



### Livingtree – How to Create a Campaign

Crowdfunding is the practice of funding a project or idea by raising small amounts of money from a large number of people, typically via the internet. The following steps and guidelines will help you create an online fundraising campaign using **Livingtree**, which is the crowdfunding partner of Austin ISD and Austin Ed Fund.

#### Why should I use Livingtree?

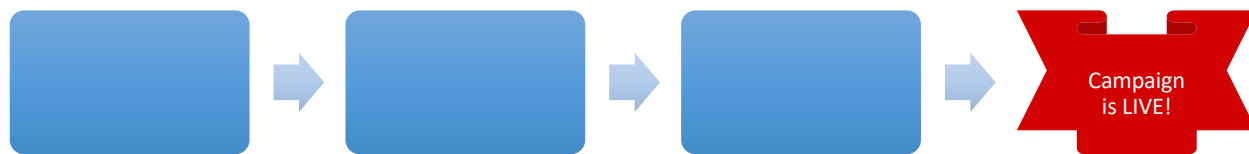
[Livingtree](#) is an Austin ISD-supported crowdfunding platform for online donations. The platform enables schools to create fundraising campaigns, accept online credit card payments, manage donor information, and communicate with donors using preloaded templates and social media links. Livingtree has been customized to meet the needs of our district and includes a built-in principal/bookkeeper approval process, direct deposit into AISD accounts and automated donor receipt for tax purposes.

#### What can I raise funds for?

Livingtree campaigns allow schools to raise philanthropic dollars, also known as donations, to support instructional-based initiatives. Campaigns that provide goods or services to a donor in exchange for their gift, such as t-shirts or candy, are not allowed. Please see the chart below for examples of campaigns that are approved for Livingtree.

Appropriate Livingtree campaigns:	Inappropriate Livingtree campaigns:
<ul style="list-style-type: none"> <li>• Equipment and supplies</li> <li>• Musical instruments</li> <li>• Travel to national competitions</li> <li>• Field trips</li> <li>• School events</li> <li>• Scholarships</li> </ul>	<ul style="list-style-type: none"> <li>• Personal campaigns</li> <li>• Cash or funds to be given to individuals</li> <li>• Sales of any kind (i.e. popcorn, t-shirts)</li> <li>• Fundraising for non-district organizations and charities (i.e. American Red Cross) must receive proper approval from the Superintendent</li> </ul>

*\*If you are unsure whether your campaign is appropriate for Livingtree, please contact Ryan O'Donnell in the Office of Innovation and Development at [ryan.odonnell@austinisd.org](mailto:ryan.odonnell@austinisd.org).*



### School Based Crowdfunding Campaigns

Campaigns follow a two-step approval process:

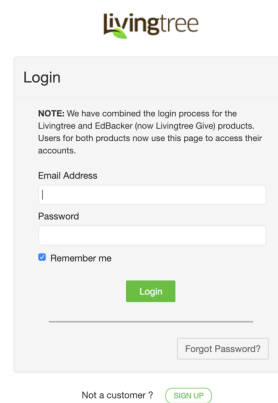
1. **Bookkeeper Review** – Once a teacher creates and submits a campaign, the bookkeeper will receive an email notification to log into Livingtree and assign an accounting code related to a campus activity account. The bookkeeper then notifies the principal that the campaign is ready for approval.
2. **Principal Approval** – After bookkeeper review, the principal will receive an email notification to log into Livingtree for final approval. Once approved, the campaign will be published on the school’s Livingtree page.

### Crowdfunding Video

Several resources exist on the Livingtree website to help schools create and implement successful fundraising campaigns. This [video tutorial](#) provides a general overview and getting started with a Livingtree crowdfunding campaign.

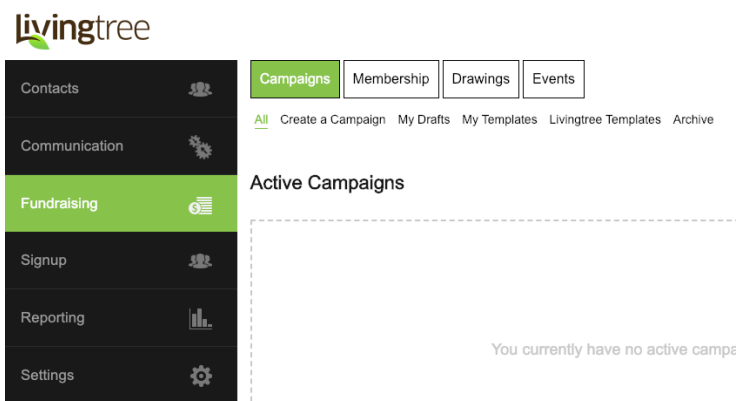
### Log into Livingtree

- Go to [learn.livingtree.com](http://learn.livingtree.com) and click on the Log In button at the top of the page. Enter your Austin ISD email address and password.
- If this is your first time using Livingtree, click Forgot Password. You will receive an email to your Austin ISD email address with a link to reset your password.
- If your Austin ISD email address is not registered with Livingtree, please contact Ryan O’Donnell at [ryan.odonnell@austinisd.org](mailto:ryan.odonnell@austinisd.org) to start a new account. **Do not create your own account!**



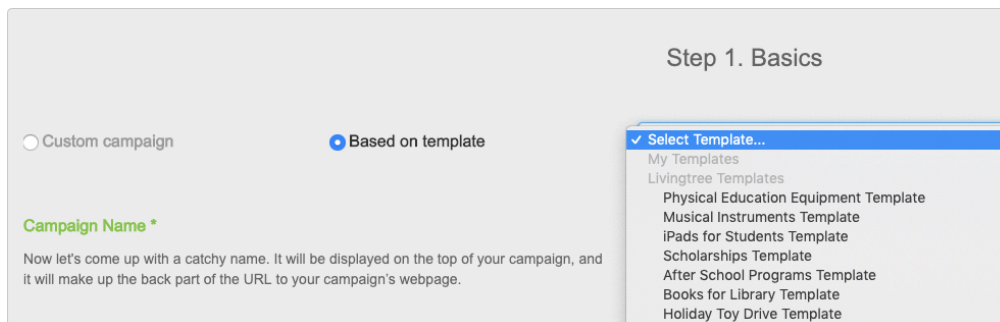
### Create a Campaign

After logging in to your Livingtree account, click on Fundraising on the left-hand side bar and then click on Create a Campaign.



## Campaign Template

Living Tree provides two options for creating a fundraising campaign. You can create your own customized campaign, or use Livingtree templates that contain preloaded text and images.



- **Custom Campaign**  
Schools can upload their own images and content to create a customized campaign for raising money online. When choosing the custom campaign option, the content fields will be empty and must be completed in order to publish the campaign.
- **Based on Template**  
Livingtree campaign templates are preloaded with content and images. These templates enable users to quickly and easily create a campaign, and are a great option for those who are unsure what information to include in their fundraising campaign. The templates are editable, which allows schools to upload images and change the text.

### Campaign Name

Select a campaign name that is short and descriptive. The campaign name will also be the URL for your school's fundraising webpage. Examples include, "Campbell Elementary Library Fund" or "Mendez Middle School Fun Run."

### Select a Category

Use the dropdown menu to select one category that best describes your fundraising campaign. The Livingtree platform enables users to search for campaigns based on category. This feature will increase your campaign's reach and visibility on the Livingtree website.

### Short Campaign Description

Write 1-2 sentences that describes your fundraising campaign and includes your school name. The short description appears under your campaign name at the top of the webpage, as well as beneath the thumbnail of your webpage on the Livingtree website.

### Campaign Project Creator

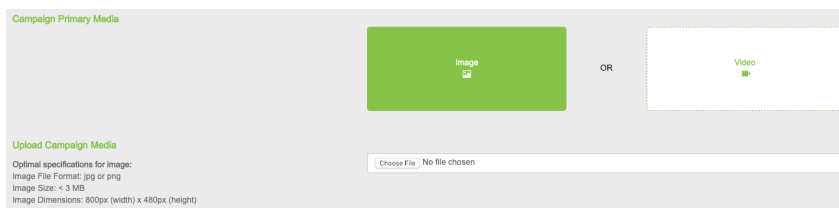
Enter the school name (Bowie HS, etc.) or organization name (PTA, Band Booster Club, etc.).

### Campaign Primary Media

The primary media is the image or video that appears below the campaign name and short campaign description. Select an engaging image or descriptive video that will effectively emphasize your message and motivate donors to act.

### Upload Campaign Media

- To upload an image, click on the Image box (it will turn green) and click Choose File. You will be prompted to upload a photo from your computer. The photo can be any dimension, and will automatically be resized to fit the web page.
- To upload a video, click on the Video box (it will turn green) and copy and paste the YouTube URL for your video into the URL field.



### Campaign Body Text

Write a detailed description of your fundraising campaign, including the crowdfunding goal, how raising money will impact the school, students or local community, and how the funds will be used. Try to be clear and concise in your description of the campaign.

### Additional Media

As an option, users can add additional photos or videos to the campaign.

### Goal Amount

Enter the total amount you want to raise during the campaign. When deciding on a goal, consider increasing your goal by 5-6% to cover credit card processing fees and the fee to use the Livingtree platform. ***Please note that it can take up to 30 days to receive donated funds at your school.***

### Start Date and End Date

Select a start and end date for your campaign. Crowdfunding campaigns are not bound by Austin ISD's two week fundraiser rule, but we recommend short timelines (less than 30-60 days). Short timelines create a sense of urgency and help maintain momentum once donors begin to give to your campaign.

### Donation Amounts

Set specific giving levels based on your fundraising goal. Use this section to describe any recognition opportunities that come with making a donation. Donors who wish to give an amount not shown may enter a different donation amount on the payment page.

## Social Media

Use your social media to promote to your circle of potential donors via Twitter, Facebook or LinkedIn. Donors will contribute to a campaign if they know the creator, if they connect with the story, and if they are reminded of the campaign over time.

## Teacher Accounts

For teacher accounts, the field containing the Accounting Code will be filled in by the school bookkeeper. **Please leave this field blank.** To notify your bookkeeper that your campaign is ready to be assigned an accounting code, click Submit to Financial Accountant. Bookkeepers will receive an email notification and will enter the appropriate accounting information related to your campus activity fund.

The screenshot shows a form titled "Step 5. Finance-Related Options". It contains the following fields and options:

- Accounting Code:** A text input field with a placeholder ".Accounting Code".
- Do you want to activate possibility of monthly recurring payments?:** A radio button option.
- Use Custom Edbacker Receipt Thank You Message:** A radio button option.

Below the form are three buttons: "Back", "Save As..." (with a dropdown arrow), and "Preview". To the right of the "Preview" button is a larger button labeled "Submit to Financial Accountant".

After entering the accounting information, the school bookkeeper will submit the campaign to the principal for approval. The school principal will receive an email notification to review/approve the campaign or suggest edits. After receiving final approval, the campaign will be published on the Livingtree website. You will receive an email from Livingtree confirming that your campaign has gone live.

## PTA Accounts

For PTA accounts, you may connect to PayPal to receive donations. To send donations directly to your PTA PayPal account, click PayPal Connect and follow the steps to connect your account to the Livingtree campaign. The fees to use Livingtree is 3.1% with a 2.0% PayPal fee plus \$0.49 per transaction. If your PTA does not have a PayPal account, you can receive donations via America's Charities, Livingtree's 501c3 partner. The fee to use America's Charities is 2%, in addition to the fees above.

To notify your school principal that your campaign is ready to be approved, click Submit for Approval. The school principal will review the campaign and approve or suggest edits. After receiving final approval, the campaign will be published on the Livingtree website. You will receive an email from Livingtree confirming that your campaign has gone live.

This screenshot shows the same "Step 5. Finance-Related Options" form, but with an additional section for payment options:

- PayPal:** A section with the PayPal logo and text: "Receive payments to your PayPal account. Choose PayPal if you already have a PayPal account and want the funds you raise to go directly into that account. If your PayPal account is registered as a non-profit then the donations may be tax deductible. The Edbacker fee is 5% +30c which includes credit card processing."
- OR**
- America's Charities:** A section with the America's Charities logo and text: "Don't have a PayPal account? Use America's Charities. America's Charities will collect the funds for you electronically, then send you a check for the amount of the donation and will send end of the year tax receipts to donors saving an immense amount of time. America's Charities is edbacker's 501c3 partner. The fee to use America's Charities is 2% + Edbacker Fee is 5% + 30c which includes credit card processing."

Below these options are the same radio button for "Do you want to activate possibility of monthly recurring payments?" and the "Use Custom Edbacker Receipt Thank You Message" radio button. At the bottom are the "Back", "Save As..." buttons, and "Preview" and "Publish" buttons.

### **Livingtree Receipt and Thank You Message**

A thank you letter will be automatically generated by Livingtree after a donation is made. Users can customize by checking the box under Use Custom Livingtree Receipt Thank You Message.

### **Preview**

Click the Preview button to view your campaign. If you would like to edit the content or image, click anywhere on the page to exit the preview mode. Click on the Back button to revise.

### **District Process**

The process for receiving donations was created in conjunction with Austin ISD Finance. All monthly crowdfunding donations raised for a specific campaign during a month are deposited into the campuses Wells Fargo KEV account. This typically happens during the first two (2) weeks following the previous month. For example, donations raised during the month of February would appear on a campuses March Wells Fargo bank statement.

Because this deposit is restricted to a specific crowdfunding campaign, the campus bookkeeper will need to transfer these funds into a campus activity account designated to the particular crowdfunding campaign. This will allow the campus to use a district AMEX Purchase Card (PCard) or a PO to purchase items specific to the campaign budget and easily provide any requested information regarding a campus' purchases for such campaign.

*Please note that it can take up to 30 days for donated funds to be deposited in your school account. Tax receipts acknowledging the donation will automatically be sent to donors via email.*

Questions regarding your campus Wells Fargo KEV account should be directed to Martha Ladyman or Esther Bull in Finance. Questions regarding your campus activity accounts should be directed to Tina Montgomery in Finance.

### **PTA Process**

Donations made to PTA-sponsored campaigns will be processed through the individual PTA's PayPal account.