GET YOUR ORG ON BOARD

Setting the Stage for Online Fundraising Success

GUIDING YOUR ORGANIZATION
TO LONG-TERM SUCCESS

As a board member, you are monitoring the operations of your nonprofit, and the organization turns to you for guidance about sustaining into the future. Do you feel like you have the right fundraising tools today to compete for the donor dollar? Are you worried about your funding sources drying up even as your budgets are tightening? Are you seeing changes in your supporter base and the ways they prefer to give? With rapid technological changes altering the behavior and preferences of your community of supporters, it's time to challenge your organization to execute on new strategies that will help to sustain your mission and develop capacity over the long haul.

Most nonprofit executives and directors know intuitively that successful fundraising requires diversification, but the communication channels that make up the right fundraising mix are always changing. In order to capture and continue to meet the needs of donors today, you need to invest in multiple communication channels, including the Internet. In fact, studies show that **adding online communications to a nonprofit's fundraising toolkit can more than double[1] the amount a donor will contribute in his or her lifetime**.

> Adding online communications to a nonprofit's fundraising toolkit
> can **more than double** the amount a donor will contribute
> in his or her lifetime.

Over the years, Convio has helped guide hundreds of nonprofits through the process of adding online communications to their marketing and fundraising strategies. As a technology partner and trusted source of knowledge for over 1,300 organizations—including over half of the top 50 charities—we're passionate about helping nonprofits reach their full fundraising potential. In this guide, we share the tips, techniques and insights we've learned from helping our clients raise over $1 billion online, with a best-odds approach for helping your organization take the first steps toward online fundraising.

Let's look at what has recently been discovered about the ways in which different generations support nonprofits, with an eye toward informing your fundraising strategies—both today and in the foreseeable future.

How Are Today's Donors Giving?

Here's some compelling demographic data you may not know: Though fund development leaders are often concerned about the "graying" of their donor list and worry that younger people don't give, a recent

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[1] *Integrating Online Marketing (eCRM) with Direct Mail Fundraising: Adding a New Communication and Donation Channel Increases Donations*, http://www.convio.com/doc-intmktgpaper

study[2] identifying giving behavior by generation paints a promising picture—if your organization can connect across multiple generations (see Figure 1).
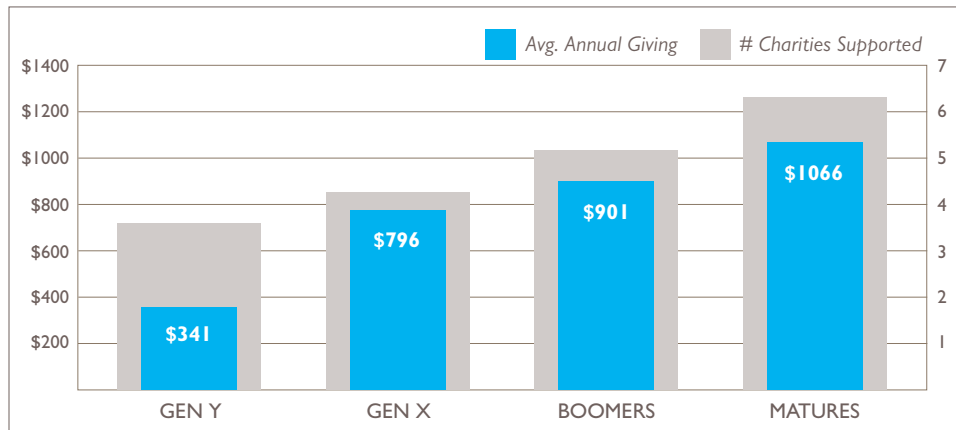

Figure 1. A recent study sheds light on a significant willingness across generations to support multiple charities, with Gen Y, Gen X, and Boomer generation donors giving hundreds of dollars each year.

From the same study, it also turns out that donors receive, and expect to receive, communications from nonprofits across multiple channels, and there are significant differences (highlighted in color in Figure 2) in channels most popular by generation.

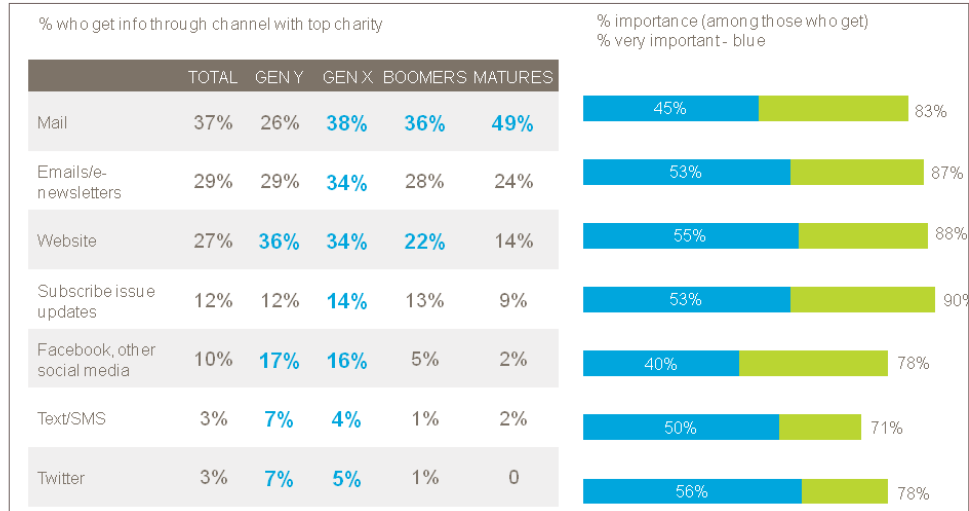| % who get info through channel with top charity						% importance (among those who get) % very important - blue
	TOTAL	GEN Y	GEN X	BOOMERS	MATURES	
Mail	37%	26%	38%	36%	49%	45% / 83%
Emails/e-newsletters	29%	29%	34%	28%	24%	53% / 87%
Website	27%	36%	34%	22%	14%	55% / 88%
Subscribe issue updates	12%	12%	14%	13%	9%	53% / 90%
Facebook, other social media	10%	17%	16%	5%	2%	40% / 78%
Text/SMS	3%	7%	4%	1%	2%	50% / 71%
Twitter	3%	7%	5%	1%	0	56% / 78%

Figure 2. Different generations prefer communication from different channels; but all expect a multi-channel approach.

And, a final point from the study that your organization needs to consider: Donors report making gifts across many different channels (see Figure 3). If your organization invests in only one or two channels, like mail and phone, ask what it could mean to your bottom line if campaign response rates declined 40-50% due to a mismatch in channel preferences.

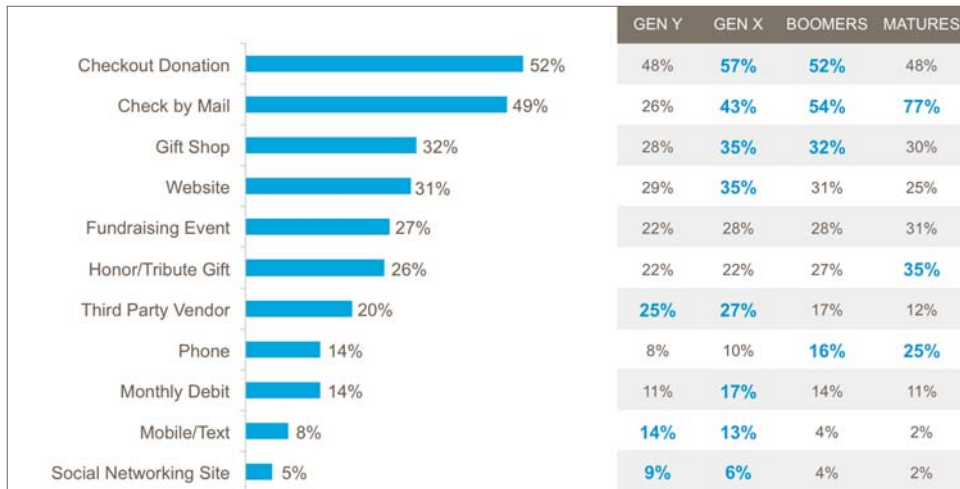[2] *The Next Generation of American Giving*, http://www.convio.com/nextgen

		GEN Y	GEN X	BOOMERS	MATURES
Checkout Donation	52%	48%	**57%**	**52%**	48%
Check by Mail	49%	26%	**43%**	**54%**	**77%**
Gift Shop	32%	28%	**35%**	**32%**	30%
Website	31%	29%	**35%**	31%	25%
Fundraising Event	27%	22%	28%	28%	31%
Honor/Tribute Gift	26%	22%	22%	27%	**35%**
Third Party Vendor	20%	**25%**	**27%**	17%	12%
Phone	14%	8%	10%	**16%**	**25%**
Monthly Debit	14%	11%	**17%**	14%	11%
Mobile/Text	8%	**14%**	**13%**	4%	2%
Social Networking Site	5%	**9%**	**6%**	4%	2%

Figure 3. Donors report giving across many different channels.

Fundraising Today

After seeing the demographics and knowing the online shifts the business world is making, you might be asking some questions about the future of fundraising in your nonprofit organization. If your nonprofit's fundraising team does not have an online fundraising strategy in place now or in the works for future growth, or the current online fundraising strategy is not successful, it may be time to ask why.

It's true that the development team is under significant pressure, with increased competition (there are 50% more nonprofits than there were just ten years ago[3]!). And thanks to the recession, support dwindles even as demand goes up. They may simply feel too busy with day-to-day operations and programs to consider making changes. But in the face of these challenges and the accelerating pace of technological changes, isn't it time to update your organization's fundraising strategies? Let your nonprofit know that they can count on your support in bringing their fundraising online and up to speed.

▶ **Convio Go!**

With Convio Go!, our one-year, guided program designed to help nonprofits get started online, we've helped hundreds of organizations like yours implement successful strategies for a complete multi-channel approach—for ***an average return of $3 for every $1 spent.***

$3 / $1

RAISED / SPENT

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7 STEPS TO RESET YOUR FUNDRAISING FOR SUCCESS

As a board member and a leader, you can provide the encouragement and guidance your organization needs to ensure they're around to see 2020. This 7-step guide will help you get there. These seven simple steps offer insights and tips for framing a constructive conversation about new strategies and investments, setting joint goals, achieving buy-in, and working together to put a proven action plan in place for a successful multi-channel fundraising strategy.

1. HELP SET THE STAGE FOR ONLINE FUNDRAISING

2. START THE CONVERSATION

3. BUST THE MYTHS

4. MAKE THE BUSINESS CASE—TOGETHER

5. SET EXPECTATIONS

6. EVALUATE THE TECHNOLOGY

7. STAFF DELIBERATELY

So read through this guide with an eye for the future of your organization. And get ready to share it with your nonprofit's executive team and fellow board members. **It's a whole new way to look at fundraising for your organization.**

▶ Success Story: *Yellowstone Park Foundation*

The Yellowstone Park Foundation grew its email list by 20% and increased the number of monthly website visits by 26% by sending regular email communications and conducting an email-based giveaway contest.

💡 **View campaign details:** http://www.convio.com/ypf-housefile

I HELP SET THE STAGE FOR ONLINE FUNDRAISING

As a board member, here's how you can approach your organization's leadership and development team about adding new, online channels to ensure the long-term success of your fundraising activities.

An Eye on Operations

Your organization's fundraising team likely understands that adding web, email, social, and even mobile communications to their fundraising toolkit will help them grow grassroots support, identify new donor prospects, diversify revenue sources, and improve bottom-line fundraising. But they're busy with the day-to-day tasks of keeping the nonprofit organization up and running during the toughest of times. The idea of pulling together a business plan for the board likely seems daunting—maybe even so time-consuming as to be infeasible this year or next.

And then there are the risks of introducing new technology into the organization: How will they juggle their existing tasks while adding new ones? Do they have the resources to maintain the technology, and are they tech-savvy enough to use it? Can they count on your support?

An Eye on the Future

The board is responsible for overseeing strategic plans and investments that tie directly to the financial sustainability of the organization. As a board member, your work is all about the long-term success of your nonprofit.

A nonprofit can and should expect board members to:

- *Be supportive of initiatives* designed to further the organization's mission while using donor dollars wisely.
- *Help all organizational leaders look ahead* and understand that online communications must become core competencies.
- *Assist with making online communications and fundraising part of strategic planning* and budgeting processes.

Within the board and the board's contacts sit many experts who can be invaluable sources of insights with regard to the Internet, multi-channel marketing, vendor research, hardware and software procurement, and business plan analysis. Be sure that the executive and fundraising leadership knows that you and your fellow board members are ready to help with these resources.

"For your board to play a strategic role in fund development, you've got to get in the habit of looking forward more than you look backward. Talking about 21st century fundraising strategies is a great way to start."

- Dr. Linda Ford, Board Consultant

2 START THE CONVERSATION

If you're uncertain about how to approach the executives at your organization about online fundraising strategies, the following tips from Board Consultant Linda Ford will point you in the right direction:

▶ Four Tips to Get the Ball Rolling
by Dr. Linda Ford, Board Consultant

1. **Be strategic.**
   If the staff isn't coming to you with ideas and directions for new fundraising strategies, ask some questions. For example: How has our donor profile changed in the past 10 years? How might it change if we had a more significant online, social and/or mobile presence? How are we growing our list of prospective donors to replace donors who move or lapse? Opening this dialogue with the leadership will help you see if there is a "champion" for this idea on the team—someone to support and grow this idea with others in the organization.

2. **Let the CEO or Executive Director know that you're willing to help.**
   Your Executive Director may not know of your expertise or connections in this area. Invite the CEO to make you available as a resource on this topic to the Development Director or someone else who seems a likely champion for the initiative. And, don't meddle; just offer. Set some boundaries or limits about how much time or what kind of expertise you are offering—it's not a blank check.

3. **Work with your champion to define the needed investment and likely payoff.**
   Once you've identified a champion, help them think through the time and resources that may be needed and the eventual return on investment. Connect them to resources for understanding the technology and the demographics that help make the business case.

4. **Socialize the idea among your fellow board members when it's time.**
   Don't do this too far ahead of staff preparation. But, do tee up the idea before a formal board presentation. Help other board members see why adding online fundraising to your marketing mix is important to the financial sustainability of the organization.

CASE IN POINT
ONTARIO ASSOCIATION OF FOOD BANKS

"We were trying to raise money online effectively," Tara Tassone, Development and Communications Coordinator, said. "But we lacked a coherent online giving strategy because our gift processing and communications systems were not integrated."

The Ontario Association of Food Banks (OAFB) joined the Convio Go! Program in 2009 to take advantage of a fully-integrated online toolset bundled with expert services. In just 12 months, they grew their list of email subscribers from 1,000 to more than 11,000.

For the OAFB, seeing significant results quickly has built staff confidence, strengthened ties within the community, and helped to reduce hunger in Ontario, even in a challenging economic climate.

"With Convio, *we had eight times as many online donations* in 2009 as in 2008. The increase in subscribers and the quality and frequency of online messages helped us raise over $200,000 online for our food banks."
- Tara Tassone, Development and Communications Coordinator, OAFB

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3 BUST THE MYTHS

Change can be difficult, especially when nothing is "broken," and there's almost always an excuse for not rocking the boat. Expect to work through some initial objection handling when you start the conversation, but don't let online marketing myths get in the way of updating your organization's fundraising strategies.

▶ Online Marketing and Fundraising Myths... BUSTED!

MYTH: We're experiencing or expecting a leadership change, so it's not a good time to discuss strategy.

BUSTED! With new leaders come new ideas, strategic course corrections among them. Leadership transitions can be an excellent time to reset any "business as usual" mentality and lay the groundwork for long-term sustainability.

MYTH: Our tried-and-true ways work for us—there's no need to change.

BUSTED! Old-school methods aren't going to keep up over the long haul, and the rest of the world is moving ahead. If you think donors and prospects are interacting with multiple channels now, imagine this discussion five years from now.

MYTH: Our staff members are over-worked as it is; a new initiative could push them out the door.

BUSTED! Adding a new communication channel on your own may be impractical. But there are smart resources that can remove that burden. With the Convio Go! Program, for example, staff members earn more than 30 hours of continuing education credit while an experienced production team fields their creative campaigns and communications. At just 5-10 hours of staff time per week, this can be a very efficient way to get significant multi-channel fundraising results.

MYTH: Now isn't the time to take risks, especially fundraising risks.

BUSTED! You have data showing the strategy is sound, but you need to show that multi-channel fundraising can work for your organization. Picking a proven program like Convio Go! keeps risk low while establishing proof of concept quickly. Your staff will be part of an MBA-style cohort of their peers, and will be able to report their results compared with aggregate benchmarks. Plus, your first focus will be on their strengths— donor communications and prospecting. Later, they can learn the software or choose to outsource to any firm, but first, you'll have the early results you need to weigh risks and opportunities wisely.

4 MAKE THE BUSINESS CASE—TOGETHER

When making the case for investing in online tools and strategies, frame the opportunity that multi-channel fundraising presents, showing that investments in technology, services and training will pay off. To achieve buy-in, you will need to have data on-hand that supports your case and be ready to address decision-makers' questions right away:

▶ Addressing Decision-Makers' Top Questions

- *How will this investment increase fundraising?*
  Share the trend data and nonprofit industry benchmark data included in this guide and its reference materials. Describe the risks of not investing, including losing donors to competing organizations.

- *How will you reach new donors?*
  Steer clear of describing plans in terms of "better look and feel" of websites and emails, or simply as "building awareness." Business leaders are more likely to respond to plans that set specific goals regarding list growth and conversion of prospects to donors.

- *What other benefits will the organization see?*
  Describe benefits in terms of efficiencies—and thus cost savings—gained in performing necessary donor service tasks, as well as more effective allocation of limited resources toward revenue-producing activities. For example, cite expanded capacity for calls and visits with donors, faster responses with more major gift proposal packages, etc.

DEMOGRAPHIC AND DONOR TRENDS

Today's nonprofit organization is up against an uncertain economy and permanent shifts in overall constituent behaviors and preferences. Your organization needs to meet donors where they are in this multi-channel world, with effective fundraising methods to recruit a new generation of long-term supporters. Being armed with recent data to prove that point is critical.

The following data will help your staffers convey important trends and opportunities to the board.

Economic Considerations
Gifts may be down and major donor pledges may be lagging. Your organization may be pressed to cut budget and staff, but don't hunker down entirely in the face of today's immediate concerns, because the donors of tomorrow won't materialize without action today.

Consider what would happen if your fund development team were to diversify your nonprofit's funding sources just like investors diversify their holdings to weather the economic storm. By investing in multi-

channel communications initiatives even in tough times, your organization can see results that help you snap back quickly. Here are two ways:

- **_Real-Time Appeals_**
  Communicate more frequently—in a relevant and cost-effective way—with existing donors to build loyalty and claim your share of their attention (and charitable giving) in an increasingly competitive market. During a disaster, for instance: because email and social media are real-time, your staff can deliver actual images of an increase in demand for your organization's services. As signs of recovery gain daily news coverage, your organization will be able to communicate when, where, and why help is still needed.

- **_More Mileage for Your Content_**
  Your staff can efficiently repurpose that same compelling website and email content for list growth campaigns that will help them reach new audiences and widen the support base needed in the years to come. With hundreds of millions of Americans regularly visiting and contributing to social networks like Facebook™, LinkedIn™, and Twitter™, the return on such content can be multiplied many times when people "share" stories with family and friends.

▶ Success Story: *Oklahoma Medical Research Foundation*

"The Convio Go! Program gave us a running start and the confidence we needed to expand our marketing efforts both online and offline. We applied the best practices we learned to our multi-channel year-end appeal in 2009, and found that direct mail and email worked hand-in-hand to grow our list, increase our total number of donors, and boost fundraising— yielding a 50% increase in total year-over-year fund development."
                              - Jenny Lee, Creative Director, Oklahoma Medical Research Foundation

💡 ***Read the full Go! case study:*** http://www.convio.com/omrf

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Fishing Where the Fish Are

This brings up another important point for fundraisers and board members alike to understand: With more than 73% of Americans online[4], it isn't surprising that online giving continues to grow strongly and that a large proportion of donors are now acquired via the Internet. In contrast, direct mail continues to decline, both in terms of dollars raised and the acquisition of new donors[5].

Driving this shift are the evolving channel preferences of donors. Many Baby Boomers and Generation X are multi-channel donors who are comfortable giving both online and in the mail. In addition, new online

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[4] The Pew Charitable Trust: *73 Percent of Americans Go Online*, http://www.pewtrusts.org/news_room_detail.aspx?id=23772

[5] A Target Analytics Report: *Index of National Fundraising Performance*,
    http://www.blackbaud.com/files/resources/downloads/cam/TargetIndexResultsSummaryQ12009.pdf

fundraising techniques, such as peer-to-peer fundraising, have attracted younger donors, who report "word of mouth" more often than "mail" as the first way they learned about their favorite nonprofits.

Statistics from The Wired Wealthy: Using the Internet to Connect to Your Middle and Major Donors speak volumes:

- ***84% of the Wired Wealthy have household incomes of $100K+***

- ***Mean age is 51***

- ***They spend 18 hours/week online***

- ***They're active online*** (90% make purchases; 78% bank and pay bills; 65% read the news)

Another study, by Convio and StrategicOne[6], found that "the increased value of adding an online donation and solicitation channel for donors acquired offline is $44.71 (a 39% increase) per donor over 12 months." With this statistic in mind, the best way for organizations to ensure year-over-year fundraising growth is to develop and execute multi-channel strategies that reach target audiences through their preferred modes of communication.

Email should be top of mind when developing new online communication strategies. Since studies show that email list size is directly tied to fundraising[7], setting goals for growing your email list will help you make solid ROI projections for how adding online communications can impact your fundraising.

Yet another data point: Convio, Sea Change Strategies and Edge Research conducted a first-of-its-kind national research study into the charitable giving behaviors and attitudes across Gen Y, Gen X, Boomers and Matures[8]. Probably the biggest finding from this study is that while direct mail remains significant, reliance on this one channel will not serve the nonprofits of tomorrow. While 77% of Matures rely on direct mail as their primary giving channel, only 54% of Boomers, 43% of Gen X and 26% of Gen Y report giving through direct mail.

Savvy nonprofits are starting to recognize these trends and are incorporating a multi-channel approach to their fundraising. As an example, Presbyterian Children's Home & Services grew their total giving program by 25% through multi-channel promotions. This included sourcing four new major donors online.

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[6] *Integrated Online Marketing (eCRM) with Direct Mail Fundraising: Adding a New Communication and Donation Channel Increases Donations*, http://www.convio.com/doc-intmktpaper

[7] *Convio Online Marketing Nonprofit Benchmark Index™ Study*, 2009, http://www.convio.com/benchmark

[8] *The Next Generation of American Giving*, http://www.convio.com/nextgen

5 SET EXPECTATIONS

If your organization has moved hesitantly online and seen unremarkable results, they may feel discouraged and vulnerable. But with data in-hand, it doesn't have to be difficult to explain why expectations need to be reset. There are certain "must-haves" that your nonprofit needs to have in place before online fundraising can yield significant results, and getting consensus to put those fundamentals in place now is what this exercise is all about.

A Website Isn't Everything

The first point your staff needs to make is that having a website isn't enough. Sure, having a website is necessary: You've likely seen the data indicating that 66% of middle and major donors visit a nonprofit's website before donating for the first time. But, this statistic from The *Wired Wealthy*[9] study indicates that you need more than just a website with content that articulates your mission; you also need to make it inspire a visitor to give.

Email Communications Help Organizations Stay in Touch and Drive Donations

People who know about your organization's most recent, compelling stories are more likely to give and recruit others to support you. But when an "ask" or fundraising appeal is included in every direct mail piece or phone script to justify the cost, supporters can't help but think that they only hear from your organization when you want money— not the best scenario for nurturing relationships and increasing loyalty.

> ▶ Quick Tip
> _____
>
> *If you and other board members are shy about asking for money,* you can still impact your organization's bottom line by contributing to list-building efforts. For example, you could work with your contacts at local businesses to send out "chaperoned emails" to those companies' lists. Or, you could donate event tickets or other "prizes" that can be used as a giveaway in a list-building campaign.

Email, though, is a cost-effective way to stay in touch regularly with prospective and existing donors, and is an efficient way to bring in donations. To differentiate your organization from the many others equally interested in capturing the attention and generosity of these individuals, use visually appealing communications that follow best practices and inspire actions like reading more about a topic online, sharing a story via social media channels, providing personal stories or feedback, and, yes, making a donation.

According to a benchmark study released by Convio in March 2009,[10] **organizations raise an average of $11 online per subscriber each year**. So for an organization with 3,000 email addresses in their file, 60% file growth equates to 5,000 addresses and an average of $55,000 raised.

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[9] *The Wired Wealthy: Using the Internet to Connect Your Middle and Major donors*, http://www.convio.com/wiredwealthyreport
[10] *The Convio Online Marketing Nonprofit Benchmark Index™ Study*

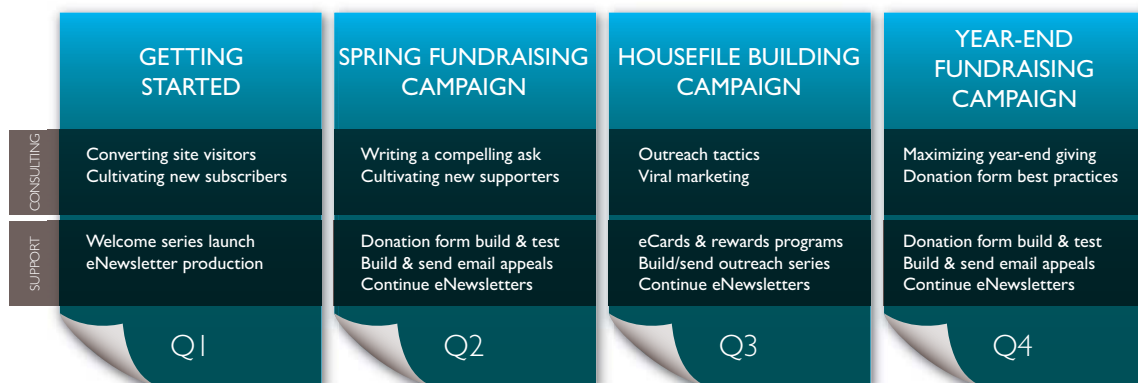## Online Communications Can Help Build the Prospective Donor List

The number of email addresses your organization has on file has a direct impact on its ability to communicate, cultivate, and drive actions from supporters.[10] That's why the fundraising team needs tools and strategies for driving traffic to the website and converting them to registered constituents. They need to be able to offer compelling online content—such as client testimonials, success stories, updates and action alerts—in order to drive registrations and, in turn, increase the pool of potential supporters. Many organizations are doing an excellent job of driving email sign-ups via Facebook and other social media sites—and integrated systems keep all the data flowing smoothly into one master marketing database.

Cross-Functional Coordination Is Critical

Your organization has a marketing calendar, but does it include multi-channel communications? Coordination is critical when it comes to an integrated communication strategy, so you'll need to demonstrate to the board that there is a plan in place to keep all departments within your organization aligned across channels.

The annual calendar should:

- *Highlight fundraising campaigns,* special events, seasonal communications and the end-of-year campaign
- *Leave room for housefile-building campaigns,* since email list growth is tied directly to fundraising growth
- *Include a benchmark for annual list growth,* and show board members ways the fundraising team can meet or exceed this number through creative, cross-functional list building efforts

	GETTING STARTED	SPRING FUNDRAISING CAMPAIGN	HOUSEFILE BUILDING CAMPAIGN	YEAR-END FUNDRAISING CAMPAIGN
CONSULTING	Converting site visitors Cultivating new subscribers	Writing a compelling ask Cultivating new supporters	Outreach tactics Viral marketing	Maximizing year-end giving Donation form best practices
SUPPORT	Welcome series launch eNewsletter production	Donation form build & test Build & send email appeals Continue eNewsletters	eCards & rewards programs Build/send outreach series Continue eNewsletters	Donation form build & test Build & send email appeals Continue eNewsletters
	Q1	Q2	Q3	Q4

Convio's Go! program provides a proven year-long project plan that delivers results fast.
Above is a typical calendar for getting started with online fundraising for new clients in the Convio Go! program.

6 EVALUATE THE TECHNOLOGY

Many providers offer websites, email solutions and payment processing, but only a few have designed complete technology solutions with nonprofits in mind. And while social media channels like Facebook, Twitter, and YouTube™ are free, they can't get your organization's message across and deliver funds in a sustainable way without the following functionality. *Be sure to include the following critical components in your recommendations for an integrated fundraising solution:*

CHECKLIST: THE CRITICAL COMPONENTS OF FUNDRAISING TECHNOLOGY

- ☐ *Easy email composition:* Anybody in your organization, regardless of their technical ability or office location, should be able to create attractive HTML email newsletters, invitations, and appeals with custom calls-to-action (e.g., "click to give" or, "sign a virtual card").

- ☐ *Simple webpage publishing:* Anyone in the organization should be able to post compelling HTML content online, anytime, anywhere.

- ☐ *Social sharing:* People are busy and already have many communication touch points. So make it as easy as possible for your email recipients and website visitors to spread the word about compelling content by integrating social media activities with other communications. Include a "share this" functionality on your website. Look for products that allow your organization to leverage social channels by integrating directly into popular social media sites like Facebook and Twitter.

- ☐ *Professionally-branded templates:* Email messages and donation pages need to have the same look and feel as your organization's website and other branded marketing materials. They must be mobile phone readable, with modern social media sharing capabilities built-in.

- ☐ *List management:* In addition to having the ability to segment and target your organization's list easily based on various parameters (e.g., geography, interests, past interactions), the solution should offer full automation of "unsubscribe" handling as well as new email sign-ups.

- ☐ *Welcome series:* New subscribers should be able to receive automated welcome messages that have a warm, educational tone that encourages long-term involvement; email appeals should be suppressed for a specified period of time.

- ☐ *Superior email deliverability:*[11] Your organization's provider should work collaboratively with Internet Service Providers to maintain "white-list" status so that your organization's emails reach the intended recipients. Many nonprofits run into problems by sending too many emails from an employee's account, causing the domain to be shut down or blacklisted.

- ☐ *Secure online transactions:* Donors want assurance that any information they provide online (e.g., credit card number) will be protected. By having a secure way to accept and process donations online, your nonprofit will continue to foster trust in donor relationships.

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[11] *The Anatomy of Email Delivery*, http://www.convio.com/emaildeliverability

- ☐ **_Flexible giving:_** Because different donors respond to different giving opportunities at different times, you should select a flexible system that can accommodate donations with premiums, recurring monthly gifts, tribute/memorial gifts, installment gifts, and more.

- ☐ **_Robust reporting:_** The development team will want to track overall metrics such as open and "click-through" rates as well as be able to see which links generated the most interest.

- ☐ **_Donor profiling:_** Fundraisers should be able to track and tag specific donors who click on specific content so they can understand individuals' motivations over time. They should choose a provider that can track what and where your organization's list members are sharing on social networks so they can nurture these social influencers. Profiles collected over time will help nurture long-term relationships and secure larger gifts from dedicated supporters who may become contacts for peer-to-peer fundraising, major gifts, foundations, planned giving, or sponsorships.

- ☐ **_Conditional content:_** Your organization should be able to offer tailored website and email content based on a supporter's interests, past actions, or preferences to improve response rates.

- ☐ **_Reward points for actions:_** Fundraisers should be able to automate a point system for supporters who take the actions that benefit your mission. Whether ongoing or tied to specific campaigns and timeframes, the ability to earn points and redeem them for gifts can be the motivator needed to make a measurable impact.

- ☐ **_Self-service data import/export:_** The organization shouldn't waste time and money by relying on a vendor every time they need to import or export contacts or gift data.

- ☐ **_Ability to scale with growth:_** Make sure your organization's web hosting, email delivery, and donation processing can scale in case of emergency or sudden tremendous publicity.

- ☐ **_Open platform:_** Recommend a solution that integrates well with many platforms so that your organization won't ever find itself locked in with a vendor that's not keeping up with shifting trends toward social media, mobile giving, and more.

▶ Success Story: *Presbyterian Children's Home & Services*

Presbyterian Children's Home & Services didn't use online communications for fundraising before starting the Convio Go! program. But after joining Go!, they saw a 56% increase in online giving in December 2009 (versus the previous December), with no decline in offline giving.

💡 *Read the full Go! case study online:* http://www.convio.com/pchas

7 STAFF DELIBERATELY

Often, multi-channel communications evolve without consideration of the skills or staff needed for each channel. With this in mind, it's not surprising to hear that the study, *The Secret of Online Success: Why Structure Matters*,[12] cites "insufficient staff resources" as the most frequent barrier to success online—and this statement holds true for nonprofits of all sizes. And, it's not just about having more people; it really needs to be the right people.

▶ Evaluate Your Team's Skill Mix

Having the right people is just as important as having more people. Along with evaluating the size of your online team, it is equally as important to evaluate the skill mix that your team possesses. According to the survey results, online staff spends an average of 28% of their time on web administration followed by creative/design, campaign management, strategy, analysis and usability (see Figure 4).

💡 *To learn more about staffing for online fundraising success, read the guide,* The Secret Of Online Success: Why Structure Matters, http://www.convio.com/structuringreport
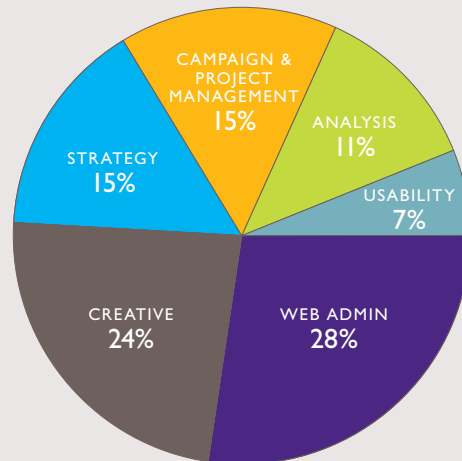

Figure 4. A breakdown of how the average online staff spends their time.

What can your executive team do now to ensure that the organization is structured for multi-channel success in the future? First and foremost, they should carefully assess their capacity, quality, and diversity in-house. After identifying key gaps that need to be filled, they should consider outsourcing any missing pieces. Because every nonprofit is unique, some will choose to outsource these roles indefinitely, while others will develop the needed online communications competencies in-house.

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[12] *The Secret of Online Success: Why Structure Matters*, http://www.convio.com/structuringreport

CONCLUSION

The data speaks for itself: offline-only fundraising methods will no longer suffice in the evolving fundraising environment. It's time to help your organization plan ahead for increasing shifts in technology and significant demographic changes by adopting a diversified, online fundraising strategy.

Armed with the 7 steps for leading your organization to fundraising success, you can give your nonprofit the encouragement and guidance needed to keep the organization thriving into the future. Helping craft savvy, forward-looking fundraising plans and obtaining the needed resources will ensure a wise investment with both short and long-term returns, making your future together more impactful.

Contact Convio today for more information about the Go! Program or to talk with a program participant from an organization like yours. You and your organization can have a clear action plan and proof that it works before your next board meeting.

To find out how to get started with Go!, visit us online at **www.convio.com/go**, give us a call at 888.528.9501, or drop us a line at **info@convio.com**.

💡 **More Success Stories**

For more examples of success with Go!, visit:
http://www.convio.com/goportfolio

ABOUT THE CONVIO GO!
GUIDED FUNDRAISING PROGRAM

The Convio Go! guided fundraising program reduces the risk of introducing online fundraising technology into your organization by giving you access not only to Convio's online marketing and fundraising tools, but also to a team of experts to guide you through your first online initiatives.

Coaching includes:

- *Client set-up and coaching* through individual and group peer sessions
- *Best practice sessions* on technology, marketing and industry topics
- *Development of communication templates*, and donation and registration forms

Your organization will gain the knowledge to:

- *Grow your email list*
- *Cultivate new opt-ins*
- *Convert prospects into donors*
- *Convert one-time donors* into recurring donors
- *Maximize year-end fundraising*

▶ Did You Know?

Nonprofit professionals who fully participate in Convio Go!, the company's cohort-based online fundraising and marketing program, can apply for 31.0 points in Category 1.B—Education of the CFRE International application for initial certification and/or recertification. So, your organizational investment in the Go! program serves as an investment in your staffers' professional development at no extra cost.

Find out more online: **www.convio.com/go**

💡 ADDITIONAL RESOURCES

Convio Research

- *The Next Generation of American Giving*, http://convio.com/nextgeneration
- *The Convio Online Nonprofit Benchmark™ Study*, http://www.convio.com/benchmark
- *The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors*, http://convio.com/wiredwealthy

Convio Best Practice Guides

- *Using the Internet to Raise Funds and Build Donor Relationships*, http://www.convio.com/fundraising
- *Nonprofit Website Fundamentals*, http://www.convio.com/websiteguide
- *Basics of Email Marketing for Nonprofits*, http://www.convio.com/emailguide
- *Going Social: Tapping into Social Media for Nonprofit Success*, http://www.coonvio.com/socialmedia
- *Toolbox for the Modern Nonprofit: Donor Management Made Easy*, http://convio.com/donormgmtguide

More Convio Resources

- *On-Demand Webinars*, http://www.convio.com/webinars
- *Quick Tour Videos*, http://www.convio.com/quicktour
- *Sign up for our newsletter*: *Convio Connection*, a free bimonthly newsletter for nonprofits on how to attract constituents, drive action, and build loyalty through online relationship management. http://www.convio.com/newsletter

ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.