



**PELOTONIA®**

FUNDRAISING  
TOOLKIT



# INTRODUCTION



**BY REGISTERING FOR PELOTONIA**, you've committed to much more than a bike ride. You've joined a purpose-driven community that is dedicated to funding innovative cancer research. You are now a member of a community that is unlike any other, and a community that is committed to raising money to end cancer. Whether you're a seasoned pro or new to the Pelotonia crowd, you are a legend to us. Your efforts help fuel the fight, the research, the discoveries, and the cure.

This fundraising toolkit has been designed to provide you with tools, resources, and examples from the Pelotonia community to help you not only hit your fundraising goals, but to surpass them. After many years, thousands of participants, and hundreds of millions of dollars raised for cancer research, our community has learned the tips, tricks and behaviors necessary to successfully fundraise. We are confident if you follow the steps laid out in this toolkit, you'll meet and even exceed your commitment this year, all while having fun in the process. Here's what you can expect to learn on the following pages:

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## WHERE THE MONEY GOES

Founded in 2008, Pelotonia was established with the objective to fund innovative cancer research. Through the first 13 years, the Pelotonia community raised more than \$236 million for cancer research. Thanks to its generous funding partners, Pelotonia is able to direct **100% of community-raised funds** to cancer research at The Ohio State University Comprehensive Cancer Center – James Cancer Hospital and Solove Research Institute.



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## HOW ARE YOU MAKING A DIFFERENCE? CHECK THIS OUT:

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### The Pelotonia Institute for Immuno-Oncology (PIIO)

In July 2019, Pelotonia announced the creation of the **Pelotonia Institute for Immuno-Oncology** at the Ohio State University Comprehensive Cancer Center – Arthur G. James Cancer Hospital and Richard J. Solove Research Institute. The institute launched with an initial \$102,265,000 pledge from the Pelotonia community. This money will be raised over the next 5 years and represents the 2,265 riders who participated in the first Pelotonia in 2009. The PIIO is building on the successful endeavors in this relatively new area of cancer research and therapy, largely considered the next frontier in cancer prevention and treatment.

Renowned medical oncologist and immunologist Zihai Li, MD, PhD was announced as the founding director. In its first year, the PIIO established 20 new clinical trials, obtained \$16 million in annual funding from new grants, published more than 265 peer-reviewed articles, and assisted in immunotherapeutic studies relating to COVID-19, among other achievements. And they're just getting started!

**Watch and learn** more about the Pelotonia Institute for Immuno-Oncology.



To learn about additional examples of the impact you're making for cancer research, please visit our **Impact page**.

## PARTICIPANT PROFILE PERSONALIZATION

It's time to personalize your participant profile! Personalizing your profile is a great way to share why you participate in Pelotonia and encourage those who come across your profile to support your efforts.

There are several ways to personalize your participant profile, including writing your story, adding profile images, and setting Challenger goals. Go to [\*\*pelotonia.org/sign-in\*\*](https://pelotonia.org/sign-in) to start personalizing your page in the following ways:

- 1 Click the edit button located in the “Why I Participate” section to personalize your participant story and share your motivation for participating.

2 Upload high quality photos for your profile picture and cover photo.

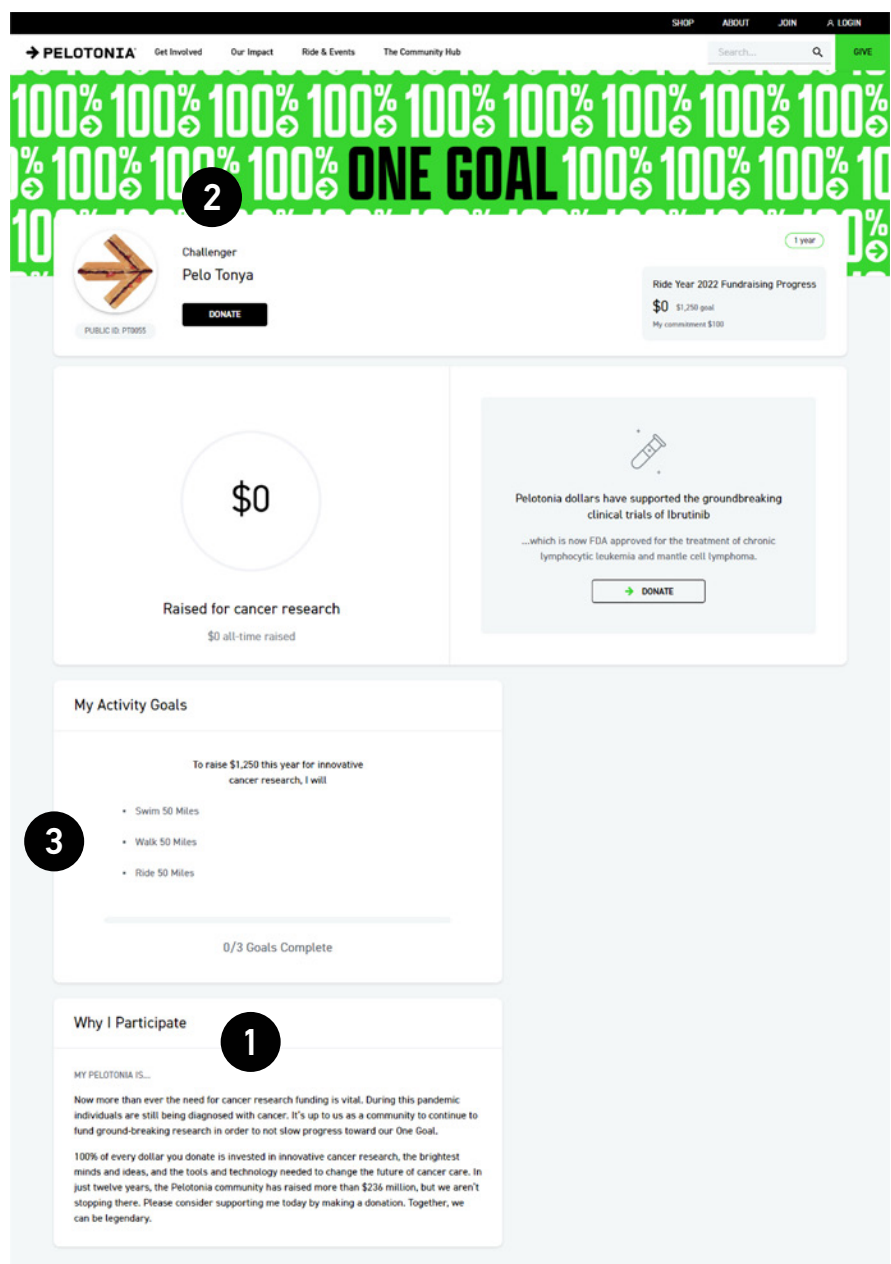
3

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Set up to 5 different Challenger goals as an additional way to motivate your supporters to give to your efforts.



Once your profile has been personalized, share your participant profile on social media, email, and even text message!



# TIME TO PARTY—Four Steps to Fundraising Success



Now that you've decided to be a part of the Greatest Team Ever and participate in Pelotonia, it's time to shout it from the rooftops! It's also time to think ahead about how you'll meet your fundraising commitment. To alleviate any concerns you may have about reaching your commitment, we've developed a four-step method (PARTY) to help you meet and likely exceed your goals: **Plan, Ask, Remind and Thank You**. This has been used by Pelotonia community members for years and has helped them meet and exceed their fundraising commitments. We're confident it'll do the same for you!

## 1

### STEP 1 PLAN

Before you begin the process of fundraising, we recommend that you craft a plan. Start by viewing the suggested fundraising timeline on page 25 that provides monthly recommendations throughout the Pelotonia season to help you be a successful fundraiser.

Once you have updated your calendar with your fundraising deadlines, it's time to build your network. Take some time to sit down and brainstorm a list of people who might donate to your efforts this year. We recommend starting with:

- Friends and family
- Current or former colleagues and classmates
- Neighbors
- Your professional, volunteer, or religious network
- Your social media connections

Don't be afraid to ask people who live outside of your community to support you. **On average, more than 35% of donations come from outside the state of Ohio!** Think global and remember that almost everyone has been impacted by cancer in some way.

After you brainstorm your list of potential donors, practice telling your story by asking yourself the following questions:

- 01 What does Pelotonia mean to me?
- 02 Why did I make the commitment to participate in Pelotonia?
- 03 What are my goals this year? Am I increasing my ride distance, riding for the first time or trying to beat my fundraising total from last year?
- 04 How has cancer impacted my life and why do I believe it's important to fund cancer research?
- 05 If a friend told me that their donation wouldn't *really* make a difference, what would I say to them?

Now that you have thought about these questions, use your answers to draft your fundraising letter and update your profile! Not sure how to update your profile? Tell your story in your profile so your network knows why you're participating and so Pelotonia can share it with the community, too. Familiarize yourself with the Pelotonia website, so you can direct your donors to your personal fundraising page and utilize the resources available to you.



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## TIME TO PARTY (continued)

### 2

#### STEP 2

### ASK

The most successful Pelotonia fundraisers have one thing in common: **they ask as many people for support as possible, in very personal ways.** Don't procrastinate—from the moment you sign up for Pelotonia, it's time to start communicating to your personal community.

Start by creating an email or mailing list of the people you identified in Step One (PLAN), and then sit down and write your first communication. Don't forget the brainstorming you did on page 7. An excellent fundraising email or letter should address the following questions:

- What is Pelotonia and where does the money go?
- Why am I participating?
- What is my fundraising commitment and how much progress have I made?

Once you have drafted a fundraising letter, it's time to send it out! **We recommend sending at least four communications to your donors throughout the year,** using this format:

- 01 Announce that you've decided to participate in Pelotonia, share your personal story and ask for support. Explain what their support would mean to you.
- 02 Share an update on your training/progress to your goal. This is also a great opportunity to offer a gentle reminder to those who haven't yet donated to your efforts.
- 03 Following Ride Weekend, share details about what your experience was like along with photos from the Ride or Opening Ceremony. This is a great opportunity to thank everyone who has supported you and remind others who haven't yet donated.
- 04 At Pelotonia's annual end of year fundraising announcement, the total amount raised throughout the Ride year will be revealed. Share this extraordinary total with your supporters and remind them that it wouldn't have been possible without their support. Also, share specific stories about Pelotonia's impact and any photos from the event.

**DON'T FORGET TO POST THESE COMMUNICATIONS TO YOUR SOCIAL MEDIA CHANNELS. YOU MIGHT BE SURPRISED TO HEAR FROM PEOPLE YOU MAY NOT HAVE TALKED TO IN A FEW YEARS!**

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## TIME TO PARTY (continued)

3

### STEP 3 REMIND

Every fundraiser will encounter someone who pledges their support online or says, “I’ll give you a check next time I see you!” but may forget to follow through. We know everyone is busy, but it’s up to you to remind them that cancer doesn’t wait.

How can you tell if someone has pledged, but has not yet sent in their donation? When logged in to your profile, you can see the “Amount” column on your donor list. If the donation amount appears next to a clock with the message that the “Donation is Pending,” then that check has not yet been received. If some time passes and you don’t see a change, you might want to politely follow up with that individual and ask them if they remembered to send their donation. Please remember, you are still responsible for meeting your fundraising minimum. Any unpaid pledges will not count toward your fundraising. This is why it’s important to **send reminders to the people who’ve pledged to support you.**

Remember, you have until the fundraising deadline, which is two months after the Ride, to meet your fundraising commitment. Therefore, we suggest sending a final reminder after the Ride weekend when you share your experience, as the timing will lend a sense of urgency to your request.

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### STEP 4 THANK YOU

It’s time for the fun part! You’ve planned, asked, reminded and you’re on your way to reaching and likely exceeding your fundraising commitment. Congrats!

**Now it’s time to thank your donors.**

Nothing is more important than taking the time to say thank you to the people who supported you this year. Whether you create your own postcard or write a heartfelt note on Pelotonia stationery, always take the time to send a personal thank you note. Remember, you can download your donor address list from your profile.



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→ **PRO TIP:** You can purchase stationery from the Pelotonia Shop at: [shoppelotonia.org](https://shoppelotonia.org)

# FUNDRAISING ONLINE



## Virtual Fundraiser Ideas!

### Online Silent Auction

- Are you unable to host your annual fundraiser but already have donations secured for a silent auction? Utilize Google Forms to set up a virtual silent auction. [Here](#) is an example!
- Raffles and 50/50's can also be executed this same way!

### Host a Livestream Fundraiser

- Create a virtual event or a video that requires a donation to watch or to receive special recognition during the recording. Some examples include a livestream concert, cooking demo, or a painting tutorial.

### Virtual Bake Sale

- If you have a love for baking, then a virtual bake sale is a great option for fundraising. Offer people different incentives for donating to your fundraising goal. People love the personal touch and baked goods, like cookies or candy, are easy to send in the mail.

### Instagram Stories Fundraisers

- Add graphics to your Stories that encourage people to donate to your fundraising efforts, such as a BINGO card or a challenge to receive a donation from each state. You can find our templates [here](#).





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## PLANNING AN EVENT DURING COVID-19



With COVID-19 so prevalent in our community, it's important for event organizers to ask several questions before determining whether or not hosting an event in-person can be done in the safest manner possible.

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**Questions to consider include:**

- Can the event be hosted outdoors?
- Whether indoors or outdoors, do we have the space necessary for social distancing (allowing 6 feet of space between each person/party)?
- Are we able to limit the number of people in attendance, or set maximum capacity for our venue at a number that allows for social distancing and keeps our event within current local, state, and national guidelines?
- Are potential guests categorized as high-risk to develop serious illness from COVID-19?
- Can we pivot this event to a virtual or hybrid platform and it be as effective as an in-person gathering?

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**If you determine that you will move forward with an in-person event, the following are some precautions that should be considered:**

- Attendees should be required to wear masks (except when eating or drinking).
- Pre-event communications should include language asking any guests who have exhibited symptoms, felt unwell, or been exposed to someone who has tested positive for COVID-19 in the past 14 days to stay home.
  - Consider offering a virtual alternative or livestream so that those not able to attend can still be involved.
  - Also consider flexible refund policies for events that require a registration fee.
- Display signage in highly visible locations around your event venue, encouraging hand hygiene, proper mask wearing, and describing measures to help stop the spread.
- Supply plenty of hand washing and hand sanitizer stations to encourage hygiene practices throughout your event.
- Have a plan in place to regularly clean and disinfect high-touch surfaces as frequently as possible.
- If food and drink are being provided, utilize individually packaged products, condiments, utensils and dishes.
- Provide physical markers, such as tape on the floor, of social distancing guidelines to encourage guests to remain 6 feet apart.
- Have a communication plan in place, including up-front information for guests about precautions being taken, as well as what communication will be shared should someone in attendance test positive after the event.

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Please note that anyone planning an event should defer to current local and state guidelines for hosting events throughout their planning process, and ensure they are seeking out necessary approvals from local and state authorities.

## SOCIAL MEDIA TIPS AND TRICKS



Once you've started putting your social networking skills to use, don't forget about your social media skills! Social media is a great way to recognize your donors, ask for donations, share your story, provide training updates, and actually show your friends what being a part of the Greatest Team Ever is all about.

### Best Practices for Social Media

- Use emojis—they catch the eye!
- Include a photo/visual when posting.
- Do a Facebook Live video to talk about your experience—you don't need to be a pro!
- Ask your friends and family to share their cancer experiences in the comments of your posts.
- Tag Pelotonia on all your posts. We enjoy seeing your fundraising efforts and and just might re-share your photos or posts (with your permission!)
- Include your Pelotonia profile link in your social media bios so people can easily access it.
- Put your Pelotonia profile link directly in your Instagram Stories with the Link Button feature.
- Don't forget to use these hashtags so the Pelotonia community can check out your posts:

**#Pelotonia**

**#OneGoal**

### LinkedIn

#### Exporting connections from LinkedIn

- 01 Click the *My Network* icon at the top of your LinkedIn homepage.
- 02 Click *Your connections* on the left rail.
- 03 Click *Manage synced and imported contacts* near the top right of the page.
- 04 Under Advanced actions on the right rail, click *Export contacts*.
- 05 You may be prompted to sign into your account.
- 06 Click the data files you're most interested in — *Connections*
- 07 Click *Request Archive*.
- 08 You will receive an email to your Primary Email address which will include a link where you can download your list of connections.
- 09 Send a personal email solicitation to the list of connections detailing your passion for Pelotonia!

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## MATCHING GIFTS & INDIRECT DONATIONS



This section is intended to answer some of our most commonly asked questions about matching gifts and indirect donations. Please carefully read the following pages. For additional questions, visit the Give section of our website [here](#).

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### Matching Gifts

Matching gifts are a great resource—but can also be complex when you're fundraising on a deadline. Please make note of the things to know below:

- In previous years, Pelotonia shared its nonprofit Tax ID with The Ohio State University Foundation, which accepted all matching gifts on behalf of Pelotonia. Beginning January 1, 2020, Pelotonia received a new 501c3 number and began operating under the EIN 82-4997087. This means that Pelotonia internally processes all matching gifts now.
- We offer a fantastic tool that you can use to find out whether an employer matches charitable contributions, how frequently they disburse gifts, and how to contact their matching gift coordinator: [pelotonia.org/get-involved/give/matching-gifts](https://pelotonia.org/get-involved/give/matching-gifts)
- We encourage you to apply for your matching gift as soon as possible to ensure your funds have the best chance of arriving into your account before the fundraising deadline. **It can take up to a year for a check to arrive in your account after you submit the initial request with a company.**
- Each company controls the schedule on which it issues matching gift checks. Many companies issue matching gift checks on a quarterly basis, while others may issue checks on a semi-annual or even annual basis. Thus, it is very important for you to familiarize yourself with a company's matching gift policy.
- While the Pelotonia team highly encourages the use of matching gifts in fundraising, **we have no control over the timing, distribution and receipt of your matching gift.** For this reason, we encourage you to *supplement* your fundraising efforts with matching gifts instead of relying on them.

**WE MUST RECEIVE ALL MATCHING GIFT DONATIONS BY SATURDAY, OCTOBER 1, 2022 TO BE COUNTED TOWARDS YOUR 2022 FUNDRAISING COMMITMENT.**

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## MATCHING GIFTS & INDIRECT DONATIONS (continued)



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### Instructions: Stock Donations

Donors should consult a tax advisor about the deductibility of an appreciated stock gift.

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#### TO MAKE A STOCK DONATION:

- 01 → Contact your broker to set up the transfer of stock from your account to Pelotonia using the information below.

Pelotonia  
450 W. Broad St.  
Columbus, OH 43215  
Attn: Janelle Goldbach  
614-221-6100  
Tax ID: 82-4997087

DTC: Huntington Investment Company  
DTC# 0443  
FBO: Pelotonia  
Account Number: HCS024709

- 02 → Complete the **Charitable Gift Form** on the Pelotonia website in order to have your donation routed to Pelotonia. Once completed, email the form to [jgoldbach@pelotonia.org](mailto:jgoldbach@pelotonia.org).
- 03 → Be sure to have your broker let you know once the transfer is complete. You will receive an email confirmation from Pelotonia with the exact amount of your donation when the donation is received by Pelotonia and added to your Pelotonia profile. Be aware that the transfer and confirmation process could take up to 14 days.

#### QUESTIONS:

If you have questions about your stock donation, please contact your personal broker or call Pelotonia at 614-221-6100.



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### Give through a Donor-Advised Fund

Please ask the administrator of your fund to issue a check payable to Pelotonia (Federal Tax-ID 82-4997087). A note of instruction should be included and the name of the Rider or Peloton you wish to support.

#### The check should be mailed to:

Pelotonia  
L-3454  
Columbus, OH 43260



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## MATCHING GIFTS & INDIRECT DONATIONS (continued)



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### Indirect Donations

At Pelotonia, we consider a donation to be an “indirect donation” when it has traveled through a separate entity to get from the donor to the recipient. Examples of this include websites like Network For Good, Benevity, and JustGive.

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**It is important to pay close attention to these donations for these reasons:**

- ➔ **Pelotonia generally has little to no control over the receipt and allocation of these donations,** and it is generally more difficult for money donated through a separate entity to find its way into your fundraising account.
- ➔ Similar to matching gifts, these donations must go through another company’s disbursement process before being received at Pelotonia. This may delay receipt of your donation.
- ➔ Many indirect gifts arrive at Pelotonia smaller than when the donor originally made the gift. For example, if you donate \$100 to Pelotonia through an organization that takes a 10% processing and administrative fee from each donation, only \$90 will arrive at Pelotonia.
- ➔ If you choose to give through indirect donations, **it is imperative that you list the donor name, Participant name, and Public ID number** so that the gift can be acknowledged and allocated correctly.

We support the use of indirect giving, but it is important for riders and donors to educate themselves about the fees and legwork involved when donating through a separate entity, instead of donating directly to Pelotonia.

**WE MUST RECEIVE ALL INDIRECT DONATIONS BY SATURDAY, OCTOBER 1, 2022 TO BE COUNTED TOWARDS YOUR 2022 FUNDRAISING COMMITMENT.**

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## FAQs



For a full list of FAQs, please visit our website at [Pelotonia.org/faq](https://pelotonia.org/faq).

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**Q: What happens if I don't meet my fundraising commitment by the deadline?**

**A:** When you registered for Pelotonia, you were provided with and accepted an agreement stating that Pelotonia reserves the right to charge your credit card if your fundraising minimum is not met by the stated deadline. For example, if you choose to ride 100 miles and you've only raised \$1500 by **October 1, 2022**, your credit card will be charged the remaining \$500 to make up the difference.

While you can change your route distance and fundraising commitment up to (but not later than) 11:59 p.m. on **Thursday, July 7, 2022**, we are confident that our comprehensive resources will give you the tools necessary to reach your commitment.

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**Q: My employer has a strict no-solicitation policy. How am I going to reach my commitment if I can't tell my colleagues about what I'm doing?**

**A:** We respect your employer's solicitation policy and we encourage you to review it carefully. We hope that our Four Step Fundraising Method (PARTY) helps you think creatively about other fundraising opportunities outside of your area of employment. Additionally, you can always contact our team at [pelotonia@pelotonia.org](mailto:pelotonia@pelotonia.org) if you need help brainstorming additional fundraising ideas. The Pelotonia community is often sharing different ideas on social media as well!

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**Q: I am nervous that I won't reach my fundraising commitment and that my credit card will be charged in October. What should I do?**

**A:** Don't let fear of the unknown make you nervous. Year after year, we have watched as thousands of participants met and exceeded their fundraising commitments by following these recommendations. If you follow the Four Step Fundraising Method (PARTY) and keep in contact with our team, we are confident you'll have nothing to worry about. We are always happy to connect you with other members of the community to brainstorm fundraising ideas as well.

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**Q: I have a personal issue and can no longer devote as much time to fundraising as I'd hoped. What should I do?**

**A:** You can change your route distance and minimum fundraising commitment up to but no later than 11:59 p.m. on **Thursday, July 7, 2022**. Just visit your profile page under "Manage My Profile: Personal Information." After **Thursday, July 7, 2022**, you will not be able to decrease your route and minimum fundraising commitment.

## FAQs (continued)



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**Q: I was expecting a matching gift to arrive before the fundraising deadline and it hasn't. What do I do?**

**A:** Check with your donor or employer to get an expected date of arrival. If it's received after the fundraising deadline, it can be counted toward next year's fundraising.

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**Q: Can Pelotonia staff come and support me or speak at my cool / awesome / unique fundraiser?**

**A:** We try to attend as many events as possible throughout the year, but at the end of the day, there are thousands of you and we are a small team. We ask that you contact Pelotonia by emailing [pelotonia@pelotonia.org](mailto:pelotonia@pelotonia.org) and we'll do our very best to be at your special event. If we can't attend, we're happy to equip you with the tools and information needed to have an amazing event!

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**Q: Why doesn't the amount 'I've raised' equal the total donations listed on my profile page?**

**A:** While every donation pledged to you is immediately reflected on your donation list on your profile page, a check donation can only be added to the amount that you've raised after the check has been received by the Pelotonia office. To see which check donations have not yet been received by the Pelotonia office, log in to your profile page to view your donor list. Check donations which have not yet been received will show a red "NO" in the column title 'Paid.'



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# SUGGESTED FUNDRAISING TIMELINE

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## March–April

- Register for Pelotonia
- Create personalized profile
- Post on social media about your new Pelotonia journey!
- Meet 20% of fundraising goal
- Submit matching gift forms

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## June

- Post on social media
- Upload training pictures to your profile page
- Meet 60% of fundraising goal

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## August

- Ride Weekend!
- Post on social media about your ride weekend experience
- Meet 100% of fundraising goal
- Send reminders to pledged donors

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## May

- Mail handwritten letters or emails
- Meet 40% of fundraising goal

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## July

- Post on social media about your fundraising progress
- Send follow-up letters or reminder emails to your potential donors
- Meet 80% of fundraising goal

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## September

- Check on your outstanding matching funds. All funds must be received by Pelotonia by October 1, 2022.
- Send thank you letters with pictures from the Ride
- Exceed fundraising goal!

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## Fundraising Milestones

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**YOUR BIRTHDAY:** Considering asking for donations to your fundraising in lieu of birthday gifts this year. A great way to ask for birthday donations is through Facebook Fundraisers!

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**SPRING CLEANING:** Before the summer heat kicks in, pick a weekend morning to sell those old clothes and forgotten treasures sitting around your home. Ask your friends for their donations and host a garage sale. Or work with local community groups on social media to sell those items to help you fundraise.

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**TRAINING RIDES:** Ask donors to give \$1 for each mile you ride over the summer! If you cross-train, create a fitness challenge such as \$1 for every pushup you complete.

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**EVERYONE LOVES A GOOD COMPETITION:** Reach out to a fellow Pelotonia rider and tell your friends you're doing a competition to see who can raise the most money. The winner gets to pie the other in the face, or wear a sporting team jersey, etc.



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## TYING UP LOOSE ENDS...



If you have read this guide in its entirety, rest assured that you can accomplish anything! The Pelotonia community has used these suggestions and resources and has raised over \$236 million dollars (and counting) for cancer research. With your help, we know that we can raise even more and make a larger impact. Together, we are unstoppable.

Before we leave you, here's a comprehensive list of links that will be helpful as you begin your fundraising journey:

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Pelotonia Website

[pelotonia.org](https://pelotonia.org)

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FAQs

[pelotonia.org/faq](https://pelotonia.org/faq)

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Pelotonia Asset Kit:

[2022 Asset Kit](#)

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Impact Statistics:

[pelotonia.org/impact](https://pelotonia.org/impact)

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Pelotonia Fundraising Resources:

[pelotonia.org/fundraising](https://pelotonia.org/fundraising)