



Crowdfunding Guidelines

Before crowdfunding can begin, it is the project leader's responsibility to review and understand the following UC Irvine ZotFunder Crowdfunding Guidelines. UC Irvine reserves the right to revise these guidelines at any time. At least one project leader will be expected to submit a Project Leader Agreement, which confirms review and acceptance of these guidelines.

How are projects selected?

UC Irvine's Annual Giving team, in its sole discretion, will determine the eligibility of participating projects on the ZotFunder platform at <https://zotfunder.give.uci.edu>. There is an average of ~10 to 15 spots per cohort, and projects will be accepted based on the strength of their application, previous fundraising success and potential to fulfill 100% of their fundraising goal. The Office of Annual Giving may discontinue an active fundraiser at any time if a project fails to comply with these guidelines.

In addition, the offices of Gift Administration (GA) and University Advancement Finance (UAF) and Digital Transformation and Innovation (DTI) must review projects to ensure the fund information given is accurate and there are no conflicts of interest with other fundraising efforts. Content will also be reviewed to ensure all student groups are using their registered organization names and following UC Irvine branding and licensing guidelines.

How do projects receive the money or open a new fund?

To ensure compliance with UC Irvine guidelines, all projects must have an approved philanthropic gift fund set up through the UC Irvine Foundation to which donations can be accepted and then distributed to the respective campus unit's account on the UC

Irvine ledger. Applicants can check <https://secure.give.uci.edu/> and search for all existing funds. Groups may use a gift fund associated with a sponsoring unit, such as a department, program or center, with the approval of the finance officer in that area.

All monies must be used for the project's stated purpose. Individuals are strictly prohibited from keeping any portion of the funds raised as a profit or compensation. All projects must be non-profit in nature. The Project Leader Agreement, which outlines how the money will be spent, is a required agreement to be signed by the project leader before the page is activated.

What can we fundraise for?

Projects must support UC Irvine's programs and initiatives. Funds cannot be redirected to a third-party, external charity or other non-profit. UC Irvine cannot act as a "pass-through" entity to provide funding to other charities. Projects that appear to serve as a "pass-through" will be rejected.

What are the expectations for each project?

When applying for a UC Irvine ZotFunder, project leaders agree to provide the following:

- Signed Project Leader Agreement (must be signed before the project can begin fundraising)
- Attend at least 1 Zoom meeting to discuss outreach strategy and digital marketing materials
- Detailed description that explains what the project is and why it is worth supporting
- Images:
 - 1 image to be used as the project image on the ZotFunder home page (mandatory)
 - At least 1 image included within the description (mandatory)
 - Either 1 Original video (minimum of 45 seconds) OR 2-3 images to be used as the projects ZotFunder page campaign carousel
- Budget breakdown that explains how donations will be spent, and what they will do in case they do not meet their goal or if they surpass it
- General group + project leader bio(s) and photo(s)
- 5 suggested gift levels for donations at multiple increments with titles and descriptions
- Ongoing outreach to promote the project after launch based on provided Digital Media Calendar
- Project updates throughout the campaign

- Stewardship messages after the campaign concludes to thank donors and share update of project progress
- Fulfillment of courtesies after campaign close

All content on project pages will be approved by the Office of Annual Giving, which has the right to edit, or require project content edits, at any point in the campaign. It is the project leader's responsibility to ensure they have all of the required components uploaded before the specified due dates. Failure to meet these deadlines may forfeit the opportunity to crowdfund via ZotFunder.

What should a project focus on?

Projects should have specific goals and be driven by tangible accomplishments – for example, purchasing new equipment, funding travel fees or providing student workshop opportunities. Projects without a specific goal are generally less successful and typically do not qualify for their own project page.

How to choose a goal?

Goals should be realistic. The ZotFunder program seeks projects that can fulfill 100% of their proposed goal. First-time projects usually fundraise in the \$500-\$3000 range whereas returning projects can go beyond, depending on previous success. We recommend that project leaders keep their bandwidth, network and team support in-mind when making a goal. If this is a group's first time fundraising, they may be required to lower their goal in order to participate.

A final fundraising goal for your campaign will be determined in collaboration with the Office of Annual Giving.

What marketing support is there?

The Office of Annual Giving may provide email marketing support for crowdfunding campaigns related to other major fundraising events such as Giving Day. However, this is not enough to help a project reach its goal.

It is up to the project teams to market their campaign and provide outreach. The larger and more dedicated the project team, the more likely they will succeed. Teams should consist of at least 3 people that will focus on marketing and outreach. Teams that are able to achieve 30% of their goal within the first 48 hours of a campaign are more likely to achieve their total goal.

Project teams are responsible for promoting their campaigns via social media, email, phone calls, texts and on-campus, when appropriate; preparing personal thank-you messages to donors; and submitting regular updates on their project.

The Office of Annual Giving will request a list of potential donors prior to project approval or launch date. This may be used to determine project eligibility and goal capacity.

The Office of Annual Giving does not provide any contact data on alumni, parents, friends or students. It is up to the project teams to connect with their personal affinities and contact lists. While the Office of Annual Giving may promote the ZotFunder platform, groups should not rely on this for fundraising success. The Office of Annual Giving will work with groups to generate a strategy for marketing and outreach.

Are gifts to my ZotFunder campaign tax deductible?

The UC Irvine Foundation is a nonprofit 501(c)(3) corporation. Gifts to your ZotFunder campaign qualify for tax deduction in accordance with IRS regulations during the calendar year that you make your gift. Donors should consult their tax professional for more information.

Will donors receive a receipt for tax purposes?

Yes, donors will receive a confirmation email with their gift details immediately after making a gift to your ZotFunder campaign. Donors can always request a physical gift receipt for their donation by contacting UC Irvine's Gift Administration team at gift-admin@uci.edu.

Can we accept offline donations?

Most gifts will be raised online through <https://zotfunder.give.uci.edu>. Some offline gifts may be used toward the project's goal. This includes, but is not limited to checks, gifts of stock, donor-advised funds (DAFS) and other funds awarded or received during the crowdfunding campaign. ZotFunder projects cannot count gifts from pledges, bequests, gifts already allocated to another fund or money raised through sales, such as bake-sales, car washes or other "give-to-get" fundraising strategies. All gifts must be collected prior to the project's deadline.

There is a \$5 minimum donation required through the ZotFunder platform.

All funds raised from outside of the UC Irvine ZotFunder platform must be delivered to the Office of Annual Giving for deposit. This is to ensure that donors receive proper

credit and receipts. If this occurs, alert the Office of Annual Giving to receive further instructions.

Mailing address for Office of Annual Giving:

UC Irvine Foundation

Attn: ZotFunder

101 Aldrich Hall

Irvine, CA 92697-5600

Please make sure donors know to indicate which ZotFunder project they are supporting in the memo line so the gift is applied to the correct campaign.

What incentives can we offer?

Monetary premiums and perks are not to be used to incentivize gifts. Promotional materials such as t-shirt giveaways or other “give-to-get” fundraising strategies are not permissible, as they affect a donor’s ability to claim a tax deduction. Projects that plan to gift items will not launch. However, intangible perks such as shoutouts in a video or name/logo recognition are acceptable in a ZotFunder campaign.

What else should we know?

Projects will be hosted on the crowdfunding platform for a predetermined amount of time, typically a 60-day period. Some exceptions may apply.

If the project is not fully funded within the allotted timeframe, any monies raised will still be allocated to the project. All funds, even without meeting the goal, should be spent to offset the cost of the promoted project or utilized as best as possible. Projects will notify their donors and inform them how their donations will be spent whether or not the goal is met.

UC Irvine is a 501(c)(3) non-profit educational institution with a mission to discover and disseminate knowledge through research, teaching and creative expression in acclaimed academic programs. All projects must comply with the institution’s mission. Projects cannot violate any laws. UC Irvine reserves the right to decline any project or discontinue an active campaign at any time due to changes in the group’s eligibility status.

For questions regarding these guidelines, please email zotfunder@uci.edu or Sara Blanco Gale, Assistant Director of Digital Philanthropy & Student Engagement, at sblancog@uci.edu.



Project Leader Agreement

By signing below and submitting this agreement to the Office of Annual Giving on behalf of my project group/team, I acknowledge that I have read, understand and agree to the policies, procedures and expectations outlined and defined in the current UC Irvine ZotFunder Crowdfunding Guidelines document.

Intended Project Title

Project Leader (Print Full Name)

Project Leader Signature

Date