

**ioby**

# **Field Guide to Crowdfunding**

A practical toolkit to crowdfunding for positive change. From start to finish, wherever you are.

## **Table of Contents**

<b>Introduction</b>		<b>4</b>
<b>How to use this guide</b>		<b>6</b>
<b>Chapter One</b>	<b>Your Team</b>	<b>7</b>
<b>Chapter Two</b>	<b>Setting a budget</b>	<b>11</b>
<b>Chapter Three</b>	<b>Crafting a compelling story</b>	<b>14</b>
<b>Chapter Four</b>	<b>Planning your asks</b>	<b>17</b>
<b>Chapter Five</b>	<b>Making your asks</b>	<b>21</b>
<b>Chapter Six</b>	<b>Soft Launch</b>	<b>27</b>
<b>Chapter Seven</b>	<b>Four Pushes</b>	<b>30</b>
<b>Chapter Eight</b>	<b>Thank you!</b>	<b>34</b>
<b>Chapter Nine</b>	<b>Big budget</b>	<b>38</b>
<b>Chapter Ten</b>	<b>Fiscal Sponsorship</b>	<b>41</b>
<b>Chapter Eleven</b>	<b>How to leverage a match</b>	<b>44</b>
<b>Chapter Twelve</b>	<b>Recruiting and managing volunteers</b>	<b>47</b>
<b>Chapter Thirteen</b>	<b>Social media deep dive</b>	<b>49</b>
<b>Chapter Fourteen</b>	<b>Fundraising with events</b>	<b>50</b>
<b>Chapter Fifteen</b>	<b>Promotions and press</b>	<b>53</b>

# Introduction

## What is ioby?

ioby is a crowdfunding website, but we're more than that. We're growing a movement of community-led positive change and we want you to be a part of it.

ioby gives local changemakers the tools and resources they need to build a real, lasting impact from the ground up. Our crowdfunding platform helps connect leaders (like you!) with support to raise the money they need from their communities to make our neighborhoods safer, greener, more livable and more fun.

ioby stands for "in our backyards," but it also stands for taking care of each other, for civic muscle, and for trusting our neighbors to know what's best for the neighborhood.

We work all across the country, but we have particular cities of focus: Memphis, Cleveland, Detroit, Cincinnati, and Pittsburgh. We have honed in on these cities because there is tremendous power in the work that their residents are doing, but also because our work is informed by the history of disinvestment within certain neighborhoods. Our City Action Strategists are community organizers who provide on-the-ground support to residents in our focus cities and allow us to boost leaders as they work to make positive change.

Anyone from anywhere in the US can work with ioby to fundraise and build support for your neighborhood project. All we require is that the project is **local** to where you live, work, or play and that it has a **public** or community benefit. Learn more about eligibility at [ioby.org/eligibility](http://ioby.org/eligibility).

## So you want to crowdfund...

If you care about your neighborhood and have a community of friends, family, and neighbors who care about it too, you already have everything you need to make change. In fact, you very well might already be a changemaker!

Making change isn't always about having an important title, or being really famous, or having a lot of money. In fact, some of the biggest change happens when lots of everyday people decide that the status quo won't do and commit to using whatever power they have, over whatever corner of the world they live in, to make change. Whether you're dreaming of a very big project or something just for your block, there's work to do.

You don't always need funds to make change. There are lots of projects that you could bring to life without needing a penny. But other times, you might need some money to bring that great idea to life. That's where crowdfunding with ioby comes in.

Crowdfunding is simply the process of raising the funds you need for something by a group of people. At ioby, that means leaning on your neighbors and community to raise money to bring projects to life that strengthen your neighborhood and bring a clear public benefit to the community. Small gifts make a big impact together.

People have been fundraising for community projects for years and years—the pedestal for the Statue of Liberty was, in part, crowdfunded! Crowdfunding online is simply a new tool for an old strategy.

No matter how experienced you are, crowdfunding can be a powerful tool to raise the funds you need and rally your community to support your idea—and we can help you do that.

There isn't just one way to run a fundraising campaign, and there is no perfect campaign. Each project, and each community, is different. You'll need to take stock of what specific needs and opportunities exist in your neighborhood to craft a winning campaign for you. Instead, think of this guide as having the key ingredients to a successful campaign. You'll need elements of each step to craft your perfect campaign, but each step will likely look a little different depending on your needs. Follow this road map, adjust along the way with your teammates as you see necessary, and you'll be on your way to making positive change in your community.

## Why crowdfund?

If you care about your neighborhood and have a community of friends, family, and neighbors who care about it too, you already have everything you need to make change. In fact, you very well might already be a changemaker!

You have lots of different options when it comes to fundraising, each with different benefits and drawbacks. We believe in crowdfunding because it's a proven tactic to raise funds, but it also comes with a whole range of other benefits. After all, your project is so much more than just money raised—it's also about connecting with your neighbors to get their support and enjoy the benefits of your project together.

When you crowdfund with ioby, you raise more than just money. You also deepen your connection with your neighbors as you explain your project and invite them to play a meaningful role in bringing it to life. As you raise money, you raise support from your neighbors and learn about their needs. You get an extra pair of hands and an opportunity to shape your project to make sure it meets the needs of the community.

Money is important too, and crowdfunding offers you a flexible way to get the money you need—unlike a grant, you can crowdfund for almost anything, and the only strings attached are the promises and commitments you make to your community. That means you're only restricted to what your community wants and needs, not what a grantmaker requires of you. When you do seek out a grant, having the support of your community can go a long way to demonstrate that there is a need for that grant or that local government support.

As you start to make a change and flex the civic muscles it takes to do good, you help others around you also flex their muscles. Your ability to work with your community, with nonprofits, with government agencies, and with others grows, and the ripple of your impact grows bigger and bigger. Crowdfunding is special not because of the money, but because of you.

## 4 Crowdfunding Myths

**1. You can put up a page online and watch the money roll in!** If only it were this easy. In reality, there is no magical community of funders just waiting to support projects on crowdfunding sites. At ioby, we look at your campaign page as one tool in your fundraising arsenal—something like an online business card where all your key information can live. But that page itself isn't going to talk to your friends, meet your neighbors at an event, or get itself in front of new people. It's **your** awesome network that's going to chip in and make it a reality. In our experience, between 70 and 80 percent of your donors will be people you reach out to directly, and most of the other 20 to 30 percent will be people in their extended networks. The ripple effect from the outreach work you do fuels the crowdfunding engine.

**2. Social media will fundraise for you.** In our work, we've learned that less than one percent of people who see your social media post will become donors just because they saw it. Social media can be great for building awareness and creating "buzz" for your project, but it's generally not a great tool for actually asking for money.

**3. Crowdfunding will annoy your friends and family.** We can't refute this one better than ioby Leader John Bailey, who raised over \$13,000 to fund a tool lending library for his neighborhood in St. Paul, Minnesota: "People like being asked. Our perception of fundraising can be: 'I was cooking dinner and Greenpeace called me and I burned my food! It's so annoying!' Or you get asked for money for something random at the grocery store and don't know what to say. But when we're asked by someone we know, it's flattering. It's saying: 'I've thought about you and I know you would care about this.' It implicitly suggests, 'I hold you in high regard.'" It's true that your contacts may need to be nudged a time or two (or three) before they give, but most will be glad to do so.

**4. You need to have a flashy project to interest donors.** Grassroots leaders successfully crowdfund for simple, everyday things all the time! We're talking garden sheds, backpacks for kids, building renovations—even (one of our favorites) a lawnmower. Don't be tempted to alter your project to be more provocative, or try to make it sound more glamorous than it is. Just work on explaining to prospective donors exactly what it is you're raising money for and why it's important.

## How to use this guide

Think of this guide as your road map to crowdfunding success.

**Chapters 1-4** will help you build a sure foundation for your campaign by helping you create a crowdfunding plan. **Chapters 5-8** will walk you through the steps to follow once your campaign is launched—how to craft a compelling story, start making your first asks, and more. Each of these steps might look different depending on your project, but you'll need to follow them in order to hit all your bases and set your team up for success.

**Chapters 9-15** are deep dives; they explore specific topics in further depth if you're interested in honing that skill for your team more, or if you're interested in additional crowdfunding tactics. These include things like pitching to journalists to get media coverage of your project, securing match donations from local businesses, and more. These steps aren't critical to most campaigns, but if you're crowdfunding for a larger budget you might want to explore them.

In each chapter, we've also included some opportunities to help you practice what you've learned, or hone the skills you already have. When you complete them, you'll walk away with a concrete tool you can use to help you crowdfund—like an organized chart of donors, a rough idea of a budget, and more.

### Planning is key

The secret ingredient to every successful crowdfunding campaign is a well thought out, and well-executed, plan. No matter how large your goal is your campaign will be much, much more successful if you craft a plan to reach it. It'll save you time and effort in the long run, and it'll ensure you don't miss a critical step along the way. If you're working with a team it'll also help make sure that everyone is on the same page and everything gets done without a hitch.

### What if I get stuck?

Don't panic! Crowdfunding is tough, and most people are bound to come across a challenge or two. The first thing you should do if you feel stuck is to review your fundraising plan. Did you skip a step? Do you need to add more detail to a step, like a longer donor list? Troubleshooting there might help fill some gaps.

When that doesn't work, remember that we're always here to help. Once you've shared your idea with us, you'll be connected with a dedicated ioby Leader Success Strategist. Think of them as coaches and cheerleaders—they can be a soundboard for you, and help offer suggestions for when you run into trouble.

## Chapter One – Your Team

One of the first steps of planning your crowdfunding campaign is to build your team. Now, you may be asking, “Team? Can’t I just crowdfund by myself?” Sure! We love crowdfunding because the barrier to entry is relatively low. You don’t need permission from a funder or to be a formally incorporated group; all you need is a great idea for the neighborhood and a community of folks ready to support you to get started.

**But no one is an island—even the best and brightest leaders.** This is true of crowdfunding, but it’s also true of most—if not all—community development projects. Having a team lets you bounce ideas off each other to make sure that your idea really is what your community needs most, and it helps make the journey a lot easier—and a lot more fun. Crowdfunding isn’t a “set it and forget it” proposition. Putting your project idea online and sitting back and watching the money roll in is, sorry to say, a fantasy that almost never actually happens. It takes time, effort, and a wide network of people to raise money, and a strong team helps all of those things happen.

### Key tip

ioby leaders that crowdfund with a team fundraise up to six times faster and are more likely to meet or surpass their fundraising goal than leaders who crowdfund alone. Plan to partner with at least two or three other reliable people for maximum fundraising power—the more the merrier!

### Building a stellar team

There are two things to keep in mind as you build your team—the **key skills** that you want on your team and the crowdfunding **roles** teammates will play.

Your team’s crowdfunding roles will likely remain consistent no matter who is on your team. You will always need someone to play these roles to ensure that your campaign is a success. Be sure that someone on your team is responsible for the following:

1. **The Nudge:** One person has to be the internal leader who reminds everyone about deadlines and upcoming events.
2. **ioby Point Person:** One person should always be the one who works with ioby staff directly.
3. **Manager:** One person has to keep all the lists and contacts and donations organized.

Members of your ioby fundraising team are committed to an active role in your fundraising campaign. At a **minimum**, your fundraising team should be prepared to do the following:

- Create a personal prospect chart of likely supporters (more on this in Chapter 5) and commit to making direct asks (in person, over the phone, or by personal email) to **raise a specific amount of money** through their own personal and professional network.
- Plan the campaign communications.
- Commit a minimum of 2 hours a week during the ioby campaign, an estimated 6-10 weeks.

### Key tip

Host a team kick off meeting to define what each team member should be doing during the campaign. This should run the gamut from crafting a story together to planning and making asks. Look out throughout this guide for “Do this with your team” suggestions.

For large campaigns (over \$10,000), you may want your fundraising team members to make additional commitments, such as:

- Asking their prospects who donate to tell others about the campaign, thus becoming fundraisers themselves.
- Asking a foundation or local company to provide a larger gift that could be used as a match campaign. (See Chapter 11)
- Participating in a video your team produces about the ioby campaign.
- Hosting a casual fundraising event to increase face time with potential supporters. (See Chapter 14)
- Committing to send a dedicated email blast to the organization’s mailing list, for those fundraising team members who are part of or represent an organization.

### Key tip

Sometimes supporters can commit to doing things that seem like commitments of a fundraising team member but rarely are. These include agreeing to tweet or share on Facebook or sending a generic email. It can also include pitching a story to a local news organization. These are useful engagement activities but have a very low rate of return on fundraising requests. Include these super fans in your campaign planning, but reserve spots on your fundraising team for people who are serious about making asks.

Your team’s key skills are the qualities across your teammates that can give your campaign a boost, like someone with a strong network of connections in local government who can help you secure permission for your project or a friend who is a videographer who would be willing to put together a fundraising video for you. You’ll have a team with different skill sets depending on who you can call on for support and how big your team is. You’ll need all kinds of skills, some of which might be innate and some you might have to learn together. Here are a few skill sets to look out for when picking your teammates:

- **Social savvy.** People who seem to know everyone are very useful in fundraising because they have a lot of people they can ask to contribute to the campaign. People who are comfortable being chatty, sharing stories, and talking to lots of people will be very helpful when you start asking for donations.

- **Strong networker.** People who are connected to your local government (it might just be a friend they know who works in city hall who can answer your questions!) will be helpful when it comes time to implement your project and might add a bit of legitimacy to it too.
- **Marketing pro.** People who are professionals in marketing and communications are a blessing to campaigns, but you don't have to have professionals. You can just rely on people who are naturally good at marketing and make sure they know they're on your fundraising team for that role.
- **Digital native.** Not everyone feels comfortable using online tools. If you're easily frustrated by Facebook, ask a friend, niece, or grandchild to help you manage your ioby campaign and online communications.
- **"Celebrity."** These might not be movie stars, but instead people in your network who can help spread the word for you. They could be journalists, community leaders, or local politicians who are willing to boost your campaign and build buzz. Use these endorsements wisely; you might want to consider waiting to the ~60% mark of your campaign to express urgency and reinforce your asks.

## Key tip

As you pick your teammates, you'll also want to keep an eye out to make sure that they'll be a good fit. While you might find plenty of folks who are interested in supporting your project, you should differentiate between supporters and people who will be able to commit to your project. Consider the **networks** that they have—do they overlap with your own? If so, you might consider asking someone with a different network that they could ask to grow your donor base. Are they able to commit **time** and effort to your campaign on your timeline, or do they have other things going on that might interfere? Do they bring new **skills** to your team or are the skills they bring duplicative of the skills your other teammates bring? Do they have a **personal connection** to your project? None of these have to be deal breakers, but they are important things to consider as you build your team.



# Activity

## Building your team.

Let's build your dream team! Remember, valuable members of your fundraising team have the following key skills:

- Social Savvy
- Strong Networker
- Marketing Pro
- Digital Native
- Celebrity
- Any other role(s) specific to your campaign

**What skill set will you personally bring to your team? Put a star by that skill(s).**

**Next, think about your project. What other skill sets do you absolutely need to make your project a success?**

List them below.

---



---



---



---

**Now, brainstorm up to 5 other people you could ask to join your fundraising team.**

Remember to focus on finding team members to fill those roles you didn't star and who have different networks and different skill sets than you have.

1. 

---
2. 

---
3. 

---
4. 

---
5. 

---

**Now, divvy up responsibilities.**

List which team member will fill each of the roles below. Only list one person for each role.

**The nudge** 

---

**The ioby point person** 

---

**Manager** 

---

## Chapter Two – Setting a budget

With your teammates in place, you'll need to set a smart budget. There are a few things to think about as you do so.

### What do you need?

Think about the concrete items that you'll need to implement your project. What materials will you need to purchase? Will you need to pay to rent space or for someone's time? Take some time to write these out and build an itemized list of things you'll need. Include how many of each item you'll need and how much each of them will cost. A quick internet search should give you a good estimate.

Once you have a list of everything you need and how much they'll cost, add them up. That's the goal you'll be working towards with your crowdfunding.

### How big is your team?

Remember to consider the size of your team and how big your fundraising capacity is. Not sure what your capacity is? We'll help you figure that out in chapter 4 with prospect charts.

If the number you calculated for your budget is high (over \$10,000), you may want to think about scaling back your budget—and potentially your project.

### Adjust your budget, or your team

If your budget still seems large and overwhelming, first take another look at your itemized budget. Is every item listed an urgent funding need? Could some of these items be donated by community members or local organizations? Pare it down to your absolute essentials.

Then, consider if you can build your team further. Are there other folks you can invite to join you who might bring new donors with them? Do your teammates know people who can also be fundraisers? A bigger team will help make big budgets quick work.

If you've tapped out your fundraising team and your budget still seems overwhelming, it might be time to consider adjusting the size of your budget. Could you start with a pilot project? This might tee you up for a second crowdfunding project, or help you make a compelling case for grant funding or support from your local government.

Or could you start crowdfunding for a first phase, implement it, and then crowdfund again for a second phase with evidence of your success? Big budgets are achievable, but they'll take a lot of work and are more likely to be successful if you split them up into smaller bite-sized pieces. Remember, this doesn't have to be your only project—in fact, additional projects are often more successful than the first!

## Storytime

Danny Glover (not that Danny Glover!), in Macon, Georgia, wanted to create an “agri-hood” to help tackle food insecurity in his neighborhood. He knew that crowdfunding the full amount to build out a major urban farm and a community space would be challenging at first go, but he also knew that asking for a grant wasn’t a surefire win. So he started with a pilot project and crowdfunded \$3,500 to get it going. With that success, and support from the community, they received a \$500,000 grant from a national funder who was impressed by their efforts.

Crowdfunding can be an effective way to access unrestricted funding—if your budget includes items that don’t often fall within the scope of what grantmakers’ fund, crowdfunding with ioby is a great opportunity to still raise funds for those things.

### Small can be quite big

Not quite sure how a small project could make a big impact? \$500 may not seem like a huge amount of money, but in the decade that ioby has been helping local leaders fundraise for community projects, we’ve seen just how much of an impact even small budget projects can make. Here’s a low-budget best practices we’ve learned from our local leaders in the past decade:

#### Make a visible change that shows you care—and that others should, too

Example: Crosswalk Flags

Memphian Sarah Newstok raised \$543 on ioby to install crosswalk flags at a busy intersection in her neighborhood that drivers routinely sped through, scaring and endangering pedestrians. Now, before pedestrians cross the street, they can pick up a brightly-colored, reusable flag from a bucket zip-tied to a nearby pole. They wave the flag while crossing for increased visibility, then deposit it on the other side for the next person.

After watching the flags in action for a while, Sarah reported that the city took notice: “The flags are not a perfect solution, but I do think they help. We did get a crosswalk and a crosswalk sign at our intersection after installing the flags, so that’s progress!”

While the average budget for ioby projects is a few thousand dollars, many are larger scale. If you have your sights set high, your budget—and fundraising skills—will have to rise to the challenge. Crowdfunding large amounts of money on ioby is totally doable, but it takes some extra planning. Thought through your budget and still think you need to raise \$10,000 or more? See tips on how to make it rain in chapter Nine, Big Budgets.

# Activity

## Brainstorming your budget

Sample budget

### Sample budget

Lawnmower	\$100
A/V	\$100

### Insurance

Event Insurance	\$350
-----------------	-------

### Items

Shovels	\$100
Wheelbarrows	\$100
Dirt	\$150

### Promotion/Marketing

Print flyers	\$300
Print postcards	\$200
Design	\$100

### Staff/Professionals

Plumber	\$250
---------	-------

### Miscellaneous

Snacks	\$100
--------	-------

**Total budget to raise**

\$1,850

**Now, build your own budget below – take into consideration everything you’ll need to spend money on.**

Item

Cost

## Chapter Three – Crafting a compelling story

The story you tell about your project will be the center of the asks you make of your community. Whether or not they donate to your project will hinge on whether or not they are convinced by your story. You'll tell a version of that story in person, over the phone, in emails, and on social media. Needless to say, it's important that you nail this portion of your campaign. In this chapter, we'll go over how to identify your audience and how to craft a compelling story.

### Before writing a story, focus on your audience.

Your story will change depending on who you are telling it to. The story you tell your nextdoor neighbor about your project to fund community-owned solar street lights will likely be different from the story that you tell a local foundation who you'd like a grant from. Your neighbor knows what it's like to live on a dark street or might have a vivid memory of the utility shutting off the street lights; your local foundation probably doesn't.

Your audiences are groups of people with similar cares and concerns who will give to your project. They could be your neighbors, your local PTA or school board, a foundation, your friends and family, etc.

To help guide your story, come up with a list of potential audiences. Then, think about and list the things that they care about that might lead to them supporting your project. For example, if you're working on a project to beautify a dark underpass, your neighbors might be most concerned about lighting and the physical beauty of the neighborhood. A local foundation, on the other hand, might care about public art and opportunities for neighbors to engage with it. Shape your story to fit your audience's "why."

### Your story should start with a "why."

Once you've figured out what your audience cares about, you can begin crafting your story. Start with a "why." You and your team have to be able to answer the question: Why is this project important and necessary? That's the heart of your story and the heart of your ask for money. Take time to meet with your team and discuss your personal "why." Consider the reasons you all signed up to crowdfund. What about your experience living in the neighborhood makes this project particularly compelling?

Remember that if you believe deeply in the work, others will too. If you're excited about what you're doing, the good vibes will come through—and they're contagious! Tito M, who crowdfunded for Plena Cangrejera in Puerto Rico, writes in his project page: "The essence of this community should be preserved because even though the hood has been rapidly gentrifying, we are still here. The project is part of a wider community effort to support an inclusive narrative that tells the story of those that came before us that defined the sector as what it still is today a vibrant and diverse community. Plena Cangrejera will strengthen our community's sense of belonging and pride. We aspire to contribute to the wider conversation towards a healthier, stronger and more resilient community." Imagine how pumped this project's leaders must have sounded in person—and then notice that they raised over \$20,000.

With your why at the center, you can flesh out a story for it to live in. This story will likely be different for you and each of your teammates. Rather than repeating the same story, each teammate should tell a version of the story that resonates with them and their contacts. The following page will show you how to do that.

1. **Keep your story personal.** Focus the story on what you have in common with your potential donor. What brought you to this work? How will this project impact your life, your donor's life, and your shared community? No need to recite the history or mission of your organization.
2. **Keep your story focused.** Lay out the problem you're tackling and how you are resolving it in a concise way. You only have about 60 seconds to make your case. Be specific—focus on the one most important element of the story (protecting the watershed through a storm garden, or tackling redlining with an art project or whatever your project is) and carry it through the narrative from start to finish.
3. **Show the bigger picture.** Who doesn't like to know that they are part of something bigger than themselves? Share with your donors the significance of this project for the local community or for a larger movement. Are they contributing positive change that goes beyond your project? Say so.
4. **Be an authority.** Reference facts, statistics, or points of view from a person or organization outside of your project. Avoid overly technical language, but show that you know what you're talking about.
5. **Make it dramatic.** This might go without saying, but your story should be dramatic. Your story must have some element of interaction between two or more parties that involves catastrophe, suspense, or emotional pulling. Show how high the stakes are by providing an element of conflict that your donor can help resolve. Speak to people's values, empathy, and emotions by talking about the people your project is serving.

### Don't forget the basics

In addition to your why and our five key elements of storytelling, make sure that you give your prospective donor everything they need to know about your project. If they don't know what they're giving to, they likely won't give! Your story should cover:

**What** the project is + **Who** is involved in it and impacted by it + **When and Where** it is taking place

# Activity

## List your audiences and what they care about/what is important to them.

Remember, your audiences are the groups of people who will donate to your campaign.

**Audience**

**Care**

Keep this list of audiences in mind as you tell your story and make your asks. The more you practice this, the easier it'll come to you!

### Next, let's craft a story.

1. **What's your title?** This should be something catchy that people can remember.
2. **What's your campaign tagline?** Write a memorable, bite-sized campaign pitch in one short sentence.
3. **Why do you care?** Why is this project/issue important to **you**? Why should your donor care too? This is where you should hone your audience's "why" as well.
4. **Why this project?** How does your project solve a social, economic, or environmental problem in your neighborhood or community? What makes **this particular project** the best thing to do to solve it?

Once you're done, you can put all these pieces together. That's your story! It should be about 200 words and take about 60-90 seconds to tell. If it is longer than that, work to make your story more concise. If it's much shorter, you're probably not sharing enough information. Try exploring your "why" a bit more.

## Chapter Four – Planning your asks

With your story and your “why” in hand, it’s time to think about who you’re going to tell that story to and ask for donations. A prospect chart is the best tool to do so. With your prospect chart, you should (1) be able to identify the people you can ask for money, (2) know how you’re going to ask them, and (3) be able to estimate how much each person will be able to give. Remember when we mentioned this prospect chart in **Chapter Two – Setting a budget?** Your prospect chart will help you determine the total amount you can expect to fundraise and therefore will help you set a realistic budget. If the amount you can expect to fundraise from your prospect chart is **less than** the budget you set in Chapter Two, you’ll need to either add teammates to expand your prospect chart, or trim your budget. Refer back to Chapter Two if you need help setting a new, smaller budget.

### Your prospect chart

A prospect chart is a tool to help give you a top level view of how much money you can expect to receive based on the number of “prospects,” or potential donors, you have. Your prospect chart is critical to every other step in your fundraising process. For a whole range of reasons, not every person you ask will give you money. That’s actually a big part of fundraising. If everyone you ask says yes, you’re probably not asking enough people and you’re likely leaving money on the table! Building a prospect chart, or a chart of potential donors, helps you stretch your boundaries and raise money from lots of different kinds of people.

You’ll also likely ask people for money in different ways based on the relationship you have with them. One tactic is to ask in person. This is a hands-on tactic that requires you know your prospect quite well and that you can only use when you have the time, but it’s a tactic that consistently pays off. You’ll probably be able to ask your friends, family, and neighbors with this tactic. But that college roommate you haven’t spoken to in a few years? Chances are you won’t be able to ask them in person. You also probably know a lot more people than you can reasonably ask in person. But don’t write them off! You can still add them to your prospect chart and ask them for a donation using a different tactic, like, say, an email or a social media post.

Creating a prospect chart is like creating a dashboard of both of these things—your potential donors, and the ways you can reach them. See the following page for what a sample prospect chart looks like.

### How to build a prospect chart

The first thing you and your teammates will need to do is make a list of everyone you know. That’s right: absolutely everyone you collectively know. This is your list of prospects. It’s the universe of people that you will, through one method or another, ask for donations.

It’s a common myth that crowdfunding is something you can set up and then let it run on auto-pilot. The truth is that crowdfunding campaigns almost never go viral, and strangers will very rarely give to your campaign. Instead, most of your donors will be people you already know or people that you’re connected to through your network.

Build a list, and trust the prospect chart process.



Method of Asking	Likelihood that they'll give	Ask amount	Number of Prospects	Total to expect
In-Person	50%	\$150	5	\$375
Phone	25%	\$100	4	\$100
Direct email	5%	\$50	50	\$125
Generic email	1%	\$30	50	\$150
Mail	1%	\$0	0	\$0
Facebook	0.5%	\$20	1000	\$100
Twitter	0.5%	\$20	300	\$30
			<b>Total Campaign Target</b>	<b>\$880</b>

**Sample prospect chart.** Note that your “Method of Asking” column and your “Likelihood that they’ll give” column shouldn’t change. You and your teammates will instead edit the “Ask amount,” “Number of prospects,” and “Total to expect” columns. *Once you’ve completed this prospect chart, your total campaign target should match your crowdfunding goal.* If it doesn’t, you’ll need to either grow your prospect chart by adding teammates to add new donors or pare down your budget.

## Methods of asking

Not all asks are made equal. After a decade of fundraising, we’ve found that the way you make your asks has a big impact on the likelihood that a prospective donor will give. For instance, if you were to ask a prospect to give in person, we’ve found that the likelihood that they will give is about 50%. That means that in order to get a single donation, you’d need to ask two people to give to your campaign. The likelihood of giving drops to 25% for personal phone calls, which means you’d need to ask four people in order to receive one donation. The more personal and intimate the method of asking, the more likely your prospect will be willing to give.

Method	Effectiveness for Asking
Face to face	50%
Personal Phone Call	25%
Personal Email	5%
Generic Email	1%
Direct Mail	1%
Facebook	<1%
Twitter	<1%

Now, connect your methods of asking to your list of donors. Which donors will you ask donations of with each method? Face-to-face asks are more effective, but there are probably only so many people you can make these kinds of asks of—either based on the nature of your relationship or simply because of the limited time you have to make asks.

Once you've matched all your potential donors with an "ask," tally people up by method and add this to your prospect chart. Adjust the number of people on your prospect chart to what's reasonable for you to make asks of with this method. Generic emails and social media asks are much less effective, but you're also more likely to be able to send *many* of those emails and therefore reach many more people, so the number of prospects here will likely be much higher than the number of face-to-face prospects, even if you can't expect a donation of most of them.

## Charting your asks

Now it's time to complete the "Ask amount," and "Total to expect" columns. Try to spend some time on this and think closely about your donor base so that your ask amounts are not too low or too high. Remember to take into account the differences in the likelihood that people will give. Expect larger gifts of people that are more likely to give, and smaller gifts of people that are less likely to give.

### Key tip

As you plan your crowdfunding campaign, try to incorporate more face-to-face opportunities to ask donors to give to your campaign. This might mean making the extra effort to attend social events where you'll be around people you know and who might be interested in giving—like PTA meetings, neighborhood associations, church events, etc. This could also mean organizing your own outings like asking a friend to meet for coffee or planning a group happy hour event, or even organizing an event for your neighbors to learn about your project.

Method of Asking	Likelihood that they'll give	Ask amount	Number of Prospects	Total to expect
In-Person	50%	\$		\$
Phone	25%	\$		\$
Direct email	5%	\$		\$
Generic email	1%	\$		\$
Mail	1%	\$		\$
Facebook	0.5%	\$		\$
Twitter	0.5%	\$		\$
			<b>Total Campaign Target</b>	\$

## Interpreting the results

Everyone on your team should fill out a separate prospect chart. That way you'll know just about how much you can expect in fundraising per person.

If you and your team each fill out prospect charts and the final total amount that you raise is \$6,000, but you really need \$10,000 to make your project happen, you know what to do—you'll need to increase your team's fundraising capacity.

There's two ways to do this. The first, as we've mentioned before, is simply to add teammates to your crowdfunding team. But before you do that, it might be worthwhile to ask if you and your teammates are willing to put in a little extra effort to moving some prospects from a lower likelihood giving level (like a generic email or a personal phone call) up to a higher likelihood giving level (like a face-to-face conversation).

## Try this with your team

Consider setting aside an hour or two to meet with your team to fill your individual prospect charts together and look over them together.

## Activity

Now it's time to complete your prospect chart! If you'd like to fill your prospect chart out online, visit [ioby.org/prospect-chart](http://ioby.org/prospect-chart)

**Step 1.** In a separate document, list everyone you know. We mean everyone!

**Step 2.** Segment that list by “Method of asking,” or column one in the prospect chart below. This is how you'll ask those folks to give. Yes, all of them! You might want to divide them by your relationship with them—close friendships might get an in-person ask, while distant acquaintances might just get an email. But, remember to step out of your comfort zone. The more in-person and phone asks you make, the more yeses—and donations—you'll get.

**Step 3.** In the “Ask amount” column, record how much you think you can reasonably ask each group of donors to give. The methods with higher likelihoods of giving should have higher ask amounts than lower likelihood methods.

**Step 4.** Look at your segmented list in your separate document. How many prospective donors will you make asks of using each method? Tally them up, and jot those numbers down in the “Number of prospects” column.

**Step 5.** If you're completing this online, the “Total to expect” column will show you how much you can expect to raise for each method. Your “Total Campaign Target” Box will show you the total amount you'll be able to raise. If it's lower than the amount you need to raise, you'll need to brainstorm more people to ask to add to your prospect chart.

Method of Asking	Likelihood that they'll give	Ask amount	Number of Prospects	Total to expect
In-Person	50%	\$		\$
Phone	25%	\$		\$
Direct email	5%	\$		\$
Generic email	1%	\$		\$
Mail	1%	\$		\$
Facebook	0.5%	\$		\$
Twitter	0.5%	\$		\$
			<b>Total Campaign Target</b>	\$

## Chapter Five – Making your asks

Crowdfunding isn't as simple as creating a page and watching the dollars roll in. Sometimes campaigns go viral, but don't count on it—it almost never happens. A successful crowdfunding campaign takes effort but almost always pays off in the end. In this chapter, we'll cover some common fears with fundraising, how to get over them, and tactics for crafting the perfect ask.

### Moving beyond stigma

You might be thinking, "Asking for money is hard!" You're right! There's a lot of discomfort and stigma in our culture about money, especially in asking for it. It makes us anxious, embarrassed, and some of us straight up refuse to do it. That's understandable. Our approach to money is often informed by our upbringing, our economic background, and often a cultural veil of secrecy, discomfort, and maybe even shame. It certainly doesn't help that when we think of money, it's easy to associate it with the way it can be used to further exploitation, oppression, and inequity. But it doesn't have to be that way!

What is standing in your way? To take the stigma out of fundraising, it often helps to identify what's holding you back. Here are some common fears that prevent people from crowdfunding:

1. My group is too small or unimportant to ask for funding.
2. I'm not a 501(c)(3), so how can I fundraise?
3. Where do I even start?
4. How do I talk about my project and get people excited about it?
5. I don't have time to fundraise.
6. I've never fundraised before!
7. My friends aren't rich, how can I ask them for money?

Identifying your fears are a great first step, as well as understanding that people will say no. Every time you ask for money there will be plenty of yeses and plenty of nos, but don't let yourself feel discouraged every time you hear a no. Here are some things to keep in mind to make fundraising more approachable so you can fuel your movement for positive change:

1. **When you ask for money, you're giving people an opportunity to participate in something meaningful.** Through crowdfunding you aren't just raising money, you are building and deepening relationships with friends and donors at all giving levels. People will appreciate that you are sharing how important the work is to you, and they'll feel a more profound connection to the cause because you told your story.
2. **You are invested in your changemaking project, and you're focused enough to commit significant and valuable time to it.** It is a gift to ask others in your community to be a part of it with you and share a role in the project. That's why it's very important that you lead with your "why," and share your enthusiasm authentically.

3. **Asking for money is like asking for volunteers.** You probably don't have the same feeling of dread when calling volunteers to ask them for their time an expertise as you might when you ask them for donations. But asking for money is just a different kind of necessary resource that makes it possible to realize your goals.
4. **People can say no, and that's ok.** The people who most often give to a project give because they are asked. And the people you ask are always allowed to say "no," and that's ok. You aren't forcing them to do anything they don't want to do, and they can still care about and be interested in your work. Refusals are rarely ever personal, there are a million different reasons someone may not be able to give at that time. On the flip side, if you never ask, they can never say yes!
5. **You're earning more than money.** It might sound awful to call up some friends and acquaintances to ask for money to bring your project to life. But if you keep at it, it almost always pays off in both strong relationships with your community of supporters and in the resources you have to keep at it. After jumping in, you might even decide you like it!

Read over this list and remind yourself of how important your project is everytime you feel nervous or anxious about asking someone for money. Your project is worth it to you, so it's worth asking someone to be a part of it!

### Make asking for donations fun

A bit of fun can go a long way to reducing stigma and fundraising stress. Afterall, part of the joy of working with a team is being able to add a bit of fun and understanding to your campaign. Here are some ways to make asking for donations fun:

1. **Ask your friends and family first.** They'll probably say yes! These easier asks will give you the confidence boost you need to build momentum and make harder asks down the road.
2. **Make it interactive.** Can you take your donor to a specific location or have them meet the people you'll be working with? If not, you could create some sort of visual, like a model or a photo, of what the finished product will look like.
3. **Create a little competition.** There are lots of ways to incentivize donors. You could have a contest or give away an incentive prize, like every person who donates before midnight gets a photo or special tour.
4. **Get creative in the way you thank people.** Unless they want to remain anonymous, consider tagging them on social media with a photo.
5. **Celebrate with your team.** Make time to meet with your team regularly for a treat together to celebrate and reward success, troubleshoot issues, and enjoy each other's company. You're on this journey together!

### How to ask for donations

Once you learn a few basics about how to ask for donations—and after you practice a few times—we can all but guarantee that the process will get easier, seem more natural, and even feel gratifying.

#### Components of every successful ask

Remember when we crafted your story in Chapter Three? Your ask is the big glaring gap we left out. It's sort of like the cherry on top of your story that brings it all together and gives your prospect an action item. Your whole beautiful story, with all its drama and your "why," should all build up towards this ask. So your ask should essentially be:

What your project is + Your and your prospect's "why" + A specific ask amount

That's it! It's straightforward and simple—and it should be, you don't want to bog down your ask with too much around it or the ask will get lost. Of course, once you ask for a specific amount you should give your newly minted donor instructions on how to give to your campaign. If it's in person, it might be sharing a link with them via email then and there, if it's online it might be a hyperlink in your email or social media post.

**Why be specific?**

Being specific about your ask takes the guesswork out of a donation and helps get the most out of your prospective donors. For someone who might've just recently been introduced to your project, it is likely tough to place a specific value on the project or to understand how big a gift would be meaningful—even if they do care about it. Make it easy on your donor by making their answer a simple yes or no, rather than make them do some guessing about how much (in cash) your project is worth.

It might also help to detail what their gift will go towards. Providing that image can help donors see the value of their gift, especially if you're asking for a large donation. If you're raising funds for a community garden, it's easy to say that \$10 will buy a leaf rake; \$150 will buy a compost tumbler; etc. But even less “concrete” projects offer ways to quantify. The leaders behind Memphis's Hampline bike and pedestrian trail raised close to \$70,000 from more than 700 people. They had calculated that a \$55 gift would pay for one foot of the new trail, and stressed this in their asks.

**Making your ask in person**

Fortunately the asks you make in person—those most likely to net you donations—are also some of the easiest asks. These conversations can be casual and friendly. Consider if someone asks how you've been doing. You could say something like:

“I'm good but busy! I've been working on raising money for a new community garden in my neighborhood. Right now the site is a vacant lot that's full of trash, and since it's on a busy corner, it's a complete eyesore for everyone who walks by. I'm hoping to turn it into something neighbors will enjoy looking at and can actually go in and experience. Do you think you could chip in \$20 for lumber for our new raised beds?”

**These asks are often 50% successful.**

**Asking over the phone**

If you're making a call to someone to ask for donations, chances are you know them and have a rapport. It might seem strange to call and ask your friend for money, but it doesn't have to be any different than asking in person. A preliminary text might also help ease the tension. You could text something like:

“Hey, do you have time for a quick phone call? I want to talk to you about this project I'm really excited about!”

**OR**

“Hey, I'm crowdfunding for this project in our neighborhood, it'll do [THIS.] Would you be interested in being part of it?”

Once you get your friend on the phone, you might find it much easier to break the ice and talk about your project. The expectation is already set!

If you and your team feel like you need more guidance during your phone calls, a phone tree can help keep you and your team organized and keep your donation asking conversations on track. See the following page for an example.

**These asks are often 25% successful.**

## Sample Phone Tree

**Hampline:** Have you already given to the Hampline campaign?

**Caller:** Yes



**Hampline:** Great! Thanks so much for your donation...



**Hampline:** We are in the final 2 weeks of the campaign and still have \$40,000 to raise before November 23, otherwise the project may get delayed another year. We're asking friends and supports to ask 5-10/30-50 of their network to donate. This is important in reaching our goal. Can you commit to asking some people you know to join you in supporting the Hampline?

**Caller:** No

**Hampline:** Are you familiar with the hampline?

**Caller:** Yes



**Hampline:** Can I count on you to make a tax-deductible donation? [ioby.org/project/hampline](http://ioby.org/project/hampline)

**Caller:** Yes



**Hampline:** We are in the final 2 weeks of the campaign and still have \$40,000 to raise before November 23, otherwise the project may get delayed another year. We're asking friends and supports to ask 5-10/30-50 of their network to donate. This is important in reaching our goal. Can you commit to asking some people you know to join you in supporting the Hampline?

**Caller:** No



**Hampline:** Livable Memphis, Broad Avenue Arts District and Binghampton Development Corp. are in the middle of a public-fundraising campaign to raise \$75,000 to build a protected bike lane that will connect the Shelby Farms Greenline with Overton Park.

**Caller:** No



**Hampline:** I'm sorry that you aren't able to give right now. If you're interested, there is another way you can contribute...



### Why be specific?

Being specific about your ask takes the guesswork out of a donation and helps get the most out of your prospective donors. For someone who might've just recently been introduced to your project, it is likely tough to place a specific value on the project or to understand how big a gift would be meaningful—even if they do care about it. Make it easy on your donor by making their answer a simple yes or no, rather than make them do some guessing about how much (in cash) your project is worth.

It might also help to detail what their gift will go towards. Providing that image can help donors see the value of their gift, especially if you're asking for a large donation. If you're raising funds for a community garden, it's easy to say that \$10 will buy a leaf rake; \$150 will buy a compost tumbler; etc. But even less "concrete" projects offer ways to quantify. The leaders behind Memphis's Hampline bike and pedestrian trail raised close to \$70,000 from more than 700 people. They had calculated that a \$55 gift would pay for one foot of the new trail, and stressed this in their asks.

### Asking via personal email

Even though you're asking via email, don't forget to keep your ask personal. Keep the person you're writing to in mind. If you're writing a blast, you'll still want to keep it tailored by keeping in mind the audience that's receiving your email. See Chapter Three for more information on audiences.

Bring up the story you wrote in Chapter Three. This should be the basis of your email. Center your "why" and cover all your bases too—the who, what, when, and where of your project.

You'll also want to include the link to your fundraiser **at least three times**. Drop it in there in bold, and consider using a different color so that it will stand out from the rest of your email. Since most people only read the first few sentences of an email, be sure to include some compelling information here and your first link to your fundraiser. **The link to your fundraiser should be the only link in your email.** You should have lots of information on your campaign page already, and people have short attention spans over email, so resist the urge to educate your prospect in your email. The last thing you want is for someone to be really interested in your email but have their interest fade or their attention taken up by something else while they're on another web page where they can't donate to your project.

### Sample email

Hi Angela!

How did the event go last week? I'm so sorry I missed it. I've been busy preparing to lead a project in my neighborhood and I've hardly had time to think! You can read more about it at **[ioby.org/grandavenue](http://ioby.org/grandavenue)**

Have you ever noticed how dangerous it is to cross Grand Ave? Last year, six pedestrians were injured while trying to cross the street in the crosswalk. It's terrifying just imagining one of our kids risking their lives to cross the street just to play on the playground.

We've put requests in with local officials to add a stop sign or a crossing guard but we haven't gotten any responses. So we're taking our community's safety into our own hands. Crosswalk flags are a cheap and effective way to increase safety for pedestrians crossing the street.

This week, I'm asking friends and family to give to our campaign at **[ioby.org/grandavenue](http://ioby.org/grandavenue)** Can you give \$35 to help us get started?

P.S. All donations to **[ioby.org/grandavenue](http://ioby.org/grandavenue)** are tax deductible!

**Personal emails are often 5% successful, generic emails (think, "Dear friend") are 1% successful.**



# Activity

## Draft your asks

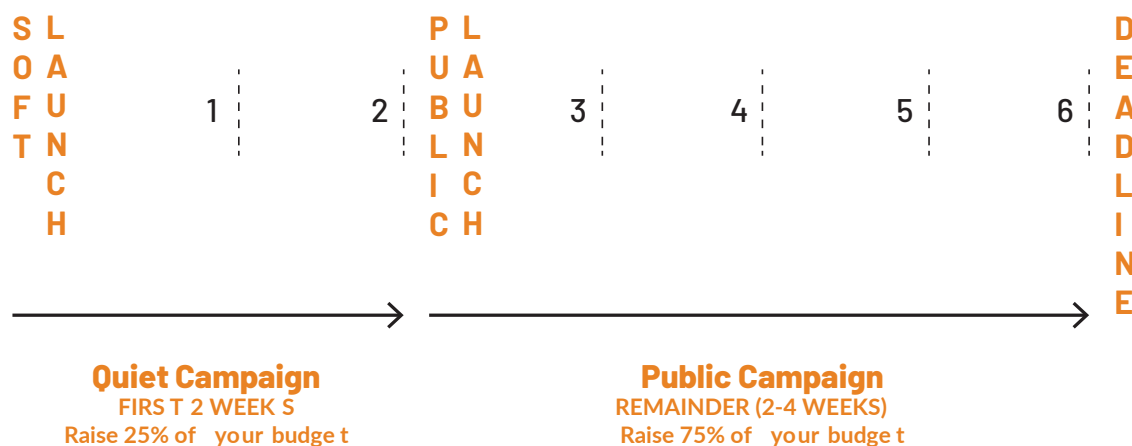
Now, it's your turn to try! Looking at your prospect chart, do yourself a favor and write some scripts that can help you plan your asks. Do you have a lot of phone calls planned? Draft a text or plan your phone tree. Do you anticipate sending a lot of emails? Write a couple of templates that you can customize later on to make personal to the person you're asking.

Use this page to plan a phone tree or draft an email. [You can also click here](#) to download a phone tree template online.

## Chapter Six – Soft Launch

Now that you've pulled your team, your budget, and your crowdfunding plan together, you're ready to start actually fundraising for your project. But before you start shouting your asks to the rooftops—which will come soon!—you have just a bit more work to do.

It's helpful to think about your fundraising in two phases—your “quiet” phase, or what we call your soft launch, and your “loud” phase or your public campaign.



Your soft launch helps set the stage for your public campaign. Your campaign will still be active during your soft launch—this is *not* the time to be building prospect charts or other planning, that should already be done—you just won't tell the broader public yet. That's because, based on our decade of experience, we've found that most donors are more likely to give once they see that others have given to a campaign and once they see some momentum. We've found that 25% is that sweet spot of a reasonable fundraising goal for your close network and enough momentum to nudge others to get on the bandwagon. It's a natural reaction for people to want to be part of something bigger and something that others are already a part of. Having a soft launch *before* your public campaign helps you take advantage of that.

During your soft launch, you'll raise the first 25% or so of your overall budget from the people you are almost certain will give to your campaign. This is your and your team's closest network of friends, family, and colleagues—the people who love and care about you and trust you enough to feel comfortable in investing in your campaign even if you're still at \$0.

## How to get started

1. **Calculate your soft launch goal by dividing your total goal by 4.** Then, divide that number by the number of teammates you have. **This is your individual soft launch goal.** Here's an example:  
Total goal: \$10,000; Soft launch goal: \$2,500; Divided by 5 teammates → \$500 each.  
Remember that each team member should map their asks with their own prospect chart.

### Try this with your team

Every team member should have their own, individual soft launch goal. Take time to work that out with your teammates, and ensure that you know each others goal and track each others progress to stay accountable. When folks reach their goal, celebrate!

2. **Choose a realistic soft launch deadline.** For a typical 6-8 week campaign this is the first 2 weeks, but you should extend this date for a bigger budget or longer campaign.
3. **Ask your teammates to give first.** Any donation, no matter how small, will start to build your momentum and encourage potential donors to give.
4. **Look at your prospect chart and identify the people most likely to give.** These will likely be your family, friends, and close colleagues. Let them know how critical they and these first donations are to your campaign. Try to make your asks face to face or over the phone.
5. **Make your first asks** of your close family, friends, and colleagues.
6. **Follow up.** After you send an email, set a date to call or visit with the folks on your soft launch list that haven't yet responded. It might take 3 or 4 follow ups, but it is very important that you do so. Most people who give require at least 4 follow ups—this is normal.
7. **Thank your first donors** within four days and, when possible, turn them into teammates. Ask them to share your campaign with 10-15 of their neighbors and closest friends. Provide them with specific language (emails, tweets, messages) you want to be shared.

### Help! We're stuck!

If your soft launch isn't going as well as you would like, try some of these ideas to jumpstart your fundraising:

1. See if you can find someone who can be your special first donor. This should be someone that you know very well that would enjoy playing the special role of moving you from \$0 raised. When you make your ask, make sure they understand the impact of your work and why it's bad to have your live page read \$0 raised.
2. Try to recruit more teammates to expand your network of potential donors.
3. Try a soft launch challenge. You and your teammates could make the first donation and challenge close family and friends to at least match your donation. We've seen it work before!
4. Make sure you and your teammates have followed up personally with those they've asked. You might not be stuck; you might just need to make some more follow ups!

# Activity

## Break down your budget.

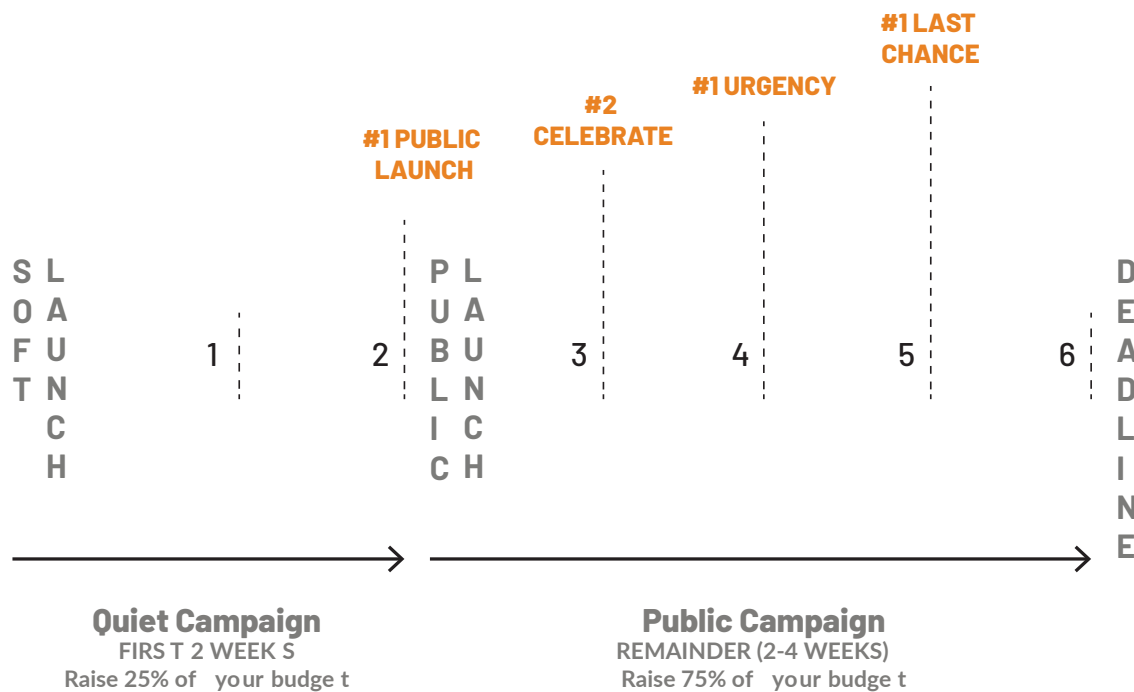
1. Write down your budget goal. Remember to reference your prospect chart and make sure that this goal is a reasonable one. Now divide that budget by four.
2. Next, divide your soft launch budget by the number of teammates you have. This is how much you'll individually need to raise in your soft launch time frame.
3. Now, determine the length of your soft launch. The first quarter of your campaign will be your soft launch. If your campaign is 8 weeks long, your soft launch should be 2 weeks. If your campaign is 12 weeks long, your soft launch should be three weeks, and so on and so forth.
4. Lastly, identify each of your first ten donors from your prospect chart. These will be the first donors to give and should be the folks most likely to give to your campaign.

Now you're ready to make your asks! Remember to refer to your story and make specific asks of your donors. If your donors are close to you, emphasize just how important that first donation is to your whole campaign.

## Chapter Seven – Four Pushes

Once you’ve completed your soft launch, you’re ready for the public phase of your campaign. And with about a quarter of your budget already raised, you’re in good shape!

You can think of the public phase of your campaign as four different pushes that you’ll make: (1) The Announcement, (2) The Celebration, (3) The Urgency Builder, and (4) The Last Chance



### The announcement

Your team will introduce the campaign to everyone on your list. This is an exciting moment, but it needs to include more than just an email blast or social media post. Here’s what it may look like:

1. Send an initial announcement via email, but personalize it for each contact. Include a SHORT version of your story and a prominent link (or several) to your campaign page. Ask people to give a specific amount and to share your campaign!
2. You may want to resend this email one or two days later with a short “making sure you saw this” note at the top that includes a major reason why the project is important to you.

3. For donors you know well, pick up the phone. Ask if they saw your email, and remind them why your project matters. Ask if you can count on their support and make a specific ask.
4. When possible, schedule a time to talk in person over coffee or drinks. Make the case face-to-face.

## The Celebration

Donors want to be a part of something successful, so share your success to build excitement and credibility! This push can come halfway to your deadline or when you've raised 50% of your funds. Use a celebratory tone to update those who have already given, as well as those who haven't yet, with new content like behind-the-scenes stories, photos, videos, or links to local media coverage to show your momentum.

1. Post to the Updates Tab of your campaign page, then share your post on social media channels. Posts with photos or videos to get more clicks.
2. Nudge your easy asks. By this point, if you don't see your bestie's name on your donor list, reach out to them and remind them how important their early gift is.
3. Ask community partners to share with their networks. Make it easy by providing the content - and don't forget to repost or retweet anything they share.
4. Thank donors and ask them to share the news about the work they are supporting.

## The Urgency Builder

What differentiates crowdfund from other fundraising? The deadline. You only have a certain amount of time to raise money for your project, and your progress will be public. Always include your deadline in your communications, but use it to build a real sense of urgency and keep the momentum up in the second half of your campaign. Social media can be particularly helpful in this step.

1. Individual stories. Focus on telling the story of a single individual who is affected by the project. Fundraisers have been found to be more successful when focusing on a single person's story, rather than a larger number of unnamed people or statistics.
2. Use numbers. How close are you to your funding goal? How much time is left? Repeating your deadlines and funding goals can help create urgency.
3. Make thank yous public - and personal. For donors who give during this time, share a photo of your team celebrating - a personal and shareable way to extend your gratitude.

## Last Chance

This last push should target one key group - procrastinators. These are people who have considered giving but just haven't taken initiative yet. This will be your most urgent ask and should fall within 5 days before your fundraising deadline or when you're within 15% of your goal.

1. What's at stake? Tell donors what will happen if the campaign doesn't hit the fundraising goal. Will a crucial part of the budget need to be cut? How will that missing piece impact the project and the community?
2. Go personal. Has anyone in your closest contact list put off giving? Reach out to them personally and let them know this is their last chance and that you're counting on them.
3. Donor story. Those who don't react to the rising sense of urgency might react to one last compelling story. Find a donor who has already given and share their words on why they decided to donate.
4. Ask for last-minute shares. Reach out to all of your donors a second time and thank them once more, and then tell them what's at stake if the campaign doesn't hit its goal. Then ask that they spread the word to their networks one last time, sharing their own reason for giving.

# Activity

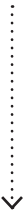
## An hour a day—Planning your campaign timeline

Use this blank worksheet to help plan each week of your campaign. Plan who your donors are for each week, and jot down some thoughts on what a compelling message might be for each stage of your campaign. Remember, every message should lead to an outcome; maybe it's giving to your campaign, or maybe it's coming out to take part in your project and volunteering. Focus your message on the action you want your donor to take!

Remember we're always here to help if you have questions. **Reach out to us at [success@ioby.org](mailto:success@ioby.org)**

### Week 1: **Soft Launch**

Your first 10 donations



### Week 2: **Soft Launch**

Reach 25% of your dollar goal



### Week 3: **Announce & Celebrate**

Announce your campaign, and celebrate the 25% milestone. Reach 40% of your goal by the end of the week.



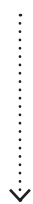
### Week 4: **Celebrate**

Reach 50% of your goal



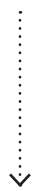
### Week 5: Urgency

Reach 65% of your dollar goal



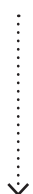
### Week 6: Urgency

Reach 75% of your goal



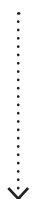
### Week 7: Last chance!

Reach 90% of your goal



### Week 8: Last chance!

Reach 100% of your goal



### Week 9: Closing out

ioby funds **MUST** be transferred to a 501(c)3 non-profit. **OR** ioby can serve as your nonprofit fiscal sponsor, if you are eligible.



### Week 10: Cultivate lasting relationships

[Empty dotted box for notes]

[Empty dotted box for notes]

[Empty dotted box for notes]

[Empty dotted box for notes]

[Empty dotted box for notes]

[Empty dotted box for notes]



## Chapter Eight – Thank you!

By the time you've reached the thanking portion of your campaign, you've already engaged your networks, made the asks to donors, and turned contacts to donors. That probably feels good! At this point, you might be tempted to put your asks into hyperdrive—posting more asks to social media, attending events, and more. Those are all good things! But as you're doing them, it can be easy to forget a crucial and critical step: thanking your donors.

Taking the time out to thank your donors will pay for itself in dividends. It'll make your donors feel appreciated and honor the gift that they've given to you, meaning that you can likely come back to them later down the line—maybe even during the same campaign, if you're running a months long campaign—to make an additional gift. And perhaps even more important, a grateful and generous donor might consider asking their own friends and family to also give to your campaign, extending the network of people who learn about your project and are asked for a donation.

Remember that prospect chart? Growing your prospect chart is one surefire way of increasing the potential amount of money that you can raise. One way to expand that prospect chart without adding too much work to your or your teammates, plates is by encouraging your donors to ask their own networks. Appropriately thanking them for their generous gift is a key way of encouraging that.

### How to thank your donors

Thanking your donors doesn't have to feel stuffy and superficial—you can be creative in your thank yous to make them authentic to the relationship you have with your donors. You could drop by a person's house to thank them in person, give them a call to explain what their gift will do for your project, tag them on social media in a photo of the items you purchased, or you could send them a personalized email sharing your plans on how you'll complete the project.

Remember that your donor is the hero in this story—that is, the story of their gift and how it'll help bring your project to life. A simple way to focus on the hero, your donor, is by saying “you” instead of “I” or “we” to say things like “You made this happen,” or “Your gift is transforming the neighborhood.”

### Add a next step

The day or two after a donor gives to your campaign is the time that they are most excited about your project. That makes it the perfect time to send a quick and heartfelt thank you, as well as to follow up with a next step like reminding them to RSVP to a related upcoming event or inviting them to share the project with their networks. A quick response to a gift is important. While you may want to consider an additional, “bigger” thank you like organizing an event with a major donor or dropping by someone's house, a quick and timely phone call or email shortly after a donor gives is often very appreciated.

See the following page for an example of a thank you email.

Subj: Thanks for your gift, Joanna!

Hi Joanna,

I just wanted to drop a line and thank you for your gift to our project, the 14th Street Community Garden [Link].

Your gift will help us build a new raised bed for our garden so that kids from the neighborhood can come and learn about worms and the environment and enjoy fresh veggies in the summer. This project wouldn't happen without you; you're making a big difference in our block!

Would you be able to join us for our potluck next weekend in the garden? We'd love to thank you in person and show you what your gift will help us build this summer.

Hope to see you soon, and a huge thank you again!

My best,

Roberta

### Celebrate with your supporters!

As you build momentum and gather more donations, remember to celebrate how far along you've come. In addition to personalized thank yous after each gift, consider sharing milestones—like your 50% and 75% mark. Share how excited you are that your project is growing and that donors like them are taking part, explain what their gift will help you do (your “why”), and invite them to share your project with others. Turn your supporters into active cheerleaders by giving them a link to share your campaign, a bit of language to help them craft their own ask, and a nudge to do so. Here's an example:

Subj: We're halfway there!

Hi Joanna,

Happy Friday!

I wanted to share some exciting news with you—thanks to your gift, we're halfway to our goal of \$5,000! We're well on track to building new raised beds for the garden and offering summer gardening programs for kids in the neighborhood. But, we've still got more work to do.

Would you mind sharing our campaign with some of your friends? I attached some language below if that helps—I'd really appreciate the share to help get us over the line.

“I just donated to The Garden! Would you be willing to make a donation too? Your \$25 gift would go a long way towards bringing programming so that kids can learn about gardening and the outdoors! [LINK]”

Thanks for making a BIG change in our neighborhood.

My best,

Roberta

### Get creative with your celebrations!

There are lots of different ways to thank your donors and invite them to do more. Think about your audience and what they would appreciate.

For example, one project leader who was raising money for her urban farm held an event and asked for a \$100 donation from attendees, who then received a portrait of themselves with a chicken in return. She knew that her audience would love the fun and silly gift of a portrait with a chicken; but not only did they love it, they posted that portrait on Facebook and Twitter inviting their own network to check out the campaign.

Their friends' social media feeds then filled up with goofy photos of people with chickens, and even people who didn't attend the event got curious—what the heck are all these portraits with chickens, and how can I get my portrait taken with a chicken? That generated more and more buzz and excitement for the project, got more people interested in the project, and ultimately the project leader was able to make more asks—and do another chicken photoshoot—of more donors.

By getting creative, your thank you can be heartfelt, it can be redeemable, and it can even be shareable. It doesn't have to be expensive or complicated to give to your donors; it just needs to be thoughtful.

**Note that you do NOT need to give a reward to your donors to incentivize gifts. In fact, a reward may complicate your campaign and complicate tax-deductibility, which may disincentivize donors.** Instead, a heartfelt thank you will generate good feelings and encourage your donor to give again or share your project. Rather than a traditional gift, consider a creative way to thank your donors that speaks directly to your audience—who knows, it might even involve chickens!

## Maintain momentum

A key reason for thanking your donors is ensuring that you maintain momentum for your campaign. While you may want to break with your teammates to celebrate when you hit a milestone, it's important to remember that the work isn't over. Use each milestone—whether it's an event or a fraction raised of your goal—to keep the energy and buzz up and gather more donations. As you thank your donors, giving them a next step—like sharing your campaign—is a key step to maintaining that momentum.

As you get closer to your budget, you may also want to consider what comes next. Do you want to start planning another campaign for the next phase of your project? Do you want to start reaching out to foundations and other grantmakers to share the success of your project and the breadth of your support to tee up a future grant proposal?

Your fundraising doesn't have to end when your campaign is over. For example, Ivette Bledsoe and the firefly trail in Athens, Georgia, jumped from their successful campaign to start planning next steps. They leveraged the \$60,000 they raised for a pilot walking and biking trail in their town to demonstrate the support they had from the community to expand the project. They convinced their local government to support a ballot initiative to allocate funding for the next phase of the project, and voters agreed—they voted to set \$16 million aside for the next phase of the trail. While your project might not be quite as big, don't underestimate the momentum you have on your side once you get your campaign going.

## What if I don't make my goal?

Even with the best of plans, things don't always work out the way we want it to. We have a flexible finish policy at ioby, which means that you get to keep whatever you raised (less our fess). If you don't reach your goal, work with your team and with your Success Strategist to adjust your budget so that you can still accomplish what you set out to do but with a smaller initial budget. That might mean implementing a pilot instead of the full project or setting up another crowdfunding campaign later on when the timing is right to fundraise the remainder.

Look back on your process with your team—What went well? What was missing? Take those learnings to run another even stronger campaign or decide what other opportunities you might now have given that you have some funds raised.

# Activity

Now, draft your own thank you templates to share with your teammates so that they can thank their donors appropriately too. Follow our tips above, and write a draft for a phone call, an email, and a social media post.

## Phone call

## Email

## Social media

## Chapter Nine – Big budgets

At ioby, we think that your project can be meaningful no matter how big the budget. For many projects, you don't actually need all that much money to make a big impact—the average budget on ioby is about \$4,000. If you find yourself with a very large budget (at ioby, we think that anything over \$10,000 is a large budget), it might be worthwhile to check in with yourself and your team. Is your budget a perfect-case scenario? Could you get by with a truncated budget? Do you really need to buy new, or could you get some equipment donated?

But sometimes you just need more money to make it happen. We get it.

While crowdfunding for a budget over \$10,000 is definitely doable, it will take some extra planning and some extra hard work to make it happen. If you have your sights set high, your budget—and your fundraising skills—will just have to rise to the challenge. Here's how.

### 1. Build your team carefully.

Make your fundraising team as large and diverse as possible. We recommend no less than 5 people on your team, but two of our previous big budget team leaders assembled crews of 20 people or more, with backgrounds ranging from commercial airline pilot to church pastor to bicycle co-op director.

That said, **don't ask just anyone to join you for the sake of a big team. Make sure everyone on your team understands your project, is genuinely interested in it, and is game to help you reach your goal.**

Don't discount people with little or no fundraising background. An enthusiastic and invested team member will take you much, much further than someone with lots of experience but who is apathetic to your project and not willing to commit time to it. Remember that it doesn't matter how much money the individuals on your fundraising team have themselves. What matters is that they're committed to your cause and will step up to ask others to give, so don't rush your selection process.

**In addition to people, consider what organizations you could partner with to help you fundraise.** The prospect of supporting an awesome neighborhood project—by giving advice, spreading the word, or donating money—is appealing to many nonprofits and foundations.

### 2. Stay accountable.

Make accountability part of your plan. Since all of your work is likely to be volunteer, and life happens, check in with your team regularly to inquire how their asks are going. Set goals, stay organized, and shout out each success to the whole group to up morale. Staying involved will keep your team energized and set a tone of “we're all in this together.”

Be concrete and forthcoming about your plans and progress with your team and with your donors. Report to your team regularly about how much money has come in and how much there is left to raise. When people feel more informed, they feel more ownership.

### 3. Outline a realistic budget and fundraising plan.

Ask as many people as you can to help review your budget to ensure it seems reasonable. This could include your fundraising team, any partner organizations or institutional funders you're working with, and any of your peers who have experience in the area you're working in.

Pay attention to timing. The last three months of the year are when a lot of organizations send out their asks, but it's also when folks are most likely to give. This is where your prospect chart comes in handy. Know your audience well enough to know when the best time to ask is—and ask your audience for their opinion if you're not sure.

### 4. Cultivate big donors.

While it's great to get lots of small donations, it is usually worth your while to spend extra time cultivating bigger donors if you think they can give more. This could mean upping the number of folks on your prospect chart that you ask in person or offering special recognition to big donors.

Identify big givers (including local businesses) by their generosity to other projects. Do they give prolifically to other projects or organizations that are similar to yours? While one or two small gifts might not mean much, if a potential donor gives meaningfully to aligned organizations it might mean that they're capable and interested in making a larger gift to your campaign.

### 5. Plan your asks in waves.

Fundraising takes energy: plan your asks in waves so your team doesn't lose stamina. How many people will you ask for \$100? \$50? Knowing exactly who you plan to ask for what amounts is key. Sit down with your team and have each team member write down the names of the people they plan to ask at what amounts. Completing a detailed prospect chart will not only reveal how you will reach your goal but will serve as a great tool for holding your team members accountable to the asks they've committed to making.

### 6. Use match dollars to leverage more donations.

Most big-budget projects have a match available at least once over the course of their campaign. A match is an opportunity for your donors to increase the impact of their donation. It's a great idea for big campaigns in a number of different ways.

For your big donors, whose large gifts you turn into a match, it'll make them feel good about being part of something bigger and stretching their gift even further—the \$1,000 will turn into an additional \$1,000 through smaller gifts. If you have a big donor already, and especially if you have a close connection to a large donor through your project, you should consider asking if they'd be willing to give with a match. This could be a match with a specific pool of money they give, or they could adjust their gift based on how much people end up giving.

With a match in place, smaller donors are more likely to give to your campaign since they can see—in real-time as their donation is doubled or even tripled—that their gift is going that much further. Who doesn't love to see their money and their impact multiply?

### 7. Make a plan to reach each milestone.

Just like you have a strategy for your soft launch (see chapter Six), you might want to have a strategy for reaching each of your other milestones. This will help chunk out your campaign into smaller, more manageable pieces.

This might mean hosting a fundraising event to get from 25% to 50% and planning your asks around invitations to come and selling tickets at different levels. It might be that you work hard to secure a match from a big donor to bring your campaign from 50% to 75%. Whatever your strategy, you should make a plan for each milestone.

### 8. Behold the power of story.

- The story of a project can be told from many perspectives, including:
- Your life experience and what makes your project important to you
- How you imagine other people benefitting from it
- A common point of pride for your community that relates to it
- Your neighbors' thoughts about and hopes for it

Whatever narrative direction it comes from, incorporating a story into your campaign will help you forge common

ground with donors by illustrating why they should care, and help you make the abstract idea of your project tangible by sharing what it actually looks and feels like.

Similarly, there are many great formats you can use to tell your story:

- Share photos and narrative text through your ioby campaign page, social media, emails, and every other available channel.
- Consider investing some time (and possibly money) in a short, high-quality video or video series. Hiring a pro if there are no experienced videographers on your team can save you from the turnoff of an amateurish final product.
- Go for earned media. Pitch your story to local news channels, radio shows, blogs, and other outlets.
- Plan a benefit event and ask your neighbors to share their own personal reasons for supporting the project with all attendees.

However you employ the story of your project to connect with donors and reach your fundraising goals, remember: don't stop once the fundraising phase is done! Keep your backers in the loop as your project progresses past the campaign stage.

## 9. Fundraising and community buy-in go hand in hand

Crowdfunding for a local project is a great way to bring neighbors together. As you seek both approval and financial support from your neighbors, keep in mind how you can appeal to different people's interests.

Pay attention to donor feedback. When you tell your story or post updates on your campaign page or social media, study people's comments to learn what's most interesting and inspiring to them. If they loved the photo with all the kids in it, post more of those! If they wanted more details about the budget revision you just announced, give it to them.

Consider planning a non-fundraising event to keep donors engaged after your campaign is over. This might be a thank you party in your backyard, a ribbon cutting event, a progress update ... There's no limit to the ways you can keep your backers interested in your work after they've given.

**Crowd-resourcing is about tapping into community energy as well as money. Do the future you a favor and don't think of your campaign as "one and done," even if you don't expect to do another. The awareness you raise and support you earn for this project could be leveraged to bolster other efforts down the road.**

## Phasing

When fundraising, it is important to realize that the bigger the project is the more money you need, and that can make the process more daunting. In these cases, it's important to reflect and really see what you and your team are able to successfully accomplish at this very moment. This could mean breaking down your project into parts, or phasing as we call it.

Phasing can be fundraising for one specific part of the project or breaking a large budget into pieces that are more feasible for the team to tackle. An example of this would be cutting a \$20,000 budget that needs to be raised maybe over six months in half. This would create two, three-month campaigns. If you have a team of five that means each person would be responsible for \$2000. That's a lot more feasible if this is your first campaign. Another example would be a garden revitalization project may be early in the year you can start fundraising for the soil, seeds, and lumber for the raised beds. Then in the fall in summer you can raise funds for a water irrigation system. These are just a few ways to break down a large project into something that's easier to tackle. Another thing to note is that many leaders double the success of their second project. So starting small can lead to big payoff in the end.

## Chapter Ten – Fiscal Sponsorship

### Build your team What is fiscal sponsorship?

Fiscal sponsorship is an arrangement in which a legally incorporated nonprofit extends their tax-exempt status to another entity by agreeing to accept and manage funds on their behalf. It occurs when an informal group or an individual wishes to receive tax-exempt contributions for charitable or community-focused activities without having to build a full organizational infrastructure.

Fiscal sponsorship arrangements can vary, but two are most common:

1. **Comprehensive:** Ongoing sponsorship and support which may include things like human resources management, IT support, and other services. If your project is ultimately hoping to raise more funds than what is described in your ioby campaign or if you'll need long term sponsorship that extends beyond the life of your project, comprehensive fiscal sponsorship from another organization may be an option to consider.
2. **Project specific:** Limited to a specific project. **iooby's fiscal sponsorship is a type of project specific sponsorship and is limited to the project that you've described on ioby.**

### Why do I need a fiscal sponsor?

Since ioby is a nonprofit crowdfunding platform supporting local, community-based projects with a public benefit, we can only support projects that qualify as charitable and community-focused. In order to qualify, all projects must be managed by a federally recognized nonprofit, tax-exempt group. This is how we guarantee that all donations made on ioby are tax-deductible.

iooby's fiscal sponsorship is required of all campaigns that do not have their own 501(c)(3) status or a 501(c)(3) fiscal sponsor. If you do not have your own 501(c)(3) status and do not have a 501(c)(3) fiscal sponsor, ioby may be able to serve as your project's fiscal sponsor.

### What do I do if I'm a 501(c)(3) or already have a fiscal sponsor?

Great! You are welcome to crowdfund on ioby with a different nonprofit fiscal sponsor, you'll just need to provide us with a bit more information, like the name of the organization and a copy of their federally issued non profit determination letter. Once you've finished crowdfunding, we'll pass the funds you raise on to your fiscal sponsor, and they will distribute the funds to you according to the agreement you have in place.

Can ioby be my fiscal sponsor?

Yes! But ioby offers limited fiscal sponsorship, which means that our sponsorship only extends to the funds raised on your crowdfunding project. It is important to note that we don't offer the kind of full, comprehensive fiscal sponsorship you might find at other organizations like a community foundation. This means that once your campaign is over and your funds are disbursed, we are no longer able to serve as your fiscal sponsor -- unless you crowdfund for another project, that is!

There are also just a few types of projects for which we aren't able to offer fiscal sponsorship but that are still eligible



to crowdfund with ioby if you have another fiscal sponsor. That just means you'll need to find another organization to sponsor you while you crowdfund on ioby.

### How much does it cost to use ioby's fiscal sponsorship service?

There is no up-front cost for using ioby. At the end of your campaign, we retain a 3% donation fee on the total raised that covers secure third-party donation processing. This fee applies to all ioby campaigns.

If you raise over \$1,000 in your campaign, we retain a flat fee of \$35 that helps us keep our platform running (and we waive that fee if you raise less than \$1,000).

In addition to the above fees, if you elect to use ioby's fiscal sponsorship service, we will also retain a 5% fiscal sponsorship fee on the total raised.

### Can ioby accept my grant?

Yes, ioby can accept grant funds on your behalf with some restrictions:

1. Your project must meet ioby's project criteria.
2. You must use ioby's platform to crowdfund at least 25% of the project's total funding need. That is, if you expect to receive a project grant for \$20,000 and want to use ioby as your fiscal sponsor, your team must commit to crowdfunding an additional \$5,000 through an ioby campaign page.
3. You must be seeking a temporary, project-based fiscal sponsor.

If you do not seek funds in addition to the grant, prefer not to crowdfund, or are seeking ongoing—not project-based—fiscal sponsorship, ioby may not be the best fit fiscal sponsor for this particular project.

### When will I need to find my own fiscal sponsor?

ioby's fiscal sponsorship service may not be right for you in a few situations:

1. ioby cannot apply for a grant on behalf of your project. If you apply for a grant as part of your crowdfunding campaign, we can provide a fiscal sponsor confirmation letter and a copy of our 501(c)(3) letter, and we're able to receive the funds as long as the grant doesn't exceed 75% of your project's total funding need. We cannot sign any agreements or make a commitment to provide grant reports.
2. ioby can only serve as your fiscal sponsor for money you crowdfund. Once your crowdfunding campaign is over and your money has been disbursed, we can no longer serve as your fiscal sponsor.
3. ioby cannot enter into other legal agreements on your behalf, like signing contracts or filing any government forms. We also cannot provide you with forms for certificates of liability, site or event insurance, or similar actions.
4. ioby cannot fiscally sponsor most projects that take place on private property or involve the purchase of private property

### How do I find my own fiscal sponsor?

ioby's fiscal sponsorship service isn't always right for everybody. If you'd like ongoing fiscal sponsorship, would like to accept grants that exceed 25% of your campaign budget, would like to conduct your project on private property, etc. you may need to obtain another fiscal sponsor before crowdfunding on ioby.

Here are a few tips on where to look and what to look for:

1. Nonprofits with missions similar to yours are more likely to be able to offer fiscal sponsorship. You might start with your current affiliations. Make a list of the professional societies, educational associations and institutions, religious organizations, social and recreational clubs, and other groups with which you are already associated.
2. Some obvious examples of potential fiscal sponsors are 501(c)(3)s, but you might also look to other federally recognized tax exempt organizations—like public schools, local governments, religious organizations (like churches or mosques), etc.
3. When approaching prospective sponsors, be ready to give a verbal or written proposal that explains:
  - Your project: Why it's needed and its goals, objectives, methods, evaluation, staffing, and budget. This is similar to a grant proposal.
  - How it advances the nonprofit's mission.

- Other ways the nonprofit can benefit from being associated with your project.
4. A resource like the The Fiscal Sponsor Directory allows you to search by state, service category, or keyword for nonprofit fiscal sponsors. Profiles include eligibility requirements, fees, services, and types of projects supported. The site also provides statistics and resources on fiscal sponsorship.
  5. The National Council of Nonprofits also provides very helpful suggestions for Fiscal Sponsorship Resources, including further tips and tools for finding a fiscal sponsor.
  6. If you're looking for more comprehensive fiscal sponsorship, you may want to check out this great guide from Grantspace. It provides more information about fiscal sponsorship as well as staff-recommended websites to help you on your search.forms. We also cannot provide you with forms for certificates of liability, site or event insurance, or similar actions.

## Chapter Eleven – How to leverage a match

A matching fund can be an effective way to boost your campaign and delight your donors. For your big donors, whose large gifts you turn into a match, it'll make them feel good about being part of something bigger and stretching their gift even further—the \$1,000 will turn into an additional \$1,000 through smaller gifts. With a match in place, smaller donors are more likely to give to your campaign since they can see—in real-time as their donation is doubled or even tripled—that their gift is going that much further. Who doesn't love to see their money and their impact multiply?

Match campaigns are incredibly effective at raising funds and we have seen many ioby leaders achieve their goals with them, especially for large budgets. Here's how it works:

1. You'll identify an individual or business who is willing to pledge a large donation to your campaign.
2. Instead of giving directly to your campaign, you can nudge that donor to instead gift a match. If you're crowdfunding for ioby, that money won't appear all at once but instead will appear when others give to your campaign, instantly doubling their gift.
3. Work with the donor to identify the terms of the match. Will they only match a specific amount per donor, like the first \$50 of each gift? Will they only match up to a specific amount, like the first \$2,500 of your campaign? **Clearly communicate your and your donor's expectations.** Write down what you agree on and send it to them via an email. That way there is no confusion about what is happening with their gift or the terms of their gift. This is a very generous gift you are receiving, so assume nothing and leave nothing to chance.

### What does your match donor get out of it?

Through ioby, businesses and individuals can contribute tax-deductible donations in a way that's highly visible. When the match fund is set up for your campaign, we add a banner to your page and a separate landing page to describe the match in more detail. The match donor can be recognized, if they would like, in both places. Additionally, they get the satisfaction of knowing their money will help you get more donations, stretching their gift further.

Companies will want to know what you can offer them in exchange for their support. Make a list of everything that you can think of. Some ideas include featuring the business on your ioby campaign page, adding a physical sign to your project with their logo, hosting a volunteer day for their employees, talking about them to the media, or introducing them to your ioby project team. You have a lot to offer and can help them to encourage customer loyalty to their business.

### Who do I ask for match dollars?

Think of everyone that might be able to support your ioby project. Make a list of the businesses in the neighborhood, people you know, the stores that you frequent, companies that care about building stronger, more sustainable communities and more. Don't rule anyone out. Identify big givers (including local businesses) by their generosity to other projects. Do they give prolifically to other projects or organizations that are similar to yours? While one or two small gifts might not mean much, if a potential donor gives meaningfully to aligned organizations it might mean that

they're capable and interested in making a larger gift to your campaign.

When you make your list, identify how they may be able to help (e.g. materials, tools, food, volunteers, etc.) and how much they're likely to contribute financially. Then, write how much you'll ask of them right next to that, shooting a little higher than what they're likely to give.

Everyone is capable of giving different amounts. If you ask for less than what a donor is capable of giving, you're leaving money on the table. Ask for a little more than you're likely to receive so that even if they give less, you still make the most of that contact. Be sure to take care and ask for a reasonable amount of money and not something inordinately high for that donor. Making an ask that is too large may come across as unrealistic, unprofessional, and maybe even rude. It's a balance to strike and one you'll have to make with each donor.

Keep in mind that a match works best with \$500 or more. You should also consider bundling large gifts together to create a bigger match. Your list could look something like this:

<i>Name</i>	<i>Amount likely to give</i>	<i>Amount to ask for</i>
Sheila	\$1,000	\$1,500
Markus	\$750	\$1,000
Randi	\$500	\$750
The Flower Shop	\$1,000	\$2,500
Grant from the Neighborhood Garden Fund	\$1,000	\$1,000

### Who do I ask for match dollars?

Prioritize your needs so you know what parts of your project are most urgent. Maybe you need soil and plants first? Or training? Or cash to purchase bicycles? Then pair these "asks" to the individuals and businesses you will approach. For example, if you need to clear a lot in the neighborhood, maybe you can ask a neighbor who borders the lot. If you need flowers, you can ask a local plant nursery for an in-kind donation. Be as specific as possible and make it easy for them to say "yes!"

Remember that, in most cases, you will want to ask for more than you expect to allow space for the potential match donor to come down from your ask.

So what should you say when you ask? Emphasize your story, the impact of your work, and how they can play a special role in the success of your campaign by providing match. You could get creative and ask your potential donor to "buy" a piece of your project. To do this, create a structure where they can sponsor a component of your project, like the greenhouse for your garden or a set of books for the library.

Here's a sample script for asking an individual donor for a potential match donation:

"Hi Sheila! Good to see you. I'm so glad that we could meet up today. As you may recall, we're running a crowdfunding campaign on ioby to raise money for our community garden project. Last year we taught 100 kids how to plant and harvest vegetables for themselves and we want to triple the number this year.

Our campaign is off to a good start and we're working to get some more strategies in place to help us hit our milestones of 50%, 75%, and ultimately 100% raised. Right now we are raising match dollars—one of the most effective ways to increase donations. Our campaign can be set up with a match fund that allows donations to be matched in real-time. Donors love to see their money doubled or tripled!

Would you be willing to donate \$X in match funds? It would be a great way to help us leverage more donations to help more kids learn about growing their own food.

(If they say yes, continue with the following.)

Thanks so much! We're so thankful for your generosity! Would you like to be recognized on our campaign page as the donor?

I will send you detailed instructions later, but basically you'll mail the match dollars to ioby and then they'll set up a match fund specifically for our campaign. Thanks again!"

When asking a business, you might like to be a bit more formal. Develop a letter or proposal that you can give to businesses. It should include a description of the project, your impact, how they can help, and what they get in return for supporting you. The letter or proposal should be short and concise and end with a specific request for funds and detail what you'll do with those funds. Here's an example:

Date

Name

Company

Street

City, State, Zip

Dear [NAME],

For the past several weeks, a number of volunteers and I have been working together to transform the vacant lot on Smith Street into a beautiful community garden and event space. The lot has sat vacant for nearly 20 years collecting trash and standing as a symbol of disinvestment. Members of the community are working to break this pattern and are working to reimagine what the vacant lot could be. We would like to transform it into a space that we can all be proud of, but to do that, we need the help of many supports.

In a neighborhood like ours, which many consider a food desert lacking easy access to fresh fruit and vegetables, the garden will provide a neighborhood space for healthy food options—and offer hands-on learning opportunities for the community to learn where our food comes from and connect with one another. A team of over 20 neighbors have already volunteered to build the garden, and we've made substantial progress clearing the lot and placing garden beds so they can be in full bloom by next Spring.

But we need your help. To bring our garden to life, we are seeking financial contributions for things like materials and supplies like shovels, wood, bulbs and seeds. We would be very grateful for a contribution from [Org Name] of \$1,500 to help us achieve our goals. We're very interested in multiplying the impact of your gift, as well, by offering a match to our donors with your gift—turning your \$1,500 gift into \$3,000 in impact.

I'd love to schedule a call with you soon to talk to you about how [Org Name] can make a tremendous impact in the community with your gift. Please give me a call at [Number] or send me an email at [Email].

Thank you for helping to make our neighborhood stronger and more sustainable.

Sincerely,

Your Name

As you can see, match funding can be a powerful tool to further your fundraising and is a great way to get more buy in from big players in your community. This will take planning and preparation, but is worth it when crowdfunding a large campaign.

## Chapter Twelve – Recruiting and managing volunteers

We often say at ioby that no leader is an island. Even the best and brightest leaders need support from others. That's why we strongly encourage every leader to put together a team for your crowdfunding campaign and to help implement your project. Having volunteers and supporters back you up along the way can boost your project in numerous different ways:

1. **Support:** Recruiting volunteers is a great way to gain support for your project from the very beginning. You're working where people live! So don't wait until design or implementation; tell your community your ideas at the beginning.
2. **Stability:** When people are involved in—or even just informed about—a project from the get-go, they're more likely to feel a sense of ownership and support it as time goes on. That could mean giving it their time, their money, or just their vocal support.
3. **Ideas:** No one knows a neighborhood like a neighbor. They can really help you brainstorm and make your ideas better. Lean on your volunteers and supporters; ask them what they want to see.

This chapter will help provide guidance for you as you recruit and manage your volunteers.

### Identify your volunteer needs

The first step to recruiting volunteers for your project is to make a list of volunteer needs. That way, when someone expresses interest in helping out later on, it will be easier to make a match! Volunteer roles can range anywhere from help during the crowdfunding stage of your campaign to assistance during your project's implementation.

Common volunteer roles in neighborhood projects include: painting, planting, supervising children while they do those things, passing out flyers, staffing the sign-in table at events, making phone calls, introducing the project to their connections in churches, schools, or other organizations, building a website or managing a social media account, taking photographs, and recruiting other volunteers.

If you have too much on your plate, it may be helpful to ask a volunteer to help you manage your volunteers. Your volunteer coordinator would be responsible for updating and maintaining your team's list of volunteer needs, organizing and maintaining the growing list of prospective volunteers and their contact information, keeping volunteers in the loop about upcoming meetings, events, and opportunities, and thanking volunteers when they lend a hand.

### How to find your volunteers

Just as in fundraising, the people you already know should be the first place you go to for volunteers. Are any of your friends and neighbors willing to lend a hand? Do they know of people who are interested in a similar project and might want to volunteer?

You might also want to ask people in groups you are affiliated with who already have a strong volunteer base. A good

place to start is your local school (think PTA), neighborhood associations, church leadership, and special interest groups. If people are involved with those things, they likely already have an interest in their community. Developing a relationship with leaders in those places can also pave the way to recruiting even more volunteers—for instance, connecting with school leadership can help you recruit student volunteers.

Within these groups, if you hear people talking about community issues or see them at meetings, that's a good sign that they'll be receptive. Remember that people want to be asked to help! They'll come to meetings and just sit back unless you go up and ask them—then they'll usually jump at the chance. People just want a personal invitation.

Another good way to identify potential volunteers is to ask those who could not donate money to your crowdfunding campaign to give their time or resources instead. If they aren't able to give financially, giving time and volunteering with your project might be another deeply meaningful way for them to contribute.

### **Now that you have volunteers, keep your team organized**

Always gather volunteers' contact info. At the bare minimum, this should include their first and last name, email address, and phone number. Keep a sign-up sheet at meetings and make sure all volunteers sign-in at events so you can keep them in the loop and say thank you. This will help you stay in contact and will help make assigning tasks and corralling folks much, much easier.

A good way to keep your volunteer list strong is to take care of your volunteers. Just like you should cultivate your donors by sharing information with them, soliciting them for gifts, and thanking them, you should do the same with your volunteers. Here are some ways to make your volunteers feel appreciated:

1. Thank your volunteers in person and in a follow-up email or phone call after every volunteer opportunity.
2. Provide food, drinks, and the right tools for the job. This makes sure volunteers are comfortable and can expect the same experience next time.
3. Reward your volunteers with giveaway items. Thank you letters, certificates, t-shirts, and volunteer picnics are some examples of inexpensive but important gestures.
4. Make sure your volunteers know what all their work is adding up to, and let them share the success with you. When you've reached a goal or passed an anniversary, celebrate it by putting it in writing or by making a poster or banner to show your appreciation.

### **Asking people to volunteer**

When it comes to asking people to volunteer, don't make assumptions! Invite people to volunteer point blank. You might even be surprised to find that they'd be interested in helping with something you would have never guessed!

Keep it personal. Identify what someone is good at by assessing their skills and personal qualities. Maybe a volunteer has a skill like photography or foreign language competency that could help you during an event. Or maybe a volunteer has a characteristic that would make them a strong fit for one of your volunteer opportunities. Are they naturally charismatic? They may be a good person to hold a megaphone to direct foot traffic at an event. Do they have a friendly disposition? They may be the right person to greet volunteers and event attendees as they arrive and collect sign-in information.

### **How to ask**

1. Before you ask someone for help, think about what makes them special and how this quality is a great asset to your volunteer needs.
2. Then, tell them what you think! Don't be afraid to compliment your potential volunteers. You could say something like:
 

"I've noticed you're a very punctual person and are always early to our meetings. We could really use your help this weekend to direct volunteers. Do you think I could rely on you Sunday morning getting our volunteers signed in?"
3. Lastly, put it all in perspective. Ultimately, people want to know that what they're doing is making a difference. Explain that even things that might seem small (like picking up trash) are key steps toward the larger goal (beautifying the neighborhood). Make sure they understand how what they're doing helps the bigger picture, and that without them, your project would not succeed.

## Chapter Thirteen – Social media deep dive

We live in an era where social media often dictates how we interact. When it comes to fundraising, social media can also be a great tool for you to reach out to potential donors. But there are a few things to keep in mind as you go along.

First, remember that social media is pretty limited in its use for gathering donations. The likelihood of a donor giving via social media is about 0.5%. That means that in order for one donor to give, you will have had to reach about 200 people. Gifts also tend to be smaller when given through social media.

On top of that, if you're using a Facebook page to reach your donors, you should note that most of your Facebook fans won't see your post even if they like your page. Facebook, and other social media sites, use complex algorithms to decide who gets to see your post and when they see it, if they see it at all. It's a good rule of thumb to estimate that only about 10-15% of your followers will actually see the content you post. Use that number to come up with a number of prospects for your project.

When using social media, keep in mind that social media is often great for:

- **Building buzz.** If donors hear about the campaign from multiple sources—like in person and on social media—they'll likely perceive that the campaign is successful and will be more likely to donate.
- **Storytelling.** Get the project story out there and see who reacts. Then, follow up with social media contacts and make a direct fundraising ask.
- **Thanking donors.** Double impact! First, your donor will feel appreciated by your public expression of gratitude (provided that they have chosen to give publicly, not anonymously). Second, you'll reach new networks of potential donors by tagging your donor in your thank you post.

**But note that social media is NOT great for asking for donations.** You can expect only about 0.5% of your social media followers to donate, so it's best if you focus your time and energy on making direct asks. Be wary, too, of spending money to advertise on Facebook to get more folks to see your post and give. Unless you spend a sizable amount of money and spend time customizing a sophisticated online campaign, it likely isn't worth it.

Here are a few tips to help you get the most out of fundraising on social media:

1. Stick to your story. Remember how you crafted a story in Chapter 3? This is still just as vital on social media as it is for in-person asks. Remember to share the basic facts about your project and focus on your "why."
2. Try new mediums. Add photos or make a video to help people connect with the project. Posts on social media that have media connected to them, like photos and videos, are more likely to be seen (Facebook's algorithm rewards this type of content) and are more likely to be seen and clicked on. Put your best foot forward!
3. Pick your main outlet. There are lots and lots of social media outlets to pick from, each with their own pros and cons AND with their own rules around algorithms and best practices. It can be confusing! If you don't have the time to deeply invest in social media (think several hours a week), you might be better off picking just one or two platforms (Facebook, Twitter, and Instagram being the most popular) and tailoring your posts to those platforms.
4. Make it easy to share. Sharing on social media is very easy. That makes sharing content with your followers and donors via social media an ideal way to nudge your supporters to reshare your project. Create calls to action around sharing posts or sharing the link to your campaign. You could make it even more interactive by creating a custom hashtag. This way when people share you can track it and thank them or interact with their networks.



## Chapter Fourteen – Fundraising with events

Events are a cornerstone fundraising strategy for many community groups, nonprofit organizations, and grassroots initiatives. It's easy to understand why; who isn't tempted by a beautiful bake sale? Who hasn't heard of the ALS Ice Bucket Challenge? There are even charity runs for couch potatoes now!

As fun and effective as events like these can be, raising money with ioby tends to look a little different and often brings in more than just money. Crowdfunding the ioby way invites dialogue, knowledge-sharing, and a sense of joint responsibility for a project's success. Unlike the bake sale model, fundraising with ioby is not a one-for-one, give-to-get trade where the attraction is an essentially unrelated event. The flow of crowdfunding means that donors give directly to the change they want to see. That promotes transparency, strengthens bonds between leaders and participants, and keeps everyone's eyes on the prize: a better neighborhood for all.

Does that mean we think events have no place in community crowdfunding? Absolutely not! In fact, there are some big ways organizing the right kind of event can help your fundraising campaign succeed. Events can:

### **1. Help you raise money by creating—and capitalizing on—urgency.**

A decisive funding deadline, a budget that depicts your needs, and a personal story are all great vehicles for communicating that time is of the essence. A fun event that involves people in the “now” of your project can be the icing on this urgent cake.

### **2. Events can help you raise interest and excitement by showing—not telling—what your project is all about.**

In community fundraising, as in the rest of life, there's no substitute for the real thing. When you invite people to experience what you're doing, live and in real time, they can understand and appreciate your project much more easily and much more fully than they can through a computer screen.

### **3. Events can help you realize your project's full potential by keeping up—not dropping—the momentum once the goal is met.**

Throwing a fun thank you event or recurring anniversary events after you meet your crowdfunding goal can not only help you stay in touch with your donors for the next time you crowdfund, it can also help you grow your network and make new connections. What's more, staying in the loop with your community can help you shape your project as it grows or come up with new ideas to improve your shared lot. How will you know what your neighbors are on board with if you don't get to talk with them?

## Storytime!

“Any fundraising campaign is a great opportunity to build community. Build that aspect into your strategies. Think about how you’ll be able to tap into community energy—not just money—in the future to accomplish other goals. Don’t think of your campaign as ‘one and done.’ You want to be able to leverage the success you achieved here in your next project, not let it go cold. Fully capitalize on your project’s success,” Project leader Aylene McCallum

“We did a crowdfunding launch at a brewery in town, which was great for getting press, and we made a fair amount of money there. You’re almost by definition going to get supporters at an event like that. It’s good to get people to give when they’re excited in the moment, rather than give them time to think about it when they get home. We had iPads circulating around and encouraged people to just do it then, when they were surrounded by it—and enjoying a beer,” Project leader John Bailey

## Throwing an event

There are a few types of events you can host: an event that aligns with something bigger, like an end of year fundraising event or a Halloween event, and an event that connects to your own internal agenda, like a gala. For both of these types of events, you’ll want to follow the same general guidelines.

### End of Year Fundraising

If your campaign happens to land in the fall and winter time, you might want to take advantage of Giving Tuesday and a Year End Giving campaign. Think of these events as powerful tools to shape your messages to donors around to help supercharge giving to your campaign.

### What is #GivingTuesday?

You’ve likely heard of “Black Friday” and “Cyber Monday,” the days following Thanksgiving when businesses urge consumers to make holiday purchases. In 2011, several nonprofits came together to come up with #GivingTuesday—a campaign to remind folks to give generously, alongside their spending sprees. It’s since become known as the global day of giving, which can be super helpful for your own ioby campaign.

### What is a Year End Giving campaign?

The end of the year is often known as the “giving season.” These last three months of the year are when the bulk of all charitable giving happens (as in, 70 cents of every dollar given annually). That could play in your favor, as you ride the wave of charitable feeling and good cheer. Or, it might be a signal to avoid any events and fundraising at that time of year, so you can try to stake out a special claim in your donors’ hearts without having to compete with other organizations looking for donations. A Year End Giving campaign often includes special asks of your donors via email and social media and is also a potentially strong anchor for a fundraising event to bring your neighbors and supporters together and ask them for donations in person. The success of such an event all boils down to your specific audience, their commitment to your cause, and what other things are competing for their attention.

### Your own event!

What kinds of events could you throw that might play well with your particular audience? If you’re crowdfunding for a community garden, that might be a garden party or a potluck outdoors. If you’re crowdfunding for an art project, maybe that’s hosting an evening at your local coffee shop to mingle with your neighbors and raffle art pieces. Whatever it is, it should align closely with your goals and the interests of your audience.

## Planning your event

Whatever type of event you end up throwing, you’ll likely follow a similar set of steps. Here are some tips to help you get started.

### Build a fundraising plan

It’s never too early to get started! Whatever type of event you’re planning to put together, your planning—like a crowdfunding campaign—should begin months in advance. Consider similar steps to a fundraising plan—you’ll need to

ask, and ask again, for people to attend, organize volunteers to take on various tasks, and more.

This is especially true if you're planning a Year End Giving campaign. Lots of nonprofits start their year-end giving campaigns and make individual asks as early as September. As the months go on, more organizations start to make asks and people's inboxes fill up with more and more requests for donations. If you start early, you'll get a chance to send your message before your donors are saturated with asks and give your donors a chance to get to know you better before they give.

### Set clear goals

When it comes to building a plan, set clear and measurable goals to help keep you on track. What will you and your teammates have accomplished 6 weeks before your event? Two weeks out? By the day before? Set a timeline for when each component of your event should be complete and make sure everyone on your team is clear on each step so nothing falls through the cracks. Check and recheck—take nothing for granted.

You should divide your goals between two things: (1) getting people to fill your room and (2) getting the event ready for primetime.

Getting people to come to your event isn't unlike building prospect charts and soliciting people for money. You'll still need to identify people who will be interested in coming, who might be interested in giving once they've arrived. Think of the event as simply an opportunity to make lots of in-person asks in a short amount of time.

At the same time, you'll want to put together a series of to-dos to bring your event to life. This includes everything from food and catering, to securing a space and renting sound equipment. Set milestones along the way to ensure that you and your teammates are making satisfactory progress along the way. That way, you won't get any nasty surprises at the last minute.

### Key tip

As soon as you decide to participate in Giving Tuesday or a Year End Giving Campaign, you should draft a timeline of communications that your supporters will receive. This timeline should include one or two communications pushes each week, starting in October. Then, on #GivingTuesday and/or December 31st, plan an hour-by-hour breakdown of phone calls, pre-scheduled personalized emails, and social media posts. Social media will not be enough for a successful #GivingTuesday campaign. You'll need to plan other direct outreach (phone, in-person or personal emails) in addition to social media and e-blasts.

## Chapter Fifteen – Promotions and press

The bread and butter of your crowdfunding campaign should be the asks that you make of your prospect chart. This will be where the vast majority of your donations come from and, most likely, where most of your community and neighborhood support will need to come from. If you're fundraising for a big budget (over \$10,000) or for a particularly large project, you might want to expand your network by reaching out to journalists and getting some press. This chapter will cover the basics on how to do so.

### Why seek press coverage?

Getting your story told by the media can help convince influence-makers, elected officials, businesses, and the general public to support you and take action on your behalf—whether that means funding, an endorsement, volunteer time, or something else. Think of press as a vehicle for engagement.

When you're trying to get a good idea off the ground, you often have to work long and hard for a while before experiencing a win. Press coverage can provide encouragement: it shows you have capacity, substance, something of interest—important ingredients in building and sustaining movements.

### What if the reporter gets it wrong?

Don't sweat the small stuff. If there's something really big that's wrong, or you've been misrepresented, a quick call or email to the reporter will often fix it. Be polite. Compliment the piece before you ask for a change. If that doesn't work, social media can be a good way to get your take out there. Just remember that working with the media is all about personal relationships. Don't burn a bridge you'll need later on.

### What types of press should I seek out?

Start local: People often reach too high at the beginning—they read The New York Times every day, so they want to pitch their story there, but that's not likely to work. Outlets like neighborhood blogs and local weekly papers are generally a good start to propose an idea and a place to “earn your first ink.” Hyperlocal coverage trickles up and informs bigger outlets, and it provides a more legitimate basis for follow-up and amplification than a cold-call pitch.

#### Key tip

Remember that direct communication—like going door to door, or canvassing on the street—and online avenues like social media and email lists are other good options. Pitching your project to third-party media outlets should only be one part of your overall outreach strategy.

## How can I choose the best outlets to contact?

Identify your champions: Reporters or outlets who have shown a prior commitment to the problem you're focusing on. For example, if you're working on a child hunger-related project, the *New York Daily News* could be a press ally, as they have a longstanding campaign against that issue. Do some research!

Find a hook: Look for opportunities to communicate about your issue in the context of stories that aren't your own. Primarily, you'll want to seek out press for your own initiative, but when things happen in the news that are somehow related, you can also appeal to the press by talking about how your project connects to them. For example, if you want to improve pedestrian crossings in your neighborhood and the city reports on a traffic fatality, you can write to a media outlet about the importance and timeliness of your project with that event as your "hook." This strategy comes with the added benefit of introducing yourself to reporters as a plugged-in source for future comment on current events that relate to your issue.

## Do I need a press release? Or a pitch?

A press release is different from a pitch. Your press release is a longer document (usually one or two pages) that you can share with reporters who have indicated interest in writing about your project. It's got all the basic who, what, why, when, where so that they can get started writing about your project. You might want to include one on your website, if you have one, have a few handy at any events you might have, or send it personally to reporters to indicate interest.

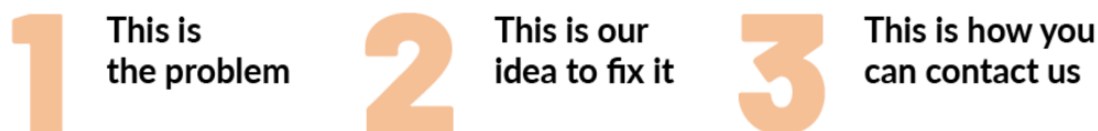
**Before you send a press release, you should send a brief pitch.** This is a three to four sentences synopsis of your project just to intrigue a reporter and see if they're interested. Remember, the people who read these queries are busy, working in a frenetic environment, and have to wade through tons of pitches including yours. Breaking through only happens when you recognize this and write a compassionately brief and clear pitch. Then, if they're interested, follow up with your press release and an offer to provide more information or to give an interview.

## How should I pitch to media outlets?

Before you write a pitch, make sure you understand where you fit in the context of your project. Are you starting from scratch with a new idea? Or picking up where someone else left off? What is the history of your issue that's brought it to where it is today? You want to be seen as an authority on your idea, so spend a little time getting to know your place in the bigger picture.

Convey the newsworthiness of your idea upfront and give only a brief introduction to what you're doing—this is not the place for an explanation of every facet.

Structure your pitch like this:



## When should I seek press?

You'll want different press at different stages of a project's timeline. Getting press during multiple phases of your project will help reach more people and keep momentum up. One classic formula is:



## Writing a press release—Key tips

### 1. Pinpoint your story

In one or two sentences, what message are you trying to deliver? What story do you want to tell? What major activities will take place? What impact will they have? Look first at your ioby campaign. Stick to that message. Don't concoct a "new" storyline. Just accurately reflect the details—and the passion—of your ioby campaign.

### 2. Find the right news outlets

Where should you send your release? To which news people? At which outlets? Have you listed them all? What about your local newspaper or news portal? Public radio station? Local bloggers? Are there school, business or community groups that should know about your news? Local Web sites or specialty groups? Are you posting the release on your own website in a way that will get attention? Remember: These days, news can appear most anywhere.

### 3. Spread your news clearly, and accurately.

Writing for the public calls for accuracy above all. It also calls for clarity. These are the cornerstones of sound communication.

## What to include in your press release

As you write a press release, go through the following steps to put together a rough draft of your release.

- 1. The "lead," or opening sentence:** Jot down, in one sentence, the news in a nutshell. What's the most important/exciting thing that will happen because of your program or grant? Is there a key detail you should include?
- 2. Second paragraph;** the bigger problem to be solved: What is the context? What larger problem is being tackled? Jot down a detail or two giving background about the issue or program at hand.
- 3. The quote:** Jot down a few names of people you might want to quote in the release. The head of your organization? An official from a partner organization? Another key player? Who can best explain why people should care? Tip: When you go to get the quote, be sure to ask: "Why does this campaign matter?" You can ask for quotes from several people. But then, you need to choose the one (two, at most) that sings – a clear, compelling, persuasive point, said in everyday language.
- 4. How, who, when, and what:** Jot down the details about how this program will work, who will be affected, and what will be accomplished, when.
- 5. Why an ioby campaign?** Why does this matter to the community enough for the neighbors to fund it?
- 6. A brief summary on your organization, and partner organizations, if available:** If you're crowdfunding as part of an organization, or alongside an organization, include a brief blurb about who you are. You might also include a brief blurb about ioby. This can be nice as background for a reporter, but is not necessary if you don't have one.
- 7. Further information:** Be sure to include, at the bottom of the release, names/ numbers/email addresses/ websites for people to go to for further information. This should include at least a person from your organization, and you may choose to include someone from a partner organization.
- 8. Headline:** Now that you clearly see the details of the story you want to tell, write a brief (6-12 words) headline that captures the story's essence. The headline should tell the story in sketch form, using concrete language.

Once you've drafted your release, go over it again to ensure that it's accurate, impactful, efficient, and gets across all the basic information that a journalist would need. If your release is (1) concise and (2) doesn't force a journalist to dig around for your information, you'll be more likely to get coverage. Here are some things to look out for as you review your release.

- 1. Fact check.** Go back through the text and double-check all your facts. Are the phone numbers and email addresses at the end? The spelling of people's names? Do the numbers add up? Did you include the right dates?
- 2. Spell check.** Use Spell Check throughout the document? Have you also spell-checked by hand to catch things that the computer won't (their/there, you're/your, its/ it's, etc.)?
- 3. Quote check.** Go back to the person you are quoting – in person or via email – to make sure that the quote you're attributing to them is accurate.
- 4. Paragraph trim.** Go back through the text to make sure paragraphs are clearly marked and separated. Ensure that each paragraph is brief, and doesn't stretch on, and on, and on.
- 5. Jargon hunt.** Go through your release and take out any institutional jargon, and any other words or abbreviations that someone off the street with no knowledge of you or your project would be familiar with. Instead, substitute each piece of jargon with a specific concrete detail, and spell out abbreviations. If in doubt, spell it out!

## Activity

### A sample press release

This is a real press release that a project leader used to secure coverage about their project in their local paper, lightly edited.

#### FOR IMMEDIATE RELEASE

#### Public Fundraising Campaign Launched to Complete Build of the Memphis Hampline

Memphis is on the cusp of building innovative bicycle infrastructure. Broad Avenue Arts District and Liveable Memphis launch public campaign to complete required funding.

#### Contact:

Pat Brown  
Broad Avenue Arts District  
Pat@example.net

Sarah Newstok  
Liveable Memphis  
Sarah@example.org

Sara Studdard  
Funding Coordinator  
Sara@example.net

**Memphis, Tennessee (October 14, 2013)** Recognizing the growing interest in bicycling in Memphis, a public fundraising campaign has been launched to close the gap in funding required to provide a safe route for bicycle riders to get between Overton Park and Shelby Farms Greenline.

Coupled with this launch is the announcement of a permanent name for the connector—"The Hampline." The name was chosen to honor the nickname that long-term residents of the Binghampton community use when referencing their neighborhood. The Hampline is located in the center of the Binghampton community.

Once completed, The Hampline will be one of the most innovative bicycle infrastructure projects to occur in the United States—a gold standard for other cities to follow.

The goal of the campaign is to raise \$75,000 from the public. The remaining funds to begin construction (approximately \$175,000) will be raised through foundation giving.

The public campaign will utilize ioby, a crowdfunding platform for citizen-led neighborhood projects. ioby's website is specifically built for grassroots-based civic projects. ioby fondly stands for "In Our Backyards." Those interested in making tax-deductible gifts to the campaign may visit [ioby.org/hampline](http://ioby.org/hampline) for more information and to make a gift. Any size donation is greatly appreciated. In order to stay on schedule and to complete construction, funding must be secured by November 23.

The Hampline is designed to be a cycle track designed for all levels of bicyclists. It will showcase best practices with regards to protected cycle tracks, considered best-in-class design for green lanes (protected bicycle lanes). This design provides greater safety for bike riders because it is physically separated from automobile traffic via a physical barrier. The project, which incorporates leading standards for on-road cycle track design, signalization, and stormwater engineering, was designed by pioneers in the field (Fuss & O'Neill, Inc., Alta Planning and Design, and the GreenLane Project) in partnership with the City of Memphis Engineering. Livable Memphis and Broad Avenue Arts District provided project leadership.

The total cost for the project is estimated at \$4.5 million, which includes construction (\$2.6m), planning and design (\$600k), sidewalk accessibility improvements (\$500k) and art enhancements (\$800k). To date, over \$1.2 million has been raised privately via foundations and grants to fund the initial phases of the project. The City of Memphis secured funding for the majority of construction via Congestion Mitigation Grant Air Quality funding.

In addition to showcasing engineering innovation with the street design, the Hampline will feature two miles of public art murals and sculptures, an amphitheater and numerous art galleries.

#### Additional contacts and information

To make a contribution: [ioby.org/hampline](http://ioby.org/hampline)

For campaign updates: [facebook.com/broadavearts](https://facebook.com/broadavearts) or [facebook.com/liveablememphis](https://facebook.com/liveablememphis)