# University Of Wisconsin-La Crosse
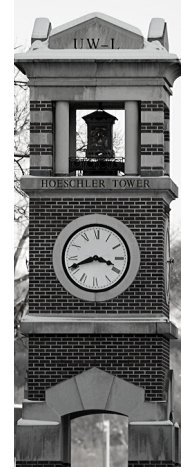
# How to build your Crowdfunding Campaign

**UWL Advancement**

**2020**

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## UWL Advancement

UWL Advancement serves as the umbrella for the Alumni Association, Foundation and University Communications. Together, we work to engage alumni, donors and friends of UWL in an effort to promote the University as a whole.

## Introduction

The University of Wisconsin-La Crosse Advancement Office manages the UWL crowdfunding platform (https://give.everydayhero.come/us) in order to support the vision, mission and core values of UWL.

Crowdfunding is the practice of funding a project or initiative by raising many small donations of money from a large number of people through an online campaign. Crowdfunding can be used to fundraise for a wide variety of projects initiated by faculty, staff, and students, that further UW-La Crosse's mission.

# Campaign Policies

Each crowdfunding campaign must further University of Wisconsin-La Crosse's mission by supporting university programs and initiatives. Funds cannot be redirected to a third-party entity, such as an external non-profit or individual. Crowdfunding campaigns must not violate any law, regulation, or University of Wisconsin-La Crosse policy.

Any current student, faculty, or staff member may submit a campaign application. Each campaign must identify one faculty or staff member to serve as the campaign team leader or campaign advisor.

UWL Advancement, in its sole discretion, will determine the eligibility of submitted applications and approve each project on an individual basis. Campaigns cannot be run in conjunction with other efforts to fund the same project by an individual or group.

Each crowdfunding campaign must identify a single faculty or staff member who represents the project and ultimately takes responsibility for the members of the project team.

Each campaign must identify an approved University of Wisconsin-La Crosse Foundation gift account to receive donated funds. All funds raised will be deposited to the gift account. Even if the goal is not reached, all donated funds must be used for the stated purpose(s) of the campaign. The collection of cash and check donations will be administered by UWL Advancement. Individuals and organizations are strictly prohibited from keeping any portion of the funds raised as profit or compensation.

Prior to the campaign launch, all campaign platform content will be reviewed by UWL Advancement which has the authority to edit or require revisions at any time.

UWL Advancement does not distribute contact information about or for alumni, parents, friends, or students. Campaign teams must develop campaign and marketing content and contact their personal networks. UWL Advancement will consult with teams to generate ideas, provide feedback, and review content. To help with administrative costs of the Crowdfunding program, UWL Advancement will retain 5% of funds raised by each project.

UWL Advancement must review and approve any donor benefits or premiums. (E.g., donors receive a free t-shirt if they donate at a certain level.) UWL Advancement may deny benefits or premiums that would affect tax deductibility or the tax receipting process of gifts.

UWL Advancement may discontinue an active campaign at any time due to a team's failure to comply with these guidelines or a team or organization's change in eligibility.

# Campaign Timeline

•**Two Crowdfunding cycles:**
–Fall (campaigns launch first Monday in October)
    -Applications due July 31
–Spring (campaigns launch first Monday in March)
    -Applications due December 31.

- **10 weeks prior to launch date**
  - Submit application to foundation@uwlax.edu or in-person: Cleary Alumni & Friends Center
  - Fall applications due date: July 31 | Spring application due date: December 31

- **8 weeks prior to launch date**
  - Upon application approval, set meeting with UWL Advancement
  - Obtain campaign page log-in information and begin drafting page
  - Establish UWL Foundation funding account if necessary

- **6 weeks prior to launch date**
  - Meet with UWL Advancement to discuss needed campaign page edits and communications plans
  - Make necessary edits to campaign page
  - Refine solicitations and communications plans with project team

- **4 weeks prior to launch date**
  - Send out "Save the Date" communications to announce campaign and launch date
  - Draft emails, social media posts, blog posts, etc. to be used throughout the campaign
  - Send draft "thank you" communication to UWL Advancement for approval

- **2 weeks prior to launch date**
  - Finalize communications
  - Prepare for launch activities*
  - Launch silent phase for lead gifts (if deemed necessary by UWL Advancement)

- **Day of launch**
  - Share project page link on social media sites and send initial emails/communications to personal networks
  - Spread the word and encourage others to follow the campaign page through on-campus events* (i.e. tabling, Campus Connection, digital signs, etc.)

- **During Campaign**
  - Post updates/comments to campaign page to engage donors (1-2 per week)
  - Post updates to social media (3-4 per week)
  - Hold regular meetings to check in with project team

- **Close of Campaign**
  - Send thank you letters to donors no later than 2 weeks after close
  - Complete project implementation and take photos or create video to show impact
  - Send follow-up communications to share impact with donors

# Team Responsibilities and Structure

## Team Lead

- Acts as project manager and liaison to UWL Advancement. This role requires approx. 8 hours per week leading up to and throughout the campaign to ensure its success.
  - Submit application and create campaign landing page
  - Recruit and oversee project team
  - Oversee development of campaign plan, timeline, and goals
  - Oversee communications plan and implementation
  - Provide project updates and thank you letters to donors
  - Meet with and send regular updates to UWL Advancement

## Team Members

- Assist the team lead in developing the project content, social media, and other communications. This role requires approx. 4 hours per week preceding and throughout the campaign.
  - Assist in development of campaign plan, timeline, and goals
  - Work with and motivate assigned Fundraisers
  - Complete tasks assigned by Team Lead
  - Send communications/share posts to personal network

## Supporters

- Share social media and messaging to a widespread audience. This role will require approx. 3 hours per week throughout the campaign.
  - Share communication and updates provided by project team via social media, email, etc.
  - Spread word about project and ask for contributions via word-of-mouth

## Campaign Advisor (for student-run Campaigns)

- Works with the project team through the campaign.
  - Advise team on University policies
  - Oversee proper use of funds raised
  - Send communications/share posts to personal network

## UWL Advancement

- UWL Advancement reviews campaign applications, content, and communication plans.
  - Manages the crowdfunding platform, consults regarding best practices, and trains campaign teams as necessary.
  - Will send up to two emails on behalf of the project.
  - Does not create campaign plans or content on behalf of campaign teams.
  - Sends tax receipt to donors.

# Team Responsibilities and Structure

**UWL Crowdfunding homepage**

→ Established and maintained by UWL Advancement

**Campaign Landing Page**

Visitors to this page can: give directly to the campaign OR create their own "fundraiser" page

→ Team Lead designs and manages
(UWL Advancement reserves the right to revise)

**Supporter Pages**

Personal fundraising pages associated with the campaign

→ Team members/anyone can create and begin fundraising with their network

# Tips For Successful Campaigns

- ## Successful campaigns:
  - Have a meaningful name including the group being supported (creative or witty title is encouraged).
  - Use active language such as support, help, or send.
  - Mention 'challenge' in the project title.

- ## Allow ample planning time:
  - The success of your campaign depends on your ability to develop and implement an effective plan.
  - Your plan should include a schedule for emails, social media posts, and campaign updates.
  - Include extra time for unforeseen delays and other challenges.

- ## Set a meaningful and realistic goal
  - If your goal is reached mid-campaign you can use your momentum to set a stretch goal and encourage your network to achieve more success.
  - Set your completion date on a Sunday (more people give on weekends).

- ## Tell a compelling story
  - Organize your campaign around a purpose that is meaningful to an identifiable audience.
  - What will happen as a result of your project getting funded? What need will your project fulfill?
  - Consider how you will tell this story across various channels and media.
  - The use of images with your social media posts and other communications will engage your network more. Create the content before your project begins.

- ## Practice your pitch and be prepared to market your campaign
  - Personalize your conversations/messages. Remember, you wouldn't talk to your friend the way you would a stranger.
  - Think of the reasons why someone would say no to giving and provide a polite and sincere counter argument.

- ## Stay positive and enthusiastic, and always express gratitude
  - Even if someone says no to giving, thank them for their time and consideration.
  - Your influence can be tracked through the site by sharing the links from the project page.

- ## Have clear calls to action in all your communications
  - Donors are likely to give more with specific asks compared to open-ended asks
    - Example: Hey! We are headed to conference and we need your help. Would you consider giving $25 to help us get there?
  - **Every communication should include an invitation to donate with the giving link.**

# Checklist

- Establish Team Lead and members, create tasks and recruit fundraisers
- Develop campaign goals and timeline
- 10 weeks out: Submit application to UWL Advancement
- 8 weeks out: Set meeting with UWL Advancement, begin drafting campaign landing page
- 6 weeks out: Meet with UWL Advancement to discuss any needed revisions, draft communications
- 4 weeks out: Send 'save the date' communications to family, friends, colleagues
- 2 weeks out: Finalize communication, prepare any on-campus launch day activities, initiate silent phase (if appropriate)\
- **LAUNCH DAY:** Share link on all social media pages, send initial emails to personal networks, on-campus launch day activities

**Days 1-7**

3 Posts to social media

Post update to campaign page

Meet with team members

**Days 8**

3 Posts to social media

Post update to campaign page

Meet with team members

**Days 15-21**

3 Posts to Social media

Post update to campaign page

Meet with team members

Meet with UWL Advancement if necessary

**Days 22-28**

3 Posts to social media

Post update to campaign page

Meet with team members

**Days 29-35**

3 Posts to social media

Post update to campaign page

Meet with team members

**Days 36-42**

3 Posts to social media

Post update to campaign page

Meet with team members

**Days 43-45 (Or final days)**

Final social media post

Final update to project page

**Close of the Campaign**

Meet with UWL Advancement for debrief

Send final version of "thank you" text to UWL Advancement to be sent to donors

Email/share photos/videos of the project to social media to show impact, thank donors

# FAQ for contributors

- **Where will my donation go?**

Your donation will be deposited with the University of Wisconsin-La Crosse Foundation and distributed to the program, lab, institute, or department leading your selected project.

- **Is my contribution tax-deductible?**

Yes, contributions through UWL's Crowdfunding platform support specific areas of the university and are therefore eligible for income tax deductions as allowed by law.

- **Will I receive a receipt for my contribution**

Yes, UWL Foundation will send you a gift receipt via email for tax purposes.

- **When will my credit card be charged?**

Your credit card will be charged immediately upon finalizing your gift on the website.

- **Who should I contact with questions about my contribution?**

Please call 608-785-6803 or send an email to foundation@uwlax.edu with any questions about your gift.

- **Is there an administrative or processing fee?**

5% of funds raised will be used to support the Crowdfunding platform and credit card fees (3%).

- **What is the institution's Employer Identification Number (EIN), also known as a Federal Tax Identification Number?**

The Tax ID for the UWL Foundation is 39-1145116

- **What is your refund policy?**

Charitable gifts to the UWL Foundation, a non-profit organization are not refundable.

- **What happens if the project is not fully funded within the campaign?**

Prior to the campaign launch, the campaign creators will outline with UWL Advancement how the funds will be used if the goal is not reached. Campaign creators will receive all funding made to the project, even if the goal is not achieved.

# FAQ for potential applicants

- **What kind of projects can be submitted?**

All projects should advance learning, research and enhance the overall student experience at UWL. This includes those projects focused on student aid, athletics, capstone projects, and travel for credit and faculty-specific initiatives. Projects that raise funds for other charities will not be accepted. The UWL Foundation is a registered charity. All submitted projects therefore must meet charitable requirements. Interested teams must apply and be accepted. Part of the acceptance process includes confirming that their project aligns with UWL's giving guidelines and ethics.

- **What is an appropriate funding level for projects on this platform?**

With some exceptions, accepted projects will have goals ranging from $500 to $5,000.

- **Who can submit a project?**

Any UWL student, student organization or faculty/staff member can submit a project for consideration. The decision to approve the project remains with the office of UWL Advancement

- **How much information do I need to provide?**

UWL Advancement will help polish your submissions but the more details you have in regards to the project, (timeline, promotion, and implementation) the easier it will be to understand the scope and meaning of the initiative.

- **How do I access the donations?**

Funds will only be deposited in a restricted fund associated with your project.

- **How long does a crowdfunding project take from start to finish?**

A UWL crowdfunding campaign takes from 10 - 12 weeks to launch, depending on readiness. Campaigns generally run for 30-60 days.

- **Once my project is submitted, how can I help it succeed?**
  - **Prepare**. Talk to your friends, family and networks about your upcoming project. Let them know you will be looking for support. Prepare your team so that everyone is aware of what the fundraising process will look like and who will be responsible for what parts of the campaign.
  - **Share & Update** Share your project with friends, family and anyone else you know! Use a variety of channels - social media, word of mouth, emails and even letters. Keep the project alive with updates on how the project is going, videos, testimonials, and especially news of how the project or event went.
  - **Give**. Make your own personal gift to support your project. It will be easier to ask others to give when you have already given. Remember the 30% rule. It is recommended that for any good fundraising campaign (including crowdfunding) you try to raise at least 30% of your goal before you launch publicly.
  - **Thank**. This is important! Once your project is completed make sure to thank your supporters. When you have reached your financial goal or the end of the campaign, keep UWL, your social network and your supporters updated on the success of your initiative. A great thank you is the most important part of any fundraising campaign.