COUGAR CROWDFUNDING CHECKLIST ✓

STEP BY STEP GUIDANCE
FOR A SUCCESSFUL CAMPAIGN

6 steps before you launch

PRE-LAUNCH TIMELINE



ONE — CONTACT THE OFFICE OF ANNUAL GIVING PROGRAMS FOR A COUGAR CROWDFUNDING 101 MEETING WHERE YOU WILL REVIEW OUR HANDBOOK, GUIDELINES, AND THE APPLICATION FORM.

TWO — TIME TO CREATE YOUR TEAM, A SENSIBLE GOAL AND COMMUNICATION PLAN AND DON'T FORGET TO GATHER ALL YOUR SIGNATURES BECAUSE YOU'RE READY TO APPLY!

THREE — APPLY FOR COUGAR CROWDFUNDING

FOUR — CREATE AND TURN IN YOUR PROJECT DESCRIPTION AND PROJECT IMAGES TO THE OFFICE OF ANNUAL GIVING PROGRAMS.

FIVE — REVIEW AND CONFIRM YOUR PERSONALIZED PTOJECT PAGE CREATED BY THE OFFICE OF ANNUAL GIVING PROGRAMS.

SIX — ONE DAY BEFORE LAUNCH, SEND THE LINK TO THE PRE-COMMITTED DONORS AND ADVERTISE YOUR UPCOMING EVENT. THIS WILL GIVE YOUR PROJECT MOMENTUM RIGHT OUT OF THE GATE.

YOU'RE READY TO LAUNCH!

FOR MORE INFORMATION ON COUGAR CROWDFUNDING, FIND US AT:

•750-8895 •

COUGARCROWDFUNDING@CSUSM.EDU

WWW.CSUSM.EDU/COUGARCROWDFUNDING

7 steps you should take during your campaign

CAMPAIGN TIMELINE



DAY ONE

THE PROJECT TEAM POST ON ALL PERSONAL/ TEAM SOCIAL MEDIA ACCOUNTS. SEND EMAILS AND MAKE PHONE CALLS TO YOUR LIST OF CONTACTS. *THIS SHOULD BE DONE DAILY.

TWO/THREE DAYS IN

FIRST PROJECT UPDATE SHOULD BE EMAILED TO THE DGS,(DIGITAL GIVING SPECIALIST)-THIS WILL BE POSTED ON YOUR PROJECT PAGE. POST A PROJECT UPDATE ON YOUR SOCIAL MEDIA ACCOUNTS AS WELL; INCLUDE TOTAL RAISED SO FAR, THANK THEM FOR THEIR SUPPORT AND ENCOURAGE THEM TO HELP SHARE YOUR PROJECT.(DEPENDING ON SUCCESS OF CAMPAIGN, THIS DATE CAN VARY).

AFTER ONE WEEK:

SEND OUT REMINDER E-MAILS TO YOUR CONTACT LIST THAT HAVE NOT YET DONATED AND POST ON YOUR SOCIAL MEDIA ACCOUNTS. PERSONALLY THANK ANY DONORS YOU KNOW THAT GAVE (CALL, EMAIL, TEXT, ETC.)SEND A WEEKLY UPDATE TO DGS TO POST ON YOUR PROJECT PAGE. HAVE A WEEKLY TEAM MEETING TO REVIEW DONOR OUTREACH PLANS AND TEAM MEMBER EFFORTS.

AFTER TWO WEEKS

SEND OUT REMINDER E-MAILS TO YOUR CONTACT LIST THAT HAVE NOT YET DONATED AND POST ON YOUR SOCIAL MEDIA ACCOUNTS. IF CAMPAIGN IS NOT AT 50% TO GOAL – WORK WITH THE DGS ON A REVISED STRATEGY. FOLLOW WITH WEEK ONE REMINDERS (SEE ABOVE).

AFTER WEEK THREE:

MAKE A LAST WEEK EFFORT TO MEET YOUR GOAL, REVIEW YOUR DONORS LIST AND CHECK IN WITH AMBASSADORS TO SEE IF THERE IS AUDIENCE YOU HAVENT TAPPED INTO. FOLLOW WEEK TWO REMINDERS. START THINKING OF POST CAMPAIGN THANK YOU HIGHLIGHTS.

WITHIN 72 HOURS POST CAMPAIGN

WORK WITH THE DGS AND THE OFFICE OF STEWARDSHIP TO SEND A PERSONALIZED THANK YOU EMAIL TO ALL YOUR DONORS. CREATE A FINAL "THANK YOU" UPDATE FOR YOU PROJECT PAGE DESCRIBING HOW THE FUNDS HAVE BEEN SPENT WITH A PHOTO SHOWING THEIR DOLLARS IN ACTION.LASTLY, CONSIDER BECOMING AN HONORARY AMBASSADOR FOR FUTURE PROJECTS. YOU WILL BE ADDED TO THEIR DONOR LIST IN HOPES YOU CAN SPREAD THE WORD DURING THEIT CAMPAIGN.

*DGS : Digital Giving Specialist - Alex Perkins

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APPROVAL FORM CHECKLIST

Forms to review

Before you apply, please make sure you have reviewed and understood all Cougar Crowdfunding forms listed below:

Cougar Crowdfunding Handbook

Cougar Crowdfunding Guidelines

Cougar Crowdfunding Approval Form

Signatures

Before submitting your approval form, you must have the following two signatures:

Administrative Approval Signature
Ex: Dean, Division VP, Director of SLIC

Project lead :
The project lead must agree to all Cougar Crowdfunding requirements.

Funding source for project

Once you review the approval application, you will need to collect the following signatures before your application can be submitted. Please allow 2-3 week to gather these signatures.



Contact Us

By phone: 760-750-8895

By email: aperkins@csusm.edu

For more information on Cougar Crowdfunding, visit www.csusm.edu/cougarcrowdfunding