CSUSM

Guide to Thrive

Cougar Crowdfunding 101

COUGARFUNDING 101

What is Crowdfunding?:

Crowdfunding is an exciting new channel for fundraising, bringing groups of donors together to fund specific projects during a time constrained campaign. In this peer-to-peer model, projects raise small sums of money (typically in the $2,000 - $5,000 range) to fund special projects. Crowdfunding projects are run out of the Office of Annual Giving Programs which is the official source for all Cougar Crowdfunding activities and is managed internally through our CSUSM Giving platform, Anthology.

Who can apply?:

All CSUSM faculty, staff and students who wish to use crowdfunding as a means of supporting university related projects should follow the *guidelines* (located under "Resources" on the Cougar Crowdfunding website) . This will ensure proper branding, that gifts are tax deductible and that CSUSM is equipped to recognize and steward these donors. The funds will go directly into the gift fund designated for the projects use once project is complete.
Outside crowdfunding pages are strictly prohibited- If an external crowdfunding site is used, the name and branding of CSUSM may not be used in relation to the project, as this would constitute the unauthorized acceptance of gifts on behalf of the University.

Project Timeline:

Projects require advanced planning in order to see success. It is suggested that teams allot at least five weeks between project approval and launch date. This provides groups adequate time to gather all content and receive feedback from the Office of Annual Giving Programs. **All campaigns will run for a maximum of 30 days.** This creates a sense of urgency and encourages donors to make a gift immediately.

PROJECT REQUIREMENTS

Before submitting your project for consideration, please be sure you can address each of the points below. If you have questions regarding any of the project requirements, please contact Alex Perkins, Digital Giving Specialist at aperkins@csusm.edu or 760-535-8941.

Cougar Crowdfunding 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 administratorbefore the campaign will be activated.

Examples of fundraising associated with an *approved* university program that may be approved for Cougar Crowdfunding:
- A faculty member or group of students raise money for an educational field trip.
- CSUSM club sports team raises money for new uniforms.

Examples of fundraising *not* associated with an approved university program that will not be approved for Cougar Crowdfunding:
- A group of student raise money on their own to go on a field trip.
- A group of faculty and staff raise money for disaster relief (non CSUSM gift).

For a complete list of past approved projects, please visit the Cougar Crowdfunding website at : www.csusm.edu/crowdfunding.

GO TEAM GO!

Time to create your dream team:

Each project will need to assemble a team of volunteers

Project Lead:

Each team will have one project lead as the main point of contact and responsible for ensuring all tasks are completed in a timely manner.
This person will be the face of the team and will be sent all project questions. It is suggested you have a few memebers of your team on hand to help with content creation who are committed to the success of the project.

Amplifiers:

Each project should have at least five amplifier volunteers willing to share content and ask their networks to give, but are not necessarily involved in content creation. More amplifiers create a wider reach for the project, resulting in the opportunity for more donations.



BEFORE GOING LIVE! **COMMUNICATION PLAN**

The content in your communication plan should be the roadmap for success!

The following items should be included to ensure ease of execution:

- Dates/Times the general message will be sent and their intended audience(s).
- Vehicle for promotion (social media post, email, phone call, etc.).
- Actual content due dates.
- Additional materials including photos, quotes, etc.
- Decision on who is responsible for creating content/distribution - add to your micro goals for the week!
- Frequency of communication: consider content for social media posts nearly every day. People view their social media at different times, so it is important to have variety in the schedule and content. If you are working with the Digital Giving Specialist for a targeted alumni emails, consider the messaging to include in 2-3 emails.

Consider your Audience:

Cougar Crowdfunding projects rely on personal networks to inspire donations. When planning communications, it is important to think about who the message will be sent to and how it should be tailored to the audience. Before projects are launched, teams should think about who will be included in these fundraising appeals and compile their contact information.Consider the following affiliations when creating your master list: friends and family, previous participants, previous donors, followers on social media.

Consider a soft launch:

Before launching your project, it is suggested to let your supporters know it's coming with social media "teasers" that way when you launch, you will already have individuals ready to give to create momentum.

SETTING UP:

PROJECT MICROSITE

Once projects are approved, the Office of Annual Programs will begin building the specific site.
All content will need to be sent in an appropriate timeframe otherwise the project will not move forward.

What we need from you to help you succeed:

Photos:

- The Cougar Crowdfunding page shows each of the projects as a tile image, so each team will upload a photo that represents their project.
- The required dimensions of this small image are 300px wide and 170px high. The project main image will be the same photo used for the tile image, but with dimensions of 606px wide and 343px high.
- There is an option to add a video to your site. For video examples and information, visit our video Info page.

Project Description:

- **Project Title:** This will appear on the main tile page, header of the project, and on social media shares. ***60 character max.***
- **Project description:**The description section gives teams the opportunity to fully explain who they are, what they are working on, and where the funding will go (budget breakdown). These aspects should be fully covered, as well as ending with a direct ask—a call to action telling viewers what you want them to do. For example, “make a gift today to allow our team to attend the championship game.” Adding photos in this area enhances the case and request for support. This section should be around ***200 words max.***
- **Project Goal:** The case for support description should dictate the goal advertised. We will only promote the amount needed for the project and nothing more.

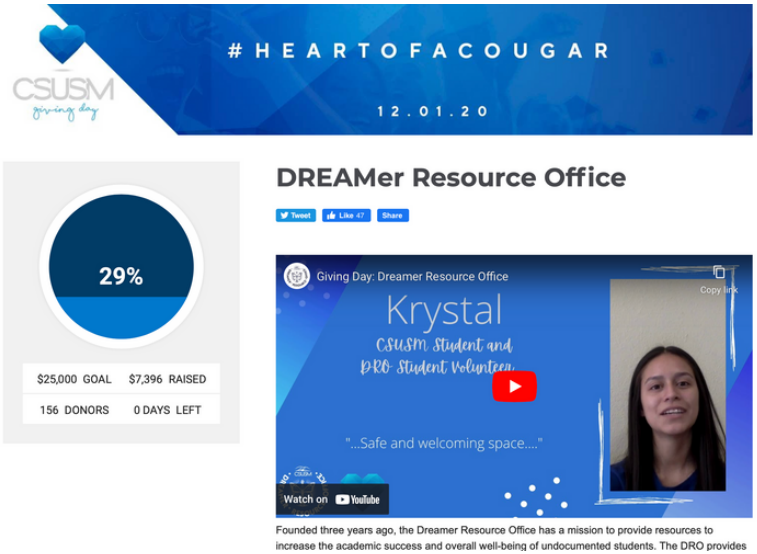
Launch Date and Time:

- The launch date is important to the success of the campaign. All materials need to be completed by this date and team members ready to reach out to their networks. Teams should be mindful of conflicting priorities: finals, holidays, etc. The time of the project launch will be the same time it ends, so teams should be mindful of this when setting the campaign timeframe. Example, if you would like your project to start at 7:00am on the first day of launch, it will also end at 7:00am on the 30th day.

COUGAR CROWDFUNDING MICROSITE

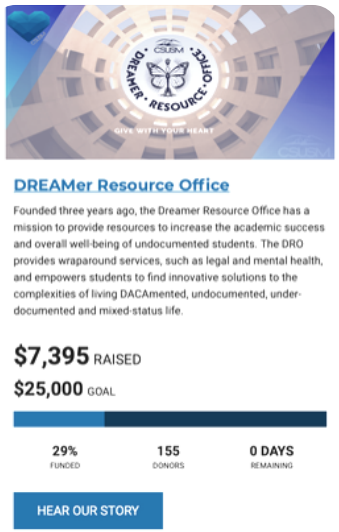
COUGAR CROWDFUNDING MICROSITE

The project's microsite contains all of the project information created prior to launch.
This may include the projects photos, optional video, full case for support as well as any updates communicated by the team within the 30 day campaign..



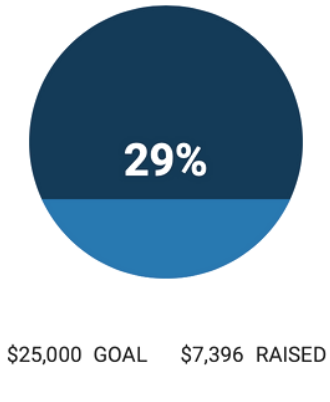
COUGAR CROWDFUNDING PROJECT CARD

The above photo shows a close up to what a project card will look like. Please note, each card will have the following:
Short case for support.
Project photo.
Progress Indicator..



COUGAR CROWDFUNDING PROGRESS INDICATOR

One of the most important pieces to each microsite is the progress indicator. This will let viewers know what the project's goal is, how much they've raised and how many days/hours are left to fundraise. This is a similar progress indicator shown on the projects card that lives on the main Cougar Crowdfunding website.



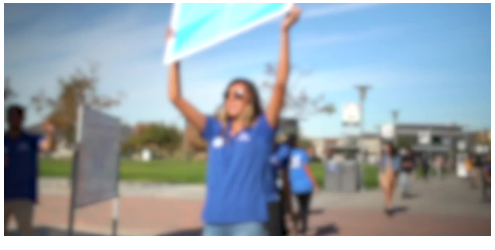
SETTING UP: OPTIONAL VIDEO

Que the Camera!

The video can be an *important* aspect of the campaign. This is an opportunity to make the project personable and give a face to the abstract. Videos do not need to be professional quality but should include a few key elements:

- Videos should be no longer than **two minutes.** Users tend to have short attention spans and lose interest around 90 seconds into a video.
- Keep it short and direct.
- Answer the following questions: who are you, what are you doing, why is it important, and what do you want viewers to do?
- Include a direct ask. This is a clear statement of what you want the person watching the video to do next. Example: Make a gift today to allow the soccer team to attend the winter competition.
- It is suggested that videos have a script and a storyboard before filming.
- Have a face! People relate to people, so each video should include someone speaking about the project.
- Include B roll: video that can be used while someone is speaking in the background.
- Add background music to move the video along. YouTube offers a catalogue of free music that does not breach copyright laws.

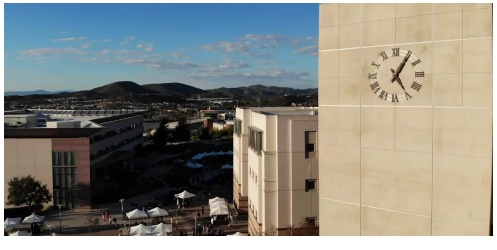
Click on the videos below for an example of a past project videos:



Aviation Academy:
Fight for Flight



Alumni Engagement:
Taste for Student Success



ASI:
Cougar Pantry Stock

BEST PRACTICES:

TOOLS TO HELP YOUR PROJECT SUCCEED.

Best Practices for Email

- Every email has one goal: get people onto the campaign page.
- Every email has a link to the campaign page.
- Every email has a strong call-to-action: ''Can you donate today?''
- Try and keep them personal. Have an email that you copy, paste & send and just change the recipient's name. Don't cc loads of people - it will feel impersonal.
- Remember, all the info about the campaign is on the campaign page, so keep your emails simple - 6 sentence maximum.
- If somebody hasn't donated yet, remind them in the same thread.
- Any mass emails should be congratulatory of the success you've had so far - they're motivating news updates, not painful reminders.
- Don't link to the video separately from the campaign page.

Best Practices for Social Media

- Every post has one goal: get people onto the campaign page.
- Every post has a link to the campaign page.
- Every post has a strong call-to-action: ''Can you donate today?''.
- Promote media in your posts - include relevant photos and ask people to watch the video (on the campaign page NOT ON FB/TWITTER).
- Post around lunch time or evening.
- If people like/retweet/comment/share your posts about the campaign but haven't donated, follow up with them personally.

CONTINUING THE

MOMENTUM:
WAYS TO STAY ON TRACK

CHECK IN'S

Check in with your amplifiers to make sure they are staying within the project timeline and hitting their weekly micro goals. Once the campaign has launched, communications should be consistent. Everything scheduled in the communication plan should be put into action, making the preparatory work critical.
Remember that all members of the team will be actively reaching out to their networks during the campaign and making personal asks.

UPDATES,UPDATES,UPDATES!

Remember to send the Digital Giving Specialist your updates periodically so the fundraising pages can remain current with new content .

SOCIAL MEDIA

Get Excited - show your spirit and enthusiasm through your post.
Spread the word!
Post social media updates throughout the campaign; this will help you stay relevant.
Keep in mind that the use of existing social media managed by the group is recommended.

PROJECT
CLOSURE

Thank You's

Once the project is completed, you will work with the Donor Stewardship Office to coordinate a personal thank you to donors for their generous gift and time.

Updates

One of the benefits of doing a crowdfunding project is the opportunity to show donors the impact they are making via social media. In addition to strengthening the relationship between the organization and their community, post-project updates aid in future donations. By showing donors that the funds have a tangible impact, that they were used for the intended purpose, and including them in the process, there is an increased chance they will donate again. This is extremely beneficial especially if the project plans on becoming an annual occurrence.

Testimonials

After completion of your project , please consider writing a testimonial to be posted on our Cougar Crowdfunding Website to serve as a successful example to all future projects.