page

Honours/Event Name Page Creator **Team**

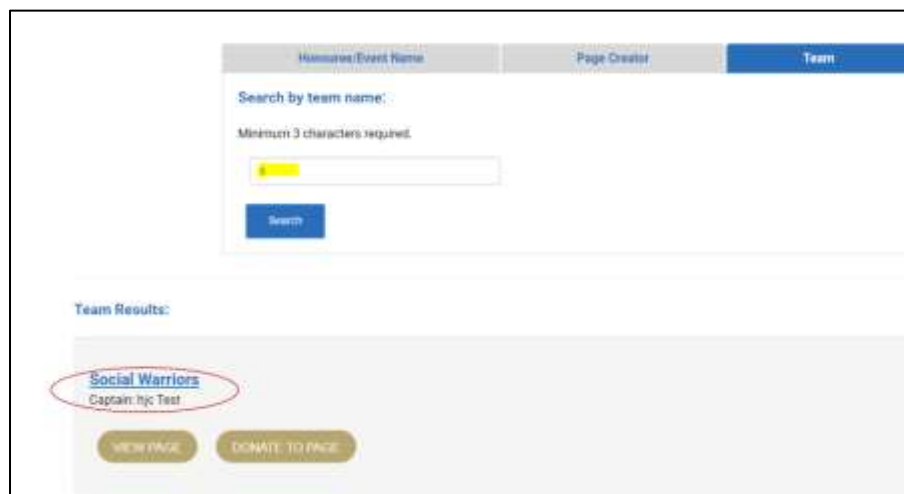
Search by team name:
Minimum 3 characters required.

Search

- If you are looking for a team, search by team
 - Enter the team name

Alternatively you can leave the field blank and click “Search” to show a list of all pages listed by Team.

Team search results



Honours/Event Name Page Creator **Team**

Search by team name:
Minimum 3 characters required.

Search

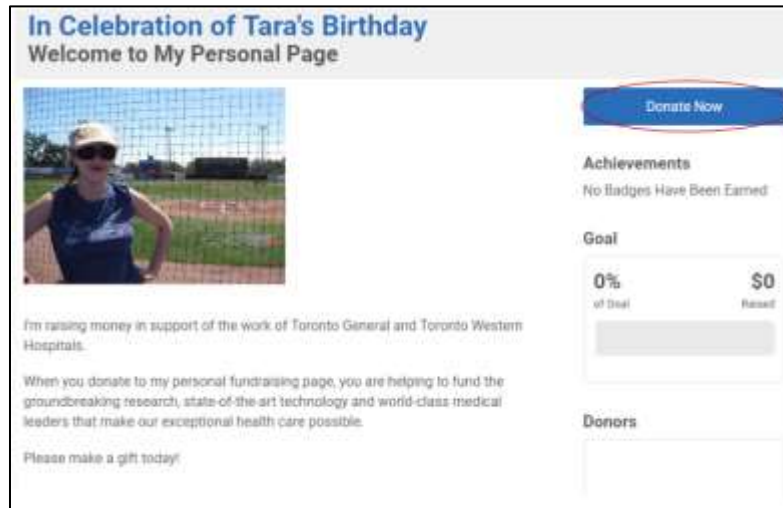
Team Results:

[Social Warriors](#)
Captain: hjc Test

VIEW PAGE DONATE TO PAGE

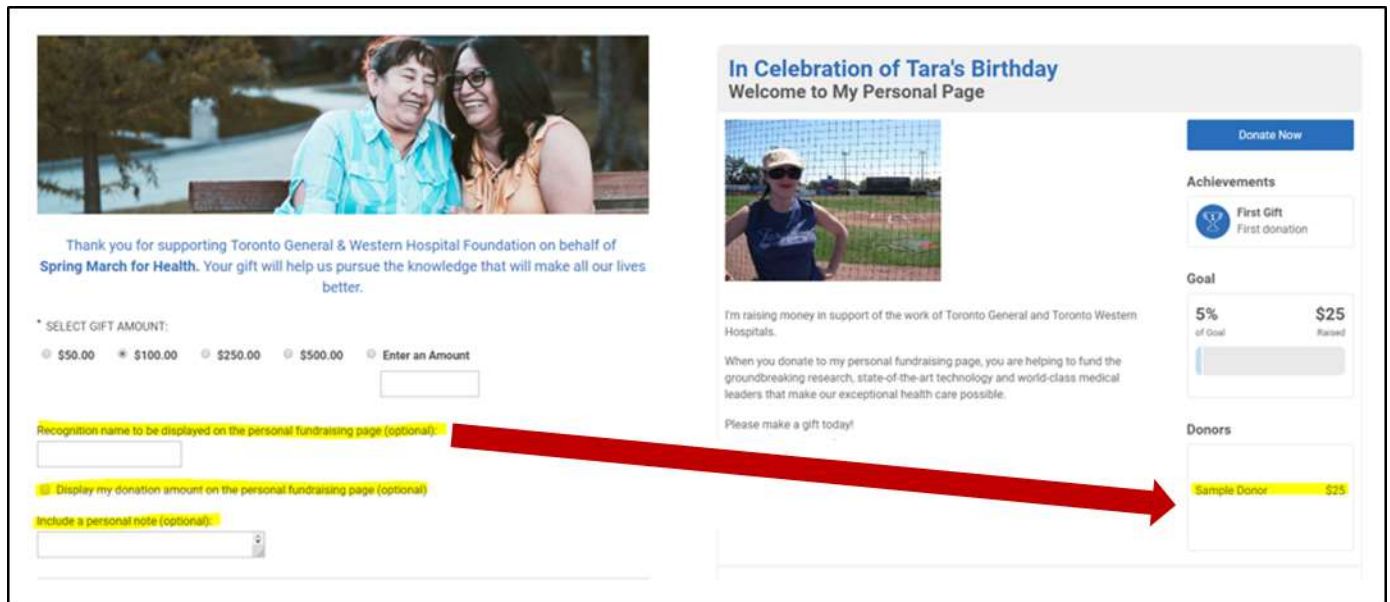
- To view the page click the link above or the view page button
- To make a donation to the page, click donate to a page

Making a donation from a page



- From the personal or team page, click the donate now button
 - This will take you to the donation form

Donation form tips



- As a donor to a personal page, you have the option of having a recognition name visible on the donor scroll on the personal page, as well as the option of including your gift amount
- In the example above, the recognition name is "Sample Donor" and the gift amount is \$25
- When you include a personal note, this is delivered to the page creator in their Participant Centre. It is NOT public facing: it is only shared with the page creator.