



# Part 1

## Planning your project

# Introduction

Crowdfunding is a way to raise money for ideas online. It's been around for centuries but the internet makes it possible to reach much bigger audiences than before.

Like most things in life, the more you put into your crowdfunding project the more you'll get out of it. You've done the hard bit by coming up with your idea, now the key is making sure you have everything lined up and ready to go before launching.

## Here to help

We want to build the capability of all charities by providing year-round support, skills and sharing of knowledge. So we've teamed up with Crowdfunder to create a series of free resources and toolkits to guide you through how crowdfunding works and what to do to make it a success

## How crowdfunding works

**1.**

Create your unique project page on [Aviva Community Fund](#) explaining your idea.

**2.**

Spread the word to family, friends and others in your community, telling everyone you know about the project.

**3.**

People who like your idea donate or pledge money in return for a reward that they'll receive once your project succeeds.

# Benefits of crowdfunding



## Crowd validation

Crowdfunding can be a fantastic way to test your idea. A successful project proves there is belief in what your organisation is doing, and gives you confidence that you're on the right track.



## Awareness

Running a project can raise your organisation's profile in a big way. Think of the funding period as an intensive marketing exercise and an opportunity to try out new ways of promoting your organisation.



## Advocates

Crowdfunding is for life. The people who support you might become your volunteers and members. Your supporters take part in the journey, meaning they make incredible ambassadors for you in the future.



## Future funding

Having a successful crowdfunding campaign could help to unlock additional grants and support in the future. It proves you know what you're doing.

“Following our Crowdfunder project we gained more volunteers, more people attending our classes, we re-used our video and also appointed new people to our steering board! It's about so much more than just fundraising.”

**Ilana Taub**  
Co-Founder, [Snact](#)



## Extra funding

We're giving Aviva's people the opportunity to decide the projects we fund to strengthen our connection to the communities we support. So, every three months, £250,000 will be donated by our UK employees to the projects that matter most to them.

You can read more about how this works in our [eligibility criteria](#).  
UK charities with new and innovative UK projects can apply.

[avivacommunityfund.co.uk](http://avivacommunityfund.co.uk)

# Making a plan

This is your project, so it's up to you to make sure you have everything lined up and ready to go before the big launch date.

You might want to use a simple checklist list or dive into the detail with a spreadsheet; it's your call.

You'll build your plan as you work through this pack, adding other tasks that are specific to your campaign.

To get you started, here's our checklist with all the essentials:

## Key action

Use a calendar to prioritise and map out deadlines for each task, showing what needs to be done by when. Try your best to stick to those dates to stay on track.

## Checklist

Build your team and assign roles

Identify project's key points of interest

Start drawing network map

Ask your team to help expand network map

Bullet point key messages (What, Why, Who and How)

Estimate audience size

Set a realistic target

Choose project title

Add a project image

Flesh out story with subheadings

Add a variety of images

Discuss possible rewards with team

Refine reward list and add to your project page

Prepare social media accounts

Plan video

Shoot and edit video

Start marketing plan

Agree actions with team

Warm up your Crowd

Plan launch

Make a list of first 10 supporters

Go live

Keep reviewing your plan

Get funded

# Skills you'll need

Think about your strengths and weaknesses – are there any gaps in your own skillset that need to be filled?

It's a good idea to share the load when running a project and find people to help with specific tasks. It can sometimes feel like a lot of work for one person to do alone, so delegating can free up more of your time to focus on driving the project forward.

Run through the list of skills that you need to outsource and think about anyone you know who has experience or expertise in that area.

The core team behind great projects is usually made up of 2–5 key people, so think about who you want on board and start those conversations.

## Useful Skills



Project leader



Content writer



Creative



Videographer



Networker



Social whizz

“Gather your team together for group brainstorming sessions on telling your story, offering rewards and spreading the word.”

**Bertie Herrtage,**  
Senior Coach, Crowdfunder.co.uk

“People can fill more than one role if that's where their skillset lies”

**Sami Mauger,**  
Head of Coaching, Crowdfunder.co.uk

# Identifying your Crowd

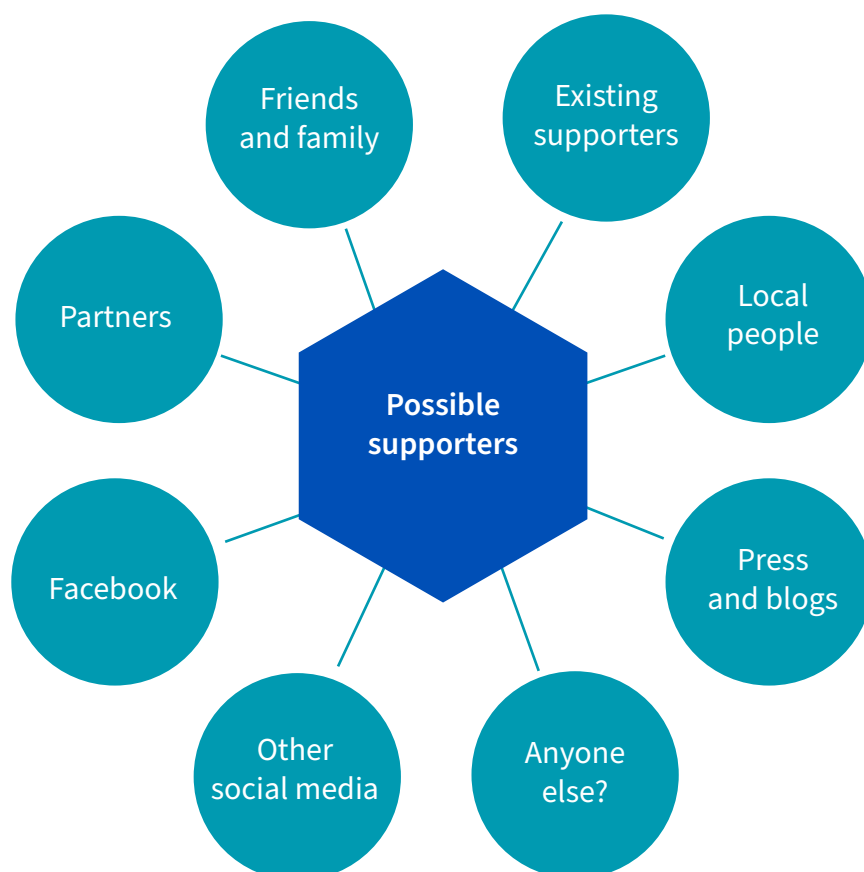
You'll need to engage with your personal and professional contacts to make your project a success. Usually your friends and family will be the first to pledge, with new audiences coming later. Let's look at the big picture first.

The best way to start is to gather your team together and start drawing a map of your network. Using this network map template will give you a much fuller picture of the shape and size of your Crowd. Your unique network map will be the basis for all the key elements you'll be creating next, so leave nothing out.

Local

Relevant

National









# Nurturing your Crowd

## Who's missing from your network map?

Identify any groups or individuals you'd like to reach, but haven't yet connected with.

It's also important to make sure you engage with everyone already on the list, so your channels of communication are open and active. If you haven't spoken to a particular group in a while, now is the time to get back in touch.



### Personal contacts

Speak with your friends and family to tell them about your upcoming project launch. It'll make them feel valued and will save you time explaining what you're up to later.



### Existing supporters

As these people have already engaged with your project, they're a fantastic group to nurture. Giving them an 'exclusive' early opportunity to see your new idea is a good way to keep them on board.



### Social media

If you don't have a Facebook page for your project, set one up as soon as you can. Get active and build your audience on Facebook, Twitter and Instagram before going live – don't wait until you launch to start engaging.



### Relevant groups

Become active in forums and online groups that are used by your target audience. You can find lots of groups on Facebook and LinkedIn. Remember to engage with comments and ask questions, don't just talk about your project.



### Local people

If your project is targeted towards a specific location, spend some time attending events and talking to local people to raise awareness. Collect business cards and email addresses, get networking!

## Next step

You're now through the planning stage and **ready to start creating your project.**

## Any questions?

Don't hesitate to ask, come along to one of the weekly [Q&A Drop-in sessions.](#)

## Summary

Let's recap what you've achieved already:

- ✓ Created your own unique checklist
- ✓ Plotted your key activities onto a calendar
- ✓ Assigned key roles and responsibilities
- ✓ Created Facebook page
- ✓ Identified your Crowd
- ✓ Started nurturing your Crowd

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