



CROWDFUNDING Strategy Guide



Begin planning a successful crowdfunding campaign.

Our team will coach you through all the components to set you up for success, but these are the items you should be considering as you start the crowdfunding process. **Please note: the guidance given below assumes you already have a project picked out and fully or nearly planned out.**

When you start your campaign, your **Project Coach** will direct you towards resources that will help make your crowdfunding experience as smooth as possible. If you need help navigating how to fill-in your project page, make sure to reference the **Project Page and Website Navigation Guide**.

We will primarily be looking at the ways in which you can best prepare for your campaign; however, the last two pages act as a **timeline** and a **checklist** that you can reference as soon as you decide to start your campaign.

There are **four key phases** of your crowdfunding process:

PHASE 1 Preparing for Your Campaign

PHASE 2 Launching Your Campaign

PHASE 3 During Your Campaign

PHASE 4 The Final Week

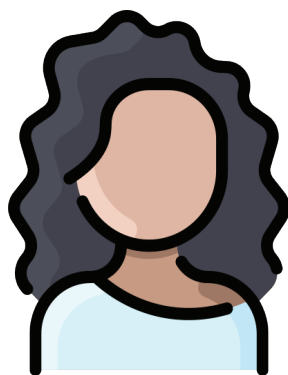


Preparing for Your Campaign

Establishing a Team & Assigning Tasks

Your team will work together, with assistance from your **Patronicity Coach**, to develop a communications and outreach strategy suitable to your community. It's important to make roles and responsibilities very clear from the beginning. Below are some examples of the types of team members you'll want to have:

CAMPAIGN MANAGER



The point person for the campaign - keeps in contact with the project coach

Organizes team check-ins, tasks, and timelines

Creates target list of donors, supporters, and potential influencers

SOCIAL MEDIA DIRECTOR



Creates and implements a social media strategy and calendar

Manages project/org's social media platforms

Encourages and reminds network to share project

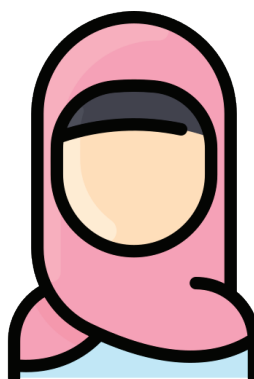
EVENT COORDINATOR



Plans, implements, and attends campaign fundraising events

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

TREASURER



Works with project or organization's budget

Track donations as they come in and sends thank you notes

Manages offline donations on backend and keeps track of donor rewards



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

Identifying Potential 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.

POTENTIAL DONOR GROUPS: When you think about who to ask for donations and other forms of support in your community, you should consider:

- Local foundations, hospitals, volunteer groups
- City hall, city redevelopment commission
- The chamber of commerce, local/county tourism organizations
- Historical societies, schools, school alumni groups
- Large corporations, small business owners
- Religious organizations, local sports teams, senior centers, banks
- Anyone located next to the project site
(they shouldn't be surprised by your campaign - talk to them early)

Make a Campaign Calendar

Have team members create a timeline of who you will reach out to and when you'll do the outreach, week by week.

Balance reaching out to people who you're confident will support your campaign with 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.

Start Outreach Early

Connect with potential donors/influencers in the month before you launch to ask for their support. This will make donors feel special (because they know about the campaign before anyone else in the community) and help ensure that you have a few donations lined up for your first day.



Defining Giving Levels and Awards

Providing a variety of **Giving Levels** is an easy way to demonstrate to donors that you appreciate all levels of support. This can be especially important for donors who can only give \$5, \$10 or \$20, amounts that are not commonly seen as impactful in larger campaigns. **If you provide creative and unique giving levels for higher amounts, donors might be convinced to donate more generously than they otherwise would.** At the very least, the Giving Levels provide you an opportunity to think outside the box and be clever in your project's presentation.

Keep in mind...

Impact Rewards are those that let people know what their donation will provide to the project. This is a great tool to use if you can't or don't want to provide a physical reward. Example:

Boxwood Level – donating at this level will allow the project team to plant one boxwood.

Day Camp Level – donating at this level will provide one day of camp to local youth.

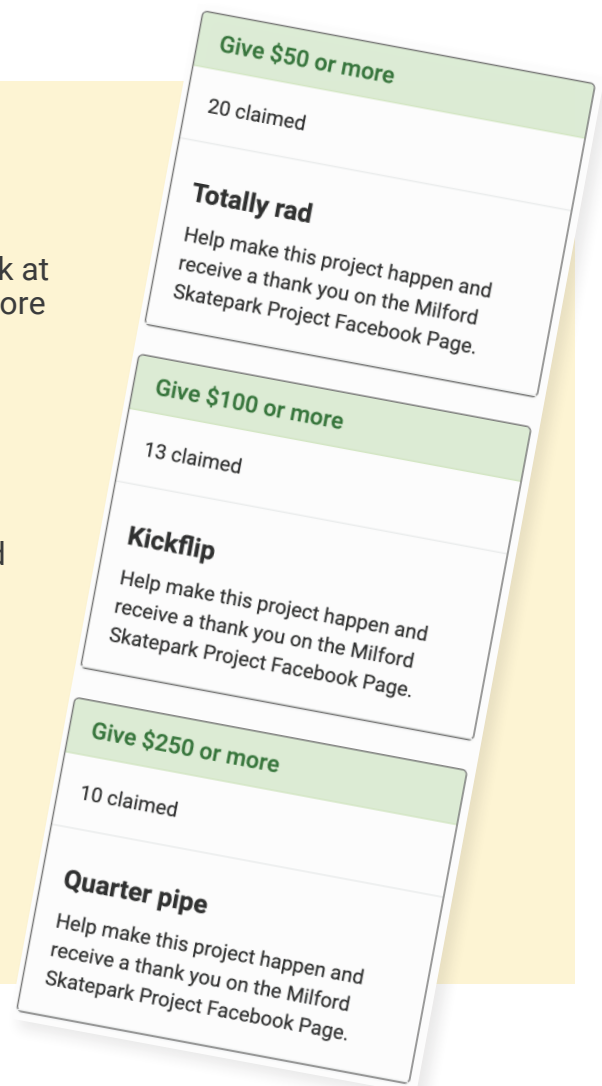
Try to identify rewards that are **free or no cost for you to produce**. Be careful with the amount of time and money it takes to make or ship rewards.

Schedule pickup days when donors can get their rewards themselves, rather than mailing items.

Ideas for Giving Level Rewards

This is a great chance to get creative and motivate donors to support your project! You can always look at current and past projects on [Patronicity.com](https://www.patronicity.com) for more inspiration.

- 1 Gratitude and Acknowledgements: FREE**
(handwritten cards, recognition on social media)
- 2 Experiential Reward: FREE**
(free class with a local artist, free tickets, reduced price membership, free dinner, rental, or use of community space)
- 3 Naming Reward: FREE (sometimes)**
(all or parts of a space, plaques, bricks, etc.)
- 4 Tangible or Material Awards**
(shirts, mugs, pens, stickers, artisanal goods, books, sponsored gifts, art piece from a local artist, etc.)



Creating Community Outreach Materials

Below is a collection of suggested materials and strategies that you should 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.

Have these materials on hand before launch day:

- **Solicitation emails** asking people to donate to the crowdfunding campaign.
- **Personal or group emails** asking people to spread the word.
- **Thank you emails** to donors, including encouragement to share about the campaign.
- **eNewsletters** for your organization's 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.

Budgeting and Financial Planning

TARGET DONOR AMOUNTS: Some projects have found it useful to organize their target donor list by the amounts they are hoping to receive. For example, for a \$50,000 campaign, you might come up with a target list similar to this.

\$10,000	2-3 donors	\$1,000	5-12 donors
\$5,000	3-5 donors	\$500	6-15 donors
\$2,000	4-8 donors	\$100	10-25 donors

That being said, craft a budget and know exactly how much your project will cost so you are able to plan accordingly. Here is a **sample project budget** that you can use to structure the budget for your project.





Campaign Timeline and Checklist

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



Tasks are color-coded based on who should complete them. Each task is assigned based on the color box associated with each team member. 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** Confirm initial donors from the team’s network and close partners.
- ☐ **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 donors.
- ☐ **THANK YOU NOTES** Send personalized “Thank You” emails to donors 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 donor thank yous, 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 Week

- ☐ **TEAM CHECK-IN** to make sure everyone helps with the final push needed for the crowdfunding.
- ☐ **CALL OR EMAIL** any straggler donors 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 donors 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.