

FUNDRAISING WITH CIVICRM

Izi Clery, Head of Fundraising and Engagement
Population Matters



CONTENT

- **Our set up**
- **Communications**
- **Segmenting**
- **Relationship Management**
- **Engagement**
- Contribution pages
- Groups
- Financial types
- Membership
- Profiles
- Scheduled reminders
- Mosaico templates
- Form Builder
- Checksums and tokens
- Mailings and A/B Testing
- Contact Summary Layouts
- SearchKit
- Dashlets
- Activities
- CiviRules
- Personal Campaign Pages
- Events
- Custom Data
- Tags

OUR SET UP



WEBSITE

populationmatters.org

Sign up to our mailing list to receive our monthly newsletter, as well as campaign updates and information on how to support our work.

To view past newsletters, [click here](#).

FIRST NAME

LAST NAME

EMAIL

We ensure your contact details will not be shared with any other organisation to contact you.

By signing up you agree that you have read and agree to our [privacy policy](#) and that you are happy for us to keep you informed by email.

SIGN UP

You can unsubscribe at any time.

MAKE A DONATION

I'D LIKE TO GIVE

£20

£50

£100

£200

OTHER

DONATE NOW

Want to make a regular donation? [Become a member](#).

Your regular donations enable us to carry out all our campaigning activities.

STANDARD MEMBERSHIP

FREQUENCY

MONTHLY

ANNUAL

AMOUNT

£2.50

£10

£20

OTHER

NEXT

MAKING A DONATION

<https://populationmatters.org/civicrm/contribute/transact/?reset=1&id=16&amount=100&rf=Once>

1 DETAILS 2 PAYMENT

Welcome Ms Elizabeth Clery. (Not Ms Elizabeth Clery, or want to do this for a different person?)

[Back to Donate](#)

Please complete the form below to donate to Population Matters.

You are making a one-off donation of £ 100.00.

YOUR DETAILS

TITLE
Ms

FIRST NAME
Elizabeth

LAST NAME
Clery

EMAIL *
izi.clery@populationmatters.org

SEARCH FOR AN ADDRESS
Start typing a postcode

Configure Page - Donation

CONTRIBUTION LINKS

Title **Amounts** Memberships Receipt Google Analytics Tell a Friend Profiles

Use this form to configure Contribution Amount options. You can give contributors the ability to enter their own contribution amount. Depending on your choice of Payment Processor, you may be able to offer a recurring contribution option. (Learn more)

SAVE SAVE AND DONE SAVE AND NEXT CANCEL

Include Profile (top of page) Your details (Main) PREVIEW EDIT COPY CREATE
Profile to be included above the billing information (but after the introductory message, amount and currency).

Include Profile (bottom of page) Gift Aid PREVIEW EDIT COPY CREATE
Profile to be included at the bottom of the page.

SAVE SAVE AND DONE SAVE AND NEXT CANCEL

Execute real-time monetary transactions Uncheck this box if you are using this contribution page for free membership signup ONLY.

Currency * GBP (£) Select the currency to be used for contributions submitted from this contribution page.

Payment Processor Direct Debit (UK only) Debit / Credit card (via Stripe) Your PayPal account
Select the payment processor to be used for contributions submitted from this contribution page (url).

Pay later option Check this box if you want to give users the option to submit payment offline (e.g. mail in a check, cash).

Contribution Amounts section enabled Uncheck this box if you are using this contribution page for membership signup and renewal only - a price set will be required.

Price Set No Contribution Price Sets have been configured / enabled for your site. Price sets allow you to create different contribution amounts for different groups.

Recurring Contributions Check this box if you want to give users the option to make recurring contributions. This feature requires a recurring payment processor.

DONE CANCEL

Group Updates

Pre-checked?

Hidden?

Order 1
Order will be automatically calculated if not specified.

THANK YOUS

Gift - One Year - Gifter	Contribution Page - One year Gift Membership
Gift - One Year - Recipient	Membership - Gift Annual
Thank you - Donation	Contribution Page - 8BillionAndCounting, Donation
Thank You - E2P - AFGA	Contribution Page - Afghan Family Guidance Association
Thank you - E2P - Awakening	Contribution Page - The Awakening
Thank you - E2P - Core / General	Contribution Page - Empower To Plan, Empower To Plan - annual, Empower To Plan
Thank you - E2P - Turimiquire	Contribution Page - Turimiquire Foundation
Welcome life	Membership - Life
Welcome member	Membership - Student/non OECD, Monthly, Annual

Title * Thank you - E2P - Awakening

Entity Contribution Page

Summer appeal 2020- Population Futures
 Test - daily card payment
 Test contribution
 Test Join Form Daniella
 TEST Omnipay
 The Awakening

- contribution status -
 Completed
 Pending
 Cancelled
 Failed

Trigger date) OR

hour(s) Receive Date

Activity for
 Attached email

Email Screen

Use Template E2P-The Awakening thank you

Subject Thank you for donating to The Awakening </> Tokens

HTML Format

COMMUNICATIONS



TEMPLATES

CiviCRM » FormBuilder »

BLOCKS CONTENT STYLE UNDO (0) REDO GALLERY

Mosaico Tem

NEW TEMPLATE

Title

appeal

↑ Title

Appeal_Big Give_202

Appeal_Big Give_202

Appeal_Population Fi

3 results

258 x 150

Title

Far far away, behind the word mountains, far from the countries *Volabia* and *Consonantia*, there live the blind texts. Separated they live in Bookmarksgrove right at the coast of the *Semantics*, a large language ocean. A small river named Duden flows by their place and supplies it with the necessary regalia.

BUTTON

166 x 130

Title

Far far away, behind the word mountains, far from the countries *Volabia* and *Consonantia*, there live the blind texts. Separated they live in Bookmarksgrove right at the coast of the *Semantics*, a large language ocean. A small river named Duden flows by their place and supplies it with the necessary regalia.

BUTTON

534 x 200

Section Title

Far far away, behind the word mountains, far from the countries *Volabia* and *Consonantia*, there live the blind texts. Separated they live in Bookmarksgrove right at the coast of the *Semantics*, a large language ocean. A small river named Duden flows by their place and supplies it with the necessary regalia.

BUTTON

Section Title

Far far away, behind the word mountains, far from the countries *Volabia* and *Consonantia*, there live the blind texts. Separated they live in Bookmarksgrove right at the coast of the *Semantics*, a large language ocean. A small river named Duden flows by their place and supplies it with the necessary regalia.

166 x 90

166 x 90

166 x 90

Title


Far far away, behind the word mountains, far from the countries *Volabia* and *Consonantia*, there live the blind texts.

BUTTON

258 x 100

258 x 100

Unsubscribe [View in your b](#)



{contact.email_greeting},


The Big Give Christmas Challenge is back!

This week, you can double your donation to Population Matters through matched g

As part of The Big Give Christmas Challenge, we have secured matched-funds of £8.2 from some of Population Matters' brilliant supporters, and want to raise twice that amount to help support our campaigns by the end of the week. Please can you help match our pledgers' generosity?

The Christmas Challenge runs from today until* 12 noon GMT on Tuesday 6 December. During this time your donation will have twice the impact at no additional cost to you. **Support us from just £1 using the link below, and your donation will be doubled***

ONE DONATION, TWICE THE IMPACT



It's time to talk

For too long, our growing numbers have been largely ignored as a contributor to our environmental crises. T

despite evidence of the multiplying effect we all have of our individual needs for space to live, to grow food, use of natural resources like water, and our carbon footprint - which we know aren't equal and those least to blame most when it comes to climate change.

CHECKSUMS + TOKENS

https://populationmatters.org/awakening-empowering-girls-boys-pakistan?cid={contact.contact_id}&{contact.checksum}

12.5 million girls globally may not be able to complete their education. 7 million girls are at risk of child marriage.

But you can help.

DONATE



If you feel able, please support The Aw support will:

- Engage 200 girls and boys in se health and education workshops
- Organise 10 medical camps, pr and information on reproductive
- Train 30 girls to lead family plan

COMMUNICATION PREFERENCES

Hello Ms Elizabeth Clery

Our supporters are vital to our success and we're delighted you're part of the Population Matters movement, keeping up to date with our campaigns, activities and events.

Please use this page to change what information you receive and update your details.

MANAGE MY SUBSCRIPTIONS

I WANT TO...

EMAIL POST

receive the monthly newsletter, campaign updates and information on how to support your work

receive the Population Matters magazine (twice a year)

receive information about projects I can support, including updates on Empower to Plan

receive the Journal of Population and Sustainability (twice a year)

unsubscribe from all emails

Please note that unsubscribing will not affect your receipt of transactional emails that are important to your interaction with Population Matters such as donation receipts, event confirmations or renewal reminders.

ABOUT YOU

If you wish to change your name please [email us](#).

EMAIL ADDRESS

izi.clery@populationmatters.org

{afform.afformCommunicationPreferenceUrl}

MAILINGS + TESTING

From

"Population Matters" <supporters@populationmatter...>

Recipients

Empower-To-Plan donors

Projects and appeals - non members SG

REFRESH RECIPIENT COUNT ~18178 RECIPIENTS

Subject

(A) Do you want to support grassroots projects?

(B) Communities across the world need you!

Distribution

Test Mailing A		(20%)
Test Mailing B		(20%)
Final Mailing		(60%)

Mailing A	Mailing B	Final
3636	3636	10906
3623 99.64%	3623 99.64%	10863 99.61%
1089 30.06%	1070 29.53%	3200 29.46%
15 0.41%	12 0.33%	56 0.52%
13	13	43
0	0	0
Mailing A	Mailing B	Final
Test A (230222 - E2P top up ask - supporters)	Test B (230222 - E2P top up ask - supporters)	Final (230222 - E2P top up ask - supporters)
"Population Matters" <supporters@populationmatters.org>	"Population Matters" <supporters@populationmatters.org>	"Population Matters" <supporters@populationmatters.org>
Do you want to support grassroots projects?	Communities across the world need you!	Do you want to support grassroots projects?
Include: Projects and appeals - non members SG Exclude: Empower-To-Plan donors		

SEGMENTING

MAILING GROUPS

Updates	24011	McAndrew, Michael	Public Mailing List The monthly newsletter, campaign updates and information PM's work
Updates - members SG (Smart Group) (Smart Group)	unknown	Tregenna, Rebecca	Group(s) In Updates ...AND... Group Status 'Added' ...AND... Is a current member
Updates - non members SG (Smart Group) (Smart Group)	unknown	Tregenna, Rebecca	Include Updates, Exclude Updates - members SG (Smart Group)
Projects and appeals	23390	Tregenna, Rebecca	Public Mailing List / Email - Fundraising information about projects, including updates on Empower to Plan
Projects and appeals - members SG (Smart Group) (Smart Group)	unknown	Tregenna, Rebecca	Group(s) In Projects and appeals ...AND... Group Status 'Added' ...AND... Is a current member
Projects and appeals - non members SG (Smart Group)	unknown	Tregenna, Rebecca	Include projects and appeals, Exclude Projects and appeals - members SG (Smart Group)

OTHER GROUPS

Catalyst members SG (Smart Group)	unknown	Tregenna, Rebecca	For Membership Tags / Catalyst members identified via:Membership Status In New, Current, Grace ...AND... Membership Type = Annual ...AND... Amount of Last Membership Payment ≥ 600.00Or Membership Status In New, Current, Grace ...AND... Membership Type = Monthly ...AND... Amount of Last Membership Payment ≥ 50.00Or MANUALLY added	Mailing List
-----------------------------------	---------	-------------------	--	--------------

Major Donors SG (Smart Group)	unknown	Tregenna, Rebecca	For Membership Tags / Contact type = Individual + not deceased + Total Lifetime Contributions ≥ £10,000 / one-off donation amount £5,000+
-------------------------------	---------	-------------------	---

Group(s)
(search by group type)

- * Board members SG (Smart Group)
- * Catalyst members SG
- * Expert Advisory Group SG
- * Major Donors SG
- * Patrons SG

Group	Description
All Current Members SG	Is a current member
Catalyst members SG	For Membership Tags / Catalyst members identified via:Membership Status In New, Current, Grace ...AND... Membership Type = Monthly ...AND... Amount of Last Membership Payment ≥ 50.00Or MANUALLY added
Behind-the-scenes email (Smart Group)	Twice-yearly special behind-the-scenes email for Population Matters' catalyst members and
Life members SG	For Memberships Tags / Life members identified via:Membership Status In New, Current, Grace ...AND... Membership Type = Life ...AND... Amount of Last Membership Payment ≥ 5000.00Or MANUALLY added
Annual report postal mailing list SG	Tag = Legacy Arranged, Legacy Potential; Group = Catalyst members, Honorary members, Major Donors
Major Donors SG	For Membership Tags / Contact type = Individual + not deceased + Total Lifetime Contributions ≥ £10,000 / one-off donation amount £5,000+

RELATIONSHIP MANAGEMENT



Every choice counts

CONTACT RECORDS

ACTIONS **EDIT** **DELETE CONTACT**

- Summary
- Memberships **1**
- Contributions **188**
- Activities **163**
- Mailings **0**
- Events **16**
- Relationships **1**
- Groups **3**
- Tags **3**
- Pledges **0**
- Cases **0**
- Gift Aid Declaration **1**
- Summary Fields
- Change Log
- GDPR

About

- Employer
- Job Title
- Known As
- Source

Address

- Home Address **Map**
- Billing Address **Map**

Layouts **+ LAYOUT**

Layouts on top have highest priority.

- Basic layout - individual**
Show: Individual
To: Civi Layouts - Basic
- Basic layout - organisation**
Show: Organization
To: Civi Layouts - Basic
- Advanced layout - individual (fallback)**
Show: Individual
To: Civi Layouts - Advanced
- Advanced layout - individual**
Show: Individual
To: Civi Layouts - Advanced
- Advanced layout - organisation**
Show: Organization
To: Civi Layouts - Advanced
- Super layout - individual**
Show: Individual
To: Civi Layouts - Super
- Super layout - organisation**
Show: Organization
To: Civi Layouts - Super

System Default

Customizing the system tabs will affect every layout which uses

Customize tabs Overriding defaults

- Summary
- Contributions
- Pledges
- Tags

The system default

- Employer, Job Title, Nickname, Source
- Comments
- Search Form
- Email
- Home Email, Work Email
- Website
- Facebook, LinkedIn
- Address: Home Address, City, County/State, Postal Code
- + Multiple
- Communication Preferences

Insights

Comments

Last membership 09/08/2022 12:00AM

Payment amount 50.00

Tags Catalyst member HNWI

Contact Type Individual

Wealth notes

Wealth band

Note

Tag Tree

Memberships

Tag Set for Contact (created 03/09/2021)

Filter List

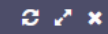
- Catalyst member
- Complimentary member
- Expert Advisory Group
- Life member
- Major donor
- Patron
- Standard member
- Student member
- Trustee

ACTIVITIES

Filter by Activity			
Include	Exclude	Status	
- all activity type(s) -	- no types excluded -	- any -	
Show 25 entries		First Prev	
Type	Subject	Date	Status
Phone Call	TBC re Biodiversity	16/02/2023 10:13 AM	Scheduled
Email sent	Biodiversity project update	14/02/2023 10:11 AM	Completed
Bulk Email	Smaller families and China's population decline - January Members' Update	02/02/2023 11:30 AM	Completed
Bulk Email	Your chance to feedback	20/01/2023 4:00 PM	Completed
Bulk Email	Webinar recording now available!	09/01/2023 3:34 PM	Completed
Phone Call	Donation error [resolved]	09/01/2023 12:06 PM	Completed
Letter sent	Thank you and receipt	09/01/2023 10:04 AM	Completed
Email sent	Thanks / receipt in post	09/01/2023 9:40 AM	Completed
Bulk Email	Highlights (and some lowlights!) of 2022	30/12/2022 12:15 PM	Completed

DASHLETS

▸ My scheduled activities



▸ Legacy notifications



▸ Gift Memberships Welcome Packs

▸ Gift membership renewals

▸ Overdue activities (primary)

▸ Overdue activities (secondary)

▸ Upcoming activities (primary)

▸ Upcoming activities (secondary)

▸ My contacts (individuals)

▸ My contacts (organisations)

Activity Type	Subject	Date	Status
Note	Follow up	06/02/2023 3:05 PM	Scheduled
Email received	£8k donation imminent	23/02/2023 4:30 PM	Scheduled
Phone Call	TBC re Biodiversity	16/02/2023 10:13 AM	Scheduled
Grant report	Fundraising + E2P report due soon	01/02/2023 2:43 PM	Scheduled
Grant report	Office space grant report due soon	02/01/2023 2:32 PM	Scheduled
Email received	Donation expected	30/01/2023 9:53 AM	Scheduled

« < 1 > » Page Size 50

Activity Type	Date	Status
Pop Futures	Note 01/12/2022 12:30 PM	Scheduled
Lunch meeting	Note 16/01/2023 11:27 AM	Scheduled

« < 1 > » Page Size 50

ENGAGEMENT

ANNUAL SURVEYS

POPULATION MATTERS ANNUAL MEMBER SURVEY 2022

SECTION 1 OF 4: POPULATION MATTERS

OVERALL, HOW SATISFIED HAVE YOU BEEN WITH YOUR EXPERIENCE OF POPULATION MATTERS? *

- Very satisfied
- Somewhat satisfied
- Neutral
- Somewhat dissatisfied
- Very dissatisfied

WHAT ASPECT OF YOUR WORK INTEREST YOU THE MOST? *

- Campaigning
- Education and awareness raising
- Academic research

PREVIOUS

NEXT

Bulk Email

Bulk Email

Change Memb

Contribution

Annual Survey

Bulk Email

Annual Survey

Overall, how satisfied have you been with your experience of Population Matters? Very satisfied

What topics are you most interested in? Global population growth

Are you happy with the number of emails you receive from us? I'm happy with the frequency

Which content in our monthly update do you like most? Other population news

What aspect of your work interest you the most? Education and awareness raising

Do you follow Population Matters on Social Media? No

Would you like to know more about leaving a legacy to Population Matters?

Yes


PERSONAL CAMPAIGN PAGES

CHALLENGE YOURSELF


Do you enjoy a physical challenge and want to raise money for our campaigns?
Why not sign up to take on the mighty UK three-peaks challenge or trek up a mountain? Or if cycling is more your thing, cycle from city to city or coast to coast!

CREATE YOUR OWN FUNDRAISING PAGE

MEET OUR FUNDRAISERS



MICHAEL WALKER
Michael is running the Two Tunnels Marathon (Bath, UK) on 20th August 2023. He has chosen to fundraise for Population Matters to help achieve a sustainable human population to allow for a future for his grandchildren. You can support Michael by clicking [here](#).



THIS COULD BE YOU
Do you want to raise money for our campaigns? Start your own journey by creating your own [personal fundraising page](#).

Population Matters.

FUNDRAISER
MR MICHAEL WALKER

£20.00
Raised of £100.00

3 donors

DONATE

f Share T Tweet

Personalise the contents and appearance of your personal campaign page here. You will be able to return to this page and make changes at any time.

TITLE OF YOUR FUNDRAISER *

WHAT'S YOUR FUNDRAISER? *

Introduce your fundraiser including what you're planning and any key dates etc. This text will appear at the top of your fundraising page.

YOUR GOAL *

Total amount you would like to raise. Use only numbers and a decimal e.g. 500.00

WHY ARE YOU FUNDRAISING FOR PM?

Tell people why you're fundraising for Population Matters.

INCLUDE A PICTURE OR AN IMAGE

No file chosen

You can upload a profile picture or image to include on your page. Your file should be in jpg, gif or png format. Recommended dimensions:

QUESTIONS?

Thank you for listening!

Visit: populationmatters.org to learn more about our charity

