

## Crowdfunding 101: Give Campus Best Practices

### CROWDFUNDING PROJECTS:

- Project must have a compelling story that is student-centric
- Project needs to have a student voice
- Project needs to have an identified target audience

### STUDENT/PROGRAM DRIVEN:

- Projects are owned and driven by a minimum 2 student leaders and/or 1 faculty/staff leader; project leads are responsible for roughly 85% of work
- Annual Fund provides resources, support and strategic consultation throughout the lifecycle of the project
- Give Campus is a tool to assist you with your grassroots fundraising efforts, not a simple way to guarantee money
- Projects last for 30 days (giving day projects last 14 days), so you and your team must stay committed (sending updates, remain actively engaged, etc...) throughout the entire project

### MARKETING:

- Crowdfunding is only successful if it reaches a broad audience through various mediums; **email, social media, websites**, etc...
- Students and program affiliates are responsible for identifying 20-30 prospects with a capacity of \$100
- Using Give Campus's Advocate feature, each advocate will send an email to their respective prospects
- **Both personal and organizational social media must be utilized to broadcast projects**
- **Project leaders are responsible for creating the project content and video in a way that makes giving compelling. Videos are required to launch a project.**
- Various stewardship pieces are built in and **MUST** be planned throughout the campaign before projects go live

### RAISING MONEY:

- Typical projects range from \$500 - \$2,500 over 30 days (14 days for giving day projects)
- **Project success is 100% dependent on project team's involvement**
- **Average gift size is about \$50/donor. Use this to determine if your project goal is realistic**
- Organizations can keep all fundraised money even if the project goal is unmet
- Every student involved in the campaign is responsible for identifying prospects that they will solicit for a gift
- Project leaders should try to identify a lead **donor to create a match or challenge gift**

### DATA & LOGISTICS:

- All projects must be tied to a Foundation Account or a University agency fund (student club/organization).
- Student Clubs/Organizations will use the CLUB01 Foundation account for crowdfunding projects. Funds will be distributed to the club's agency account on a monthly basis. Student clubs/organizations are assessed a 3% fee for all gifts that come in for the project.
- One-time projects: Funds will be held in the Foundation holding account temporarily (if the project is not tied to a current Foundation account), then a check will be cut to your agency account. Checks can be picked up in University Advancement 1-2 weeks after your project has ended.
- The MSU Denver Foundation charges a **6% fee** on all gifts that come in for your projects not tied to a student club or organization.
- All information captured by the platform is automatically transferred into RE and coded in your Foundation account with the crowdfunding appeal code
- **Donors receive a tax receipt for their gift.** All gifts are 100% tax-deductible. If you are offering incentives, this could change the tax-deductible portion of the gift.



## Main Video

Keep it short – 2-2 ½ minutes, never longer than 3

Make it personal – there should be beneficiaries and/or project team members in the video, talking about why this is important.

Don't overproduce – use a GoPro or even an iPhone, this should look grassroots, not like it took a lot of money to produce – it keeps the project authentic.

## Project Description

Here you are answering three questions:

- 1) Who are we?
  - a. Keep it personal – introduce the organization or department or group of people working on this particular project.
- 2) Why are we raising this money?
  - a. State need
  - b. Feeling of urgency
- 3) How can you help?
  - a. Give
  - b. Share

Use pictures to break up long chunks of text! You want this to be consumable.

## Updates

Updates are a critical and underutilized form of stewardship and donor engagement. You must be committed to sending updates during AND after your campaign.

Updates should be something that enlightens, entertains, and engages the donor about your cause by:

- ✓ Showcasing your campaign's progress
- ✓ Featuring selected member's personal statements about what drew them to the issue you are trying to solve
- ✓ Sharing interesting facts or stories about the cause you are undertaking or issue you are tackling
- ✓ Providing special "VIP" or "behind-the-scenes" access to your process or training (i.e. featuring your laboratory, practice regime, research travels, etc.)



**ELEVATE** THE IMPACT OF YOUR DOLLAR

## Crowdfunding Videos 101:

**FACT:** Crowdfunding campaigns that utilize video are more likely to have a successful campaign.

**AUTHENTIC:** Videos do not to be heavily edited and fancy. In fact, more authentic and grassroots style videos have had better success in crowdfunding campaigns. These authentic videos resonate well with potential donors.

**TECHNOLOGY:** Your video can be shot with technology like an iPhone and free editing software. If your department/organization has a video camera, tri-pod, an editing lab etc. feel free to utilize this technology, but it is by no means a requirement.

**LENGTH:** The video for the main page of your project's campaign should be 1 ½ - 2 minutes in length.

**CONTENT:** Creativity with your campaign's video is encouraged. Involve members of your campaign team in the creation process. Suggestions include: a brief explanation of the project and how it got started; why the project is important; the impact a donation would have on the project; a behind-the-scenes tour of your lab; footage of your team or organization's meeting or practice; and testimonials from students, faculty/staff or community members who will be impacted by the project. **It's important to showcase the Project Creator and key campaign team members to make a personal appeal to donors.**

**MUST DO:** Be sure to make an "ask" for a donation during your campaign's video and encourage donors to share the project with others who may be interested.

**UPDATE VIDEOS:** Throughout your campaign, you will make several updates. It is recommended that 3-4 of these updates are videos. These videos should be about 30 seconds long each and **can be pre-shot before the launch of your campaign.** These update videos will be posted when 50% of your campaign goal is reached, when a stretch goal is implemented, when there is a few days left in your campaign, within a week after the end of the campaign. Videos could include a group "Thank You" for achieving various milestones throughout the campaign; campaign team members sharing compelling facts about the project; and personal testimonies about the project's impact. Again, creativity is encouraged. **Always be sure to thank your donors in each update and video.**

**EXAMPLES:** Take a look at other crowdfunding project videos at <https://www.givecampus.com/schools/MetropolitanStateUniversityofDenver>.



# Motivate your supporters with Incentives

Getting to know the Incentives feature -- A quick glimpse at the finer points of creation, complete with creative examples shared by GiveCampus partners.

The Incentives feature can help you motivate your supporters to go the extra mile.

Incentives for donors can be tied to specific donation levels (e.g. 'For a donation of \$100 or more...'). Incentives for Advocates can be tied to the Advocate's impact in terms of either the number of donations they generate OR the sum total of the donations they generate.

Incentives can be limited in quantity (e.g. only available to the first 25 donors who make a gift of a certain size). For incentives tied to a donation level, you can also add the fair market value of the incentive and this value will display on the donor's tax receipt.

Donors who give the appropriate amount and opt in to receive an Incentive will be flagged in your donation report. Advocates who earn Incentives will be flagged in your Advocates report.

**Can I edit an Incentive?** After creating an Incentive, you can edit it or delete it at the

bottom of the page ONLY until it has NOT been claimed. Once an incentive has been claimed by a donor, it cannot be removed. You can only update the quantity available, beyond what has already been claimed, or lock the incentive, preventing it from being claimed in the future.

Below are a few screenshots to illustrate creative uses of this feature:

## Incentives

### ► GENERATE 1 DONATION

Login, share your personal link, and get one friend to give and we'll send you a UVM bumper sticker for your car, bike, or board.

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### ► GENERATE 5 DONATIONS

Login, share your personal link, and get five friends to give during this campaign and we'll send you a UVM tumbler. So you can sip and enjoy your favorite beverage, knowing you are a rockstar.

## Incentives

### ► GENERATE 5 DONATIONS

Help us reach our goal by being an #AllinforDavidson advocate. If your advocacy efforts generate five donations, you will receive a handwritten thank you note from a current student.

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### ► GENERATE 10 DONATIONS

Only 1 left!

If your advocacy efforts generate ten donations, you will receive a special social media shout out on the Davidson College Facebook page.

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### ► GENERATE 15 DONATIONS

Only 4 left!

Take your advocacy to the next level! Advocates who generate 15 or more donations will receive a personal thank you call from President Carol Quillen.

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## Incentives

### ► GENERATE 10 DONATIONS

Only 48 left!

Become an Advocate for this challenge and when you generate 10 or more donations, you will be sent a limited edition Smith Fund tote bag. Click the "Advocates" button above to participate.

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### ► GENERATE \$2,500

Only 48 left!

Become an Advocate for this challenge and when you generate \$2,500 or more in donations, you will be sent a limited edition Smith Fund tote bag. Click the "Advocates" button above to participate.

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### ► DONATE \$10

All gifts to this campaign count toward recognition as a Smith Star, which commences upon five years of consecutive annual giving to Smith. An embroidered star decal is presented at reunion.

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### ► DONATE \$100

You've shown Smith your support, now show the world that you're a proud Smithie. Donors of \$100 or more may select to receive a 'Smith College' window decal.

## Incentives

### ► GENERATE 2 DONATIONS

Only 30 left!

Inspire two other people to make a gift and we'll send you a mini Westtown pennant! Click on the 'advocates' tab to get started or create a Matching Donation or Challenge Gift.

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### ► GENERATE 5 DONATIONS

Only 10 left!

Inspire ten other people to make a gift and we'll send you a knit hat! Click on the 'advocates' tab to get started or create a Matching Donation or Challenge Gift.

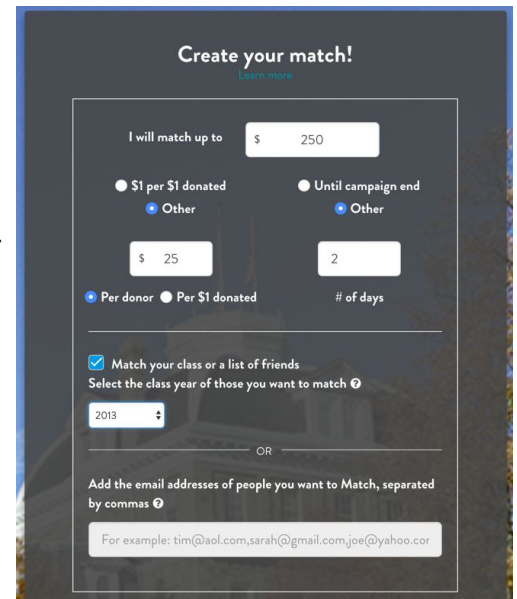
## How to Create a Matching Donation or Challenge

Inspire your friends and classmates by creating a matching gift or challenge. To create a match or challenge, go to the [\[campaign page \(enter hyperlink\)\]](#), and click on the appropriate button on the left side of the screen, below the video. Step by step instructions below.

Matches and challenges are similar, the key difference is that challenges are milestone-based (e.g. if 100 people make a donation, I will give \$250) and matches are made on a per donor basis (e.g. I will match up to \$500 on a dollar-for-dollar basis for the next \$500 that is donated).

### Matching Donations

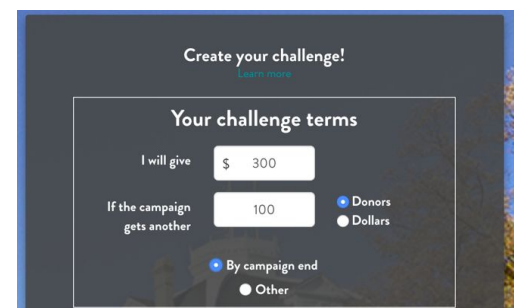
1. Enter how much you'd like to match up to (e.g. up to \$150).
2. Select if you want the match to be 1:1 match or if you click 'other', you can choose to donate \$2 (or another amount) for \$1 donated or if you'd like to make a 'per donor' match and donate \$20 for every donor who makes a gift.
3. Select when the match should end (e.g. until campaign end or over a certain period of days).
4. Most matches are not restricted, but you can choose if you would like to restrict your match to only apply to fellow members of your class or to a list of friends. (Note: matching gifts can also be restricted based on designation, but that feature has to be turned on by GiveCampus. To do so, email [support@givecampus.com](mailto:support@givecampus.com))
5. Enter your payment information.
6. After you've created your match, encourage your friends and classmates to join you in supporting XYZ school.
7. Track your match's progress by visiting the campaign page.  
Note: your match will be displayed on the Advocates tab as donors respond to your match.



The screenshot shows the 'Create your match!' form. At the top, it says 'Create your match!' with a 'Learn more' link. Below this, there's a section for 'I will match up to' with a text input field containing '\$ 250'. Underneath, there are two radio button options: '1:1 match' (selected) and 'Other'. The 'Other' option has a sub-section with a text input field containing '\$ 25' and a label '# of days' with a text input field containing '2'. Below this, there are two radio button options: 'Per donor' (selected) and 'Per \$1 donated'. Further down, there's a checkbox labeled 'Match your class or a list of friends' which is checked. Below the checkbox, there's a text input field for 'Select the class year of those you want to match' with '2013' entered. Below this, there's a section for 'Add the email addresses of people you want to Match, separated by commas' with a text input field containing 'For example: tim@aol.com,sarah@gmail.com,joe@yahoo.com'.

### Challenges

1. Enter how much you'd like to give.
2. Choose the milestone (e.g. donors or dollars).
3. Enter your payment information.
4. After you've created your challenge, encourage your friends and classmates to join you in supporting XYZ school.
5. Track your challenge's progress by visiting the campaign page.  
Note: recognition for your challenge will not display on the Advocates tab until your challenge is successful.



The screenshot shows the 'Create your challenge!' form. At the top, it says 'Create your challenge!' with a 'Learn more' link. Below this, there's a section for 'Your challenge terms'. Underneath, there's a text input field for 'I will give' containing '\$ 300'. Below this, there's a section for 'If the campaign gets another' with a text input field containing '100'. To the right of this, there are two radio button options: 'Donors' (selected) and 'Dollars'. Below this, there are two radio button options: 'By campaign end' (selected) and 'Other'.



# Matches and Challenges

Everything you ever wanted to know about how matches and challenges work on GiveCampus!

## Overview:

Matches and Challenges represent an incredible opportunity for donors to leverage their own giving to encourage others to join them in making a meaningful contribution. The GiveCampus platform gives advocates and generous donors tools, like the ability to set up a match or challenge directly on the platform, designed to effectively solicit their peers.

Matches and Challenges differ in that a Match will match dollars/donors as they come in, while Challenges unlock ONLY IF a certain threshold is reached. Additionally, donors have the ability to restrict Matches to specific groups of people while Challenges cannot be restricted.

A **Match** can be set up as matching \$X per donor OR \$X per \$1 donated. For example, *"Anna Anderson is matching \$20 per donor up to \$400"* OR *"Ben Baker is matching \$2 per \$1 donated up to \$1,000"* (please see the attached 'match' screenshots). The donor will be counted in the over total and the associated leaderboards as soon as they set up the Match but they will have \$0 associated with them until they start matching gifts and then dollars will reflect the amount that has been matched as qualifying donors give.

## Matching Gifts ⓘ

Offer a Matching Gift

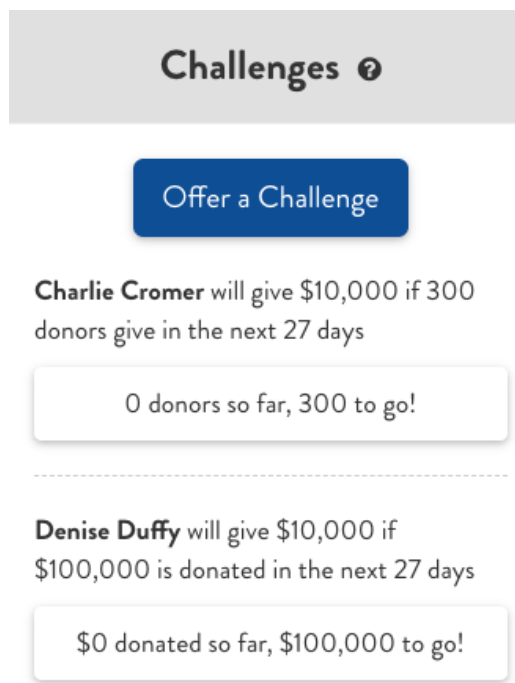


**Anna Anderson is matching \$20 per**  
donor up to \$400 for the next 163 days



**Ben Baker is matching \$2 per \$1**  
donated up to \$1,000 for the next 163 days

A **Challenge** is set up in such a way that a donor will give \$X if Y number of donors give OR the donor will give \$X if \$Y is donated. For example, “*Charlie Cromer will give \$10,000 if 300 donors give*” OR “*Denise Duffy will give \$10,000 if \$100,000 is donated*” (please see the “Challenge” screenshots below). Challenges are all-or-nothing in that the dollars are not released unless the threshold specified in the terms of the Challenge is met. The donor will be counted in the over total and the associated leaderboards but they will have \$0 associated with them, once the threshold is met and the Challenge is unlocked, it will display automatically in your overall donation amount and any associated leaderboards.



Reminder, **only** matches can be restricted to specific groups (e.g. affiliation, OR class year, OR a list of donor names, OR designation). We do not allow challenges to be restricted because they are 'higher stakes' in that if the milestone is not reached, you will not receive any of the funds.

### Additional Options for Matches and Challenges:

For any of the options described below, please send an email to [support@givecampus.com](mailto:support@givecampus.com), include a link to the campaign you would like us to edit and let us know which of the options below you would like to utilize to further customize your campaign.

## Crowdfunding Project Checklist

- ☐ **Project Name:**
- ☐ **Goal Amount:**
- ☐ **Launch Date:**
- ☐ **Closing Date:**

**Description:**

**Campaign Card Summary:** This will appear on your campaign card, so it will be one of the first things people read about your campaign. A succinct synopsis with a 'call to action' will capture people's attention and help win their support. 140 characters max.

**Incentives (optional):**

**Project Video:** No longer than two minutes. Please see Videos 101 and Crowdfunding Best Practices page.

**Photos:** Please include any photos that you would like included in your project description. I will also need a campaign card photo with the image size 600x400 (or any 3:2 ratio) to prevent cropping.

**Sign up as an Advocate:** Please see Advocate handout. In order to view your donors, you will have to set up an advocate profile. Everyone in your group should sign up as advocates to help promote your page.

**Match or Challenge Donors:** If you have someone in mind for a match or challenge, make sure to let them know about the project early. I can open up the page for them to set up the match as soon as I have all of your content. Matches are Challenges significantly increase the amount you can raise for your project.

**Updates:** Write at least one update to be posted during the campaign.

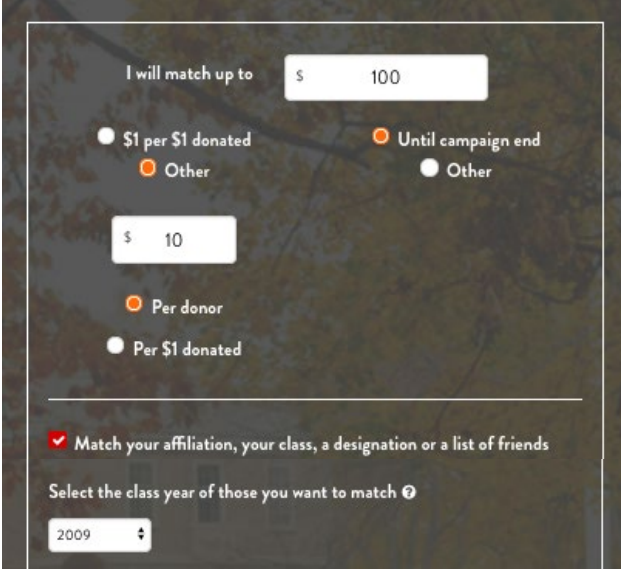
**Marketing Plan:** Create marketing plan for entire 30 day campaign. This does not have to be super detailed, but include the channels in which you will be reaching out to your potential donors.

# How to Become an Advocate on GiveCampus

Make **your** impact at MSU Denver by encouraging your classmates, family, and friends to support your campaign. GiveCampus helps connect donors to their peers to making giving to and getting involved with a campaign more meaningful. With the Advocate features on GiveCampus, spreading the word about your campaign is easy, fun, and rewarding. You can help other donors' gifts go further, add your own story to the campaign, and even track how many clicks, gifts, and dollars your outreach is driving in real time.

1. The first step to becoming an Advocate is to **sign up for a GiveCampus user account**. Visit [givecampus.com](https://givecampus.com) and click 'Sign Up' in the top right of the page. It's important to know that simply signing up for a user account won't make you become an Advocate-- to become an Advocate, you must take *active* steps to inspire *others* to make gifts. Once you're signed up for and logged into your GiveCampus user account, you can become an Advocate for **[campaign name]** by taking one-- or better yet, all!-- of the following steps:

2. **Consider your own gift!**. Great advocates lead by example and you can leverage your gift to encourage others to give! Offering a Match means that you'll give a number of dollars for each dollar or donor that the campaign receives up to your specified maximum gift amount. You can restrict Matches to only apply to donors from an affiliation group, class year, or even a specific group of friends. Offering a Challenge means that you'll give a gift *only* if the campaign receives a certain number of donors or dollars after you set up the Challenge. Challenges cannot be restricted to specific donor groups.




The screenshot shows a matching interface on GiveCampus. At the top, it says "I will match up to" followed by a text input field containing "\$ 100". Below this are two rows of radio button options. The first row has "\$1 per \$1 donated" (selected), "Other", "Until campaign end" (selected), and "Other". The second row has "\$ 10" (selected), "Per donor", and "Per \$1 donated". At the bottom, there is a checked checkbox for "Match your affiliation, your class, a designation or a list of friends" and a dropdown menu labeled "Select the class year of those you want to match" with "2009" selected.

3. **Create a Personal Plea**. A Personal Plea is a quick video in which you tell the MSU Denver community why you're excited about the campaign, and why others should get involved. Shooting a short "un-selfie" video on your cell phone is all you need to do to add *your* story to the campaign! After recording your video, head to the Advocates tab on the campaign page to upload your Personal Plea.

4. **Share the campaign link**. The built-in sharing buttons (located underneath the campaign video and on the Advocates tab) generate a campaign link that is unique to *you*. When you use these buttons to share the campaign link **while logged into your GiveCampus**

**user account**, the number of clicks, gifts, and dollars generated by your outreach will be tracked next to your name on the Advocates tab. Share on Facebook and Twitter to blast your friends' feeds with news about the campaign, and share over text and email to make direct, can't-ignore, peer-to-peer asks. Share early and share often!



**Ashley Pratt**

- matched 3 gifts for a total of \$15
- generated 245 clicks and 5 gifts, totaling \$283
- created a personal plea

[Watch Personal Plea](#)

## Anatomy of an Email Ask

**Emails should be personal.** Address each one by name and add an anecdote for each person.

**Explain your connection to the project.** Why are you involved? How did you get involved? If the money raised has an impact on you personally, explain how.

**Give context of wider impact.** If the project has the potential for a larger impact in the community, explain it to the potential donor.

**Mention partnership with institution.** The institutional support further validates your project's merit; use that. If your institution is a 501c3, note that donations to the project are tax deductible.

**Reference the amount of money you are trying to raise.** Be transparent about how the money will be used.

**Ask them to donate.** Tell them the issue you're working to solve can't be fixed without their support.

**Ask them to share.** Not everyone will have the capability to give at that time. Mention that they can also be helpful by sharing with someone they know who may be passionate about the subject matter.

**Keep it as short as you can.** All of the above pieces are crucial, but people also have short attention spans. The biggest focuses should be on your connection to the project and that person, while giving them a compelling reason to check out the project page.

**Pull them into the journey with you.** Whatever the subject matter of your project, you're starting a journey of how to solve a particular issue. With all of the above pieces, you're creating a story about how you will accomplish your goal. Remember that the personal emails you send are there to take donors with you on your journey. You are sending these e-mails to people who care about you and people who care about this subject matter. Tie that personal touch in wherever possible.

At the end of it, they should feel inspired to act because of you and the impact of your project...and your promise to take them on the journey with you (via updates).

## Email Ask Examples

### Example #1:

Dear Jessica,

I hope this e-mail finds you well and rested after your vacation to Tahiti! I would love to meet up soon and talk about both your trip and your extensive international travel, as I soon will be embarking on my first international journey. I have been selected among a team of engineering students through the university to travel to Honduras and build water filtration systems for a rural town outside of the capitol. As I finish my final year of school, I've begun to find a passion for public health and the impact engineering has on creating safer communities for people around the world. We are planning to put in 4 different filtration systems throughout the town we will be working within, but we do have to purchase these items prior to the trip, which end up costing approximately \$1200 per system. This cost was going to be spread among all of our team's payment for the trip, but we came together and decided we wanted our amazing communities to be a part of this trip as much as we were, so we are raising \$5,000 to purchase the equipment.

With your incredible international development work, I thought of you immediately when I started creating my list of friends who might be interested in supporting my team in our endeavor to bring clean water to this town in Honduras and to grow as engineers that help the developing world. All donations are tax-deductible, as they are directly through the university, and a donation of any amount would be a huge help. Additionally, I would be so grateful if you could share this project with your community of folks that do international development work as well.

You can find a link to our project site here, where the donations are taken: (LINK). Please let me know if you have any questions!

All my love,

Katie

### Example #2:

Dear Jeff,

So good to see you at the national conference last month! Your research surrounding traumatic head injury in college athletes continues to inspire me. As you know, the head trauma center I am involved with at the university has been doing similar research with high-school athletes and are working to put together a program that will bring the testing we've created to check and monitor student athletes with traumatic head injury in three of the lowest income schools in the surrounding area. With the university's family of schools and connections into the local school system, we've identified these schools and identified a cost point of \$3,000 per school for testing and treatment over the next school year. We've taken it upon ourselves as a center to raise this money on our own and through the use of the university's crowdfunding platform, we are attempting to raise the \$9,000 it would take to implement this program in the three identified schools.

As someone with an affinity to this topic, I knew immediately I wanted to invite you to join this project with me through a donation. Our team is hoping to gather pre-commitments to our project from our friends who are passionate about the work we do. When we launch in 2 weeks, can I count on you for a donation? Even a donation of \$100 brings the services to 2 individual students and will benefit from a year of care because of your generosity.

Please let me know if you have any questions about the project or the work we'll be doing, I'd love to sit down and talk with you about it!

Thank you in advance,

Mark

### Example #3:

Dear Sarah,

My name is Eric and I am the current President of the university's engineering design team. Since you graduated in 2009, our team has grown exponentially and has continued to excel in the competition circuit, placing in at least the Top 10 in each of the 5 competitions we entered in the past few years! This year, we have the opportunity to showcase our designs on the international scene at a competition in Europe. This is an amazing and once in a lifetime chance for our team, which is where you come in.

We as a team recognize that none of us would have been able to have the same amount of success without the hard work and dedication of all the engineering team members that came before us. Without your legacy, we would not have the sophisticated and award-winning designs that got us recognized at an international level. I am writing to you today to continue that legacy, and to help us continue our success through a donation to our cause.

As you know, as a student organization we receive limited funding from the university for our competitions and travel. To compete in Europe this summer, we will need to cover the costs of transporting our team and some equipment across the pond. After crunching the numbers, we found that it would cost \$7,500 for us to send 5 team members to the competition. The university has allowed us to use its new crowdfunding website, through which we hope to raise the funds needed to allow our team the chance to continue to learn and succeed.

I hope you think back on your time with the engineering design team with fond memories, as your past is our future. Please consider going to <https://crowdfunding.university.edu/engineeringdesign> and supporting our efforts to expand our horizons and learn from student engineers across the globe.

If you have any questions, or would like to hear about the competition and our current designs further, we'd love to have you back at the lab at any time!

Thank you for your time and consideration,

Eric





# Deposit Transmittal Form

(For checks & currency only)

Metropolitan State University of Denver Foundation

Campus Box 14

Website: <https://msudenver.edu/giving/about/reportsandforms/>

Submitted by (print name): \_\_\_\_\_ Date: \_\_\_\_\_ Campus Box \_\_\_\_\_ Ext# \_\_\_\_\_

**DO NOT MAIL CURRENCY TO THE FOUNDATION. CURRENCY DEPOSITS SHOULD BE HAND-DELIVERED TO THE FOUNDATION IN THE JORDAN STUDENT SUCCESS BUILDING, SUITE 410**

## Instructions:

1. Indicate Foundation Account (Banner Activity Code)
2. Indicate Deposit Type
3. Include Donor Information
4. Send check(s) and associated documentation to the Foundation via intercampus mail (Campus Box 14) or drop-off at the Student Success Building, Suite 410.

**Foundation Account** (Banner Activity Code): \_\_\_\_\_

**Deposit Type** (check only one):

- ☐ **Outright contribution** (100% Tax Deductible Gift)
- ☐ **Quid Pro Quo contribution** (Partially Tax Deductible)
- ☐ **Membership** (Partially Tax Deductible)
- ☐ **Sponsorship** (Partially Tax Deductible)
- ☐ **Sale/Earned Income** (No Tax Deductibility – e.g. Auction, Equipment, Catalog, Uniforms etc.)

Description: \_\_\_\_\_

- ☐ **Ticket or Event Registration** (Partially Tax Deductible or No Tax Deductibility)

Name/date of Event: \_\_\_\_\_

## DONOR INFORMATION - (Attach separate spreadsheet if needed)

Donor Name/Organization	Check #	Amount	*Tax Deduct. Amt.

\*must include tax deductible portion for account credit

**Deposit Total**

(Foundation Internal Use) Received by: \_\_\_\_\_ Date: \_\_\_\_\_

## Silent Phase

### 4 WEEKS PRIOR TO LAUNCH

- ☐ Identification of Project Team
  - Project Creator (1-2 people)
  - Advocate (3-5 minimum)
  - Amplifiers (3-5 people)
- ☐ Generate list of prospective donors who will receive a project email
- ☐ Determine project goal (based on size of team and prospect list)
- ☐ Create content:
  - Main project video: 2-2.5 minutes
  - Copy
    - Project title
    - Short description
    - Long description
    - Incentives
- ☐ Create marketing schedule & strategy
  - E-mail blasts
  - **84% donations** come from emails!
  - Video updates/testimonials
- ☐ Gather pre-commitments from donors
- ☐ Create a stretch-goal strategy
- ☐ Outreach to affinity groups
- ☐ Work with the Director of Annual Giving to create the project's strategic marketing and communications plan

## Active Phase

### LAUNCH TO 30-45 DAYS AFTER LAUNCH

#### **Continuous Responsibilities:**

- ☐ Check donor information in software
  - Send personal "thank you"
  - Remove donors from future lists
- ☐ Check goal levels against pre-scheduled update timeline
  - Post updates when milestones are met
- ☐ Send simple and authentic weekly updates
- ☐ Encourage affinity groups to share your project on social media
- ☐ Fulfill timely perks

#### **Timely Responsibilities:**

- ☐ 24 Hours Pre-Launch - Send link to pre-committed donors to get you donations right out the gate
- ☐ First 24 Hours – send email blast on morning of Day 1
  - Follow up with phone calls for those numbers you have
  - Evening of Day 1 have your amplifiers groups publish posts about your campaign
- ☐ After 72 Hours – if not at 20-30% of goal, make personal asks; if at goals implement stretch goal strategy
- ☐ After 1 Week – Send out new email
- ☐ Week 3 – Utilize pre-scheduled offline events to raise more money
  - Enter offline money into platform

## Post-Campaign

- ☐ End of Campaign – Send final thank you email and post recap/update video/copy

### UP TO SIX MONTHS AFTER CAMPAIGN END DATE

- ☐ Use update tools to take the donor on a journey with you as the money they donated is used to benefit your specific mission
- ☐ Students/beneficiaries of the project should send hand-written thank you notes
- ☐ Fulfill incentives
- ☐ Send update emails coinciding with milestones for the implementation of funds
- ☐ Push video/copy updates through various outlets
  - Use your own social media accounts as well as affinity groups'