



Crowdfunding Action Learning Program

Prepare and launch
your crowdfunding
campaign with one
of our programs.

LEARN HOW TO HARNESS THE POWER OF YOUR SUPPORTERS

WHAT IS CROWDFUNDING?

Launch your project this year!

Action Learning Program Runs for Six+ Weeks to See You Through Launch.
Crowdfunding Training and Technical Assistance Provided by Croatan Institute.

Crowdfunding can be a powerful tool for economic development and social justice organizations working to support their communities. Over the past four years, we have developed various technical assistance trainings for smaller nonprofits and social enterprises; through this work, we have learned that the best way for groups to learn the tools for a successful crowdfunding campaign is through multiple, interactive sessions over a period of weeks.

We have designed a program which will provide an action learning framework for developing and launching a crowdfunding campaign for multiple organizations or their intermediaries. Through a series of weekly 2-hour webinar sessions and off-line work, the program will help develop the knowledge and know-how within your organization or business to gain grassroots support from the many individuals interested in seeing you succeed. In addition, it will help you to hone your pitch in several formats in preparation for future donor and investor fundraising. This program will also help to identify circles of supporters for your work well beyond your first crowdfunding campaign.

Crowdfunding is ideal for enterprises that are in the early and seed-stage level of

investment readiness. Crowdfunding is also a great source of potential funds for nonprofits and groups of businesses working together to create economic value in a community (like a value chain that could include the farmer of a product, the value-added processor, the transporter, and the final distributor). While this course will focus on crowdfunding for donations (although recent changes in legislation no longer limits crowdfunding to gifts), it may be used as a stepping stone toward readiness for other forms of more traditional investments, such as debt and equity. Crowdfunding works best for specific types of projects and needs, and is best used for small to medium amounts of money. The aim of this program is for economic development and social and environmental justice organizations, as well as entrepreneurs, to understand the differences between crowdfunding platforms, to determine which is right for their interests and specific project, and to guide them in successfully launching one crowdfunding campaign from start to finish.



Crowdfunding is the use of small amounts of capital from a large number of individuals to finance a project or business (nonprofit or for-profit). It makes use of the easy accessibility of vast networks of friends, family, and colleagues through social media websites like Facebook, Twitter, and LinkedIn to get the word out about a new project and attract funds. Common crowdfunding platforms include Kickstarter and Indiegogo, and typically involve donations to the project in return for some reward or gift.

Crowdfunding is about linking to your community, to your region, and to your stakeholders to support your project in an engaging and fun way.

To learn more, see: [Guide to Crowdfunding for WealthWorks Value Chains: Understanding Options, Getting Started.](#)

SIGN UP TODAY!

Interested in joining an upcoming program?

Please contact us by **August 18, 2017**. Prices depend on the total number of participants, and scholarships may be available.

Next program will start in September 2017, depending on participant's availability.

Custom programs for groups of organizations or a foundation's grantees are also available.

Contact us for more details.

To sign up, or for questions, contact:

CHRISTI ELECTRIS
christi@croataninstitute.org

6-Week Curriculum

This curriculum includes a set of six web-enabled teleconference calls. A minimum of eight groups will be included in each class to allow for learning from each other, and no more than twenty projects will be allowed per cohort in order to ensure each group gets good feedback from other participants and enough individualized technical assistance from the Croatan Institute team.

The intensive training sessions will include presentation of training materials, with some time for discussion of each group's situation and for questions and feedback from the participants.

Participant teams will also work on and submit weekly homework assignments directly related to crafting their proposed crowdfunding campaigns. Each team will then have the opportunity to present portions of their work during the calls.

Each team registration will include an introductory call with the Croatan Institute team and a one-on-one call for coaching and technical assistance, such as help in crafting, reviewing, and editing your produced crowdfunding campaign materials and establishing your social media and online presence.

In addition to helping you develop your own social networks and support, our team will help develop support for each campaign that launches through this program cohort and through our own networks.

ASK ABOUT CUSTOMIZED PROGRAMS

Interested in gathering a group of businesses or peer organizations to take the training together? Have special topics you'd like to focus on? Prefer to incorporate some in-person trainings?

We have experience designing and running customized programs for foundations and their grantees to introduce them to this important form of peer-to-peer fundraising technique, along with the social media tools needed to make them successful. We'd be happy to discuss options that work for you.

CHRISTI ELECTRIS
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HOW TO JOIN THE TRAINING

We are trying to form a program in Fall 2017. If there is enough interest by mid-August, we will launch a program starting in September 2017. Course price will vary based on the number of registrations, but could range from \$490-\$950.

Scholarships and sliding-scale may be available for under-resourced groups. Please inquire to learn more.

To sign up, or for questions, contact us as soon as possible:

CHRISTI ELECTRIS
christi@croataninstitute.org

Registration is per organization or business (multi-person teams welcome and encouraged).

Participants must:

- ➔ Commit to attending all sessions and being an active participant.
- ➔ Commit to reading materials and doing outside homework on your own campaign weekly.
- ➔ Commit to debrief and share learning at the end of the training through an online survey.

Requirements for success include:

- ➔ Have a specific project (or projects) you want to raise funds for (this can be fine-tuned in the training, but you should have an idea of what you might be able to do).
- ➔ Assemble the right team from your organization to work on the campaign. This is not a campaign one person should run alone.
- ➔ Be willing to build your online presence and use social media to connect with potential supporters, and to reach out to those in your community and beyond.

Proposed training sessions

- Week 1: **Overview of Crowdfunding and Training Program:** Introductions, goals of program, crowdfunding basics, choosing a good project, choosing the right platform.
- Week 2: **Defining the Campaign:** Defining the specific project, timelines, legal considerations, how to determine funding goal, picking rewards.
- Week 3: **Pre-Launch Preparation:** Finding your fans, setting up your social media presence, email lists, personal website, researching budget and rewards.
- Week 4: **Preparing Your Pitch:** Crafting your story, planning the video.
- Week 5: **Campaign Strategy and Preparation:** Preparing your pre-launch strategy, and actions to take at beginning and during campaign.
- Week 6: **Launching your Campaign and Delivering on Campaign Promises:** Final tips before launch. Reward fulfillment and delivery. Thanking supporters and updating them after campaign closes on progress of your project and delivery of rewards. Maintaining new supporters beyond the campaign.
- 1-on-1: One intro call, and one individual feedback call will be included for each group.

An emphasis will be put on examples of projects that contribute to rural and urban economic development and social justice causes; however, we will tailor the program to the interests of the class as well. Lessons learned are applicable to any campaign.



Trainers



Christi Electris

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Christi Electris is a Senior Associate and founding team member at Croatan Institute. She has also been part of the Tellus Institute in Boston since 2007. Ms. Electris has led multiple in-person crowdfunding trainings for WealthWorks participants, as well as a 12-week interactive online training program. Most recently, she developed and co-taught a tailored course on crowdfunding and giving circles for economic development social justice organizations from Appalachian and the South. She also

teaches crowdfunding and social media to community members in the Boston area, where she lives. Ms. Electris is the author of "[Guide to Crowdfunding for WealthWorks Value Chains: Understanding Options, Getting Started](#)" (2014). She has developed and led social media strategies for author Marjorie Kelly upon the release of her most recent book ([Owning Our Future](#)), shaped Tellus Institute's social media strategy for the release of the Great Transition Initiative online journal, and consulted on a variety of website and database development projects. Ms. Electris is co-author of "Climate-Related Investment for Resilient Communities: DivestInvest Opportunities in Community-Oriented Climate Solutions" (2016), "Worker Equity in Food and Agriculture: Practices at the 100 Largest and Most Influential U.S. Companies." (2012), and "Total Portfolio Activation: A Framework for Creating Social and Environmental Impact across Asset Classes" (2012), among many studies on sustainable, responsible, and impact investing. She has conducted research for a variety of projects in energy, climate, agriculture, well-being, sustainability indicators, corporate redesign, and long-range sustainability scenarios. A computer scientist and quantitative policy analyst by training, Ms. Electris has worked as a researcher at MIT Lincoln Laboratory, and a research and teaching assistant for MIT's Global System for Sustainable Development group, the Laboratory for Energy and the Environment and the Sloan School of Management. She studied computer science at the University of Pennsylvania, with minors in mathematics and cognitive science, and holds a Masters of Science in Technology and Policy from MIT and a Masters of Arts in Law and Diplomacy from the Fletcher School at Tufts University.

Kristin Lang

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Kristin Lang is an Associate and founding team member at Croatan Institute, where her work has included researching opportunities for fossil free place-based investment in Appalachia, drafting online communications on mission-related investing, and supporting the Institute's work around the divestment-reinvestment movement. She co-taught a 12-week interactive online training program on crowdfunding with Ms. Electris, and co-developed and co-taught a tailored course on crowdfunding and giving circles for economic development social justice organizations. She is the co-author of "Investing for Positive Impact on Women: Integrating Gender into Total Portfolio Activation" (2015), "Fossil-Free Investment for a Just Appalachian Transition," (2014) US SIF Foundation's 2014 Report on US Sustainable, Responsible, and Impact Investing Trends, and "The Impact of Equity Engagement: Evaluating the Impact of Shareholder Engagement in Public Equity Investing" (2014). Prior to joining Croatan Institute, Ms. Lang worked with Oxfam America's Private Sector Department on its food justice campaign; she also created a workshop for rural youth interested in social enterprise for Oxfam Great Britain. She previously served as a consultant for Value for Women, a social enterprise focused on engaging young, female entrepreneurs. Ms. Lang began her career at US SIF: The Forum for Sustainable and Responsible Investment (formerly the Social Investment Forum), where she served as a program coordinator and helped launch the organization's first national conference. She has a master's degree in international development from American University, and bachelor's degrees in international relations and German from the University of Virginia.



Croatan Institute is an independent, nonprofit research institute whose mission is to harness the power of investment for social good and ecological resilience by working at the critical nexus where sustainability, finance, and economic development intersect. With initial funding from foundations, sustainable investment groups, civil society, and community development organizations, the Institute's projects address some of the most complex sustainability challenges of our time.

For more information about the Institute's programs, people, and publications, please visit www.croataninstitute.org.



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