

# UC Riverside Crowdfunding Guidelines



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## WHAT IS UCR CROWDFUNDING?

UCR Crowdfunding is an online platform to help students, faculty, and staff raise money for specific projects through their personal networks, communities, and shared-interest groups. It is similar to Kickstarter or GoFundMe, but exclusively for the UC Riverside community. This is the only authorized crowdfunding platform for gifts to UCR, and gifts through the platform are designated to UCR Foundation fund and administered by campus departments.

Please be advised that once you have completed the application process, you and your team will be required to attend an interview meeting with representatives from the Office of Annual Giving. If approved, a representative from Annual Giving will be in contact to help finalize a goal, develop a project page, create a marketing plan, and provide consultation throughout the process.

## REQUIREMENTS FOR ELIGIBILITY TO USE UCR CROWDFUNDING.

All projects posted on UCR Crowdfunding must meet the following eligibility requirements:

- Authorized by the Office of Annual Giving;
- Fundraising for an existing UCR foundation fund;
- Must meet the IRS definition of a charitable gift;
- All projects must have an academic component; If you are a student organization the primary mission of the organization must be academically focused;
- To ensure that all donors' intentions are met and to limit confusion for our donors, all project participants must ensure that all gifts made in support of your UCR crowdfunding project will be deposited into the fund for which the money was raised; and used as stated in the project description;
- No gift can be designated for a specific individual;
- Consist of project leaders that are willing to create and market promotion materials before, during and after the campaign;
- Raise 30% in the quiet phase before launching

## PROJECT CONTENT

All project content must represent UC Riverside in a positive light. Please ensure that both your video(s) and your content speak to how this project will benefit the University and/or the general University community. You should also be mindful of people, businesses, or organizations that you mention in your description and/or video(s). Make sure any other affiliates know you are mentioning them. If you have previously received grants or donations from a foundation, please obtain their permission first before mentioning their name and gift in your description and/or video.

Note that many foundations have special publicity clauses which require their review and approval of such material.

Videos–All videos must be posted to YouTube or Vimeo (this is our required platform due to music right issues, as well as closed captioning capabilities). Videos should also do their best to adhere to the [UC Riverside branding guidelines](https://brand.ucr.edu/) available at <https://brand.ucr.edu/>.

Project Description Copy–All projects will be reviewed for spelling, grammar and use of the UC Riverside style. Adherence to style will expedite the review process. Campaigns with a word count of approximately 300 words typically raise the most money.

## PROJECT REVIEW

All projects will be reviewed by the Office of Annual Giving for the following:

- Video and Copy: Will be reviewed for compliance with UCR branding.
- Project Description: Will be reviewed to ensure that the project described fits with the uses and purposes of the fund the project will benefit.

## PROJECT GOALS

Crowdfunding projects should set goals that may be a stretch but are ultimately attainable with a solid marketing plan. Asking for too much or too little can affect your project's chance for success.

Each team member should compile a list of **at least** 25-50 close contacts with a potential giving capacity of \$50 or more to e-mail about the project. *Please note: University faculty and staff are not to be solicited unless a personal relationship exists with a faculty or staff member.* Gathering pre-commitments from these contacts will give your project momentum in the soft launch and early days of your campaign. **We have found that each personal e-mail sent equates to roughly \$5 in donations to your project, so this is a good place to start when setting your goals based on the amount of outreach your team will be able to execute.**

All goals will be established in collaboration with the Office of Annual Giving. The Office of Annual Giving may adjust goals that do not seem attainable or do not have a solid marketing plan. Any changes made by the Office of Annual Giving will be communicated to the Project team before the

project's launch. The Office of Annual Giving will release all funds raised to the project regardless of whether the goal is met or not.

## MARKETING PLAN

A successful crowdfunding project has a marketing plan! Before your project launches, identify stakeholders who will give to and promote your project. Projects are more likely to succeed once 40 percent of your goal is in the door, so be sure to identify people who will give before you launch and get their gifts in within the first week.

According to GoGetFunding.com, campaigns with a day-to-day marketing plan raise 180 percent more than those without. This includes asks, emails and reminder emails, thank you messages, etc. Your marketing plan should include personal contact, phone calls, e-mail, and social media.

You will use your personal e-mail account to contact people you know, as this is the most effective method to get people to donate. As a reminder, do not solicit faculty and staff unless you have a personal relationship with them.

## PROJECT TIMEFRAMES

The ideal project will be 30-45 days in duration. This gives people time to get the word out about your campaign while also instilling a sense of urgency, which is an important part of this fundraising tool.

The Quiet Phase (4-6 weeks prior to project launch)

Creating and promoting a crowdfunding project requires considerable time and effort from all members on your team. Successful teams divvy up the workload, communicate regularly, and are committed to put forth the work needed during all aspects of the campaign. A team with at least three dedicated members is recommended, but the more people, the more successful you will be.

1. **Form a team.** Once a team is established, assign each person his or her responsibility.
  - a. Project Team:
    - i. 3-5 people
    - ii. Effort Level: Fully Engaged

- iii. The Project Team needs to be able to dedicate 45 minutes every day in quiet and active phases, as well as attend scheduled meetings with the Office of Annual Giving.
  - iv. It is imperative that your Project Team be willing to commit to work every day throughout the quiet and active phases, as no crowdfunding project is successful without the proper utilization of a team effort.
- b. Promoters
  - i. 8-10 people minimum
  - ii. Effort Level: Minor – Moderate
  - iii. Promoters are close to the project but not direct beneficiaries. They often have channels into school media and large social networks. They should have the ability to dedicate 30 minutes per day during the quiet and active phases.
- 2. **Keep the team organized.** This is best done with weekly meetings; one meeting per week in the quiet phase, and one to two meetings per week throughout the active project campaign. The Project Team should also spend approximately 45 minutes per day during the quiet and active phases of your campaign; working on the project, either through updates, monitoring donations, or completing outreach tasks.
- 3. **Set a realistic goal.** Setting a realistic goal for your crowdfunding project is important. If you reach your goal, donors will be more likely to support your team again in the future. Additionally, it allows your donors to feel like they had an active role in bringing your project to life. It is always better to start with a lower goal and to create stretch goals to keep the momentum up during your month-long campaign.
- 4. **Build potential donor list.** Build your email lists of potential donors to the campaign: friends, family, teachers, doctors, etc. **Project team and promoters are critical at this stage!** The size and makeup of your email list will play a role in the success of your project. (The larger the list and more accurate the contact information, the greater the opportunity to raise funds)

**Potential Donor List** - Structure and organize your donor list in the following way:

E6							
	A	B	C	D	E	F	G
1	first_name	last_name	email	cell_phone	Text	Email	Follow Up
2	Scotty	Highlander	<a href="#">scottyhighlander</a>	9518270000	Yes	No	
3							
4							
5							

\*Note that your donor list will be uploaded as an excel sheet to your application.



5. **Facilitate outreach to potential donors.** We recommend that the Project Team personally contact at least 50 people with a giving capacity of \$50 or more via e-mail prior to your project launch to attain pre-committed donations that will fuel the project's momentum in a soft launch.
6. **Build content.** The content of your project will consist of the following elements:
  - a. Creating Video Content
    - i. Main project page video: 30-90-second video explaining your project. Video does not need to be overproduced.
  - b. Creating Content for Project
    - i. Project Title
    - ii. Short and Long Description
    - iii. Email Ask
    - iv. Follow-Up Email
    - v. Social Media Links
    - vi. Thank You Email and Letter

#### Active Phase (30-45 Days)

Below is a sample timeframe with specific responsibilities that must be completed during this phase to position your campaign for success. Following these responsibilities will give you and your project the best chance to reach all goals.

- First 24 Hours – Campaign Launch Announcement
  - When your campaign first goes live, send out an email to announce your project and your goal. Ask donors to join your cause by making a gift and helping to spread the word. "As you may know, I am part of the \_\_\_\_ group at UC Riverside. Our primary mission is \_\_\_\_\_. We are hoping to raise \$XX this month in order to \_\_\_\_\_. Can you make a gift to help support our campaign? We would love to count you as one of our generous donors and be sure to share our page with your friends! Visit \_\_\_\_\_ to learn more and to make your gift."
  - Publish posts about your campaign to their large social media networks or their local media outlets (school newspaper, blog etc.)
- One Week Down:
  - Now that you are a week into your campaign, send another email that provides an update on the status of your fundraising. "Wow, I can't believe we're already a week into our campaign! So far, we have raised \$XX from XX generous donors. If you haven't contributed yet, there is still time! Please visit \_\_\_\_\_ to make your gift today and to share our project."
- Halfway There:

- This is really where you can start stressing the urgency in your messaging. Provide a status update on how much is still needed for you to reach your goal. Ask donors to chip in to help you reach your goal. "We are now at the halfway point of our fundraising campaign – there's just two more weeks to get involved! As of this morning, we are at XX% toward our goal of \$XX. We need as much support as possible to be able to \_\_\_\_\_. Can you make a gift to get us a bit closer? Thanks for your support and please be sure to share our project!"
- One Week to Go:
  - Announce that you only have one week left to make your project happen. Focus on the timing and your goal. "We need your help! We only have 1 week to raise our final \$\_\_ in order to \_\_\_\_\_."
- One Day Left:
  - This is it. The last chance for donors to give. Let them know that it's now or never. Be sure to celebrate the success of your campaign regardless of the progress to goal. Tell your recipients that you would love to count them as one of your general donors.
- Every Day Responsibilities
  - Check donor information through the "Donations" tab. Here you will find a list of the people who have already donated. If you see a donor from your email list, make sure to take the name off any list of potential donors, to cease contact during donor updates. The member of your group who initially contacted that donor should send a personal thank you e-mail.
  - Check goal levels against your pre-scheduled email updates.
  - Mail out thank you notes to each donor. Annual Giving will provide thank you cards.

### Stretch Goals

- Should your project raise the amount of money to reach your initial goal with ample time left in your campaign, it is recommended that you implement a stretch goal that is crafted in your quiet phase. In your stretch goal messaging, you need to name a new fundraising goal, as well as be able to describe the additional impact that money will have.

### Post Campaign

- After 1 Week
  - Make sure you are up to date on your cross references of donations on your email list.
  - Review your email list and send a follow-up email to those that have not donated.
- End of Campaign



- Make sure to send a final, thank you email/update to all donors in the active phase, highlighting the impact the money you raised will have and the tangible items it will buy that benefit your project's mission.

#### OTHER THINGS TO KNOW

- The minimum gift through UCR Crowdfunding is \$5.
- There is a five percent gift processing fee for each gift.

#### CONCLUSION:

An important thing to remember when selecting projects is that crowdfunding requires a dedicated amount of effort to drive a campaign. Project Teams should be ready and willing to spend an average of one hour per day during the active launch cycle in the promotion of their projects. Educating potential candidates on the effort required is a great way to filter passionate advocates from passive campaigners.

#### QUESTIONS?

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