

CLEVELAND CLINIC CROWDFUNDING

Toolkit



The Power of Every *One*.

COME TOGETHER. MAKE AN IMPACT.





We believe in the Power of Every One



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About Crowdfunding at Cleveland Clinic

The Power of Every One is a Cleveland Clinic-sponsored online crowdfunding platform that brings caregiver initiatives to fruition by raising moderate amounts of money from a large number of people.

The website, created by Cleveland Clinic's Philanthropy Institute, highlights caregiver projects that need funding and will have a positive impact on our patients, care and community.

100 percent of funds raised for a project will go directly to the project itself.

Any Cleveland Clinic caregiver can apply through the **online application**. Once a quarter, Philanthropy Institute staff and the Caregiver Review Board review all submitted applications and choose a few that are best suited for the site at that time.

Selected project leaders are then guided through a three to four-month process, including creating an engaging project page, marketing the cause, processing funds, thanking donors and keeping them updated after the campaign ends.

This guide will help you understand the ins and outs of building a crowdfunding page with **The Power of Every One**.

Remember this: Crowdfunding thrives on passion. The passion of a project leader inspires donors, who are motivated to spread the word and feel like a crucial part of the project's success.



Elements of a Successful Project



Elements of a Successful Project

- **A strong leader**
An engaged, passionate leader who will continually promote the project and post updates throughout the campaign is the single most important factor for a successful project. We call these leaders our “champions.”
- **An engaging video to “pitch” your project**
This will appear at the top of your project page (more about videos on pg. 4).
- **Patient involvement**
A patient “face” gives your project authenticity and demonstrates its potential impact. Be sure to follow HIPPA consent guidelines. Ask your institute’s Development Officer for the appropriate form.
- **Frequent updates**
Update at least once a week, if not twice a week.
- **Personal touches**
These make the project feel more like a community. Your audience wants to feel connected to the people behind the project.
- **A simple, direct message**
Clearly explain the link between gift and impact.
- **Varied giving levels**
Offer a variety of gift options to encourage people of all economic levels to donate.
- **Seed donor(s)**
Never start a project at 0% funded. Securing a seed donation up front is crucial to demonstrating that this is a cause people care about. Talk with your institute’s Development Officer for help.
- **Social sharing, online and off**
Social media, emails and face-to-face conversations are FREE publicity!
- **A focused audience**
The internet is a big place. Sending a broad, general call for help is just shouting into the abyss. If you know where to look and who to target, you will be much more effective.
- **A fulfilling donor experience**
Say “thank you” early and often, and go the extra mile to make your donors feel like a true partner in the project with a stake in its success.



Your Project Page



Your project page is your chance to make a strong appeal, showcase your project's potential impact and demonstrate its progress. You will learn how to login to the site to write, edit and upload content at a pre-campaign planning meeting with Erin Horan, crowdfunding Platform Manager.

Main Video

- **Length**
The ideal length is around two minutes; anything longer than three is unadvised.
- **Content**
Your video should feature project leaders and/or project beneficiaries if possible.
- **Production**
Keep it simple. Overproducing your video may actually detract from the “grassroots” feel we encourage for these projects. A GoPro or smart phone works fine.

If you don't feel comfortable handling the film portion of your project, Erin can come to you and film you/ your team on location in the greater Cleveland area. Contact: horane@ccf.org

➤ Uploading

Videos must be uploaded in the form of YouTube links. Please send your video file to Erin Horan via Cleveland Clinic's [FileShare Service](#). She will arrange for it to be added to the Cleveland Clinic YouTube channel and will then publish the video to your project page.

Description

Again, short and sweet is the motto here. Include photos if you can and make sure you tell the story of your project in a personal way, with a clear indication of how you will use the funds you raise.

Bios

Each project should have a team of at least two to three “Project Owners” (champions). Each “owner” should submit a photo and short bio to Erin. If an owner has a personal or professional website, that may be included here as well (ex: a project raising money for lab research can link bios to the lab's website).



Sample Project Page: Healthy Hispanic Cooking

Healthy Hispanic Cooking - La comida es medicinal



Share to Maximize
IMPACT

Share



Share



Share



\$2,070

103%

Raised toward our \$2,000 Goal
23 Donors



PROJECT HAS ENDED

Project ended on August 05, at 12:00 PM EDT

> Project Owners



Description

Updates (4)

Donor Wall

Healthy Hispanic Cooking - La comida es medicinal

Salud Popular Embracing Health
A collaborative of Cleveland Clinic, MetroHealth, & Neighborhood Family Practice



Before you can cook up a nutritious meal for your family, you need access to fresh foods and healthy recipes with all of the flavors and ingredients your family loves.

In partnership with Salud Popular, a community based organization that supports healthy food initiatives in Cleveland's MetroWest neighborhood, Cleveland Clinic, MetroHealth and Neighborhood Family Practice are sponsoring culturally fresh food delivery projects in identified Hispanic neighborhoods with wrap-around cooking classes. The cooking classes will be demonstrated in Spanish and feature healthy Hispanic recipes with culturally aligned ingredients. Participants will not only learn fun ways to make their favorite foods healthier, but will also get a crockpot to take home!

Funds raised through this project will also support the translation of educational pamphlets about diet-related health issues for local clinics and programs.

Food is not just energy. Food is culture. Food is medicine. Food is health.

Your gift of any amount will help make healthy, culturally appropriate food more accessible to a community in need.

Salud Popular Embracing Health
A collaborative of Cleveland Clinic, MetroHealth, & Neighborhood Family Practice



Levels Choose a giving level

\$10

Healthy food

Help purchase culturally aligned, healthy food. ~ Ayúdenos a comprar alimentos saludables y culturalmente apropiados.

Contribute \$10

\$15

Class costs

Help us purchase ingredients for everyone in the class, compensate the instructor, and secure the location. ~ Ayúdenos a comprar ingredientes para los participantes de la clase, a pagarle al instructor y a proveer un local.

Contribute \$15

\$35

Crockpot

Give the gift of a crockpot, which helps



The Big Money Questions:

Goal Setting and Giving Levels



Goal setting

The Power of Every One is designed for projects with a fundraising goal of \$2,000–\$10,000.

Projects will remain open until the established end date, even if the goal is reached before then. It is possible to raise in excess of your goal, and also possible to update with a “stretch” goal in special circumstances.

Set a goal that is reasonable and not overly “hopeful” to increase the likelihood of success.

Studies show that people are not deterred from giving just because the goal has been reached.

Giving levels

People like knowing the direct impact of their gift. Create different giving levels that are assigned to certain components of a project (ex: Pay for a child’s eyeglasses).

Be sure to offer a range of dollar amounts. While many will want to give \$10 or \$20, others may want to give upwards of \$100, and they should be able to easily see this is an option.

If your project isn’t easily compartmentalized into \$25, \$50, and \$100 portions, that is OK! You can get a little creative.

For example: Let’s say your research lab needs funding for a preliminary data study on the connection between obesity in adolescence and heart disease later in life.

You might do something like this:

- **\$33 Project planning**
33% of children ages 6–19 in the U.S. are currently overweight or obese
- **\$47 Data collection**
47% of adult Americans have at least one heart attack risk factor
- **\$90 Analysis & publication**
An estimated 90% of obese adolescents will remain obese into adulthood.

Another creative approach to giving levels uses years as price points. For example:

- **\$19.21 Foundational Gift**
Cleveland Clinic was founded in 1921.



The Big Money Questions:

Gift Processing, Receipts and Fund Access



Gift processing

Gifts made through the site are processed through PayPal. Credit cards will be charged within 1–2 days. All gifts are tax-deductible and generate an automatic thank-you email as well as a gift receipt with tax information.

Gifts made offline (such as at events or through the mail) should be brought to the Philanthropy Institute team for manual entering onto the site. These gifts receive a thank-you and gift receipt and will go through our standard gift processing procedure.

Offline gifts can be sent to:

Cleveland Clinic/Philanthropy Institute
PO Box 931517
Cleveland, OH 44193-1655

Receipts

After making a gift to your site, donors are brought to a “Thank You” page *and* automatically receive a thank-you email with a receipt that can be used for tax deduction purposes.

Offline gifts will receive a thank-you letter and receipt via direct mail that includes tax information.

Fund selection and access

As project champion, you must select an *existing* Cleveland Clinic fund to accept donations and obtain approval from your manager to access this fund. Approval must be secured prior to application.

Please allow one to two weeks after the project’s completion for the Philanthropy Institute team to review all data before requesting fund access.

Fund use reporting

When you are ready to use the funds you have raised, be sure to document the expenditures and report back to the Philanthropy Institute team for recording purposes.



Promotion: Emails

Email asks are by far the main drivers of crowdfunding gifts.

Taking the time to craft a personal, meaningful message is one of the best things you can do for your project.

Follow these tips for writing a persuasive email:

- **Make it personal.**
Address each one by name and add an anecdote for each person.
Explain *your* personal connection to the project.
- **Give the project context.**
Explain the project's potential for a larger impact in the community.
- **Mention Cleveland Clinic.**
Institutional support validates your project's merit. Emphasize Cleveland Clinic's nonprofit status and the fact that 100% of funds raised go directly to the project.
- **Be specific and transparent about what you need.**
Clearly state how much money you are trying to raise, and be transparent about how the funds will be used.
- **Ask them to donate *and/or* spread the word.**
Not everyone you email will be able to make a gift. Be sure to relay that sharing the project on social media and talking about it with friends/colleagues are other ways to help.
- **Keep it as short as you can.**
This one is self-explanatory.
- **Make them feel part of the effort.**
Think of your project as a journey to solve a problem, and this email as an invitation to come along. Mention that donors receive regular progress updates. Re-emphasize your personal investment in the project's purpose.



Promotion: Social Sharing



Social Media Policy

As a Cleveland Clinic employee, you are expected to observe certain behavioral guidelines when posting on social media. This goes for both personal and professional accounts.

If you have not already done so, familiarize yourself with Cleveland Clinic's [Social Media Policy](#).

Cleveland Clinic's official social media accounts are managed through Marketing and/or Corporate Communications and cannot be used for crowdfunding promotion.

Please use your personal accounts to promote your project.

If your Institute or Department has its own social media account, ask your manager about requesting a post for your project from there as well.

Project Ambassadors

Do you know anyone—within or beyond Cleveland Clinic—who posts frequently about your project's general topic area and has a large number of followers? Ask her or him to help! If your project has a hashtag, make sure to share that and any other keywords you would like associated with your project.

Patients who have benefited from your or a similar project in the past, or stand to benefit in the future, can be powerful ambassadors by sharing their stories. Encourage them to help spread the word!

Before launching your campaign, contact each person on the project team—including directors, physicians, researchers, support staff—and give them a specific role in promoting the project. Will they tweet once a week? Will they send handwritten letters to five good friends with the capacity to give? Will they write a short paragraph for an internal e-newsletter that includes a link to the site? Everyone brings a specific skill and network to the table.



Promotion: Offline

Events

It may seem counterintuitive to use a live event for online fundraising, but the two worlds are inextricably connected! Remember: Personal connections are what drive donations.

Start with a launch party, or host any kind of event midway through the campaign to create buzz and maintain momentum. Ask your Institute Development Officer for help with invitations and creating offline donation forms (like the one on p. 11) to pass out. Express your gratitude, have fun and encourage contributions at the event!

Earned media

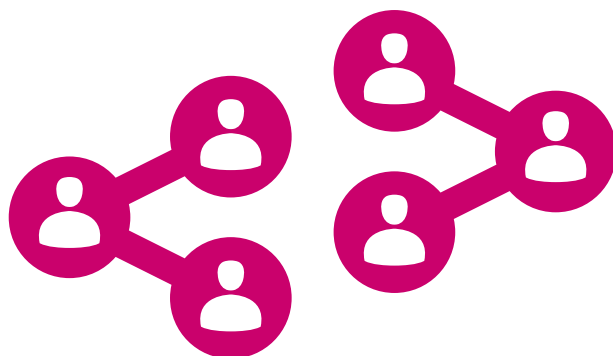
Local media outlets—print, TV and radio—are always hungry for good local content, and your campaign is a great story! If you have an interest in pursuing earned media coverage, please discuss this with the Philanthropy Institute team during your pre-campaign planning meeting. Remember that patient stories resonate well with audiences, so ask your patient ambassadors to participate in media pitches and interviews.

Pre-campaigning

Before your campaign goes live, let your networks know that your campaign is on the horizon. Encourage your inner circle to contribute as soon as you go live, so your campaign gains instant traction. Seek support from your division or department head to promote your campaign in the department or clinic. Remember, you're not simply asking people to contribute their money. You're inviting them to collaborate with you.

Inner network

For your best potential contributors or marketing partners, seek one-on-one meetings—on the phone or in person—to describe your project and explain how they can support you by contributing or spreading the word throughout their networks.





Crowdfunding Commitment Form



Crowdfunding Project Donation Form



I am pleased to make a gift to (INSERT INSTITUTE OR FUND NAME) at Cleveland Clinic Foundation, Cleveland, Ohio ("Cleveland Clinic") to assist the (INSERT PROJECT NAME) project.

1-2 SHORT PARAGRAPHS DESCRIBING YOUR PROJECT.

Funding Opportunities:

_____ \$xx.00 will pay for _____

_____ \$xx.00 will pay for _____

_____ \$xx.00 will pay for _____

_____ \$xxx will pay for _____

_____ \$ _____ (other Amount)

GIFT OPTIONS

Please complete entire form

____ Check Enclosed is a check made payable to Cleveland Clinic.

____ Credit Card Name: _____
Address: _____

Phone Number: _____
Email Address: _____
Credit Card Type: _____
Credit Card Number: _____
Expiration Date: _____
Total Amount: \$ _____

For recognition purposes, I wish for my name to be listed on the (INSERT PROJECT NAME) crowdfunding page as:

(please print)

Signature/Date: _____

Thank you for your support! Please send to Cleveland Clinic, 9500 Euclid Avenue/i13, Cleveland, OH 44195
For questions, contact Mayme Patthoff, Senior Director of Development, 216.445.7834 | patthom@ccf.org

CFCOLE 2017/06



The Donor Experience: Along for the Journey



Thank-yous

Even though all online gifts automatically generate an email receipt with a thank you message, it is still recommended that you send personal thank-yous to friends and family who have donated on your suggestion. Check the donor wall regularly for names you recognize and reach out to them.

Remember, personal touches go a long way!

Updates

Keep your donors informed with progress updates **at least once a week.**

You will be taught how to post updates during the pre-campaign planning session.

Updates can be either private (just sent to those who have donated thus far, via email) or public (sent to donors and viewable online). All updates created in the “Scheduled updates” tab will be private.

We recommend using public updates for everything, so everyone who comes to the page and is curious to learn more about the project can see what you have been posting.

Note: The Philanthropy Institute team will not write or produce updates for you.

Preparing content in advance is a huge time-saver.

For predictable milestones such as the “halfway through the campaign!” mark, you can do the work ahead of time and then publish when ready.

Throughout the campaign, posting ad-hoc updates with more spontaneous content is a great way to keep the lively spirit going. **If you know in advance that you will not have time or ability to do this, please plan ahead and send Erin at least 4 additional updates in advance.** She will then post them to the page at the pre-determined times.

Remember: A personal and engaging experience makes donors more inclined to give again.



The Donor Experience: Stewardship



Project “perks”

You may have seen crowdfunding sites offer “perks,” such as T-shirts or water bottles, to those who give. In keeping with our commitment to a zero-overhead mode—ensuring that 100% of donations go to the projects themselves—[The Power of Every One](#) does not condone gifting physical goods to donors out of project funds. We do, however, encourage creative use of “perks” with no retail value.

For example:

The Future Medical Scholars program supports paid summer internships for youth from under-represented groups interested in pursuing medical careers.

Donors to this project receive a personal thank-you email from one of the students.

Alongside a favorite photo of themselves, the students express their appreciation for the experience, detail what they worked on and share what inspires them to study medicine.

Post-campaign stewardship

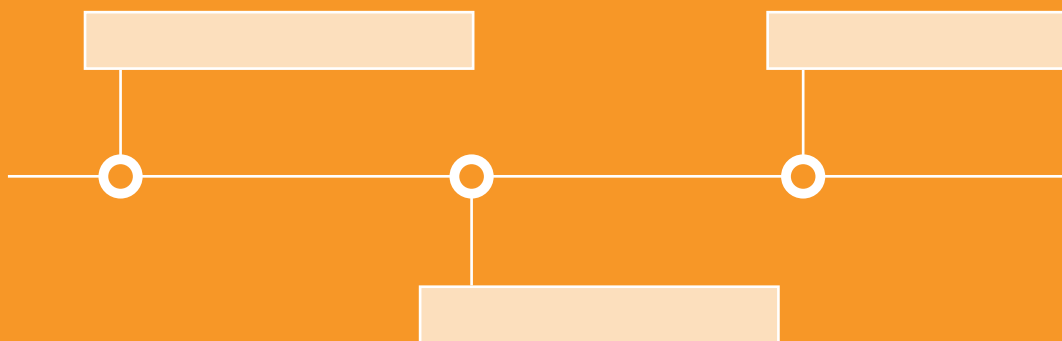
Once your 30 or 60 days are up—the project isn’t “over”! Reporting back to your donors just once at the end of the campaign is not enough.

Plan at least three post-campaign updates:

- **1. On the final day**
Express gratitude to everyone involved in donating and/or spreading the word, and communicate the total amount raised.
- **2. 3–6 months post campaign**
Explain the short-term impact the money has had within the scope of your project, summarizing what you’ve been able to do thanks to donor generosity.
- **3. 9 months–1 year post campaign**
Send final update to wrap-up campaign communication. Discuss the wider impact donations have made (ex: 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).



Timeline



QUIET PHASE

Week 1

- Meet with Platform Manager (Erin Horan) and set up weekly check-ins.
- Identify your project champions.
- Compile email lists (25–100 emails per team member).

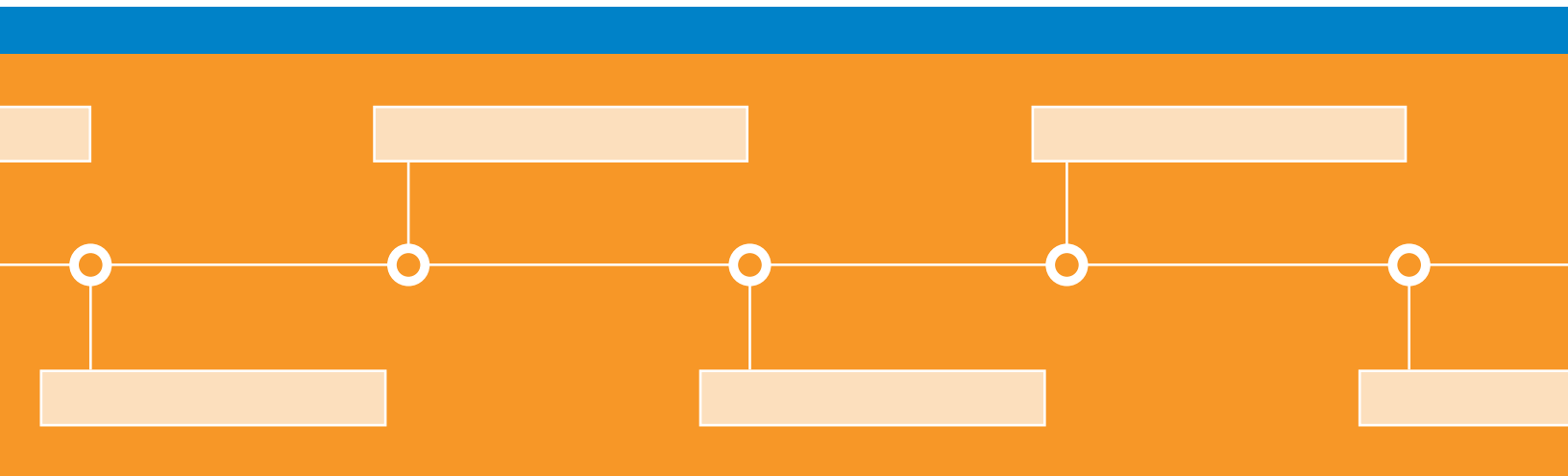
Weeks 2–4

- Decide on monetary goals based on outreach capability and any pre-seeded funding.
 - If you hit your goal before campaign is over, what is your plan for a stretch goal?
- Media:
 - Create a main video. Find images for project tile and Facebook photo.
 - Collect any additional imagery for the project description section and/or updates.
- Bios:
 - Choose up to four individuals to highlight as project owners.
 - Choose a “main creator.” Thank-you messages will identify this person as the “sender”.
- Write copy for project description.
- Come up with five to seven giving levels and/or perks.

Weeks 3–4

- Identify affinity organizations that might share messages about your project during the active phase.
 - Examples include local nonprofits that do similar work, blogs, other student groups, school paper/media, etc.
- Create a marketing plan, including initial outreach emails, follow up emails, update timeline, and/or offline event in tandem with campaign.
- Start reaching out to affinity organizations and the subset of your email list most likely to donate.
- Work with the Philanthropy Institute to identify seed donors who can collectively get you to 30% of your goal before launch.

Projects have a higher likelihood of success when 30 percent is raised within the first week.



ACTIVE PHASE

Day 1

- › Check: Have project team members sent all of their emails?
- › Post to social media.

Day 3

- › Ensure an update is sent out.
- › Check: Has 30 percent been reached?

Week 2

- › Cross reference your email list with donor list, and follow up with anyone who hasn't given.
- › Ensure an update is sent out.

Week 3

- › Hold any pre-scheduled offline events.
- › Send updates.
- › Cross-check donations against solicitations and reach out again to those who haven't given yet.
- › Pay attention to daily progress and implement the stretch goal if you hit your initial goal.

STEWARDSHIP PHASE

End of Campaign

- › Send thank-you update.
- › Start saying thank you to the people in your network who gave.
- › Three months after campaign end:
 - Publish update about the initial impact of funds raised (when money is used).
 - Fulfill perks, if using (within 3 months).
- › Six months to one year after campaign end:
 - Publish update about the project's long-term impact.

Now, go forth and fundraise!

If you have additional questions not addressed in this guide, please contact Erin Horan at horane@ccf.org



The Power of Every *One*.
CENTENNIAL CAMPAIGN