California State University
SAN MARCOS

University
Advancement

Cougar Crowdfunding Guidelines

CSUSM Cougar Crowdfunding is an exciting new channel for fundraising. This peer-to-peer fundraising model brings groups of donors together to raise money (typically in the $2,000 - $10,000 range) to fund specific projects during a time constrained campaign. Cougar Crowdfunding campaigns are managed by the Office of Annual Giving Programs through our CSUSM Giving Platform, Anthology. Before a campaign can be initiated, it is the project lead's responsibility to review and understand the following CSUSM Cougar Crowdfunding guidelines.

REQUIREMENTS:
All proposed projects must have an approved philanthropic gift fund set up through the CSUSM Foundation to which donations can be accepted and then distributed to the respective campus unit's account. Groups may use a gift fund associated with a sponsoring unit, such as a department, program or center. If an appropriate sponsoring unit gift fund isn't available, requesters will be referred to work with University Advancement staff to determine whether the project qualifies for its own gift fund. Gift funds and accounts must be completed and/or created before the crowdfunding campaign can begin.

Campaigns must support CSUSM's programs and initiatives. Departments are strictly prohibited from keeping any portion of the funds raised as a profit or compensation. Funds cannot be redirected to a third-party, external charity or other non-profit. A Cougar Crowdfunding approval form, which outlines how the money will be spent, is required to be signed by the project lead and appropriate administrator before the campaign will be activated.

MATERIALS TO PROVIDE:
When applying for Cougar Crowdfunding, the project lead agrees to provide the following:

- Signed Cougar Crowdfunding Approval Form with signature from appropriate administrator
- Project description and case for support
- Images for description, social sharing and crowdfunding home page. Video is optional
- Budget breakdown (how donations will be spent)
- Plan/timeline of ongoing outreach and promotion during the span of the campaign
- Commitment to provide personal thank you messages to donors after the campaign concludes

All content on campaign pages will be approved by CSUSM Office of Annual Giving Programs. Campaigns should have specific goals and be driven by tangible accomplishments – for example, $500 to purchase new equipment, funding travel fees of $1,000, or providing (15) student workshop opportunities at $1,000 each. Campaigns without a specific goal are generally less successful and may not qualify for their own crowdfunding campaign.

TIMELINE:
Within the Office of Annual Giving Programs, the Digital Giving Specialist will be the main contact for all campaigns from start to finish. Once the Crowdfunding approval form is completed and all content has been provided, the Digital Giving Specialist will create the project microsite within the giving platform.

After the campaign is set up on the platform and ready to accept gifts, it is the responsibility of the project lead and team to promote their campaigns to their constituency via social media, email and phone calls, when appropriate. Projects able to achieve 30% of their goal within the first 48 hours of a campaign are more likely to achieve their total goal. CSUSM does not provide any contact data on alumni, parents, friends or students. It is up to the Cougar Crowdfunding teams to contact their personal affinities and contact lists. However, project leads can work with the Digital Giving Specialist to send targeted emails to alumni or donor contact lists on their behalf. The Digital Giving Specialist will work with teams to generate ideas for marketing and outreach.

Projects will be hosted on the Cougar Crowdfunding platform for a pre-determined amount of time, 30 days maximum. Some exceptions may apply. Shorter campaigns tend to drive urgency and perform more strongly. The same team may not fundraise in consecutive campaigns for support of the same project/program but may be eligible for future Crowdfunding efforts. If the project is not fully funded within the allotted timeframe, any monies raised will still be allocated to the project. All funds, even without meeting the goal, must be spent towards the cost of the promoted project only. Project leads will work with the Donor Stewardship Office to send follow up thank you emails which will include how the donations were used.

IMPORTANT THINGS TO KNOW:

- All gifts are accepted and administered by **The California State University San Marcos Foundation** (CSUSM Foundation), an official 501 [c] [3] auxiliary organization of California State University San Marcos. The Foundation supports and promotes the University's mission by cultivating and maximizing private charitable investment, stewarding resources carefully, creating and nurturing meaningful regional relationships and partnerships, engaging the University's communities, advocating on behalf of the University, and building and sustaining a culture of philanthropy.
- CSUSM will provide official tax receipts to donors via Advancement Services.
- Most gifts will be raised online. All funds raised from outside of the Crowdfunding platform must be delivered to University Advancement for deposit to ensure proper processing and tax recording. If this occurs, contact the Office of Annual Giving Programs for instructions.
- Crowdfunding campaigns cannot count gifts from pledges, bequests, gifts already allocated to another fund, matching gifts, or money raised through sales, such as bake-sales, car washes, or other "give-to-get" fundraising. In addition, monetary premiums and perks are not to be used to incentivize gifts, such as t-shirt giveaways or other promotional items, as they affect a donor's tax deduction.
- There is a $5 minimum donor gift amount through the Crowdfunding platform, Anthology.
- The CSUSM Foundation invests a percentage of gifts to enhance the university's capacity to engage alumni and friends in supporting CSUSM. Currently this fee is 5% for gifts of $2 million and under. All Cougar Crowdfunding campaigns are subject to this fee. Funds deposited into project accounts will already have these fees removed from their totals, however, project totals online will display the full amount.
- Campaigns cannot violate any laws. The Office of Annual Giving Programs reserves the right to decline any project based on content or discontinue an active campaign at any time due to changes in the group's eligibility status.

For questions regarding these guidelines, please contact Alex Perkins, Digital Giving Specialist at aperkins@csusm.edu or 760-535-8941.

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Cougar Crowdfunding Approval Form

Before filling out the Cougar Crowdfunding Approval Form, please be sure to read through the guidelines to understand the requirements to launch a successful project campaign. Signature below indicates acceptance of the guidelines. For questions regarding Cougar Crowdfunding, please contact Alex Perkins, Digital Giving Specialist at aperkins@csusm.edu or 760-535-8941.

Applicant Information:

Project lead name: Email: Phone:

Check all that apply:
☐ Faculty ☐ Staff ☐ Student ☐ Other

Project name: Project launch start date:

Project Financial Goal: Project Campus Affiliation:

Ex: Athletics, CoBA, ASI, etc.

Funding Source for your Project:
Fund ID: I do not have a Fund ID and need to create one ☐

Proposed Project Summary:

Project lead commits to follow all the guidelines and provide materials needed to launch a successful campaign, market the campaign to the best of my ability and commits that all funds obtained will go directly to the fund ID reported in this application. I understand that false or misleading information in my application may result in disqualification.

Signature: Date:

Administrative Approval:

Administrative Approval's Name: Email:
Ex: Dean, Division VP, Director of SLIC

Is this project approved? ☐ Yes ☐ No Comments:

Administrative Signature: Date:

Approval form received on:
Date *Signature of Office of Annual Giving Programs*