



## Team Captains' Packet







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# Thank You!

First and foremost, you are a team captain, and for that we **thank you!** Being a captain is a commitment and takes time and effort. We want you to know that we appreciate it.

**We know you're going to be good at being a captain.** Simply by registering as a captain, you've demonstrated your leadership. You're likely good at organizing and have attention to detail. You're good at making connections, at building relationships, and asking for help when you need it. **These traits have already set you up for success.**

The goal of this document is to provide you with information to ensure you have a fun and successful experience.



## Levels of Engagement

Being a team captain can take as much or as little time as you have or want to give. Some captains are very busy and don't have a ton of time to go above the basics of getting the team page set up. Some captains invest many hours to organize training rides or hikes and meet-ups. Some teams don't need a ton of attention and some do. It's a moving target for sure!

**But know that your team will appreciate any and all time that you have to give.** Having one more person cheering them on and helping them will go a long way. If you ever feel like you don't have enough time to engage as a captain, feel free to reach out to a Climate Ride staff member to help. We can help you get things going and can even help find a different team captain if you really need. We're YOUR team captains!



## Being the Point of Contact with Climate Ride

As Captain, you're often the point of contact for the team, and also a liaison between the Climate Ride staff and your team. Team members may email you directly to ask questions about fundraising, logistics, or packing. We are here to help you answer those questions! It's great to be able to help your teammates prepare as best as they can for their event, but please don't ever hesitate to reach out to a staff member for assistance answering questions so that we can ensure everyone gets the correct information. That's why we're here!

One important thing that captains email us about is adding new team members. When someone registers for an event, they have the option of joining a team right away. If a participant is already registered and wants to join your team you will need to email a staff member and request the person be moved. It's helpful to forward us the request directly from the participant as well, so that we have confirmation that they want to be added to your team.

Sometimes we will flip the table and ask you for help with small things. Most of the time it relates to a specific team member who we may be having a hard time contacting. This includes if we haven't heard from them about their fundraising or a logistical detail. Sometimes we're simply trying to get a really important message out to everyone and may ask for your help reiterating it to your team. We are incredibly appreciative of your assistance!





## Being a Fundraising Resource

As a team captain, you can be a helpful resource for teammates while they fundraise. We've provided you a few tips to help you. **Please note that each Climate Ride event has one or multiple staff members specifically assigned to helping our amazing participants achieve and surpass their fundraising goals.** We're happy to help, so if anyone is struggling at all please send him or her our way!

## Lead By Example

A great way to motivate your teammates is to lead by example – make sure you have your personal fundraising page set up, and that you're one of the first to start fundraising. Teammates will be motivated to follow your example, and you can actively point them to your page for tips and suggested messaging.

**A couple of notes about team fundraising:** Climate Ride's fundraising policy is that donations must be made to individual participants and cannot be split between participants or transferred from one participant to another. However, if you're on a team and hosting a fundraising event you can mail a check for the proceeds to the office with specific instructions on how to divide it up amongst team members. You can also split large checks to your team from individual donors (but please keep it reasonable; we ask you to avoid sending us a \$20 check to split 7 ways!). Please note that credit card donations cannot be altered – only check donations may be split. Also, please note that *each individual participant must fulfill the required fundraising commitment in order to participate in the event.*



## Get to Know Your Team

If you're participating with a significant other or with close friends this might not apply to you. This can be important because it allows you to start relating to your teammates. Once you have something in common you can start building and developing a better relationship. This will make it easier to motivate them and help them later on, and they may be more likely to take your advice or get more involved with the team. You can start by sending out friendly emails asking teammates to share what's motivating them to participate, or what their longest ride or coolest hike has been. Anything to get conversation going!



## Basic Fundraising Tips:

These are a few of the essential fundraising tips that we always go over with fundraisers. Again, we're happy to help, but these can be a starting point for you if you'd like to help them directly.

- *Hitting the fundraising minimum is doable – but you have to get started.* The hardest part of fundraising is simply getting started. This is something you can help them with. Perhaps help them with their fundraising page text or see if you can help them draft an email. Just be sure to stay on top of it. If they say they'll do something over the weekend, check in with them on Monday or Tuesday and ask how it went and if they need any additional help.
- *You're not asking for money for yourself.* Fundraising is about asking people to support an organization or cause that you believe in and find important. It's also asking for personal support for the physical challenge. The mileage and terrain will be tough, and each participant has to dedicate time and energy to train.
- *Ask everyone. This is probably one of the most common roadblocks we find.* Participants are hesitant to ask others for money. Especially when they've done it in the recent past. Remind your teammate that you have to do your best to get out of the donor's head. You simply don't know what their ability or willingness to donate is. You will be surprised by who will give generously and often!





### *A Fundraising Story from Andrew, Rider Manager:*

I had a friend completely surprise me for one of my rides a couple years ago. It was a friend from my hometown back East and we were on the phone simply catching up. It was summer, and she had donated to my fundraising efforts a month or two earlier. I had called her immediately after and thanked her. But while we were catching up, she asked me, “Hey, aren’t you doing another ride this year? Because I only donated to one of your rides, but I know you’re doing two. Did I miss the link or something?” I wasn’t expecting her to donate to begin with, and here she is ready to support me twice this year! It shows that you never know who will donate. **That’s why it’s so important to ask!**

## One More Tip:

*Donating is an opportunity.* Remember that by fundraising, you are giving donors an incredible opportunity. There are a lot of people who really enjoy giving to worthy causes and supporting nonprofit organizations. There are also a lot of people out there who really enjoy supporting their friends or family in any way they can. They won’t be able to contribute if they don’t know the opportunity exists. Make sure that you present them that opportunity. You’re giving them a chance to support you, to support your beneficiaries, and to become connected to a great cause and a great organization.

**In general, if a team member feels supported, then they are much more likely to engage and participate.** Encourage them, help them, and congratulate them too. Everyone likes a pat on the back, so make sure your team members know that you noticed they are doing a great job. Simply going over the fundraising basics with them can go a long way. And again, we’re here to help if anyone gets stuck!







## Recruiting

Another responsibility that often falls on team captains is recruiting. It's important to note, though, that this isn't all on you. Be sure to ask your teammates to reach out and invite their friends, colleagues, and everyone they know to join the team and share this incredible experience.

We get a lot of questions from team captains about growing teams and recruiting. It can be challenging! Many times, they will get a "maybe." The individual will say they will only go if their significant other or friend goes. Others want to wait to hear how this event goes and maybe join next year. Some people are going to resist signing up because they simply don't want to come and they're being too nice to say no. Know that this is okay – we don't want to be forcing anything on anybody.

If someone is unsure or hesitant to join you can try a different approach to describing the event to him or her. If it's your first event and you can't speak from experience, try letting the photos and the testimonials on our website do the work. If they haven't already, have them read through the route description on the website. The places we travel through are breath taking and we have day-by-day descriptions for each event. Much of it is world-class cycling and hiking and people come from all over the world to be there. What we offer is a guided, fully supported tour of these locations.

Then there are some other concerns, like fundraising. If that's the case, you should let them know they have support. Please feel free to put them in touch with a Climate Ride staff member as well and we can help them further.

If someone tells you, they'll only go if their friend or significant other goes great! The more the merrier! One of the best ways to enhance your experience is to bring someone you know, especially a good friend. We highly encourage that!





## Team Spirit

There are other, potentially more fun, aspects of being a team captain, which is being the team spirit leader. This includes cultivating a fun, connected atmosphere among your teammates. There are many different ways to do this and adding personal flare will make it more exciting. Individuals on a team typically remember the event through the team experience, so help make it a good one! Have fun with it! Below are a few suggestions that we see and recommend.

Group events before the trip can be great for boosting cohesion. Specifically, we recommend training as a team. Many people join teams, especially beneficiary teams, because they're looking for camaraderie and they want to meet a cool group of people to train with. A lot of people **need** someone to train with in order to keep them honest and keep them motivated, so be that person! It's a great role to take and they'll appreciate it. If you don't all live in the same area, try and find a way to help your teammates who do live in the same area to put something together. Other good options we've heard of are potlucks or dinners, movie nights, or even just meeting up for a drink after work.





## Team Jerseys

There are also things like **team jerseys, t-shirts, or some other kind of swag**. Buttons or hats are other good options. This is a great way to really make everyone feel like they're part of the team. If you're going to do something more outlandish than a t-shirt, make sure you discuss it with your team and that everyone is comfortable with it. You want to be sure everyone can be included, or you'll defeat the purpose.

*A note on team jerseys:* Jerseys can take a long time to produce, so when you call in for an order you should make sure to ask what the production and turnaround time is. If you're considering jerseys, we have a partnership with Primal in which your team can earn a discount to be put towards your fundraising goals! (More [here](#)). We also recommend Atayne and Voler.



## Don't forget about team prizes!

We have special fundraising contests just for teams. Check them out!

<https://www.climateride.org/incentives-and-prizes/>



# Fundraising Dashboard: Team Captain's Features

*Please note: the support team for the fundraising software is constantly making improvements and updates to the platforms' features. If you have questions about anything, please reach out to a Climate Ride staff member and we can help.*

Every participant who is registered on a team, including captains, will have a “Team Fundraising” tab on their Dashboard. Team members are able to see all of the team stats and all of the other team members, just as captains can, but they won’t have the “edit” capabilities that team captains have.

Most of the features available to team captains mirror those designed for the personal fundraising pages but have been customized to apply to a team. Below are important details and features that are important and/or unique to team captains.

The screenshot shows the Climate Ride fundraising dashboard for a team captain. The top navigation bar includes links for Dashboard, Donations, Messages, and Resources. A welcome message for Patrick is displayed on the right. The main header features the Climate Ride logo and a banner image of cyclists. Below the header, there is a search bar for participants and a section for the current event, "Climate Ride California 2015". The dashboard is divided into two main tabs: "Your Fundraising" and "Your Team Fundraising", with the latter being selected and highlighted by an orange star. The "Your Team Fundraising" section displays a progress bar showing the team's fundraising total of \$5,580.00 out of a goal of \$4,000.00, which is 140% complete. A legend indicates that the total is composed of \$5,580.00 from team members and \$0.00 from the team itself. On the right side, there is a "Team Fundraising" sidebar with links to view and edit the team page, and a "Ask Friends to Donate" section with social media sharing options.

## Your Team Fundraising

When you log in to the fundraising portal, you should see the “Your Team Fundraising” tab on the Dashboard. Any participant who is registered on a team will be able to see this tab, not just captains. It has similar metrics information as the individual tab.

## Quick Links Side Panel

This side panel on the right side of the page has most of the features that are unique to team captains. Below are important ones to note.




## Edit Your Team Page (Under “Team Fundraising”)

As team captain, you are the only person who can edit your team’s fundraising page. Just as with personal fundraising pages, you can add a photo, customize the text for the page, and include links at the bottom.


This is also where you would update the fundraising goal if you have new members join the team. It’s important to note that **this does not automatically update if new members join your team**, so you will need to go back in and update this if need be. Remember that the fundraising goal for your team should be at least the number of members times the minimum fundraising amount. So, for example, if you have 2 team members then the goal should be at least double that amount.

The team fundraising page does not list donations, like the personal fundraising pages do. Instead it has a “Roster” tab that lists all of the team members and their fundraising totals. Clicking on a team members name will take you to their personal fundraising page.

[Dashboard](#) [Donations](#) [Messages](#) [Resources](#)  Welcome, Patrick. 60

### Team Page Information

Team Photo



Change


Team Name \*

Team Page Link

Page Alias ?


### Team Page Content

Team Fundraising Image ?



Change Image Delete

Team Fundraising Goal \*

 \$ 4000.00

Donations Received

GOAL: \$4,000

\$5,580








75% 50% 25% 0%

REPLAY

So far we've reached 140% of our goal!

Team Message \*

Styles

B I        

Help our team raise money!





## Send a Message to Your Team

This brings you to the “Messages” section of the dashboard and starts a new message that has auto-filled all the email addresses of your team members. This is a great way to send out updates and information for your team, or motivational emails.

## Invite Someone to Join Your Team

This brings you to the “Messages” section of the dashboard and starts a new message with auto-filled text requesting someone to join your team. This text can be customized as needed. We strongly suggest you always send yourself a test email, for spellchecking and formatting purposes. Please note that all team members have access to this feature.

## View Your Team

This link takes you to a list where you can see each participant, their email, and information on their fundraising. You can sort the list by any of these things. This is a special page in the portal and not the front-end team page (which also lists all of the team members but does not include this much information).

**Important Note for beneficiary teams:** This list is only people who are registered as on your team. *This does not include other participants who have chosen to support the beneficiary that your team is supporting.* If you want a complete list of participants supporting your organization, email our Beneficiary Manager, Patrick ([patrick@climateride.org](mailto:patrick@climateride.org)). Another important point is that the fundraising total being shown on this page is very simply the sum of all of the team members fundraising. This is not an accurate representation of a grant estimate for the year, since some team members may have chosen multiple beneficiaries.



## Finding Your Influencers and Team Leaders

Is someone on your team a stellar fundraiser? Is one of your team members a social media guru? Does one of your team members have connections to local media outlets? All of these individuals are big influencers and can help take your team to the next level by raising your profile. A stellar fundraiser can help motivate others to reach for the stars. A social media guru can help team members with their own fundraising efforts, in addition to getting the word out about the team as a whole. Local media is a great way to add hype to the event and your team's efforts. It can also help you recruit other teammates!



## Recognition and Incentives

One thing we always try to hammer home is killing donors with kindness. The same goes for team members. Even if it's a group of friends, thank them for accepting this challenge and being part of the team. Have you considered creating some inter-team competition by setting up incentives or getting some prizes? If you're on a team with friends, maybe the top fundraiser gets a special (but affordable) prize that the rest of the team chips in to buy. This can create healthy and fun competition between team members. There could be ongoing competitions (e.g. who puts in the most training mileage each week) or one-time prizes (e.g. for the top fundraiser).

Recognition and incentives can go beyond your team as well. Have you considered offering incentives and recognition to your team's donors? Many teams in the past have offered logos on team jerseys or shirts for large donors. Offering a button or sticker to each donor who supports a team member can help make that donor feel like they are on the team themselves. As Captain, you could also email your team's big donors with a thank you from the team itself, in addition to the individual's thank you that they got. Small gestures like this can go a long way.



## Fundraising Events

Holding a fundraising event can be a great way to not only raise money for your cause, but also to build team spirit! Whether your event is a beer bash, a karaoke night, or a dinner, here are a few tips to you can use to maximize your efforts.

- Sell raffle tickets during the event and raffle off donated items (local shops you frequent are often generous about donating prizes) or you can raffle services or even cool stuff from around your house.
- Hold an auction for goods, or even dates with eligible bachelors or bachelorettes. You know you have friends who are game enough to do this!
- Have a thrift store fashion show. Have contestants bring their own cheering sections. Have folks vote for the best (or most ridiculous) contestants by placing dollar bills in a bucket in front of each contestant.
- Always be sure to have a method for online donations at your event. People are often more generous with a credit card than cash.

## Recruitment Events

Host an event to help recruit new team members. Many teams will host a lunch or dinner, meet-and-greet, or other types of events to get together with team members and potential team members. It's possible that we could send a Climate Ride staff member there to present, so be sure to reach out to us ahead of time – the earlier the better! We can also help by sending you a copy of our photo slideshow to use during the event.



## Publicize Your Team: Flyers, Posters, and Social Media

Getting the word out about your team can raise the profile of your efforts, help recruit new team members, and boost your team's fundraising. As captain, you can coordinate and lead the effort to share photos and stories on social media. You can create print media and post them around your community. And you can reach out to local media to see if they would do a story about your team. Many times, they will! We have resources on our website available to help. There are news release templates, along with "how to use" documents, specific to each Climate Ride event. These are always available to download in your Fundraising Dashboard. For more about print media like postcards and flyers, visit:

<https://www.climateride.org/resource/>





## Sharing Travel Arrangements to the Event

Many teams in the past have organized group travel to the event start. Especially for biking trips, this can be helpful to coordinate how to get bikes (assembled or boxed) to the event start in an efficient way. As a captain, you can reach out to your team members and see how everyone is planning to get to the start and who might need help. Then, help facilitate those connections.

## Post Event Meet-Ups

Keep the good times rolling! After our events, most everyone (including staff) goes through a phase of withdrawal. They'll miss being on the event with their fellow participants and teammates. Organize a post-event meet-up to relive the glory, share stories, and deepen the connections you made during the event. Meet-ups can be anything from a post-work drink, to dinner, to a ride or hike!



If you have any questions, reach out to your participant manager or contact us at [info@climateride.org](mailto:info@climateride.org).