Step by Step Instructions

1. **Before applying:** Once you have a campaign in mind, consider:
   - The objective you are hoping to achieve and how much it will cost
   - The time and resources you have to devote to the campaign
   - Who comprises your target audience
   - People who may help you raise funds

   Tip: Campaigns run by two or more team members raise significantly more funds than those run by individuals.

2. **Training:** The Development Office will provide occasional ProjectWHOI training sessions. Check one out to see if crowdfunding is right for you or someone in your lab.

3. **Apply**: Go to projectwhoi.whoi.edu and click "Create a Project" to fill out an application. You can also find a printable PDF of the application for reference on the How It Works page under "Project manager tool kit," though you will need to submit your application online.

   Tip: Explain why this project sparks your passion, why this work matters to your audience, and how you plan to successfully execute your crowdfunding campaign. Remember to explain your work and your goals in clear, simple language easily understood by someone without a science degree.

4. **Define your goals:** You will need to determine if your campaign will be 30 or 60 days. Set your fundraising goal between $1,000 and $20,000.

   Tip: When choosing your goal, keep the SMART framework in mind: Specific, Measurable, Attainable, Relevant, and Timely. While your research goals may span months or years, break your work into chunks and ask people to fund a small part (a piece of equipment, a test, travel expenses).

5. **Review**: Once submitted, your application will be reviewed by the Executive Vice President and Director of Research. S/he will respond to you within 14 business days.

6. **Approval**: If your application is approved, you will receive an email from the Director of Annual Giving.

   Note: If your application is denied, you will receive an email explaining why. When appropriate, you may resubmit your application as long as it is modified to meet the changes specified by the Executive Vice President and Director of Research.

7. **Add a photo and/or video:** The Director of Annual Giving will ask for a photo to use on the site. You can also include a video and can choose from one of three options:
   - Immediately start fundraising with just a photo and description
   - Start fundraising and submit a video later
   - Use a 2-week grace period to create a video, then start fundraising

   Once the Director of Annual Giving has your photo and video, s/he will build your page using the information you supplied in your application. Send the photo of yourself to Kelly Westerhouse, Director of Annual Giving, kwesterhouse@whoi.edu. Put your video on Dropbox so it can be uploaded to YouTube.

   💡 Tip: According to mobilecause.com, individuals raise 4 times as much when crowdfunding campaigns are promoted by video.

8. **Volunteer fundraisers:** You may want to recruit volunteer fundraisers to help you reach your crowdfunding goal. Volunteers should click "Fundraise for a Project" on the ProjectWHOI homepage.

   💡 Tip: As a project manager, think of yourself as a coach. Keep your team informed and encourage members once your campaign starts.

9. **Login and Password:** Once your page is ready, you will be sent a ProjectWHOI user name and password with instructions on how to proceed.

10. **Solicit your audience**: Strategize about who you will ask to donate. Once you have your initial audience in place, focus on building it. Do this by posting facts, updates and other related material on social media networks, reaching out to the media, hosting a public gathering, talking with friends and family, etc. You will be able to email your contacts via ProjectWHOI while your campaign is active.

11. **Grow your audience**: Recognize the importance of family, friends, and existing social networks as the initial investor base for your project, but be willing and prepared to reach far beyond that base to ensure a successful campaign. This will not only increase the chances that your crowdfunding project will be successful; it may also lead to increased visibility and/or other opportunities in surprising ways.

12. **Stewardship**: As funds come in, thank supporters, share updates with your audience, and follow up with updates on your progress. Once your campaign ends, the Development Office will send you the list of people you contacted during the campaign so you can follow up with your WHOI email.

    Tip: Remember, your donors helped make your work possible, so keep them in mind as your work advances.

13. **Advance your project**: Once your campaign ends, make sure you use the money raised within one year of the campaign end date to meet the objectives you outlined in your crowdfunding project.