

University of California, Berkeley

# Crowdfunding Program

[Crowdfund.berkeley.edu](https://crowdfund.berkeley.edu)

**Toolkit: Guidelines + Best Practices**

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## Crowdfunding Pilot Calendar

- **4-6 weeks before you launch** will be focused first on training, gathering ideas, story and video scripts for your project. You'll start to develop outreach strategies for your campaign and explore networks to promote your project. By the end of the month, the campaign video should start filming. You should develop your perks for the campaign.
- **1-4 weeks before you launch** will be the time to finalize all aspects of your project – campaign video, solid pitch and project description, budget breakdown and an outreach strategy. Once your project page is approved, you'll start reaching out to your networks as part of the soft launch phase a few days before the full launch on the first of the month.
- **Full launch at the first of the month** to promote your page, reaching out broadly, holding campaign events, keeping up to date with your outreach plan, providing project updates and reaching your goal! You'll need to maintain consistent promotion for the full month to get to 100% of your goal. Don't forget to thank your donors and answer any questions or comments that are submitted.
- **Month following your campaign** is when your project will conclude and you will focus on providing a final project update, thanking your donors, and fulfilling your perks. You're not done yet; keep sending updates on how the money is being used – this will ensure that your donors support you again in the future if you need them!

# Planning + Building Block

## Program Description

This Crowdfunding Toolkit is designed to introduce you to everything your team needs to know in order to prepare for the launch of your crowdfunding campaign. Because we strongly believe in the concept of “learning by doing,” teams are provided with a structured process for collaboratively working through what is required to gain launch approval. The Crowdfunding Manager is available to provide guidance throughout the process and will support you in your effort to create a successful campaign!

Learning Objectives for the Program:

- Understand the basics of crowdfunding.
- Learn how to create compelling campaign content.
- Learn how to effectively spread your message during and after your campaign.

## Program Structure

The Crowdfunding Lab is broken up into phases. Each phase has been designed to empower teams to either work together, in person, or virtually. Many teams find it most effective to schedule days and times to work through the phases in person.

## Expectations

1. Your project Leadership Team must complete all necessary components to its campaign page, as provided in its campaign content checklist.
2. Leadership Team must recruit, onboard, and “activate” the minimum number of team members required for its target goal. Projects with more members are more successful.
3. Leadership Team must be available for 30-minute weekly check-ins with the Crowdfunding Manager leading up to the project launch and throughout the active fundraising campaign.
4. Leadership Team understands that it must receive official approval to activate its campaign prior to the launch date.
5. Leadership Team must provide to the Crowdfunding Manager an institutional fund code into which donations will be disbursed.
6. Leadership team understands that directors may request and require campaign page edits to be made in order to receive campaign launch approval.
7. Leadership team agrees to remain engaged through the duration of the entire campaign, including sending out post-campaign updates and thank-yous, publishing campaign blog updates, and thanking supporters in a timely manner.
8. If necessary, your team has identified additional marketing strategies (as provided in the marketing strategy checklist).

# Goal Setting

## Consider Your Networks

The key to crowdfunding is to recognize that the majority of your support will initially come from your team's core, first-degree networks: this means friends, family, and colleagues.

When planning a funding target, carefully consider what you could reasonably expect from this group and establish a minimum, target, and stretch goal.

You should plan to utilize the networks that you have already built up on Facebook, Twitter, LinkedIn, other social media and your website. Directly email the folks you know personally prior to launching to ensure funding commitments and to try to hit 30% of your goal within the first week of their campaign. (Pro Tip: Throwing a launch event to engage the broader public right off the bat is a great way to gain momentum quickly.)

## How Much Can I Raise from My Network?

To figure out how much money you could potentially raise with crowdfunding, you need to figure out the answer to two key questions:

A. How many people are in my/our networks?

*Look at all your social media connections and beyond.*

B. What is the average amount you could raise per person?

*The most common donation about to Berkeley Crowdfunding is \$25. Be realistic about how many members of your network you can get to give.*

The total is simple: A times B =

**We've found through other university crowdfunding pilots that each unique email sent raises about \$4, so make sure you have plenty of email contacts.**

Break down the math for each member of the team so they know how much they are responsible for fundraising. For example:

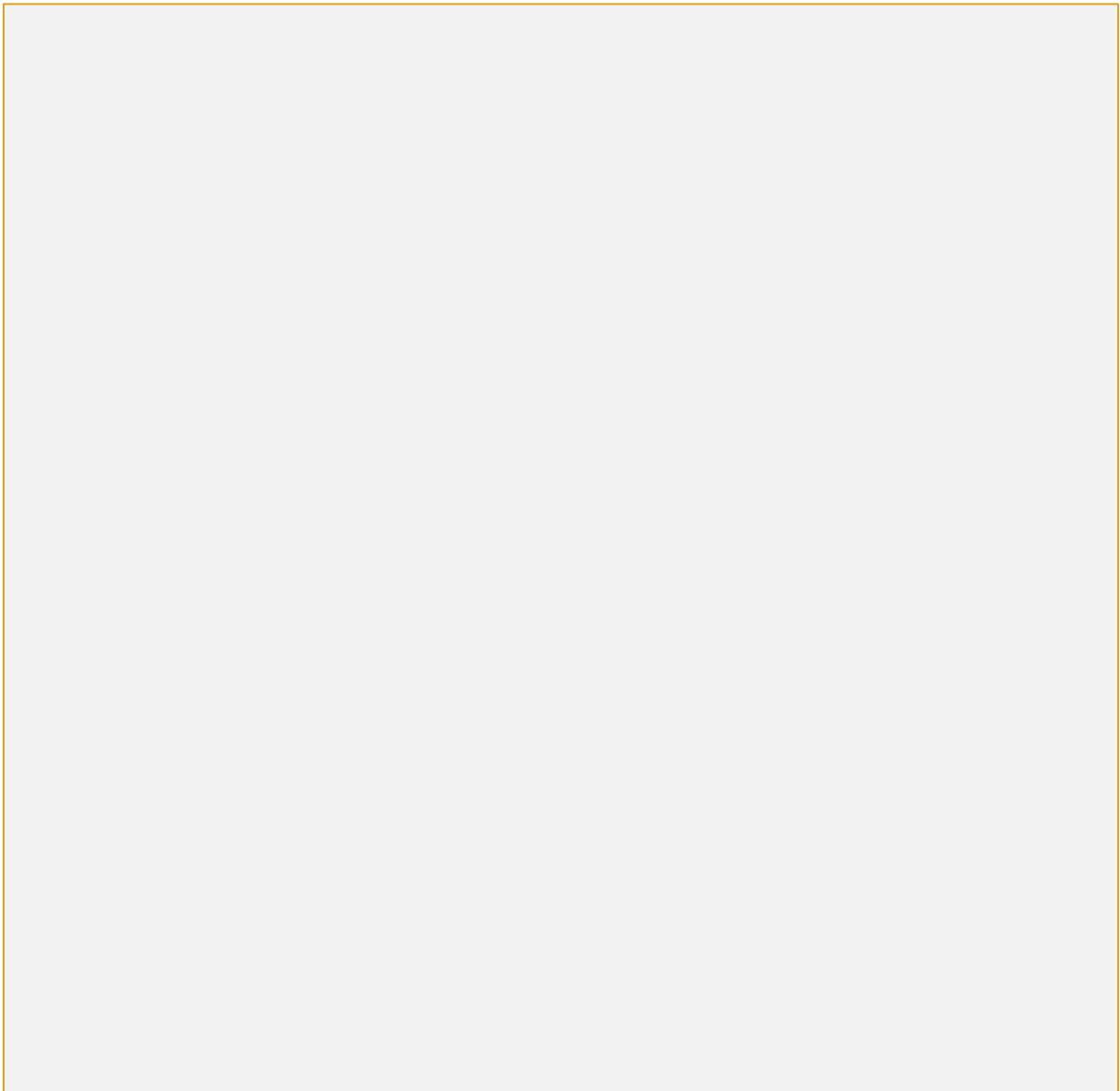
- If you have a goal of \$5,000 and 10 team members actively promoting you project, each person is responsible for \$500.

## Making Your Budget

Write down all the expenses that go into your project and add them up. Be realistic. Once you know how much you need and have some sense of what you can expect to get from your networks, you can set your funding goal.

Remember: people want to see where their money is going; a clear and transparent budget helps them feel comfortable giving to your campaign.

NOTE: It is better to have a lower goal that is more realistic to ensure that you hit 100% of your goal. Smaller goals also motivate donors more, as their one gift will have a larger impact. What is the minimal you need to make your project happen? You should start there and then add in additional items to include as a stretch goal if/when you reach your first goal.



# Developing Story + Pitch + Video

Telling a compelling story, through both your pitch and video, is the key to creating a crowdfunding campaign that travels beyond your core network. The stories that do best give a clear reason why the project was created, why it deserves to be funded, and why it needs the donor's help

## Pitch Development

What are you looking to create with the help of your community? Your pitch should inspire excitement for your idea and make potential backers confident in your ability to see it through.

A great way to get started is to define the problem your project aims to solve. Start with the exercise below, where you lay out your problem, and then slowly cross words out until you solve the problem. This will help you gain a clear understanding of the purpose of your project and why people should care enough about it to donate.

There are 748 million people in the world who ~~don't~~ get to drink clean, safe water. They ~~don't~~ have a tap. They ~~get diseases like diarrhea, cholera, and dysentery which prevent them from~~ going to work and school and ~~excelling at~~ their jobs. They ~~don't~~ survive past the age of 45 and ~~don't~~ live long enough to enjoy time with their grandkids. They have ~~no~~ time for a career and ~~zero chance~~ to live in prosperity. Their kids are born into the same cycle of ~~poverty and~~ disadvantage. Every ~~eighth~~ person has ~~no~~ access to clean water.

## Elements of Pitch Copy

A few things that should always be included in your pitch:

- Introduce yourself and any teammates involved in the project. Remember, people want to give to people. Donors will be inspired to give because of your passion.
- Tell the story of how your project came about. Share any progress you've made so far, any photos of early prototypes, and any research you've done. Potential backers appreciate these kinds of details. They want to know that you have done your homework and your project is worthy of their precious dollars.
- Share a timeline for how you plan to complete your project.
- Include your budget — even if it's just a rough one. A budget is proof that you've planned ahead. Visualizations (infographics, pie charts, etc.) of your budget breakdown are the best way to clearly show how you will be spending your funds.

### Some More Tips to Keep in Mind:

- Keep it four to five paragraphs. You need to convey your information concisely. You are not writing a novel.
- Shoot for a pitch that is reflective of who *you* are.
- Tell the backstory of your project and your journey up to this point.
- Touch on why this project matters.
- Include high-level details on where the money is going and what you're trying to accomplish.
- **Make your ask** — what do you want people to do (fund), and why? Be clear and compelling, conveying this key message: "I need *you* to make this happen." Do not make potential donors guess what you want them to do. You have to be blunt – ultimately, you want them to make a gift to your cause. When surveyed on why donors give, one of the top reasons is always "because you asked."
- Be authentic and confident; show passion for your project and for adding value to others. Show why your project is important. And, more importantly, why should others care?
- Include graphics and photos. This helps break up your copy and gives credibility to our project.
- Include social proof (from press coverage, testimonials, etc.).

### *Elements to Consider*

Risks and Challenges

Frequently Asked Questions

Stretch goal

### *Creating a Strong Title:*

Don't hold back — get creative and make sure your project title will stand out.

Tease your project with your title. The goal is to get people to click into your project page.

Keep it positive.

Visit [crowdfund.berkeley.edu](https://crowdfund.berkeley.edu) and look at past projects for inspiration.

# Create a “Message Map” Exercise

Building a message map is a three-step process to help you build your pitch.

## Step 1: Create a Twitter-friendly headline.

The headline is the single overarching message that you want your audience to know about the project. Ask yourself, “What is the single, most important thing I want my audience to know about my [campaign, project, idea].”

Make sure your headline fits in a Twitter post — no more than 140 characters (including spaces). If you cannot explain your project or idea in 140 characters or less, go back to the drawing board. This is what 140 characters looks like (includes spaces):

XX  
XX

## Step 2: Support the headline with three key benefits.

The human mind can only store about three pieces of information in short-term memory. Specifically outline the three or, at most, four benefits or positive aspects of your project. Draw three arrows from the headline to each of the key supporting messages.

## Step 3: Reinforce the three benefits with stories, statistics, and examples.

Add bullet points to each of the three supporting messages. You don’t have to write out the entire story. Instead write a few words that will prompt you to deliver the story. Try to keep your entire message map to a single page or no more than 250 words.

## Additional Messaging Questions

- Ask yourself: Why are you passionate about this? What inspired you? Why should other people care?
- If your project addresses a specific need, what need are you fulfilling?
- Who is your initial target audience with these needs? (Be specific about your target constituents and use personas to profile them. For example: 25–34 years old, energy-conscious, working in technology, up on current affairs.)
- What are the recurring emotional words or sentences that your constituents use to describe their needs? (“frustration,” “worry,” “ruins my day,” “inefficient,” etc.) You’ll need to find the emotional connection to your audience. This is best accomplished by using the words that they use to describe their problems.
- Where do your first 10 backers hang out, online and offline? You’ll have to be proactive about seeking them out at the beginning because nobody knows what your campaign is about yet.
- Who are your closest competitors? (What other organizations or campaigns are competing for similar dollars?)
- What is the key value provided? The benefit most impactful to your backers?
- Are you clearly asking for support? You don’t want to make people guess what you want them to do. Always include that you want them to make a gift and share your project.

# Developing Your Video

On your project page, you'll do more than just tell people what you will do — you will use video to tell the story behind your project.

## Why video?

Campaigns launched with a pitch video raise **115%** more compared to ones without one. {Source: Indiegogo}

Stories draw people in, help them relate to you as an individual or team of individuals, and inspire excitement in your idea. Text is important for reference. But your video will help you communicate your ideas quickly and clearly. And remember, not everyone will feel like reading your project description.

Videos show a real person who is credible and trustworthy. Plus, a good video gives supporters a reason to stay on the project page. And, most importantly, your project has a higher probability of “going viral” with a video.

Don't worry; your video doesn't have to look like it's been shot by an Oscar-winning director. In fact, a DIY approach can be appealing. Be creative. You don't have to have a traditional video with a “talking head.” Use animation, voice-over techniques, photo slideshow — whatever you can think of.

## What Should Be in Your Video

### The Basics:

Answer the questions “who, what, when, where, why, and how?” Tell your story, keeping it under three minutes — research shows people tend to click off after that. Include a strong call to action and an expression of gratitude.

1. Start by introducing yourself (and the rest of your team). Research shows that people are more likely to watch a video if they see a person addressing them directly within the first six seconds.
  - Explain how you came to your project. What was your inspiration? Why does this cause matter to you? How will you make a change?
  - Talk about the progress you've made so far. What research have you done? Have you done any initial early testing or designing? Is this a second iteration of an idea you've already worked on?
  - Lay out a timeline and budget. This is proof that you have thought about this and planned ahead, and will inspire confidence in potential backers.
  - Think visually. There should be times in the video when the viewer can internalize your mission, seeing him- or herself as part of it.
  - Finally, ask, “Can you donate to support my cause?”

## Additional Video Tips

### Be Authentic

Engage your audience and pique their interest with humor and authenticity. Write a script but feel free to go off it and let your personality shine through. The best way to shoot a video is to capture your team speaking passionately about your project and edit it later.

### Choose the Right Language

Use words like “support” and “fund,” avoiding words like “help” and “donate.”

### Sounds Right

Video quality is important: Sound quality is MUCH more important. You want to make sure that your viewers can clearly hear what you are saying – don’t film when it’s windy or in a loud area.

### Keep It Going

Create new videos in advance to roll out later, or during the campaign as updates.

### Get Endorsements

Pro Tip: Have endorsements from key people in your field backing the project or talking about why it’s important as part of your mid-campaign updates. This way, you can keep your audience coming back for fresh and dynamic material during your campaign.

### And Most Importantly...

Don’t forget to have fun and be positive! Always think about how you can get potential backers as excited about your project as you are. People love to support people, so be friendly!

## 5 Keys to a Great Crowdfunding Video

1. Remember to keep in mind the question, “Who exactly are you talking to?”
2. Focus on the problem you’re solving, not the project.
3. The transition matters – how are you going to solve this problem?
4. Show viewers how what you’re doing works.
5. Don’t forget your “call to action.” Use phrases at the end of your video such as, “Please click the donate button on this page today!”

## Video Script Exercise

Write out a three-minute script for your project below. Think visually and include details on additional shots you'll need to get.

# Building Community + Outreach

## Mapping Your Networks

In order to crowdfund, you need to be able to answer a key question: **who is your crowd?**

We all have a wide range of connections and networks of which we might not even be aware; these can be tapped during the outreach phase of a crowdfunding campaign. You aren't just raising money; you're **building a community** around your work.

This next exercise will help you to map out your personal connections to organizations, key individuals, schools, professional associations, and social networks. Take 10 minutes to write out who comprises your networks below. (No particular format is required; just write for the full 10 minutes!)

**Great job! Next, let's determine the resources represented in your network.**

In the resources column below, write down the resources that each group represents. Resources include money, connections, ability to share your campaign, potential volunteers, access to other networks, etc.

Network	Resource
<i>Example: Aunt Sally and Uncle John</i>	<i>Likely to give \$50, will share project page, Aunt Sally has connections at work, access to a large social media audience</i>

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[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

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# Perks

Perks can motivate contributors to give out of passion, pride, and participation. They are also directly tied to impact: on average, campaigns with perks raise 143% more than campaigns without perks. [Source: Indiegogo]

Be thoughtful about the perks you offer — they are a core part of determining success. Ensure the perks add meaning and value to your audience and beyond. Stand in the shoes of your backers, who will be asking, “What’s in this crowdfunding campaign for me?”

## How to Price

The most popular crowdfunding pledge is \$25 and the average for all pledges is \$75, so offer a wide variety of perks. Every backer counts, so be sure to offer an array of rewards that can appeal to all different kinds of people.

Have a wide range of price points: small (\$10– 100), medium (\$150–500), large (\$600–1,000), and extra-large (\$1,000+). On the very high end, go for interesting experiential gifts like a tour of your lab, a meet and greet with the team, or a special digital photo of the project in action.

## What Should We Offer?

Create a menu of perks that reveals your character and project brand.

Some ideas:

- Provide thanks – personal thank you notes and social media shout-outs can really make donors feel good about supporting your project.
- Allow funders to be part of your project (e.g., their name featured, access to a live event, join in on production).
- Offer experiences where get you to meet funders face-to-face and provide these at various price points. (Invite them to live events, workshops, tours, receptions, etc.)
- Don’t be afraid to have limited-quantity/exclusive perks — people love goods that are in short supply.
- Learn from other campaigns that have succeeded: they’ve done all the work for you to figure out what types of rewards work well. Hunt around on Kickstarter and Indiegogo.

Although we encourage you to get creative, we are a 501(c)(3) and all perks must be non-monetary in nature. For example, a tour of your lab is fine (access gift) but a t-shirt is not (monetary).

# Building an Outreach Strategy

Your outreach strategy is a critical piece of the crowdfunding puzzle. Before you begin, here is a quick exercise to get you thinking about your audience.

**People are motivated to give to my campaign because:**

## Launching Your Campaign

The launch of your fundraising period is exciting! Make sure to announce it to everyone in your networks. Here are some tips on the best ways to promote your project.

### Soft Launch

Hand-pick 15–50 people in your network who already know about your project or what you do, and who are likely to contribute once the project goes live. Start by sending an email to this inner circle. It is very important to have your first followers primed and ready to contribute right after you launch. This provides the public social proof of your credibility; other funders will follow their lead.

### The Hard Launch

Segment your contacts into smaller groups from our “network mapping” activity, and come up with separate messages that will appeal to these groups. Always be concise with your messaging, and make sure to link to your project page.

Draft messages to different groups from your network mapping exercise here: (Tip - Include a monetary ask, as well as an ask to share/promote the project if the person cannot back it at this time).

Here is a sample email to work from:

Dear Friends,

How often do you get to shake up the fashion industry on a Tuesday afternoon?

Many of you know I've been working on a fair-trade fashion project. [VOZ](#) is an ethical, innovative fashion project in Southern Chile. Drawing our name from the Spanish word for “voice,” our commitment is to empower indigenous artisans by connecting them with the global fashion industry.

How will we do it? We set up design workshops for indigenous weavers and metropolitan fashion designers to collaborate on pieces that represent Mapuche culture and appeal to modern women; and boldly market our clothing and accessories to the world, targeting the US boutique market. We're committed to doing this right: paying our weavers livable wages, using only sustainable materials, honoring Mapuche culture, and producing beautiful products for the everyday woman. We are thrilled to show off our model and designs in action in our [new video](#).

We've organized a brilliant international team of women to get us off the ground, working around the clock to make this vision a reality. **But we can't do it alone — we've just launched a crowdfunding campaign to ask our community to help us get started.** We've outlined the ways you can help below. If you plan to help, **please take action early; the more momentum we get in the 48 hours of our campaign, the much more likely we are to succeed.**

**There are lots of ways you can help:**

1. **[Make your gift today!](#)** We are appreciative of whatever you can give — really, truly. Even if you can't give right now, check out our campaign to see our new video and to learn more about our project. (See FAQ below for more about crowdfunding.)
2. **Email your support!** Forward this email to your friends, with a note that you care about the project.
3. **Facebook your support.** Join me in empowering ethical fashion with [VOZ](#) through crowdfunding: [kck.st/hHFMhR](http://kck.st/hHFMhR) Thank you! Speak Change, Wear Beauty.
4. **Tweet your support.** Join me in empowering ethical fashion with @madebyvoz thru crowdfunding: [kck.st/hHFMhR](http://kck.st/hHFMhR) Thank you! Speak Change, Wear Beauty. #madebyvoz
5. **Stay in touch.** Sign up for email updates, like us on [Facebook](#), and follow us on [Twitter](#).

I cannot thank you enough for your support on this journey, getting this powerful idea off the ground is a community effort! Thank you so much for helping make this dream a reality,

With Deep Gratitude,

Kyra

[www.madebyvoz.com](http://www.madebyvoz.com) | [Facebook](#) | [twitter](#)

## Social Media

Once you've emailed your larger network, your next step is to announce your project on all of your social media platforms, including any existing blogs or sites associated with your project. Engage your department or Center to see if they will push your campaign out during the critical first week.

You can schedule and track the reach of your social media posts using plug-ins like Hootsuite or Buffer. Create a hashtag for your project and use it in all your communications (e.g., #MadebyVozCampaign) including creating prewritten Twitter and Facebook messages in your fundraising emails (e.g., I support creative artists and local manufacturing #MadebyVozCampaign).

Seek out Twitter influencers to give you some PR. There is a free tool called [Buzzsumo](#) that searches for Twitter influencers by topic. Start by following these Twitter accounts and try to build relationships with them. If they like your campaign, they might be willing to tweet it out to their audiences. This will also link you to posts related to keywords that you search for.

Use social media platforms to **keep your community engaged**.

Here are some tips:

- Always include embed codes in your messaging (direct links to embed your project into other sites).
- Give people multiple ways to engage. For example, ask those who can't give to share the project instead.
- Use tools to manage your social media update. You can schedule your tweets and Facebook posts using Hootsuite, for example.

## Going Viral

Project creators who have a viral project are able to access new people by tapping into their networks' networks (i.e., their contacts become promoters and mine their own networks, etc.).

Think of creative ways you might get larger groups to share your project. Can you tag famous people in similar industries as your project? Are there LinkedIn groups that you can post to and ask them to share? Can you tag specific people directly in your social media posts (this will make your post show up on their feed for all of their friends to see)?

## Endorsements

Along these lines, gaining momentum gets easier when someone who is well-connected — someone with "social capital" — vouches for your project. This person can be a celebrity or an established connector.

Reach out to communities of like-minded groups and organizations. If you are developing a new device that will help the vision-impaired read webpages, get in touch with advocacy groups and the like. They might share it with their extended networks and then, all of a sudden, you've exponentially grown your reach!

# Additional Outreach

## Pitch it to the Press

You might be surprised who would be interested in hearing about your work. Writers and editors are constantly looking for new ideas — projects currently in the crowdfunding stage of development can be great fodder for stories.

Try using “Help a Reporter Out,” or “HARO.” It’s a tool that many journalists from influential publications (the *Wall Street Journal*, *Forbes*, etc.) use to find sources for their stories. You can use it to respond to requests for comments on stories in which you might be considered an expert or even a man-on-the-street source. Visit <https://www.helpareporter.com/>.

What you get out of it: if journalists use your opinion for their article piece, they might also feature a link back to your crowdfunding campaign. And you get free publicity on these high traffic sites.

## Find Influential Blogs and Sites to Cover You

Think beyond the mainstream media: you can get plenty of PR from blogs. Add comments to popular posts – especially if you see that others are already commenting. LinkedIn groups are great to post in – users frequently get email updates when new posts are featured.

## Events

Events are a great way to garner interest in your project. A great idea is to host a project launch event during the first week of your project, and again during the last week. Have laptops set up so people can donate while the event is going on. A great way to get people excited and engaged is to have a screen that projects real-time funding totals on the wall.

List any pre- and post-launch events on sites like FunCheapSF to reach a wider audience.

## Give Thanks!

Thanking people directly engenders good will — it shows you appreciate the support and makes the whole process more personal.

Thank your funders publicly — on your project page and via social media — and establish a dialogue. Facebook is a great place to say “thanks” and you are also able to directly tag your supporters and provide updates on what their gifts are covering. This is an easy way to spread the word about your campaign since now their networks will see that they were tagged. In addition, this builds credibility for your project to spiral out to a wider network. Keep this up

### Pitch Tips:

- Go after writers first, not editors.
- Find media outlets that cover work like yours; if it’s a tech solution, talk to tech writers
- Think local first: national media has to handle a lot more news than local media. But local publications and outlets will be thrilled to hear about local ideas, especially if they have a direct impact on local communities.
- Don’t pitch the fact that you are crowdfunding; pitch the idea itself.
- Try to line up a big press piece for the first week — this is when press mentions will be most valuable.

throughout your entire campaign and establish a consistent communication with your supporters.

## Campaign Launch Reminders

### Project Page Updates

Updates bring your project to life! Update your project page regularly by adding blog posts, comments, and media mentions. This is a great way to keep your followers aware of how your project is doing. Your campaign is a virtual event — publicize and celebrate accomplished and upcoming milestones (percentage of funding, number of contributors, etc.), as well as things like blog and press mentions.

### Pitch Parties

A pitch party is a great way to get some quick momentum on your project. The idea is simple – gather as many members of your team as possible in one place. For 30-60 minutes, everyone uses that time to personally email as many friends or family members as possible. Being in one place motivates everyone on the team to share the project, and can yield a great number of donations in a short period of time. Consider holding a pitch party at a local coffee shop with Wi-Fi, or order a few pizzas and invite everyone over to your place.

### Listen and Respond

If you get messages or social media comments, answer them right away. This is a great way to show potential donors that you are invested in your campaign and that you care enough to answer questions or respond to comments. The more interactive you are with a potential donor, the more likely they will want to support and share your project.

### Keep Them Talking

Find fun ways to stay relevant and keep your followers coming back by adding new content to your project page. This could come through new video updates, live events, or other imaginative short-term initiatives.

### Reminders

Don't be afraid to send multiple emails to the same people throughout your campaign. Many people will appreciate the reminder and if someone hasn't taken action on your email within 48 hours of receiving it, they likely will forget about it.

### The Finish Line

Messages during the last few days should be updated faster and delivered with more frequency. Build on your success and add a sense of urgency combined with gratitude.

**Good luck and Happy Crowdfunding! If you have any questions, we are here to help – do not hesitate to ask questions! [Crowdfund.berkeley.edu](https://crowdfund.berkeley.edu)**

## Tips for Project Promotion

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crowd·fund·ing

<sup>1</sup>kroud ɪ fəndɪŋɡ/

noun

1. the practice of funding a project or venture by raising many small amounts of money from a large number of people, typically via the Internet.
- 

### General Tips:

- When surveyed, one of the top reasons that people donate to a crowdfunding project is simply because “someone asked.”
- Crowdfunding is a two part process:
  1. Ask people to donate.
  2. Ask people to share (and sharing is just as important to help spread the word - if someone says that they can't donate, ask them to help by clicking the share button).
- 6 simple words that have raised billions for nonprofits: “Would you consider making a gift...?”
- People like to give to people, not institutions - when asking someone to donate, talk about the people impacted whenever possible. And better yet, show them with visuals.
- Use pronouns to make the ask personal and convey the sense that donors are joining your team if they contribute - phrases like:
  - “Please join *me* in making a gift...”
  - “I hope *you* would consider joining *us* by participating in *our* campaign...”
  - “*We*’re counting on *your* support to make this happen...”



- When making the case for support, include the following:
    - Who are you?
    - What are you trying to do / what will the money support?
    - Why is it important for someone to give?
  - Crowdfunding is not an “if you build it, they will come” campaign - you must be willing to spread the word to get people to donate. Donors will not just stumble upon your page and donate.
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## Emails Tips:

- Email is always the #1 driver of traffic to your crowdfunding site.
- The average person receives nearly 100 emails a day, so it's easy to get lost in someone's mailbox - and if they don't open/interact with your email within 24-48 hours, they are likely not getting back around to it. This means you can't be afraid to email the same people multiple times before they take the action that you want.
- Keep your email copy to 150 words or less - people don't have the attention span for longer emails these days.
- Don't be afraid to email someone every 5-10 days - to do this, mix and match your messaging and keep some of the emails as light updates on your campaign (see the Berkeley Crowdfunding Guide to Emailing for topic ideas).
- When possible, personalize your email as much as you can.
- Use photos sometimes to help grab the reader's attention - photos of people work great as humans are naturally drawn to look at people's eyes.
- Include a clear call to action where you are saying, “Please make a gift today.” Don't make your reader guess what you want them to do.



- Because most people have email on their mobile device, there's no right or wrong time to send an email - just make sure you vary the timing. If a Monday morning at 8am is not a convenient time for a person, email them again on another day at another time.
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## Social Media Tips:

- Facebook is the best vehicle for driving traffic to a crowdfunding site - focus here first.
- Other social media outlets are important and can act as reminders, especially when you follow up with an email or another Facebook post.
- Social media content has less of a lifespan than email, so post more frequently. Posts can be buried in someone's feed after only a few hours. Mix and match the messaging just like you would for email (and use the email guide for ideas, just keep your posts much shorter).
- Posts with images and videos take priority over plain-text posts, so always include if possible.
- Keep posts short - don't make people have to expand your post to read the entire thing - you want your call to action to always be seen.
- Ask questions or take polls using the various "like" buttons to interact with your audience.
- Tag friends in your posts - this is a great way for them to be notified immediately, but even better way to reach their networks. Don't be afraid to post directly to someone's timeline.



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## Project Updates:

- Project updates are an important crowdfunding feature to keep current donors informed on your progress but to



also provide additional information to those that might be on the fence about donating.

- It is recommended to do a project update every 7-10 days and each update should always include:
  - Progress update;
  - Thank you to current donors;
  - An “ask” to share the project page;
  - New content to help build the case why donating is so important. This confirms a donor’s choice to give and helps build the case for new donors.
  
- Always try to add a new photo, video clip, link to an article, or something compelling to make your update interesting.
  
- Remember - when you do a project update in ScaleFunder, current donors will automatically be emailed your update unless they have opted-out. This is a great way to keep them posted on the progress and encourage them to help spread the word.

## Crowdfunding Checklist | April 2018

**NOTE:** Failure to make these deadlines may result in your project not being activated for this round of crowdfunding projects.

### Mandatory Due Dates:

- FEBRUARY 20** – If you haven't already, establish a **LEADERSHIP TEAM**, a devoted group to help create and promote your project. The more people on your team, the more money you will raise. **REVIEW A CAMPAIGN** you think is effective, and one you think is not, to better craft your materials.
- FEBRUARY 22** – Review the **CROWDFUNDING TOOLKIT** and **ONLINE RESOURCES** provided.
- FEBRUARY 26** – Complete the **GOAL-SETTING EXERCISES** to map out your network's potential (see toolkit), and adjust your goal, if needed. Remember, it's better to start at a modest goal and increase later with a stretch goal.
- FEBRUARY 28** – Finalize your **BUDGET BREAKDOWN** and **FUNDRAISING GOAL**.
- MARCH 5** – Write the **PROJECT DESCRIPTION**, your project's story, for your crowdfunding page. Use your project pitch from your application as a starting point.
- MARCH 9** – Come up with the non-monetary **PERKS** you will use to incentivize and thank donors.
- MARCH 14** – Create team **BIOS** (4 maximum), gather **MAIN AND TILE IMAGES**, write a **SHORT DESCRIPTION**, and design a **BUDGET BREAKDOWN** graphic. Add these to your crowdfunding page.
- MARCH 20** – Write a script, film, and edit a 1-3 minute **PROJECT VIDEO** that tells your story and makes "the ask." Your video should be completed by this date.
- MARCH 22** – **Complete the PROJECT PAGE on the Berkeley Crowdfunding platform (ScaleFunder) for initial review.** At this point, your perks, bios, video, project description, and other items should all be finalized. This is crucial so we can review, test, and adjust settings on your page if needed. **IMPORTANT: If you miss this deadline, you may be ineligible to crowdfunding during this round.**
- MARCH 26** – Build an effective **MARKETING STRATEGY** that involves targeted email and social media outreach and promotion, among other methods. You should also have your **EARLY SUPPORTERS IDENTIFIED** and your **CONTRACT SIGNED**.
- MARCH 27** – **SOFT LAUNCH!** Contact the people in your network you know will support your project to build a base of donors and dollars before your full launch. If you can reach 20% of your goal during these first few days you will be more likely to hit your overall goal. This step is extremely important because no one wants to give to a campaign that looks like it might not succeed.
- APRIL 1** – **FULL LAUNCH!** Contact everyone in your network by email and post to social media that your project has just launched. You should already have a handful of donations on your page in order to be successful.
- THROUGHOUT YOUR CAMPAIGN** – **PROMOTE YOUR PROJECT** through your personal networks with emails, social media, and other outreach methods. Encourage friends and family to help **SHARE** your page. Provide **PROJECT UPDATES (3-5)** to keep donors and others informed on your progress. This will help potential donors in their decision to give and will keep current donors more engaged and likely to share.
- AFTER YOUR CAMPAIGN ENDS** – **THANK YOUR DONORS** for their generosity and keep them updated on your project status!

### Go Above and Beyond – Reach your goal faster with these strategies!

- Throw a **LAUNCH PARTY** or another event during the course of your campaign.
- Host a **PITCH PARTY** with your entire team, where everyone gets together for an hour and contacts everyone they know – this helps build momentum quickly. Plan on sending emails, texting, posting on social media, and using Facebook Messenger.
- BUILD AWARENESS** by reaching out to social media influences, communities of like-minded groups and organizations, blogs, and others for endorsement throughout your campaign. Even if they aren't able to support your project, they might be willing to spread the word.
- PITCH TO THE PRESS.** With the right messaging and outreach strategy, you could get mentioned in major media outlets and publications.
- Ask your donors to click the **SHARE BUTTON** on your project page to help you spread the word.