



UNIVERSITY OF
CALGARY

UCrowdfund Toolkit

Advancement

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Welcome to UCrowdfund

Crowdfunding at the University of Calgary empowers faculty, researchers, students and alumni to fund the projects, programs and research that matter most to them. This easy-to-use platform allows project leaders to collect donations, build cause awareness and facilitate social sharing. The UCalgary Annual Giving team supports the platform in partnership with Community Funded.

Step 1. Getting Started (Application Phase)

6 weeks prior to launch

Note: Application process can take up to 3 weeks

- ☐ Define your project and apply online
 - Determine a realistic goal; it's better to target an achievable amount and surpass that goal (people want to be part of a success story). When determining your goal, consider your team's reach and networks. See Appendix A for setting an appropriate goal.
- ☐ Assemble a team to share the responsibility and distribute the workload:
 - Project Lead – This person will be given access to the back end of your online UCrowdfund page and act as liaison with the UCrowdfund program administrator. They'll be responsible for keeping the team on track.

- Communications Lead – This person will be given access to the back end of your online UCrowdfund page and will develop a communications plan and send/post regular updates about the campaign.
- Ambassadors – These are your team members. They'll leverage their connections and advocate for your project, driving people to the platform.

Step 2. Pre-Launch

3 weeks prior to launch

Craft an Engaging Story

- Define the main points of your project:
 - What is the problem and how will donations help you solve it?
- Use your main point to write a compelling and engaging story:
 - Keep it concise and impactful, and ensure you proofread!

Define Your Target Audience

- Who are the most-likely donors for your specific project and how do you reach them (social media, in person, email, telephone)? Make a list.
 - Are these people who can afford to support your campaign financially? If not everyone can support it financially, how else can they support it? Think of other local businesses or other faculties/departments that may be willing to promote your campaign. Think of individuals and organizations that would be willing to donate large sums.

UCrowdfund Page

- Create and post your video to your page.
- Describe your project:
 - Who you are;
 - Why you are doing what you are doing;
 - How the funds raised will be put to use. Identifying giving levels can help your donors visualize their impact depending on the amount they give. For example a crowdfund campaign to raise new computers for a student workspace.
 - \$25 = 1 Mouse
 - \$50 = 1 Keyboard
 - \$100 = 1 Software program
 - \$300 = 1 Monitor
 - \$500 = 1 full workstation
 - Call to action — donate now;
 - Download your page content build template here. < Insert link>

Create a Communications Plan and Collaterals

- ☐ Create a communication timeline to determine who you will reach out to, how and when.
 - ☐ Tailor the message to the audience you are sending it to. If the reader feels like you are speaking directly to them they are more likely to pay attention.
- ☐ If you have a communications budget, design material to promote your campaign (i.e. postcards, posters, buttons, etc.) By planning ahead you will be able to create the materials at a low cost. Last minute printing will be costly.

Social Media

- ☐ Create social media content – videos, posts, events, hashtags.
- ☐ Promote your campaign through social media and ask supporters to share.
- ☐ Take advantage of free channels, like community forums, to promote your project.
- ☐ Post pictures and updates along the way to let your supporters know how you are doing.

Email

- ☐ Make a list of contacts to reach out to directly. Draft personalized emails asking them for their support.
- ☐ Include a link to your campaign in your email.

Get Pre-Commitments

- ☐ Start with family and friends: visitors stay on your page 31% longer and are 22% more likely to donate once you've raised more than 40% of your goal — people want to be a part of something successful.

Step 3. Launch

Launch Event

- ☐ Consider hosting a self-funded launch event where you can bring awareness to the campaign and raise some funds. This could be a great way to show off the space or theme of your event (i.e. consider hosting tours through the lab you are fundraising for).

Promote

- ☐ Send your pre-crafted emails.
- ☐ "Campaign is LIVE" post on social media.

Step 4. Campaign

- ☐ All hands on deck — make sure all team members are keeping the campaign top of mind.
- ☐ Update your donors monthly with campaign progress.
- ☐ Track those who have donated to ensure you don't ask them for another gift in your communications.

- ☐ Stay engaged through social media.
- ☐ Keep the momentum going — talk to networks and get them excited about your project.
- ☐ Post in forums, blogs and online communities that campaign may be relevant to.

Step 5. Final Push

1-5 days before campaign close date

- ☐ Send out messaging that conveys a sense of urgency with a deadline. Call to action! This is especially effective at targeting prospects that have pledged or shown interest in your project but have yet to donate.
- ☐ Break it down with exactly how much is needed to reach your goal.
- ☐ Recap progress so far.
- ☐ Get people excited that they are a part of something *huge* and that you are almost there.

Step 6. Thank You and Impact Report

2-7 days after campaign close date

- ☐ *Thank* your donors and let them know about the impact they have made.
- ☐ Next steps now that you have reached your goal; if you have not reached your goal, update on how the money will be spent.
- ☐ Recognize major donors through social media.

Step 7. Follow-Up

1-3 months after campaign close date

- ☐ Let your supporters know about where you are at with the project and how their donations helped get you there.
- ☐ Highlight the campaign's successes and challenges.

Congratulations on your successful campaign!

Frequently Asked Questions

UCALGARY'S EXCLUSIVE CROWDFUNDING RESOURCE

UCrowdfund is the university's crowdfund platform. For use exclusively by the UCalgary community, the platform empowers faculty, researchers, students and alumni to launch projects, expand programs, and advance research. This easy-to-use tool collects donations, builds cause awareness, and facilitates social sharing. The UCalgary Annual Giving team supports the platform in partnership with Community Funded.

Get started by [applying](#) today. Successful campaigns require at least 3 months from application to completion.

WHO IS ELIGIBLE TO RAISE FUNDS THROUGH UCROWDFUND?

Groups and individuals directly affiliated with the University of Calgary including students, alumni, faculty, and staff, are eligible to use UCrowdfund. Initiatives should support the university's mission by improving our community – on campus and beyond. Successful initiatives have an identified leader and a team of 5 – 10 ambassadors willing to promote the project to their own networks.

HOW DO I GET STARTED?

To get started, submit an [application](#). Applications are reviewed by the UCrowdfund committee. If your campaign is accepted it will be added to the UCrowdfund calendar and you will be contacted by the liaison assigned to your project.

Please note, a limited number of UCrowdfund projects will be approved per year.

HOW WILL PEOPLE LEARN ABOUT MY UCROWDFUND INITIATIVE?

UCrowdfund empowers you and your team to leverage your personal and professional networks in support of your initiative. To be successful, your campaign should be peer-to-peer not institutional. Outreach to your family, friends, and colleagues via email and social media will help build awareness of your cause. It's best to bring your own "crowd." If you and your team do not have a pre-existing audience (personal or otherwise), then crowdfunding might not be the best method to raise money for your project.

Each project will be given a landing page with a unique URL to share. A well told story, creative video, and a compelling case for support are critical to success. The [Digital Media Commons](#) at the Taylor Family Digital Library has a range of loanable equipment including cameras. The Commons' One Button Studio, a room streamlined for creating video content, allows users with no technical background to save videos to a USB memory stick with the push of a single button. The room is also equipped with green screen technology.

HOW MUCH CAN I EXPECT TO RAISE THROUGH UCROWDFUND?

Typical crowdfund projects attract between \$500 and \$25,000. Of course, this number will depend entirely on the scope of your project, the size of your potential donor pool, your personal contacts and the amount of personal effort devoted to the project. It is best to set modest, attainable and realistic goals—and transcend them. Your donors will be inspired to support a project if it reflects success and momentum. Your liaison will help you figure out your ideal goal.

HOW MUCH TIME WILL IT TAKE TO CREATE AND MANAGE A PROJECT THROUGH UCROWDFUND?

Projects are posted and active for 30 days. However, plan on your project requiring 10-12 weeks of focused, intense work before and after the campaign. The project creator will need to provide updates and remain actively engaged (new videos, social media, campus events and email). It is recommended that the project creator commit 1 hour per day, and each team member commit 30-60 minutes per day, for the length of the active campaign.

WHY SHOULD I USE THE UCROWDFUND PLATFORM?

Students, faculty, staff, and alumni who wish to use crowdfunding as a means of supporting their UCalgary-related projects should use UCrowdfund, the university's crowdfund platform. This will ensure that your project is branded with the university's name and collateral, that gifts to the project are tax deductible, and the university is equipped to recognize and steward donors.

Our crowdfund platform has many advantages over other sites. Unlike outside sites, teams working with UCrowdfund will not be liable for any tax associated with the money that is raised. There are no fees associated with using our platform, and every dollar raised is made available to you, regardless of whether or not your campaign reached its stated goal. Additionally, your team will be supported by a UCrowdfund liaison who will provide training and guidance to help you reach your goal.

HOW LONG DOES IT TAKE FOR MY PROJECT TO GET APPROVED?

The approval process can take up to three weeks. Please include your contact details in your submission, as we will need additional details before we can green light your project.

IS MY GIFT TAX-DEDUCTIBLE?

Yes. All gifts made through UCrowdfund are tax-deductible gifts. Donors will receive a tax receipt within of the following month of their online transaction.

WHERE DOES THE MONEY GO?

100% of your gift goes directly to the project you are supporting.

HOW ELSE CAN I HELP BESIDES GIVING MONEY?

Help spread the word! Pick a project that is important to you and help them get the word out both on social media and throughout your networks. The more people know about a project, the higher the chance it will reach its fundraising goal.

Setting a Goal

Setting a realistic goal is important!

Most projects are able to raise \$5,000 or less. The majority of donors will come from your family, friends, colleagues and other personal networks. Do you know enough people that will donate to your project to reach your goal (e.g. If you plan to raise \$2,000, considering an average gift of \$50, you would have to have 40 people willing to donate that amount. Consider that 1 out of 4 people will give to your project; that means your email list should have 160 people on it.) The larger the team and the larger the networks, the more money you will be able to raise. Remember, it is important to set a realistic goal so that your campaign is successful. Start with the lowest goal possible - you can always add in stretch goals later.

Tips for a Successful UCrowdfund Campaign

1. Create your plan:

- A business doesn't launch into the market without a solid plan of action. Neither does a fundraiser!
- Build a campaign plan and calendar to structure your project for the highest chance of success.

2. Don't make your project only about the money:

- When talking about your project, place the primary focus on its positive attributes like how it impacts individuals or groups. Your end goal is to bring life to a worthy cause; asking for money will come soon enough. Try to replace words like "money," "fund" and "donation" with "support," "gift," "contribution" and "impact."

3. Don't exaggerate:

- Be sincere in your stories and truthful in the expected outcomes of your project. It is evident when the truth is being overstated. Instead of saying that something will "change the world," provide concrete examples of its anticipated impact.

4. Put things into perspective:

- Help your supporters understand the value of their contribution. What does \$20 buy in the context of your project? For example, if you are fundraising for the Swimming Team, does \$50 buy a flutter board, or perhaps half an hour of pool time for one swimmer? Individuals are more likely to give if they have tangible evidence of value; let them know what their gifts could do when put into action.

5. Make it brief:

- People are busy and have short attention spans. Keep your messages brief, but concise.

6. Make it personal:

- Avoid reciting a generic message to each potential donor. Add a personal touch to your messages; indicate why this person or group in particular would benefit from supporting your cause.

7. Emphasize team effort:

- Use "we" and "us" statements; give credit to your entire team when referring to accomplishments. This provides a greater sense of community and altruism.