Project Creator Training Guide
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Campaign Strategy for Student Projects

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

Welcome to your crowdfunding campaign! This document is a strategy map to guide you through your project. Here we will discuss how to lay the ground-work to support the active campaign phase.

Project Creator
As a Project Creator, you are the one with ultimate responsibility for the success of the campaign. It is your job to create a team to execute the goals. You’ll work with the Champions and Amplifiers to try and ensure that success.

Identification of a Project Team
To create a successful Project Team, you will need two core groups of volunteers. It is imperative that each of these people are willing to commit to work every day throughout the quiet and active phases!

- **Project Creator** – 1-2 people, effort level: ultimate responsibility
  - Who are these people? They are the identified head(s) of the project, often president or co-presidents of an organization or leaders of a particular project. These leaders dedicate an hour per day in the quiet and active phases.

- **Champions** – 3-5 people (minimum), effort level: fully engaged
  - Who are these people? Typically they are beneficiaries of money being raised or directly connected to the organization. These champions need to be able to dedicate 45 minutes every day in quiet and active phases, as well as attend meetings once per week.

- **Amplifiers** – 8-10 people (minimum), effort level: minor – moderate
  - Who are these people? They are close to project but not direct beneficiaries, often have channels into school media, large social networks. Ability to dedicate 30 minutes per day during quiet and active phases.

Responsibilities
- **Project Creator**
  - Decide with team of champions on a realistic monetary goal amount based on size of team, e-mail lists acquired, and any potential major donors. Every personal e-mail on average can account for approximately $4 donated.
  - Delegate responsibility for content creation among team (yourself included).
    - Video
    - Copy
    - Updates
    - Where applicable, perks/levels
Put together list of at least 100 names/personal e-mails of close contacts that have a potential giving capacity of $50 and above.

Schedule and run meetings to check in with champion group 1x per week during quiet phase, at least twice during active phase (total), and one once your campaign is over.

- **Champions**
  - Create content for the project page
    - Main project page video (2-2.5 minute video explaining project, not over-produced)
    - Copy – Project Title, Short Description, Long description, Perks/Levels, Campaign Creator Bios
  - Marketing schedule of e-mail blasts, updates, and potential offline events through end of campaign.
    - 6-8 updates throughout campaign. We recommend three to four 30 second video updates, which can be pre-shot. The video updates often include educational facts pertaining to your project or testimonials by people impacted by your project that will intrigue the viewer and compel them to share. Your other 3-4 updates can be used for major funding milestones (50%, reached goal, stretch goals, thank you, etc.) Always be sure to make ask the donor to share the project in these updates.
    - E-mail blast to core group committed to donate at project opening (open 24 hours prior to main launch for this group to donate first), e-mail blast to all e-mails collected the day of official project launch.
    - Schedule potential offline events to bring in offline donations during the third week, the typical lull in fundraising for a 30 day campaign.
  - Gather pre-commitments from donors to ensure momentum in the first days of your campaign. Acquire these through personal e-mails and face-to-face asks. The team should aim for 20-30% of the overall goal prior to your launch date. If you get less than 20% pre-committed or much more than 30% pre-committed, this is a good time to recalibrate your fundraising goal accordingly.
  - Stretch Goal Strategy
    - Should your project raise the amount of money to reach your initial goal within the first 23 days (of a 30 day campaign), it is recommended that you implement a stretch goal that is crafted in your quiet phase. In your stretch goal messaging, you need to name a new fundraising goal, as well as be able to describe the additional impact that money will have.
    - Should your project raise the amount of money to reach your initial goal after 23 days (of a 30 day campaign) have past but there are still a few days left and you want to continue to accept donations until your initial
You still need to be able to describe the impact any additional money will have.

- You should create both of these pieces of messaging in your quiet phase so you have them ready to go during the active phase, should either situation occur.
  - Outreach to affinity groups
    - Reach out to organizations that have a similar mission to the work your project is doing. This can be other similar student groups, academic departments, or non-profit organizations that can help spread the message about your project.

- **Amplifiers**
  - Put together a list of at least 25 names/personal e-mails of close contacts that have a potential giving capacity of $50 or above
    - Make personal e-mail or face-to-face asks on behalf of project
  - Use channels into large social media networks, local media to amplify message to a larger community

In the next section, you’ll learn what goes into the Active Campaign and how to leverage your time and team during this stage.

**Active Phase, less than $25,000 initial goal (30-45 days)**

Crowdfunding is an active form of fundraising that requires your attention throughout the campaign. There are responsibilities that must be completed during this phases to position your campaign for success, and they are broken out below. Following them will give you and your case the best chance for reaching your goal.

**Every Day Responsibilities**

- Check donor information through “Donations” tab. Here you will find a list of the people who have already donated. When you see a name of someone on your large list of contacts, make sure to take them off any list of potential donors. Whichever member of your group asked that person to donate should send a personal thank you e-mail. If the donor was not personally contacted by someone in your champions or amplifier group and checked to be anonymous on the donor wall, do not send a random thank you e-mail.
- Check goal levels against pre-scheduled update timeline. Post updates when pre-decided milestones are reached, but be careful to not overload donors with updates.

**Throughout Campaign**

- Remember to send updates at least once per week, a maximum 2 times per week, but only if it adds to the donor experience. Again, they should be authentic and simple. A quick “here’s where we are” or compelling facts/testimonials related to your research or project. Always task them with the action to share with others who might be interested.
- Have different amplifiers and affinity groups post on social media about your project.
- Hold meetings with champion and amplifier groups
24 Hours Before
Hold a pre-launch and send the link to the pre-committed donors you gathered during the quiet phase, giving your project momentum right out of the gate.

First 24 Hours
Send e-mail blast on the morning of day 1 to your large group of contacts gathered. Follow up with phone calls for those whose numbers you have. On the evening of day 1 or morning of day 2, have your amplifier group publish posts about your campaign to their large social media networks or their local media outlets (school newspaper, blog, etc.)

After 72 Hours
If in the first 72 hours you do not reach 20-30% of your goal, make sure you utilize your pre-planned offline events for donations as well as plan one on one, personal asks from friends and family. Also try tapping in to other communication channels (blogs/NGOs/Reddit AMA), releasing new/harder to get perks, and start acquiring more contact information from champions and amplifiers. If you are above your goal, you should implement stretch goal messaging created in the quiet phase. Additionally, this is a great time for your first update to go out to donors.

After 1 Week
Make sure you are up to date on your cross references of donations to your e-mail list, then send out a new e-mail to those who haven’t donated with another ask.

Week 3
Utilize your pre-scheduled offline events to raise more money towards your project. Make sure to enter the amount of money raised and the number of donors to the ScaleFunder platform. If they would like to be honored, mention them in the description, as there is currently not a way to add offline donors to the donor wall.

End of Campaign
Make sure to send a final, thank you update to all donors as your last update in the active phase, highlighting the impact the money you raised will have and tangible items it will buy that benefit your project’s mission.

Post-Campaign (Up to 1 year after campaign end date)
Congratulations, you made it through the first two phases! Donors of today like seeing the impact their gift has, therefore we utilize the updates tool in the post-campaign phase to take the donor on a journey with you as the money they donated is used to benefit your specific mission. While this last piece is less of a time commitment than the
first two phases, it is the most important piece to your donors and the overall success of
your project.

When you are sending updates in the post-campaign phase, make sure to always click
“Donors Only” below the text section in the Updates sub-tab before you publish your
update. When the Active Phase is over, you should decide on milestones of when you
will push out these updates.

Timeline of Updates (no more than 3-4 in post-campaign phase):
- When funds raised are utilized for initial purpose (show immediate impact)
  o Whether you were raising money to buy computers for a local elementary
    school, going on a service trip, or anything in between – your campaign has
    already specified the types of items your donors are funding. So let them see
    the initial result!
- 6 months/1 year after campaign (show long term impact)
  o In this update, you will answer the question “how has the money I donated
    made a difference?” for your donors. What were the results of your research?
    What did you learn from your service trip and how did that community benefit?
    This gives the donor a finality of the project and of the impact they made.

Always be sure to continue to thank donors in the post-campaign updates, as well as
show impact.

Perk Processing & Fulfillment
If you offered tangible or experiential perks during your campaign, the post-campaign
phases is the time to ensure all of those perks are sent to your donors and experiences
are set up. We recommend that you email all donors who will receive perks to confirm
the correct shipping information, as well as appropriate information about the perk (i.e.
t-shirt size, organize a time for a visit to a project site or research lab, etc.).

Additional Stewardship Touches
If you have the time and resources, it can be extremely touching for a donor to receive a
personal thank you from the project and potentially be a motivating factor to donating
to your institution or other projects like yours in the future. Gestures such as, post
cards, a hand-written note, or a phone call from a student that benefitted from the gift
(if donor gave at or above a certain, pre-decided level) can be incredibly powerful to a
donor. These are “hidden” perks that the donor won’t expect, making them extra
special.

Conclusion
You are embarking on a new and exciting road in the world of fundraising, but with
these strategies based in teamwork, personal outreach, and transparency – you have a
roadmap to success in your hands. Good luck and we look forward to seeing the
interesting project you bring forth!
Campaign Strategy for Faculty/Research Projects

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

Welcome to your crowdfunding campaign! Crowdfunding is a dynamic form of fundraising that requires dedication and time, but we understand how busy your schedule can be and have therefore created this document as a strategy map to guide you through your project. Here we will discuss how to lay the ground-work for a successful campaign, from how to create a team of support to defining roles and responsibilities to execute all necessary pieces through the quiet, active, and post-campaign phases.

As the main project leader and figurehead, you have five major responsibilities:

• First and foremost, **form your team of project champions**. A little later we will discuss where you find those team members as well as the responsibilities they have, but this is your most crucial first step. Once your team is established, assign each person their responsibility.
• Once each team member has their assignments, it is your job to actively keep them on task through the quiet and active phases through meetings (1x/week in quiet phase, 1-2 meetings in active phase).
• Work with team of project champions to decide your fundraising goal.
• Solicit your contacts through personal e-mails
• Appear in videos (both main and update videos); help with perks (offer experiential perks for highest level donors, printed copies of research, etc.)

As a researcher at the college/university level, you have support systems built in that you can pull from to create your team of project champions. Anyone working with you on your research (Assistant Researchers, Post Docs, Grad Students, or even Undergrad research assistants) can be beneficial for your team. Additionally, if there is a relevant development officer assigned to your department, they can be incredibly beneficial to the process. Below is an outline of the responsibilities of a project champion team:

• Creating video content (main and updates)
  o Main project page video (2 – 2.5 minute video explain project, not over-produced)
  o Update videos (Two or three 30 seconds, pre-shot educational facts pertaining to your research or testimonials by people impacted by your research area that will intrigue the viewer and compel them to share)
• Creating copy for project – Project Title, Short Description, Long Description, Perks or Levels, Project Creator Bios, Updates, Stretch Goals (2 people)
  o We recommend a minimum of one update per week and no more than two updates per week. Updates should only enhance the donor experience and should be used not only to let donors know of major milestones, but to include
educational facts pertaining to your project or testimonials by people impacted by your project that will intrigue the viewer and compel them to share. Always make sure to ask the donor to share the project in each update.

- Stretch Goal Strategy
  - Should your project raise the amount of money to reach your initial goal within the first 23 days (of a 30 day campaign), it is recommended that you implement a stretch goal that is crafted in your quiet phase. In your stretch goal messaging, you need to name a new fundraising goal, as well as be able to describe the additional impact that money will have.
  - Should your project raise the amount of money to reach your initial goal after 23 days (of a 30 day campaign) have past but there are still a few days left and you want to continue to accept donations until your initial project closing date, you still need to be able to describe the impact any additional money will have.

- Put together list of 100 names/personal e-mails of close contacts with a potential giving capacity of $100 and above. (Everyone must do this)
  - Gather pre-commitments from donors to ensure momentum in the first days of your campaign. Acquire these through personal e-mails and face-to-face asks. The team should aim for 20-30% of the overall goal prior to your launch date. If you get less than 20% pre-committed or much more than 30% pre-committed, this is a good time to recalibrate your fundraising goal accordingly.

- Schedule potential events in your third week of campaign, the typical lull in fundraising for a 30 day campaign, to bring in offline donations.

- Outreach to affinity groups
  - Reach out to organizations that have a similar mission to the work your project is doing. This can be other academic departments or mission-aligned organizations that can help spread the message about your project.
  - Amplifiers – people with channels into large social media networks or local media that can amplify message into a larger community.

Once these steps have been taken, you will be ready to take on your active phase. If you’re at an institution where you have a smaller research team, ask students from your classes! If you can identify students that are interested in the subject matter, harnessing volunteers from your classes is a great method of support as well. But as you can tell, this is a team effort. No crowdfunding project can succeed alone and should you have any questions about project preparation, both your institutional administrative contact as well as the team at ScaleFunder will be happy to act as an additional training support. In the next section, you’ll learn what goes into the Active Campaign and how to leverage your time and team during this stage.
**Active Phase, less than $25,000 initial goal (30-45 days)**
Crowdfunding is an active form of fundraising that requires your attention throughout the campaign. There are responsibilities that must be completed during this phase to position your campaign for success, and they are broken out below. Following them will give you and your case the best chance for reaching your goal.

**Every Day Responsibilities**
- Check donor information through “Donations” tab. Here you will find a list of the people who have already donated. When you see a name of someone on your large group of contacts, make sure to take them off any list of potential donors, they will be contacted through donor updates. ****THANK YOU. Whichever member of your group made the ask to that person should send a personal thank you e-mail.
- Check goal levels against pre-scheduled update timeline. Post updates when pre-decided milestones are reached, but be careful to not overload donors with updates.

**Throughout Campaign**
- Remember to send updates **at least once per week**, a maximum 2 times per week, **but only if it adds to experience**. Again, they should be authentic and simple. A quick “here’s what we’re up to” or fun facts related to your research or project. Always task them with the action to share with others who might be interested.
- Have different amplifiers and affinity groups post on social media about your project.
- Hold meetings with champion and amplifier groups

**24 Hours Before**
Hold a pre-launch and send the link to the pre-committed donors you gathered during the quiet phase, giving your project momentum right out of the gate.

**First 24 Hours**
Send e-mail blast on the morning of day 1 to your large group of contacts gathered. Follow up with phone calls for those whose numbers you have. On the evening of day 1 or morning of day 2, have your amplifier group publish posts about your campaign to their large social media networks or their local media outlets (school newspaper, blog, etc.)

**After 72 Hours**
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Make sure you are up to date on your cross references of donations to your e-mail list, then send out a new e-mail to those who haven’t donated with another ask.

Week 3
Utilize your pre-scheduled offline events to raise more money towards your project. Make sure to enter the amount of money raised and the number of donors to the ScaleFunder platform. If they would like to be honored, mention them in the description, as there is currently not a way to add offline donors to the donor wall.

End of Campaign
Make sure to send a final, thank you update to all donors as your last update in the active phase, highlighting the impact the money you raised will have and tangible items it will buy that benefit your project’s mission.

Post-Campaign (Up to 1 year after campaign end date)
Congratulations, you made it through the first two phases! Donors of today like seeing the impact their gift has, thus we utilize the updates tool in the post-campaign phase to take the donor on a journey with you as the money they donated is used to benefit your specific mission. While this last piece is less of a time commitment than the first two phases, it is the most important piece to your donors and the overall success of your project.

When you are sending updates in the post-campaign phase, make sure to always click “Donors Only” below the text section in the Updates sub-tab before you publish your update. When the Active Phase is over, you should decide on milestones of when you will push out these updates.

Timeline of Updates (no more than 3-4 in post-campaign phase):
- When funds raised are utilized for initial purpose (show immediate impact)
  - Your campaign has already specified the types of items your donors are funding. So let your donors see the initial result! Give an update on your research, give an insight into the strides you’ve made, or if you’re going into the field for research, utilize updates to show donors how their donations got you there.
- 6 months/1 year after campaign (show long term impact)
  - In this update, you will answer the question “how has the money I donated made a difference?” for your donors. What were the results of your research? If you aren’t finished yet, where are you in the process? This gives the donor an understanding of the impact they made.

Always be sure to continue to thank donors in the post-campaign updates, as well as show impact.
Perk Processing & Fulfillment
If you offered tangible or experiential perks during your campaign, the post-campaign phases is the time to ensure all of those perks are sent to your donors and experiences are set up. We recommend that you email all donors who will receive perks to confirm the correct shipping information, as well as appropriate information about the perk (i.e. t-shirt size, organize a time for a visit to a project site or research lab, etc.).

Additional Stewardship Touches
If you have the time and resources, it can be extremely touching for a donor to receive a personal thank you from the project and potentially be a motivating factor to donating to your institution or other projects like yours in the future. Gestures such as, post cards, a hand-written notes, or a phone call from a student that benefitted from the gift (if donor gave at or above a certain, pre-decided level) can be incredible powerful to a donor. These are “hidden” perks that the donor won’t expect, making them extra special.

Conclusion
You are embarking on a new and exciting road in the world of fundraising, but with these strategies based in teamwork, personal outreach, and transparency – you have a roadmap to success in your hands. Good luck and we look forward to seeing the interesting project you bring forth!
Anatomy of an Email Ask

**Emails should be personal.** Address each one by name and add an anecdote for each person.

**Explain your connection to the project.** Why are you involved? How did you get involved? If the money raised has an impact on you personally, explain how.

**Give context of wider impact.** If the project has the potential for a larger impact in the community, explain it to the potential donor.

**Mention partnership with institution.** The institutional support further validates your project’s merit; use that. If your institution is a 501c3, note that donations to the project are tax deductible.

*Most colleges/universities have 501c3 status, but please check with your crowdfunding administrative contact for confirmation that these donations are being noted as such.*

**Reference the amount of money you are trying to raise.** Be transparent about how the money will be used.

**Ask them to donate.** Tell them the issue you’re working to solve can’t be fixed without their support.

**Ask them to share.** Not everyone will have the capability to give at that time. Mention that they can also be helpful by sharing with someone they know who may be passionate about the subject matter.

**Keep it as short as you can.** All of the above pieces are crucial, but people also have short attention spans. The biggest focuses should be on your connection to the project and that person, while giving them a compelling reason to check out the project page.

**Pull them into the journey with you.** Whatever the subject matter of your project, you’re starting a journey of how to solve a particular issue. With all of the above pieces, you’re creating a story about how you will accomplish your goal. Remember that the personal emails you send are there to take donors with you on your journey. You are sending these e-mails to people who care about you and people who care about this subject matter. Tie that personal touch in wherever possible. At the end of it, they should feel inspired to act because of you and the impact of your project…and your promise to take them on the journey with you (via updates).

Email Ask Examples
Example #1:
Dear Jessica,

I hope this e-mail finds you well and rested after your vacation to Tahiti! I would love to meet up soon and talk about both your trip and your extensive international travel, as I soon will be embarking on my first international journey. I have been selected among a team of engineering students through the university to travel to Honduras and build water filtration systems for a rural town outside of the capitol. As I finish my final year of school, I’ve begun to find a passion for public health and the impact engineering has on creating safer communities for people around the world. We are planning to put in 4 different filtration systems throughout the town we will be working within, but we do have to purchase these items prior to the trip, which end up costing approximately $1200 per system. This cost was going to be spread among all of our team’s payment for the trip, but we came together and decided we wanted our amazing communities to be a part of this trip as much as we were, so we are raising $5,000 to purchase the equipment.

With your incredible international development work, I thought of you immediately when I started creating my list of friends who might be interested in supporting my team in our endeavor to bring clean water to this town in Honduras and to grow as engineers that help the developing world. All donations are tax-deductible, as they are directly through the university, and a donation of any amount would be a huge help. Additionally, I would be so grateful if you could share this project with your community of folks that do international development work as well.

You can find a link to our project site here, where the donations are taken: (LINK). Please let me know if you have any questions!

All my love,
Katie

Example #2:
Dear Jeff,

So good to see you at the national conference last month! Your research surrounding traumatic head injury in college athletes continues to inspire me. As you know, the head trauma center I am involved with at the university has been doing similar research with high-school athletes and are working to put together a program that will bring the testing we’ve created to check and monitor student athletes with traumatic head injury in three of the lowest income schools in the surrounding area. With the university’s family of schools and connections into the local school system, we’ve identified these schools and identified a cost point of $3,000 per school for testing and treatment over the next school year. We’ve taken it upon ourselves as a center to raise this money on our own and through the use of the university’s
crowdfunding platform, we are attempting to raise the $9,000 it would take to implement this program in the three identified schools.

As someone with an affinity to this topic, I knew immediately I wanted to invite you to join this project with me through a donation. Our team is hoping to gather pre-commitments to our project from our friends who are passionate about the work we do. When we launch in 2 weeks, can I count on you for a donation? Even a donation of $100 brings the services to 2 individual students and will benefit from a year of care because of your generosity.

Please let me know if you have any questions about the project or the work we’ll be doing, I’d love to sit down and talk with you about it!

Thank you in advance,
Mark
**Stretch Goal Strategy**

As you learned in the campaign strategy document, your initial goal amount is based on the ability of money you *can* raise, rather than your budgetary deficit. But what if you hit that initial goal with time left in the campaign? Implement a stretch goal!

During your quiet phase, you will evaluate the impact of different amounts of money that add up to your desired goal. This practice will help you define the content of your stretch goal. Decide within your quiet phase what any additional stretch goal will be and create the messaging around it so it is ready as soon as you hit your goal.

There are a few pieces to keep in mind as you begin to think about how to best implement a stretch goal in your philanthropic crowdfunding campaign:

**Keep it realistic.** Take into consideration how long it took you to get to your initial goal, how much time you have remaining in the campaign, and your additional outreach capabilities.

**Explain the additional impact.** In both an update and in the top portion of the project description, explain what the additional money raised will do. Make sure you keep this in line with what your project is already raising money for. Do not change the game on your donors mid project cycle.

**Do not update the goal amount in the project settings.** By changing the goal amount, you disrupt the momentum you have within that progress bar. By explaining the additional impact in your project description and updates, donors will understand the additional need.
Anatomy of an Update

Updates should be something that enlightens, entertains, and engages the donor about your cause by:

- Showcasing your campaign’s progress
- Featuring selected member’s personal statements about what drew them to the issue you are trying to solve
- Sharing interesting facts or stories about the cause you are undertaking or issue you are tackling
- Providing special “VIP” or “behind-the-scenes” access to your process or training (i.e. featuring your laboratory, practice regime, research travels, etc.)

Remember, the goal of all updates are take the donor along with you on your journey and entice them to share your mission with others who may find it compelling!

First Update (between 24 hours – 72 hours after launch)
- Thank donors, re-state impact their money is making.
- Take compelling statistics around the issue you’re raising money to tackle/solve or quotes from those who will benefit from the money raised.
- Prime donor to share with someone they know that would be interested in the project by describing a certain aspect of the project (a certain issue within your larger mission, connection as an alum of the school, etc.)

Milestone Update(s)
- Progress Milestone: note percentage of goal raised thus far (50%, 75%, etc.) and describe the impact that specific amount of money will have.
- Countdown Milestone: include elements of money milestone update and note how much time you have left.
- Use a short video, highlight someone that is either a face of the project discussing statistics about your issue or a testimonial from someone who will be impacted by the money or someone who has been impacted previously (i.e., previous scholarship recipients, those who have gone through the program you’re raising money to continue, etc.)

Stretch Goal Update
- Say Thank You!
- Explain your new goal and the impact that additional amount will have.
- Use video -- have one of your project owners describe the stretch goal and its impact.
Thank You Update

✓ Video thank you from team, explain the impact your final amount raised will have.

First Post-Campaign Update (When you spend the $ raised or 3-6 months post campaign)
✓ Explain short term impact the money has had within the scope of your project, what you’ve been able to do because of your donors’ generosity.

Second Post-Campaign Update (9 months – 1 year post campaign)
✓ Final update to wrap-up campaign communication, discuss wider impact the donation has made (i.e., you bought a tool to further your research, explain findings; you took a service trip, explain impact on both volunteers and the community you worked within).

*For the post-campaign time frame, you can always continue to use the updates to give your donors an eye into the work you’re doing with the money raised. Send videos! Just ensure you press the “Donors Only” option below the update for all post-campaign updates.

For examples of great updates, please see the following links:

University of Maryland Public Health Without Borders:  
https://www.launch.umd.edu/project/53460e410920657409de1550/updates/1

UC Berkeley, Haas School of Business Socially Responsible Investment Fund:  
https://crowdfund.haas.berkeley.edu/project/52eff0c3092065287bd105a8/updates/1

UCLA Beethoven Performance, Student Choral Group:  
https://spark.ucla.edu/project/5348bc7314bdf74f9f2fdd09/updates/1