



Nonprofit Quick Start Guide



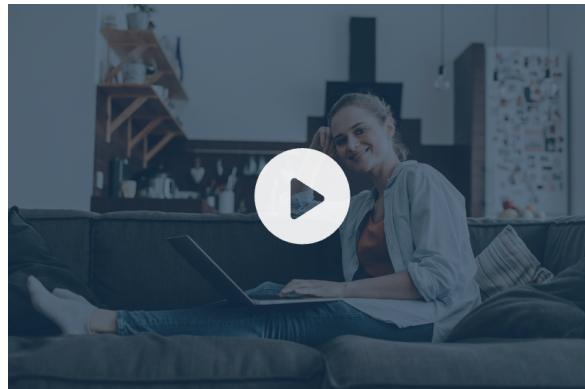
support@roundup.org



Welcome to Roundup.org

RoundUp makes it brilliantly simple to turn your donors into enthusiastic recurring givers - generating steady, predictable donations month after month.

As a nonprofit administrator, this document is your playbook for making the most of your organization's listing on our site. This guide synthesizes what we've found to be best practices for generating meaningful monthly revenue for your organization.



Watch how RoundUp makes it simple to donate to any nonprofit.

Get Started

Do these four things today:

☐ **Sign-up as a donor.**

Go through the process so that you understand what you are asking your donors to do. You can set a donation limit and/or cancel at any time.

☐ **Setup ACH/direct deposit with our Donor Advised Fund.**

The data on our site is populated from GetChange.io (the technical partner of our Donor Advised Fund, Our Change Foundation). Once you have "claimed" your nonprofit on the GetChange.io site, you'll be able to set up your account for the direct deposit of funds, update your mission statement and add a logo to your profile. Any changes made on the Getchange site feed through to our site in a few days. Claiming your nonprofit is free and you can do so here

<https://getchange.io/solutions/nonprofits>.

☐ **Provide the email address(es) we should notify with donor and donation information.**

Email support@roundup.org and let us know which address(es) we should include.

☐ **Customize your nonprofit page.** Email support@roundup.org with the hex code you'd like used as an accent color on your nonprofits dedicated landing page.

Tips for a Winning Marketing Plan

Read our client success story and start thinking about your own campaign.

Learn how one nonprofit converted 27% of their community into monthly recurring donors via RoundUp.org in just one week. Their campaign included 2 key elements that we believe made it so successful: (1) their campaign centered around a single "Mustang RoundUp Day" which created urgency and (2) they used a per new donor "bonus" incentive to encourage even more sign-ups. We highly recommend incorporating these elements into your roundup.org marketing efforts as we've found them to be best practices. https://www.roundup.org/case_studies/mcs.pdf

Audience

Decide who you will target your campaign.

- Are you seeking to convert donors who have previously only given one-time or annual gifts?
- Do you want to acquire new donors? Convert volunteers to donors?
- Is there a specific demographic in your community that would be particularly well-suited to take advantage of a micro-giving opportunity? (e.g. Alumni, Young Professionals...)

Urgency

Determine how you will add urgency to your RoundUp.org offering.

Why urgency?

- **Urgency turns intention into action.** It bridges the gap between someone liking your offer and someone acting on it. Creating urgency in a marketing campaign is important because it taps into fundamental human psychology — specifically, our fear of missing out (FOMO) and tendency to act when opportunities feel limited or time-sensitive.
- **Urgency drives immediate action.** When people feel they have unlimited time to decide, they tend to postpone or forget altogether. Urgency encourages them to act *now* rather than "later."
- **Urgency focuses attention.** Urgency cuts through noise and distraction. When customers sense that something is fleeting, it stands out from the dozens of other marketing messages they see every day.
- **Urgency creates emotional engagement.** Urgency stirs emotion — excitement, anticipation, or even mild anxiety — all of which make messages

more memorable and persuasive.

Emotionally charged decisions are often more powerful than purely logical ones.

3 ways nonprofits can create urgency in their offering:

1. Center your campaign on a single “RoundUp Day” where you encourage your audience to take action on a single day.
2. Make signing-up to donate to your nonprofit required for admission or registration to attend a nonprofit event in lieu of a ticket or fee.
3. Time or tie your campaign to an event that is central to your organization's operations or mission.

Incentive

Evaluate how you can incentivize your donors to participate.

Why incentives?

- **Incentives increase motivation to act - and act now.** Even if someone is interested in your offer, they may hesitate to commit. Incentives give them an extra push by adding immediate value for acting now.
- **Incentives create community and make your offer feel more valuable and rewarding.** When a donor gives to a campaign that is matched or leads to a bonus gift, donors feel like they are a part of contributing to something bigger than themselves.
- **Incentives expire.** When an incentive offer is time-bound, it encourages immediate action and allows you as a marketer to communicate a count-down until the incentive is no longer available.

3 ways nonprofits can create incentives:

1. **Match.** Nonprofit fundraisers are no stranger to the concept of a match. A match for a RoundUp donor acquisition campaign could be based off of the total amount of all donations from Roundup.org given in a specific month or quarter OR through the end of the year.
2. **Bonus.** A bonus could be applied on a per-new-RoundUp donor basis - much like a “bounty”. Both a match or bonus could be solicited from a single or pool of current donors OR from your board of directors.

3. **Special access.** A nonfinancial incentive could be access to extra content or admission to an event, eligibility for an exclusive perk.

Multi-Channel

Decide what channels you'll leverage for your campaign.

Why multi-channel?

- **Multi-channel campaigns are more effective** than single-channel campaigns because they reach audiences where they already are, reinforce your message through repetition, and build stronger trust and engagement across multiple touchpoints.
- **Multi-Channel campaigns reach more people.** Different audiences spend time on different platforms — some scroll Instagram, others read emails, and others respond to texts or web ads. By using multiple channels, you expand your reach and ensure your message isn't limited to one small segment of your audience.
- **Multi-Channel campaigns increase message frequency and recall.** People rarely act after seeing a message once. Multi-channel campaigns create multiple impressions, which helps your audience remember your brand and message.
- **Multi-Channel campaigns meet people at different stages of the journey.** Each channel and campaign phase plays a unique role in moving people from awareness → consideration → action.

Sample 8-day Campaign Template

Phase 1 - Lay the Foundation + Build Anticipation

Pre-launch

- Send a link with this [email script to your board of directors](#) asking them to sign up and give you feedback
- Add a link on your website to your organization's dedicated roundup.org landing page
- Add a link to your organization's dedicated roundup.org landing on your social profile's linktree

Day 1 - Let your audience know that something exciting is coming soon and to stay tuned for details. Create anticipation and excitement via an announcement flyer, signage, or email newsletter blurb. Post a social story about the campaign using an image or short candid video from key personnel.

Phase 2 - Gain Momentum + Push

Day 2 - Announce your giving opportunity. Use a "link in bio" to route users to your dedicated landing page via a social post. Send a [dedicated email](#) to your audience linking to your nonprofit landing page on roundup.org

Day 3 - Send an [SMS/text message](#) to your audience letting them know about the opportunity, consider a social media story.

Phase 3 - Add Incentive + Retargeting

Day 4 - Announce your time-bound incentive via a dedicated email and social media post.

Day 5 - Share a social story using testimonials from those that have signed up (from your community or from [the testimonials provided](#)). Reach others in your community and remind them of your offering using a print [banner](#) or [handout](#).

Final Phase - Finish Strong

Day 6 - Remind your audience that time is running out and it's the last day to participate in the incentive via social media and a dedicated email.

Day 7 - Send an **SMS/text message** to your audience letting them know that your incentive is about to expire.

Clean-up + Evergreen Marketing

Day 8 - Share or feature the names of your donors who participated and remind your audience that while the incentive maybe over its not too late to donate their spare change via roundup.org.

Ongoing - Include the total amount donated through roundup.org in your monthly newsletter and invite others to join in.

Marketing Templates

[RoundUp.org Logos](#)

[Stock Photography](#)

[Board of Directors Letter \(pdf\)](#)

[Dedicated Email \(pdf\)](#)

[3-part Email Series \(pdf\)](#)

[Video Overview \(you tube\)](#)

[8.5x11 Flyer \(canva\)](#)

[Social Media Post Templates \(canva\)](#)

[Banner \(canva\)](#)

[Yard Sign \(canva\)](#)

Testimonials

"Rounding up my credit card purchases to donate has been the most effortless way to give back – I don't even notice the extra cents, but they add up to real impact over time. It feels good to know that every purchase I make is also sprinkling a little support on my child's educational community!"

Myra Blake

RoundUp.org Donor

"I love that my spare change is going to a place I care about—and that I get to choose. Spreading out my giving over time feels so much more doable than trying to make a big contribution all at once. It's an easy way to support [my nonprofit] in a consistent, meaningful way."

Lisa Bohn

RoundUp.org Donor

"I love that RoundUp automatically sends the money to [my nonprofit] with no extra effort on my part! Now when I'm using my registered credit card for everyday purchases, I know that it counts. The spare change will make a big impact for our school, and it's super easy to sign up--just takes 30 seconds!"

Reshma Borkar

RoundUp.org Donor

"I have been rounding up at my local co-op for a while now, and have always been impressed at how much those spare cents add up. Now I have the opportunity to give to another cause I love---without even thinking about it! Setup was super fast and easy, and I am thrilled to be supporting this community every day, with no extra effort!"

Bethany Cashman

RoundUp.org Donor