



Patronicity

CROWDFUNDING STRATEGY GUIDE

Building vibrant communities





START PLANNING A SUCCESSFUL CROWDFUNDING CAMPAIGN!

New to crowdfunding? Crowdfunding is the process of gathering a community to provide financial support for a project within a set period of time. Our crowdfunding platform specializes in community-based projects that empower communities to transform and invest in themselves. Communities identify local projects and are supported through community buy-in at the grassroots level. We believe in crowdfunding because it's accessible, decentralized, a great storytelling tool, and facilitates community engagement. Learn more about crowdfunding on [Patronicity Resources!](#)

We built this guide based on tips and feedback from our most successful campaigns. Our team will coach you through all the components of a crowdfunding campaign to set you up for success, but we wanted to provide you with some tips and best practices to get you started. Don't stress! We will be with you through the entire process.

Throughout this guide, we will provide links to various templates, examples, and guides to help make your crowdfunding experience as smooth as possible.

There are four key phases of your crowdfunding process. We will primarily be looking at the ways in which you can best prepare for your campaign in **PHASE 1**; however, the last two pages of this document act as a timeline and a checklist that you can reference as soon as you start your campaign.

PHASE 1

Preparing
for Your
Campaign

PHASE 2

Launching
Your
Campaign

PHASE 3

During
Your
Campaign

PHASE 4

The Final
Push

PHASE 1: PREPARING FOR YOUR CAMPAIGN

TASKS AND BEST PRACTICES

You will work with your PATRONICITY COACH to develop a communications and outreach strategy suitable for your community and organization. Below, we've divided up our best practices into these clearly defined tasks and roles to help you succeed. You can pick and choose what works for you, but we do recommend getting a team together and breaking down each set of tasks if possible!

We also have a handy dandy checklist of to-dos for a sure-fire successful campaign at the end of this document that you can use to cherry pick tasks for team members.

Learn more about [how to build a powerhouse crowdfunding team](#) on Patronicity Resources.

CAMPAIGN MANAGEMENT



Ensuring there is a point person for the campaign and keeping in contact with the project coach

Organizing tasks and timelines for everyone on board

Creating a target list of patrons, supporters, and potential influencers

MARKETING COORDINATION



Creating and implementing a social media strategy and calendar and managing social media platforms

Sending out appeal letters and personalized fundraising emails

Creating or coordinating the creation of flyers, posters, and other materials

EVENT COORDINATION



Planning, implementing, and attending campaign fundraising events

Creating partnerships with community organizations who can host events, donate, or share the campaign

DOING THE BOOKS



Working with project or organization's budget

Tracking donations as they come in and sending thank you notes

Managing offline donations on backend and keeping track of patron rewards



TEAMS, NETWORKS, AND INFLUENCERS

Also recruit community members like ARTISTS, EDUCATORS, SMALL BUSINESS OWNERS, and ELECTED OFFICIALS to be your influencers and help you push your campaign!

IDENTIFY POTENTIAL SUPPORTERS

Early on in the process you should have an idea of who and what people and organizations in your area might support you. When you think about who in your community you should ask for support, you should consider the groups listed below. For more guidance, read more about [how to identify funding sources for your project](#) on Patronicity Resources.



EXISTING
RELATIONSHIPS
WITH FAMILY
AND FRIENDS



LOCAL
FOUNDATIONS,
HOSPITALS,
VOLUNTEER GROUPS



CITY HALL, CITY
REDEVELOPMENT
COMMISSION



THE CHAMBER OF
COMMERCE,
LOCAL/COUNTY
TOURISM ORGS



HISTORICAL
SOCIETIES,
SCHOOLS,
ALUMNI GROUPS



LARGE
CORPORATIONS,
SMALL BUSINESS
OWNERS



RELIGIOUS ORGS,
LOCAL SPORTS
TEAMS, SENIOR
CENTERS, BANKS



ANYONE LOCATED
ADJACENT TO YOUR
ORGANIZATION OR
PROJECT SITE!

GATHERING DONORS & INFLUENCERS

It's important to have a detailed plan in place for how you are going to raise your funding before your campaign launches. The first place to start is to think about who in your community might be able to provide donations, especially at higher levels. If possible, try to have one or more donations committed or on-hand before your launch day. A few things to keep in mind:

- Consider you or your organization's reach first. With whom do you already have connections? Would they be willing to support your work?
- Connect with other individuals or organizations in your area who you think would be invested in supporting the type of work you're doing.
- See how many newsletters, email lists, and social media accounts you can connect with to share your campaign. Remember: the more donors the better!
- Here are some other ideas for [how to amplify your crowdfunding campaign!](#)

MAKE A CAMPAIGN CALENDAR

Create a timeline of who you will reach out to and when you (and/or whom your team members) will reach out to each of the individuals or community groups, week by week. Distributing the outreach throughout your campaign will help you feel less overwhelmed during your campaign.

[Here is an example of what a campaign calendar might look like.](#)

Be sure to check your existing community calendar and consider local events when you're deciding on your own campaign timeline! Community events can create great opportunities for local fundraising.

Balance reaching out to:

1. People who you're confident will support your campaign, and
2. People and organizations you're less connected with, but who you're hoping will provide large donations.

The first group will help you land early wins, which are very important for getting the ball rolling in your campaign. But you might rely more on the second group for donations, and you need to give yourself enough time to garner that support. **New to asking for money?** [Learn how to make your crowdfunding ask.](#)

CREATE OUTREACH MATERIALS

Below is a collection of suggested materials and strategies that you can consider including in your campaign. Before you launch, there are a variety of printed and online outreach materials that you can prepare. Your campaign will last 30 to 60 days, which doesn't give you a lot of time to create materials while you are crowdfunding so it'll end up being really helpful to already have some of these items on hand!

- [Solicitation emails](#) and texts asking people to donate to the crowdfunding campaign.
- Personal or group emails asking people to spread the word.
- Thank you emails to patrons, including encouragement to share about the campaign.
- eNewsletters for your organization and other local organizations.
- Social Media posts: Facebook, Twitter, etc. about the crowdfunding campaign.
- Handouts, such as posters, postcards and business cards with the project page URL.
- Articles or press releases in the local paper or local blogs.

Scan me!



PRO TIP: Turn your [Campaign Short URL](#) into a QR code that you can display around town, in your organization, or on social media! A quick "QR CODE" Google search will bring up a load of helpful and FREE QR code generators. Free services like [Canva](#) can also help you brand your campaign materials.

DEFINING GIVING LEVELS AND REWARDS

The [Giving Levels](#) included on your page will help patrons determine what dollar amount to they want to give. They will see these Giving Levels as selectable buttons when checking out during the support process. You need to make sure these levels are cost effective to you but incentivize the patron to give at that next higher level.

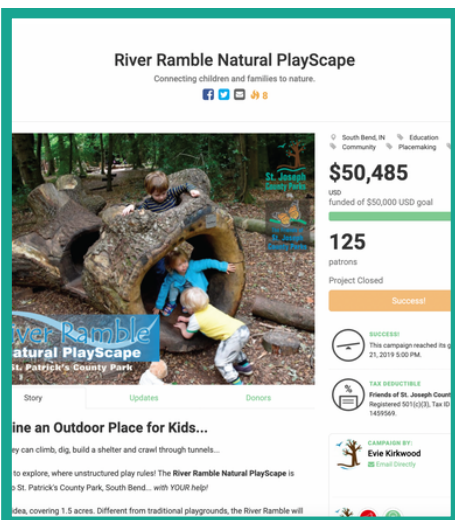
THE APPROACH

You want to really focus on getting more people to support your project and donate to your campaign when you're deciding what giving levels you want to include. That being said, make sure that what you're offering is something that you and your organization or project team can afford! At the end of the day, patrons will always have the option to give whatever amount they want.

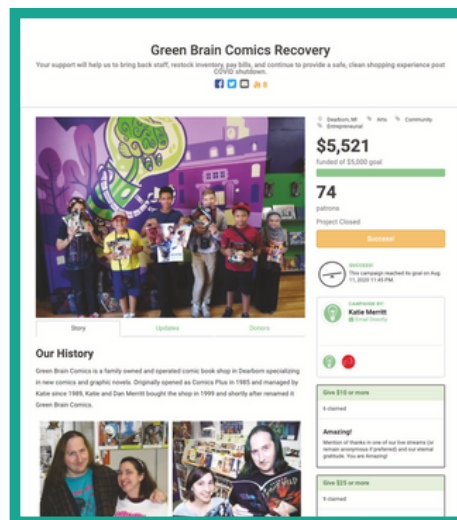
A FEW TIPS:

- We recommend having at least five giving levels (\$20, \$50, \$100, \$500, \$1,000, etc.)
- Try making their titles fun or clever and related to your project, your organization, or your community (ex: if you are running a campaign to start a pollinator garden, name your giving levels after local pollinators!)
- Make sure your "rewards" are easy to fulfill and cost effective to you
 - ex: offer pickup of rewards at a location vs. shipping, make the giving level triple the cost of the "reward," offer low or no cost options like coupons or gift cards
- Consider creating giving levels based on the items you want funded! Pull directly from your budget to give your patrons a tangible item to "fund."
 - ex. if you are planting trees as part of your project you can have a giving level that would total the costs of trees or the cost of an individual tree

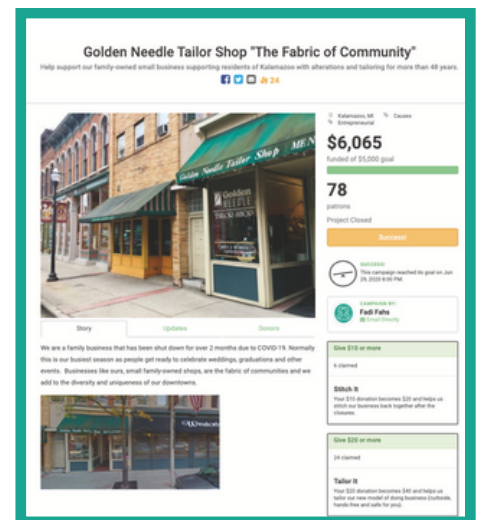
Here are a few links to some campaign pages we love with effective Giving Levels! You can always look at current and past projects on [Patronicity.com](#) for more inspiration



RIVER RAMBLE
NATURAL PLAYSCAPE



GREEN BRAIN
COMICS RECOVERY



GOLDEN NEEDLE
TAILOR SHOP

IDEAS FOR GIVING LEVEL REWARDS

This is a great chance to get creative and motivate patrons to support your project! **Here are some examples of the types of giving levels that have led project leaders to success:**

Give \$25 or more
24 claimed
Blue Dasher Dragonfly
These dragonflies are everywhere flying along the river! Lots of dragonflies indicates a healthy ecosystem!

Give \$50 or more
29 claimed
Painted Turtle
Turtles bask on sandy stretches of the river. Your gift will purchase a big bucket of sand and amenities for the water and sand play area.

Give \$100 or more
34 claimed
Great Blue Heron
Great Blue Herons perch on logs and rocks in the river. You'll help provide one of the many logs and rocks kids can climb on or build with!

Give \$250 or more
3 of 50 claimed
Green Frog
These frogs can be found in backwater wetlands near the St. Joseph River. Your gift will help create the Wetland Overlook and the Mini Wetland at the entrance!

Give \$500 or more
9 of 8 claimed
Belted Kingfisher
Kingfishers excavate nest cavities in river banks. Eight kingfishers can create features for kids to crawl through!

Give \$1,000 or more
5 of 8 claimed

Gratitude: A circular image showing a group of people sitting at an outdoor table under a pergola, enjoying a meal.

Donor Recognition Events: A circular image showing a person wearing a blue t-shirt that says "THANK YOU To our community friends" with logos for various organizations.

Tangible Rewards: A circular image showing a blue plaque mounted on a wall, listing names of donors and their corresponding rewards.

Coupons and Discounts: A circular image showing a person wearing a blue t-shirt that says "THANK YOU To our community friends" with logos for various organizations.

Gift Cards: A circular image showing a person wearing a blue t-shirt that says "THANK YOU To our community friends" with logos for various organizations.

Naming Rights: A circular image showing a person wearing a blue t-shirt that says "THANK YOU To our community friends" with logos for various organizations.

Dedication Plaque or Mural Wall: A circular image showing a person wearing a blue t-shirt that says "THANK YOU To our community friends" with logos for various organizations.

Experiential Rewards and Events: A circular image showing a person wearing a blue t-shirt that says "THANK YOU To our community friends" with logos for various organizations.

GRATITUDE

Handwritten thank-you card, social media shout out, recognition on website, etc.

DONOR RECOGNITION EVENTS

Invite your donors to an event just for them!

TANGIBLE REWARDS

Shirt, sticker, tote bag, mug, etc.

Note: this will work best if you already have merch on hand and don't have to spend extra funds.

COUPONS AND DISCOUNTS

Contribution of \$250 gets a 25% discount at a supporting local business, restaurant, etc.

GIFT CARDS

Give \$100 and get a \$25 gift card, etc.

NAMING RIGHTS

An element of your project that can be named after a very generous patron

DEDICATION PLAQUE OR MURAL WALL

A plaque around your project that lists all/some of the patrons at different levels

EXPERIENTIAL REWARDS AND EVENTS

Behind-the-scenes visit as project evolves, coffee with the project team, a 30 minute Q&A session, etc.

PRO TIP: Download a list of your supporters and their selected giving levels under the DONORS tab on your Patronicity page. You are responsible for fulfilling the rewards listed in your giving levels, so use this document to create a plan and get your supporters their gifts!





CAMPAIGN TIMELINE & CHECKLIST

There are four phases of your campaign that you need to plan. Each phase is broken down in the timeline below.



CAMPAIGN MANAGEMENT

MARKETING COORDINATION

EVENT COORDINATION

DOING THE BOOKS

TEAM, NETWORK, & INFLUENCERS

Tasks are color-coded based on who should complete them.

Each task is assigned based on the color box associated with each set of best practices. Print off your list and check things off as you and your team finish each task!

PHASE 1 Preparing for Your Campaign

- ☐ **CREATE A TEAM** Assemble and prep your team, assign roles, and create a detailed timeline.
- ☐ **CONTACT LISTS** Create an Influencer List including connectors, networking gurus and media, who can help spread the word about your campaign. Create a "hit list" of potential donors and event hosts.
- ☐ **DONORS** Create a target donor list and confirm initial donors from your team's network.
- ☐ **CAMPAIGN CALENDAR** Create your team's Campaign Calendar to figure out who is doing what when!
- ☐ **NEWSPAPERS** Draft and confirm press release for post-launch.
- ☐ **EMAILS** Draft email templates (e.g. mass and personal emails, donor "Thank You").
- ☐ **SOCIAL MEDIA** Schedule social media posts for the entire campaign (daily or several times a week).
- ☐ **ENEWSLETTERS** Prepare an eNewsletter for your organization. Also, if know of other organizations who have an eNewsletter ask if they would be willing to add it and/or share on social media.
- ☐ **PRINT MATERIALS** Prepare any print materials that work when to get the word in your community.
- ☐ **POSTERS + POSTCARDS** Always include project URL on your materials.
- ☐ **MAIL** Prepare mailed donation cards to go out early that include your project's URL.
- ☐ **PLAN AN EVENT** and start outreach efforts (launch party, tabling at events, going on the radio, etc.).
- ☐ **IDENTIFY EVENTS** happening in your community and ask if you can join to talk about the project.
- ☐ **BUDGET** Create a budget for the project and set the project's fundraising goal.

PHASE 2 Launching Your Campaign

- ☐ **ENCOURAGE** everyone on your team and in your network to donate and share the campaign.
- ☐ **ANNOUNCE** Send mass emails, press releases, eNewsletters, mailers and post on social media.
- ☐ **EVENTS** Host a launch party or event to generate excitement and gain support, have an “ask” for people to donate or ask them to share the campaign with their networks.
- ☐ **PERSONAL EMAILS** All of your team members and influencers should personally donate to get the campaign started and share the project information with their networks via email or social media.

PHASE 3 During Your Campaign

- ☐ **MEET + CHECK-IN** Continue to have team meetings and review your outreach strategy.
- ☐ **EVALUATE** your communication and outreach strategy throughout the process to see what works and what doesn't work and adjust your strategy as needed.
- ☐ **FOLLOW UP** Continue asking partners to share materials or even join the project team if they have needed expertise.
- ☐ **PRESS** Follow up with TV and radio news stations or other media sources to run stories.
- ☐ **SOCIAL MEDIA** Continue posting on social media with new content/message.
- ☐ **TAILOR OUTREACH** Create a new mass email blast each week tailored to individual networks.
- ☐ **PRINT MATERIALS** Continue to distribute print materials throughout the campaign.
- ☐ **PERSONAL OUTREACH** Make personal calls and send emails to potential new patrons.
- ☐ **THANK YOU NOTES** Send personalized “Thank You” emails to patrons with an ask to share on social media or with a friend if they haven't already.
- ☐ **EVENTS** Host and/or join events or speak at local meetings throughout the campaign.
- ☐ **MANAGE ONLINE AND OFFLINE DONATIONS**, send patron thank you's, and continue stewardship.
- ☐ **OUTREACH** All of your team members and influencers should continue to share the campaign with their networks via email or social media.

PHASE 4 The Final Push

- ☐ **TEAM CHECK-IN** Get everyone together to make sure everyone helps with the final push needed for the crowdfunding.
- ☐ **CALL OR EMAIL** any straggler patrons who said that they would donate and need reminding.
- ☐ **POST** final social media posts (“last day to donate!” etc.).
- ☐ **EVENTS** Host a celebration/wrap-up party to help bring in the final donations.
- ☐ **PREPARE REWARDS** for patrons who met each giving level.
- ☐ **FINISH** “Thank You” emails.
- ☐ **ONE FINAL PUSH** All of your team members and influencers should make one last appeal to their networks via email or social media.



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