

HSU Crowdfunding Tool Kit

A guide to putting together, and running, a successful crowdfunding campaign—and getting your project funded!

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What makes a successful campaign?

- Starting the process early (at least a month prior to launching)
- Identifying strong supporters (and asking them for money)
- Early, large gifts confirmed
- Multiple people sharing the campaign with their networks on different platforms, asking for support
- When it is in combination with another fundraising effort or event (such as a phonathon)
- When done intentionally and personally (success comes from asking for donations, versus blanket promotion)
- BIGGEST indicator of success: Being committed to asking people for money! (It's an effort game!)

Campaign Timeline

Running a successful crowdfunding campaign can seem a bit daunting if you haven't done it before. Here we layout the whole process so that you have an idea of the steps that will help you reach the most supporters and get your project funded!

1. Fill out [THE ONLINE FORM](#) about your fundraiser
2. Create your campaign CASE STATEMENT
3. MEET with the Office of Philanthropy
4. ORGANIZE YOUR TEAM: Identify and recruit 10 campaign champions that will promote the campaign through social media and personally soliciting their friends and family. These champions should also make gifts accounting for 10-30% of the goal.
5. Talk to your biggest supporters and GET EARLY DONATIONS: Each of the project leaders and champions should identify 3-4 early donors. Early donors are folks that you know will be likely to participate in the campaign. With these prospects we should be able to reach 50% of the goal.
6. CREATE MATERIALS for your campaign (see "What is needed for your crowdfunding campaign" for details)
7. Send these MATERIALS TO CONTACT at Office of Philanthropy to populate campaign
8. When prompted, CHECK OUT DRAFT CAMPAIGN to make any changes and okay it for launch
9. LAUNCH DAY!: Share with your supporters and network of family and friends by posting on your favorite social media networks, sending texts and emails. Check out our easy template guide for messaging ideas—or create your own! Consider incentivizing goals by offering prizes or recognition of donors or team members if you reach set goals or receive a specific amount for a donation, especially on the first day of your campaign. Make it fun!
10. HALFWAY CHECK IN: Leaders remind campaign team members to reach out to their supporters/networks
11. LAST DAY PUSH: Leaders remind campaign team members to reach out to their supporters/networks
12. PROJECT CLOSES
13. THANK YOUR DONORS: After your project ends, within 3-5 business days, you will receive a final list of donors, along with their contact information so that you can send them a thank you via mail or email
14. FUND YOUR PROJECT and celebrate!

Initial Meeting Agenda

After your submitted project has been approved by the Office of Philanthropy, someone will reach out to you to set up an initial meeting to discuss your goals and how to achieve those goals.

BEFORE THE MEETING

Develop your CASE STATEMENT (see “Crafting Your Case Statement”) to help direct the discussion during our meeting. This will help us better understand why funding your project is so important and how you are trying to get that message across.

AGENDA

REVIEW PROJECT (15 Min)

- Estimates
- Timeframe
- Priorities

CROWDFUNDING TOOL KIT (15 Min)

- Review Tool Kit
- Accounting
- Content Creation

NEXT STEPS (10 Min)

- Understand and Agree on Deliverables and Next Steps
- Agree on Timeline

AFTER THE MEETING

As agreed upon in the meeting, it is the Project Leads’ responsibility to provide the contact from Philanthropy the materials needed to populate the campaign.

If you have any questions or are having issues crafting your campaign materials, contact the Office of Philanthropy! We are here to help.

In order to ensure that your campaign launches on the agreed upon date, it is important to adhere to other deadlines. Failure to do so can result in delayed campaign launches.

Crafting your Case Statement

Ahead of our meeting please take some time to develop your case statement. This statement explains to a donor why they should support and donate to your project or group.

QUESTIONS TO ANSWER

To develop yours, start by answering these questions:

- WHAT ARE YOU TRYING TO DO WITH YOUR CLUB OR PROGRAM?
- WHY IS YOUR GROUP OR PROJECT IMPORTANT?
- WHAT DIFFERENCE WILL YOUR GROUP OR PROJECT MAKE ON OR OFF CAMPUS?
- HOW WILL THE DONOR'S GIFT MAKE A DIFFERENCE? CAN YOU PROVIDE EXAMPLES?

Your case statement will serve as the central voice and focus to your upcoming crowdfunding campaign.

What is needed for your crowdfunding campaign

BASIC ELEMENTS

- A project to fund (trip, equipment, project, etc.)
- 2 Project leads, one of whom is an HSU staff or faculty member
- Materials to build your case (photos, video, text explaining why people should give you money)
- People who will share the campaign and ask for money
- Supporters who will give you donations
- A plan to thank your donors

BUILDING BLOCKS

These are the required items we need from you to ensure that your campaign is set-up utilizing the full potential of the platform.

1. Project case statement
2. Photos and testimonials illustrating the importance and “human face” of the project (*Note that one photo will be utilized as a banner photo. This photo will be cropped horizontally, with the last third to the right mostly masked by the goal and total raised*)
3. Using the testimonials and case statement, write your campaign copy. This should also include an explanation of what the money is being used for and what the impact of supporting the project will be.
4. A short video illustrating your project and why people should give (*optional*)

COMMUNICATIONS

You can utilize our templates for these pieces, or feel free to write your own!

1. Emails to send to your network and potential early donors encouraging them to give and updating them on campaign progress
2. Social media posts to utilize throughout the campaign
3. Thank yous: these can include social media posts, emails and/or snail mail messages
4. Project leads should also send emails reminding team members to get the word out

Social Media & Text Templates

SOCIAL MEDIA

Want more ideas about how to use social media for your campaign?

Contact the Office of Philanthropy!

Today we launch our <CAMPAIGN NAME> campaign! Check it out here: <LINK> Help us reach our goal of \$<X>! Support <NAME OF GROUP>! :-)

I'm trying to raise the most money for my team today. It's a good cause. Hope you can help! <LINK>

Today is the last day of our <CAMPAIGN NAME> campaign! We are almost to our goal, so please consider supporting <NAME OF GROUP> students with a gift of any size. Thank you to everyone who has contributed! <LINK>

For Instagram [Note: to share the campaign link, include it on your profile as your "website" and direct followers to click on the link in your bio]:

Today we launch our <CAMPAIGN NAME> campaign! Check it out in the link in my bio! Help us reach our goal of \$<X>!

With your support, we will be able to <EXPLAIN END GOAL OF PROJECT>! Check out the link in my bio to see how you can help support this dream! Thank you!

Today is the last day of our <CAMPAIGN NAME> campaign! We are almost to our goal, so please consider supporting <NAME OF GROUP> students with a gift of any size. Check it out via the link in my bio. Thank you to everyone who has contributed!

TEXTS

Hello! Today we launch our <CAMPAIGN NAME> campaign! Will you check it out? <LINK> Help us reach our goal of \$<X>! Support <NAME OF GROUP>! <SMILEY FACE>

<LINK>. What do you think of our campaign page? Help us reach our goal! You rule!

I'm trying to raise the most money for my team today. It's a good cause. Hope you can help! <LINK>

Today is the last day of our <CAMPAIGN NAME> campaign! Help us meet our goal today! Every gift helps! <LINK>

Email Templates

FOR SENDING TO SUPPORTERS

INTRO

Hi <NAME>,

I'm reaching out for your support for <CAMPAIGN>.

<CAMPAIGN> is important to me because _____. Your tax-deductible donation is greatly appreciated.

Gifts of all sizes make a big difference! You can make your gift using this link and it will count towards my goal: <LINK>

Reach out to me directly if you have any questions! You can call, text, or reply to this email. Thank you for supporting me and <CAMPAIGN>!

Sincerely,

<YOUR NAME>

HALF-WAY POINT

Hello <NAME>!

We are at the half-way point of <CAMPAIGN> and with your help, we can reach our goal. This campaign will help me _____ and I greatly appreciate your support in making that happen.

All gifts make a big difference in supporting <NAME OF GROUP> students. You can check out our campaign progress here: <LINK>

Thank you,

<YOUR NAME>

LAST DAY OF CAMPAIGN

Hey <NAME>!

Reaching out as we are nearing the end of <CAMPAIGN> and I'm hoping I can count on your support. Check out the progress of our campaign here: <LINK> Our campaign closes at midnight tonight!

Thank you!

<YOUR NAME>

Email Templates

FOR PROJECT LEADS TO SEND TO TEAM MEMBERS

PRIOR TO LAUNCH DAY

Hello <CAMPAIGN> team!

Tomorrow is our campaign Launch Day! It is very important that we start off the campaign with a bang, so please take some time tomorrow to reach out to your family and friends through social media, email and text and let them know how much you appreciate their support.

I've included sample templates below [PASTE TEXT AND/OR ATTACH "TEMPLATES" DOCUMENT] if you aren't sure what to say. Be sure to use our campaign link (<LINK>)when sharing.

If you have any questions, please let myself or <PROJECT LEAD #2> know!

Let's do this!

<YOUR NAME>

HALF-WAY REMINDER

Hello <CAMPAIGN> team!

Today marks the halfway point of our <CAMPAIGN NAME> campaign! We've now reached \$<AMOUNT RAISED> of our total \$<GOAL AMOUNT> goal! Thank you for all your hard work in making that happen!

With two weeks left, it's up to all of us to keep getting the word out and asking for our community's support. Today, please reach out to your friends and family through social media, email and text and let them know how much their support would mean to you.

I've included sample templates below [PASTE TEXT AND/OR ATTACH "TEMPLATES" DOCUMENT] if you aren't sure what to say. Be sure to use our campaign link (<LINK>)when sharing.

If you have any questions, please let myself or <PROJECT LEAD #2> know!

We can do it!

<YOUR NAME>

Email Templates (cont.)

FOR PROJECT LEADS TO SEND TO TEAM MEMBERS

DAY BEFORE
CAMPAIGN
CLOSES

Hello <CAMPAIGN> team!

Tomorrow is the last day of our <CAMPAIGN NAME> campaign! We're SO CLOSE to reaching our \$<GOAL AMOUNT> goal and fully funding <PROJECT BEING FUNDED>! It's because of your hard work that we've already raised \$<AMOUNT RAISED>. Together, we can raise the rest!

Tomorrow, I'm asking all of you to make one more push to your friends and family, encouraging them to support <CAMPAIGN>. Share <LINK> using the templates below [PASTE TEXT AND/OR ATTACH "TEMPLATES" DOCUMENT] if you aren't sure what to say and thank those who have already supported the project.

We've got 1 day to get to our goal! With everyone's help, we can do it!

Onward!
<YOUR NAME>

Frequently Asked Questions

HOW DO WE DETERMINE WHAT OUR GOAL WILL BE?

Your goal should be the amount needed for your project, plus 5% for the platform fee. To get the goal amount, divide how much money you need for the project by .95.

HOW LONG SHOULD WE RUN OUR CAMPAIGN?

Typical crowdfunding campaigns run for 30 days. Occasionally, they will run for a longer period of time, but having a limited timeframe gives a sense of urgency, which encourages people to give immediately.

WHY IS IT IMPORTANT TO HAVE SO MANY EARLY DONATIONS?

Campaigns that start off with a large amount of donations tend to be successful as this demonstrates to potential donors that others see the value in the project, and that it will be more likely to be fully funded. The more people that give, the more likely it is that others will give as well, and the earlier this happens, the better.

WHAT IF OUR CAMPAIGN IS STRUGGLING?

Even if your campaign is struggling, you can still end up with a successful campaign! Keep in mind that the most important predictor of success in crowdfunding is simple: YOU MUST ASK PEOPLE FOR MONEY.

Remind those on your team to reach out to their friends and family through their social media platforms, email and text (and word of mouth!), and that it is up to them to ask their networks for support.

If your campaign is falling below the goals you've set, you can create a sense of urgency ("Only five more days to help send the Math Club to Seattle!"), mid-campaign goals ("We are trying to raise \$1,000 more dollars for our campaign half-way point on Thursday and you can help!") and even incentivize donations ("Support us with a \$50 donation and we will give you a shoutout on our Facebook page!"). Want more ideas? Contact the Office of Philanthropy.

WHAT IF WE DON'T HIT OUR GOAL?

Even if you fall short of your goal, your project will receive all of the funds that are raised through the crowdfunding platform (minus the 5% fee).

WHEN WILL WE RECEIVE THE MONEY RAISED THROUGH THE CAMPAIGN?

After the campaign ends, the funds will be deposited in your account in 1-2 weeks.

**Have
a different
question?**

**CONTACT
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