

THIRD ANNUAL
Convio Summit
November 17 – 19 **2008**

Dream it and do it!

Gene Austin, Chief Executive Officer
Convio Summit Keynote 2008
November 19, 2008



“Your dreams come true
when you act to turn them
into realities.”

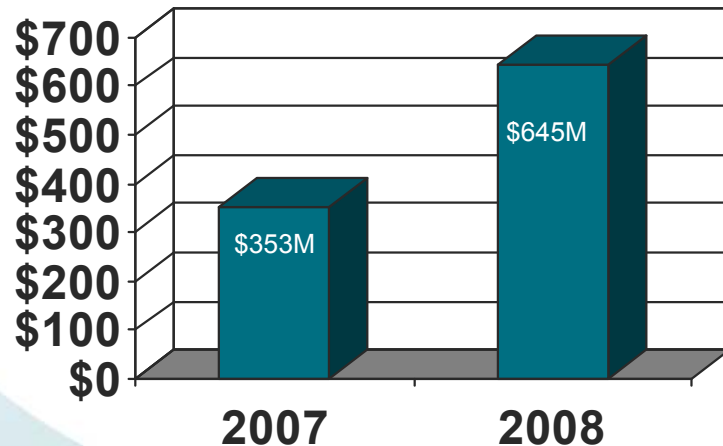
Anonymous

No longer just a dream

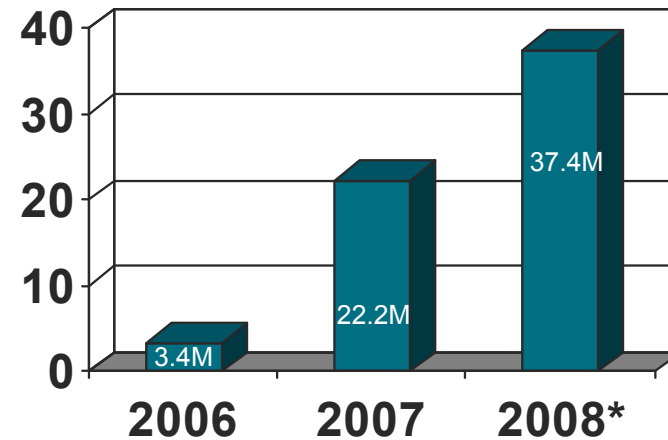


More than \$1.6 billion
online since Convio's
inception

Donations processed**

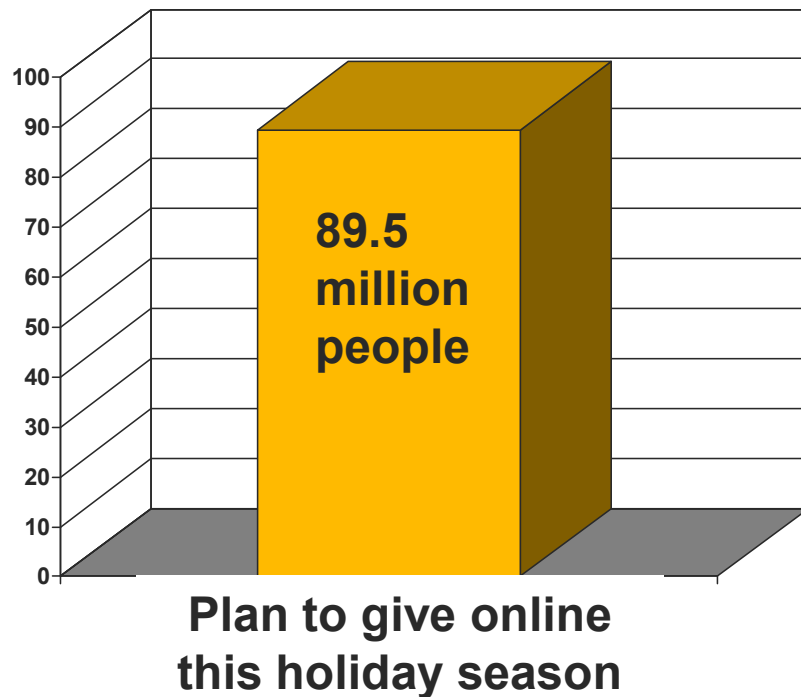


Advocacy Actions Taken**



**Year-over-year

There is reason for some optimism



- ~7 out of 10 plan to give the same amount or more
- Estimate more than \$3B to be given online this holiday season
- “Just two years ago, \$3 billion was the estimate of all online giving for a 12-month period.” (*The NonProfit Times*, October 2008)

Source: Commissioned survey by JupiterResearch a Forester Research Company

How did we get here?

You've lead a movement in my five years

The Year was 2003

facebook.

Not invented yet.



The stuff dreams are made of

- First Introduced in 2003:



- 64% of US households have Internet access
- Text messaging – offered by one vendor
- Consumers expressed “interest” in cell phones with cameras (Source: JupiterResearch)

Nonprofits and “the net” in 2003

- Convio-like tools were only for the early adopters
- Web sites were “brochure-ware”
 - ▶ One-way channel
 - ▶ About 50% could take online donations
- Email “blasts”
- AFP Research
 - ▶ 47% of orgs use the Internet to solicit gifts,
 - ▶ 61% raised more online in 2003 than in 2002
- High-end of online giving estimated at \$2B



A changing world in which to move people

- The “un-tethered” constituent
- Channels, channels and more channels!
- SaaS mainstream
- Open to the possibilities
- Single view of supporter (online or offline)



The Constituent has changed

- More engaged...more demanding



We have to fish where the fish are....



WIKIPEDIA
The Free Encyclopedia



Next?

>78 million
blogs



Social Networks: High Penetration/ Traffic



facebook

- 110m active users (Jun 08)
- 39m U.S. unique visitors Aug 08
- Avg. time per person 1:38:27
- Sessions per person – 10.5
- > 50% of users outside college
- Fastest growing demographic is 25+



myspace.com
a place for friends

- 200m+ registered users
- 59m U.S. unique visitors (Aug 08)
- Avg. time per person 1:47:55
- Sessions per person – 8.31



LinkedIn

- 30m users
- 11.9m unique visitors (Aug 08)
- Avg. time per person 0:11:29

Source: Nielsen

Constituents want Empowerment

Jewish National Fund United States

Donation Opportunities | In Your Area | The Work We Do | About Us

LOG INTO YOUR JNF ACCOUNT

Help Me go to Israel...

Make a Donation

Total Money Raised



Goal: \$800.00
Achieved: \$911.00

[Make a gift!](#)

Fundraising Honor Roll

Mom, Dad & Penni
Randy Landsman

Hi, welcome to my personal Alternative Spring Break (ASB) to Israel page!

With your help, I will be spending my spring break not on vacation, but doing volunteer work in Israel. I am raising money for my Alternative Spring Break trip to Israel, while contributing to Jewish National Fund's Northern Renewal Campaign, a worthy cause at the same time!

Here's how you can help me get to Israel on ASB this March:

Each tax-deductible contribution that you generously give on my behalf, will be used to reforest and rebuild Northern Israel. Once I raise a minimum of \$800, I will be going to Israel with the Jewish National Fund to take part in projects that are part of the Northern Renewal Campaign.

Operation Northern Renewal will focus on reforestation, upgrading parks and recreation sites, developing tourism, preparing land for agriculture and providing research and development, working on preparedness (more fire trucks, accessible hydrants and equipment storage), the purchase of a firefighting airplane, year-round camps for children, a housing loan program to encourage families to move to the north, funding of Hagey Sayarut, Israel's elite youth movement, and volunteer activities.

Since 1901, JNF has been the caretaker of the land of Israel, on behalf of its owners--Jewish people everywhere. The money you donate will help rebuild forests, parks, and communities in Northern




ASPCA Adopt or Gift a Pet Invite Friends Personal Page

Vinay Bhagat

How You Are Helping - Summary
1 actions in support of ASPCA

facebook Home Profile Friends Likes Jordan Votaw Settings Logout

Tad Druart is sharing note from nephew Jack Boyer "wanted to give thanks to everybody that voted for my short film. It showed before every event this weekend."

Wall Info Photos Boxes

Write something...

Post

Nov 1

Tad is sharing note from nephew Jack Boyer "wanted to give thanks to everybody that voted for my short film. It showed before every event this weekend." 1 likes · Comment

Tad is waiting to watch football with Andrew and Nathan. 0 likes · Comment

Tad is waiting to watch football with Andrew and Nathan. 0 likes · Comment

Oct 30

Tad is ready for Halloween to be over. 0 likes · Comment

Tad is now friends with Christopher Wilder, Scott Schaffler, Ben Wheatley and David Lutz. 4 likes · Comment

Oct 29

Tad is now friends with Ron Johnson. 0 likes · Comment

Tad is thrilled with the response to our holiday giving survey outreach. 100 likes · 2 Comments

Information

Networks: Austin, TX

Relationship Status: Married

Birthday: August 31

Current City: Austin, TX

Mutual Friends

24 friends in common See All

Victoria Holly Chris

Help me fight animal cruelty!

DONATE TO THE ASPCA TODAY

78%



Goal: \$1,000.00
Achieved: \$785.00

Tad Druart, Sachin Wadhawan, Matthew Malcarol, Brad Duff-Hudson added the application at June 26 2:47pm.

Kate Hansen, Hannah Merriman, Peter Genuardi, Karl Gillam added the application at June 26 3:42pm.

Kate Hansen, Hannah Merriman, Peter Genuardi, Karl Gillam

Patrick Odon, Hazel Nail Beebe, Karl Gillam

Like Page

Multi-Channel Marketing: The Need



← Direct mail and telemarketing



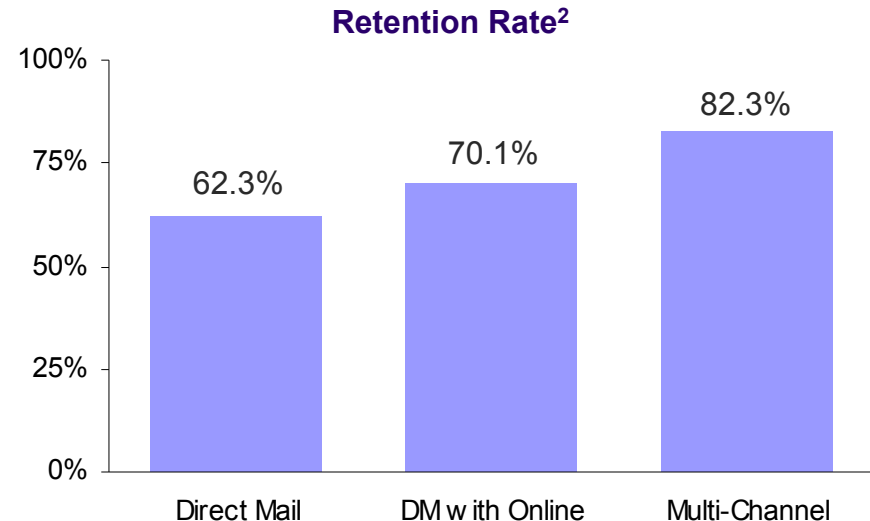
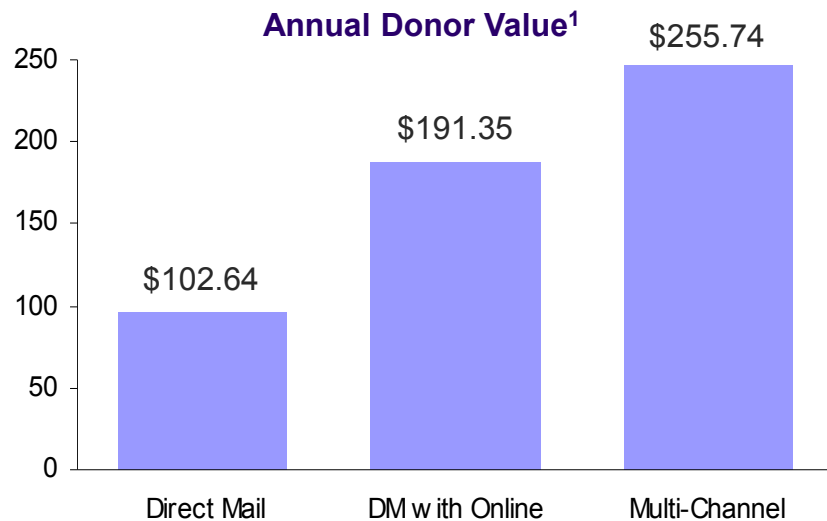
← Email and Web



← IM, text messaging, social media

Multi-Channel Adds Value

- Online engagement improves annual donor value and retention rates even if donors continue to give via the mail
- If donors give online as well, annual value and retention rates are further enhanced



Sources:

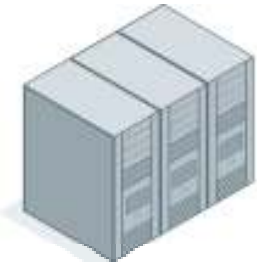
1. Convio/ Strategic One White Paper: Integrating Online Marketing (eCRM) with Direct Mail Fundraising: Adding a New Communication and Donation Channel Increases Donations; total contributions over 12 month period, excluding \$10k+ gifts for SPCA of Texas in 2005
2. Ibid. Comparison of retention rates for multi-year donors, SPCA of Texas 2005

SaaS - Innovation for today's wired world

Mainframe

Client/Server

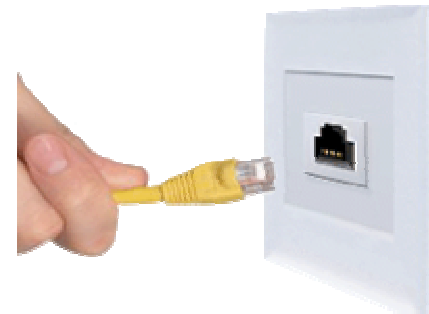
Software as a Service



Mid 20th
Century Platforms



Late 20th
Century Platforms



21st
Century Platforms



Slide courtesy of salesforce.com



Convio Open...the sky's the limit.

- **Standards** – flexibility to meet a changing world

- ▶ Others solve problems – you focus on mission
- ▶ Choose best applications for your needs

- **APIs** – linking your world to Convio

- ▶ Constituent API
- ▶ TeamRaiser API
- ▶ Transaction API
- ▶ Participation API
- ▶ Events API

- **Extensions** – extending your reach beyond your web site

- ▶ Facebook gifts and custom interactions
- ▶ Flickr
- ▶ Google Maps integration
- ▶ YouTube Video
- ▶ Plaxo
- ▶ RSS
- ▶ Bookmarklets
- ▶ Google Analytics integration
- ▶ Simplified single sign-on implementation
- ▶ CMS form actions

APIs Enable Fundraising Creativity



5 million lbs. of food for the hungry!

In the land of plenty, there's no reason more than 35 million Americans should go hungry! You can help get much-needed food to struggling families by helping *Fill America's Fridge!*

Normally, every \$1 you give **MULTIPLIES 30 TIMES** to get food and groceries to families in need. That means it only costs **\$5.25 to feed a family of four for a whole week!** Now, thanks to a \$125,000 marketing gift from Rent-A-Center as part of a four-year \$500,000 commitment to help end hunger that same \$5.25 will feed them for two weeks!

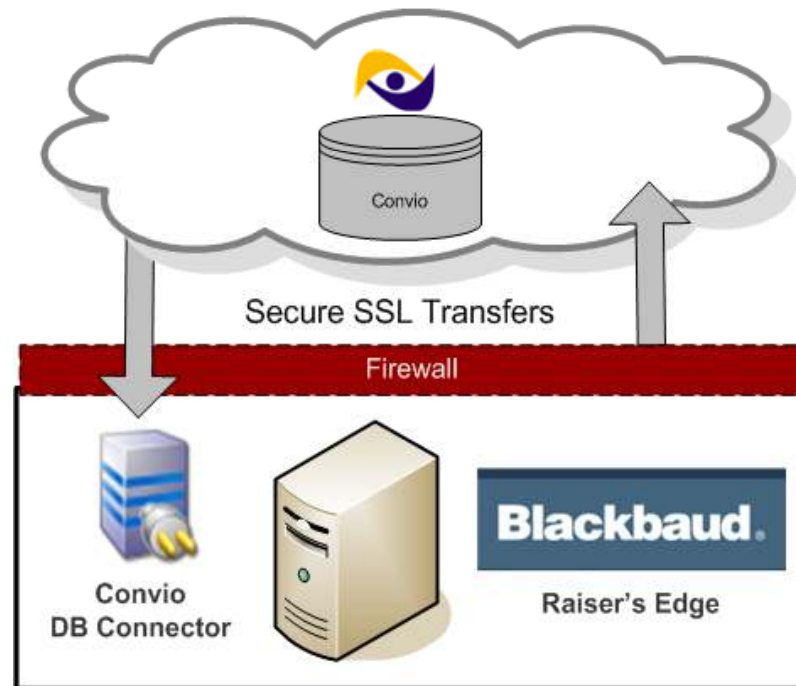
Here's how:
Choose how much you would like to give for each of the kinds of foods below. Then click the calculator and see how your gift multiplies to help hungry families!

Enter the amount you'd like to give:	What your gift will do:
Dairy Products: \$ <input type="text"/> Meat Products: \$ <input type="text"/> Fruits & Veggies: \$ <input type="text"/> Breads & Grains: \$ <input type="text"/>	Feed a family of four for <input type="text"/> weeks. That is <input type="text"/> meals. <input type="text"/> lbs. of food. \$0 worth of food. All from you \$0 gift.

Click here to GIVE NOW!

Single View of the Constituent

- Connecting two systems is not child's play
- More successful data integrations than any other vendor
- Database Connectors



Example diagram of
Convio's Raiser's Edge Connector

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Common Ground – A Single View in a Multi-Channel world

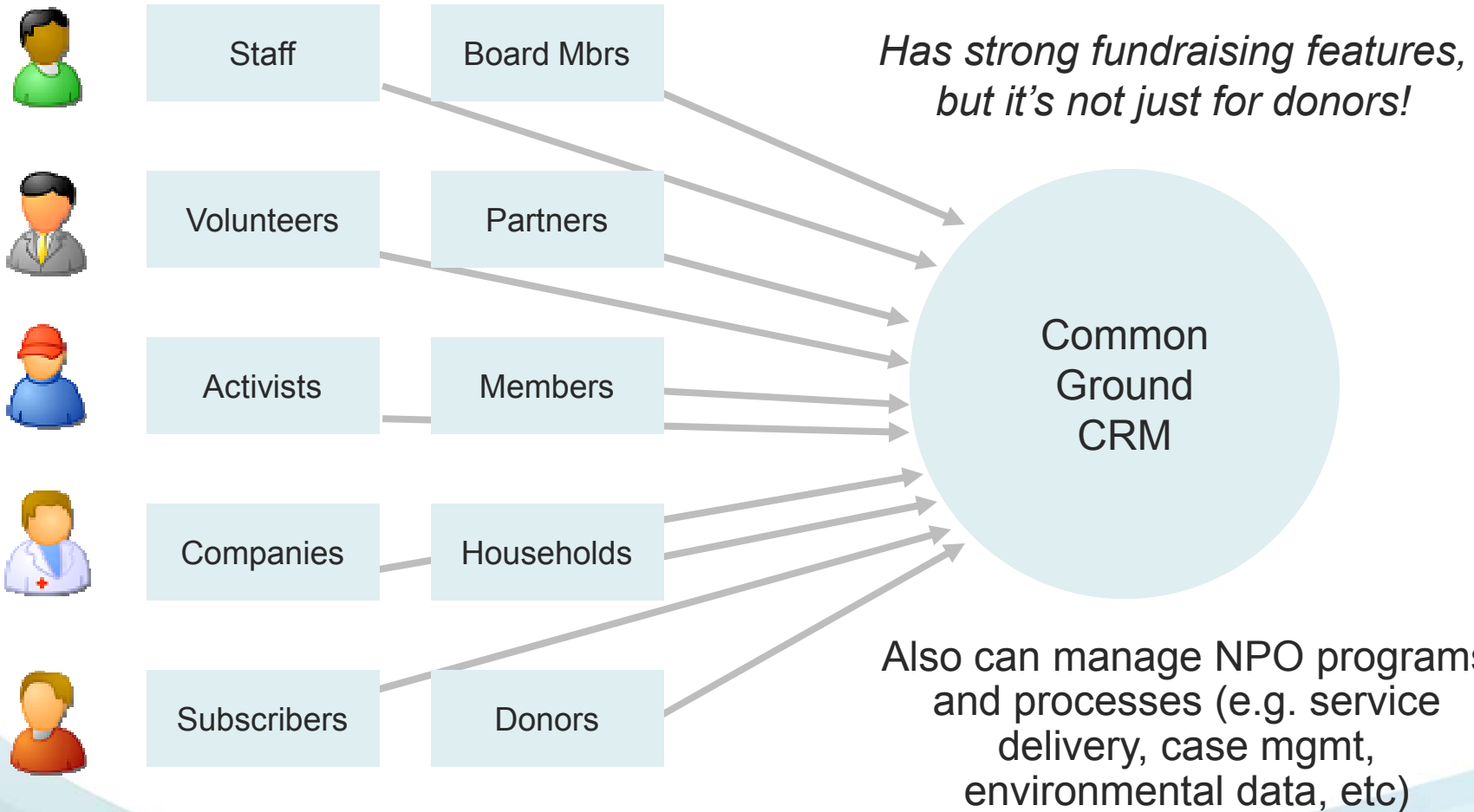
Why the Need for a New Solution?

■ Because YOU asked ...

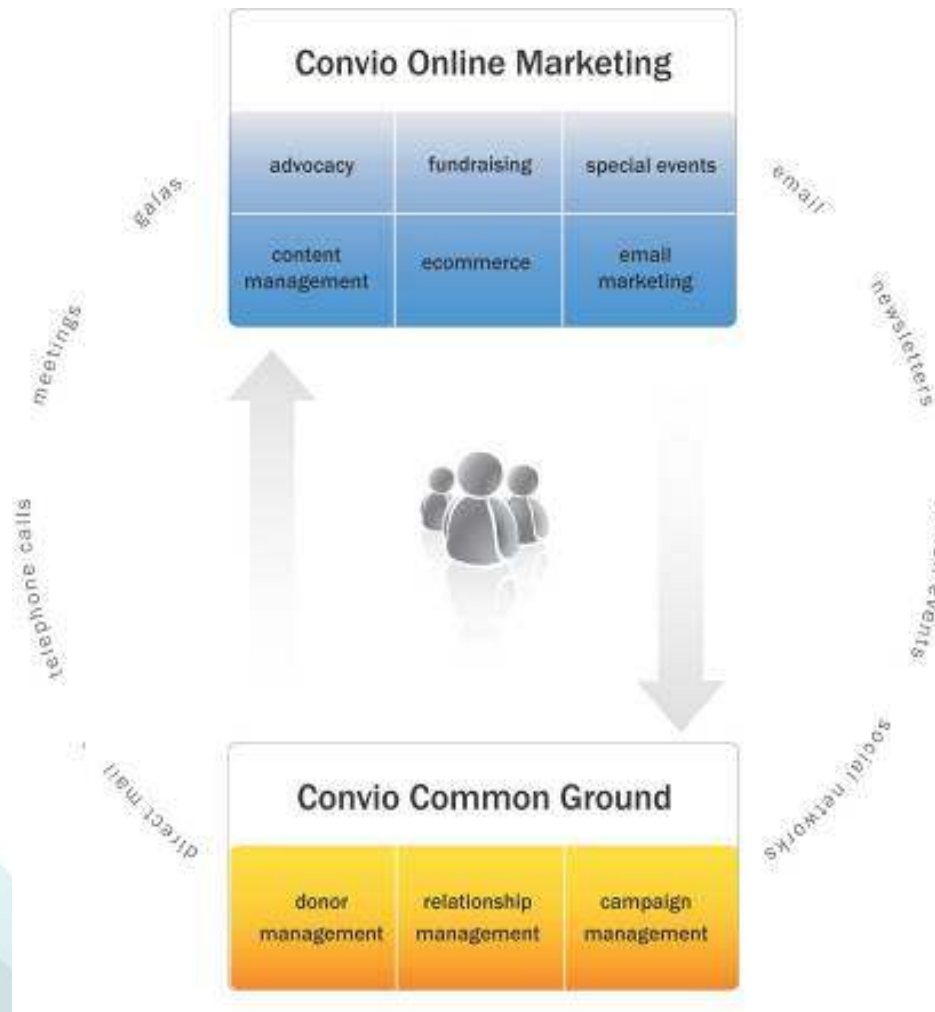
- ▶ for data integration to be simple and painless
- ▶ to link online and offline campaigns
- ▶ to manage all records, not just donors
- ▶ to give their entire team database access, from anywhere
- ▶ to customize and extend their database
- ▶ to focus on their mission, not the technology

What is Common Ground?

- A CRM to track everybody and everything your organization interacts with



Integrated with Convio Online Marketing (eCRM)



- Products are independent, but deeply integrated
- Common Ground Connector synchronizes constituents, transactions, and campaign data
- Common Ground constituent segments available in eCRM
- Integration supports federated organizations with chapters and affiliates
- Results
 - ▶ Staff focus less on integration and more on creating effective campaigns;
 - ▶ 360° constituent tracking

The Common Ground Difference

Simplicity

- Easy UI for donor mgmt and CRM
- Automated data integration
- Single database for all departments and all affiliates
- Anytime, anywhere access
- No hardware or software to maintain

Flexibility

- Customize with clicks not code
- Control access, roles, and permissions
- Set the data sharing rules for your network of affiliates
- Extend Common Ground to manage programs and processes

Choice

- Use “AppExchange” to add 3rd party products and services
- Choose from a variety of partners to implement Common Ground
- Use as your database of record or else as a “front end” for affiliates

As for tomorrow?

What should you plan for??

- Engagement anywhere, anytime
- Segmentation will be critical
- Constituents want to belong to movements
- Constituents act like investors
- Better days are ahead....be ready

One thing remains constant...



“The future belongs to those
who believe in their dreams.”

Eleanor Roosevelt

The future belongs to you.



convio[®] community
Awards 2008

Presented by Gene Austin


Community Good Citizen Awards

Given to three individuals we want to recognize for participation in our Online Community

Ben Smith, WNET

Shelley Neese, The Jerusalem
Connection International

Christian Stauffer, American Institute
for Cancer Research

 Discussions

 convio® community

 People


 Documents

 Tags

Community Leader Award


*Given to the individual who has done the most to help
our Online Community grow*

Adrian Cotter, Sierra Club

 Discussions

 convio® community

 People

 Documents

 Tags

Revolutionist 2008 Innovator Awards

Presented by Vinay Bhagat, Founder & CSO

Innovation

"When all think alike, then no one is thinking"

— Walter Lippman

"Without creativity, there would be no progress, and we would be forever repeating the same patterns."

— Edward de Bono

"Doing the same thing over and over, yet expecting different results, is the definition of crazy."

— Unknown

Convio Innovator Award Categories

- Advocacy campaign or program
- Constituent empowerment
- Email communications
- Email list growth
- Integrated fundraising campaign or program
- Online fundraising campaign or program
- Special events fundraising
- Best website
- Best overall use of Convio

2008 Notable Mentions (1 of 2)

- Advocacy campaign



- Constituent empowerment



- Email communications



- Email list growth



2008 Notable Mentions (2 of 2)

- Integrated fundraising campaign



HUMAN
RIGHTS

- Online fundraising campaign



- Special events fundraising



- Best website



CANADIAN WILDLIFE
FÉDÉRATION CANADIENNE
FEDERATION DE LA FAUNE



- Best overall use of Convio



Winner: Advocacy Campaign



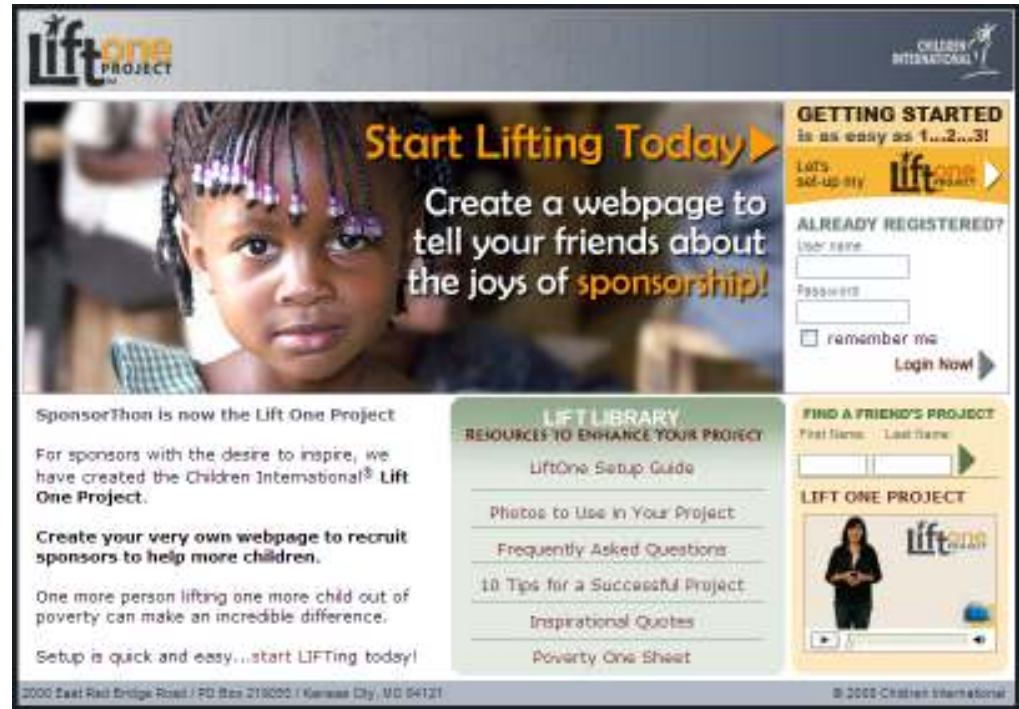
- 200,000+ comments to FCC and House/Senate
- “The Wall” photo petition with 5,000 signers delivered to Congress
- Senate unanimously overturned FCC ruling

A screenshot of the STOPBIGMEDIA.com website and its YouTube channel. The website header includes navigation links: WHAT'S AT STAKE, GET INVOLVED, POLICY & RESEARCH, WHO OWNS THE MEDIA?, and DONATE. A call to action reads "Take Action: Tell the House to Veto the FCC" with a progress bar showing 0% completion. Below is a YouTube channel page for "videofreepress" with a video titled "Is junk media making you sick???" and a photo petition titled "THE WALL" with 5,000 photos and counting. The petition is presented by STOPBIGMEDIA.com. A grid of 50 small photos shows various people participating in the petition.

Winner: Constituent Empowerment 2.0



- Innovative use of TeamRaiser to and recruit new child sponsors
- Since 2005 recruited over 5,000 sponsors and sponsored over 560 children
- Use of Convio's multi-lingual tools helps CI reach out to English and Spanish speakers



Winner: Email Communications



- Monthly Newsletter Goal: pick just five stories to drive traffic across the whole website
- Keeping it short - all above the fold - went against broadcasting best practices
- Drove list growth and great results that are being copied by other stations
- Gives listeners/viewers compelling reasons to give

KQED public broadcasting for northern california

QED Up – 5 things you need to know

July 2008

support KQED

- digital tv
- member benefits
- continuing membership
- got a question?
- join/renew

Dear Sandra Hudson,

Putting a (cartoon) face to a name
America's favorite FM grease monkeys make the transition to prime time. The Tappet brothers, as they are otherwise known, star in [Click and Clack's As the Wrench Turns](#) on KQED TV Wednesdays at 8pm. The animated duo fix cars, mollify disgruntled customers and generally attempt to do as little as possible. Get to know the gang at [Car Talk Plaza](#).

And the hits just keep on coming!
Hands down, we get the most hits every year when we remind you about [Forsim's Summer Reading List](#) as Michael Krasny's audience recommends favorite books. This year is no exception...titles run the gamut from *The Enchantress of Florence*, to *The Bible* and equal-time suggestions from the Conservative and Progressive book clubs. And for fans of KQED FM's **Pacific Time**, read *Where the Ashes Are: The Odyssey of a Vietnamese Family* by Qui Du'c Nguyen. Thank you for [selecting your favorites and supporting our efforts](#).

Water, water everywhere, but not a drop to drink?
California is growing at the rate of nearly 600,000 people a year, but much of the state only receives 15 inches of rain or less annually, barely sufficient to meet the ever-increasing demand. Will new technologies such as desalination and recycled water offer solutions? This month **QUEST**, KQED's multimedia science and nature production, presents *A State of Thirst: California's Water Future*. The program debuts [Monday, July 14, on KQED FM](#) and [Tuesday, July 15, at 7:30pm on KQED TV](#).

Olé! Olé!
As the host of **Made in Spain**, chef José Andres puts the spotlight on the culinary and cultural riches of his passionate and exuberant country. Be the first on your block to flamenco dance to the stove, and experiment with Serrano ham, manchego cheese, saffron and more. Whip up paellas and tapas guaranteed to have friends begging for invitations to your next soiré. Remind yourself to [tune in to KQED TV on Saturday, July 26, at 2pm](#) for a special broadcast of PBS' newest hit.

Out of the mouths of babes
...come original and very creative stories such as "Rainbow Flower," "The Tooth That Took a White to Come Out," "The Magical Crayon" and "The Evil Dr. Comaca." More than 700 kindergartners and first, second and third graders from across the Bay Area participated in the 14th Annual Reading Rainbow Young Writers and Illustrators Contest. Encourage your own budding authors while [watching animated versions of the winning stories](#) together.

Winner: Email List Growth



- Changed from 'brochure' to interactive website
- Multi-faceted file building strategy
- Acquiring 1,000+ email addresses per month; 1% convert to donors within 6 weeks

The screenshot shows a website interface for a campaign. At the top left, there is a photo of an elderly woman and the text "Remember NATIVE AMERICANS". To the right is a "SIGN THE PLEDGE" section with the text "I will Stay Informed. I will Get Involved. I will Remember." and input fields for "First Name", "Last Name", and "Email", followed by a "SIGN" button. Below this is a "GET A FREE RIBBON MAGNET WHEN FIVE FRIENDS PLEDGE TO REMEMBER" section. It includes a description of the magnet, a photo of the magnet, and a "Step 1 of 2: Request Your Magnet" form. The form has sections for "Your Information" (Name, Email, Street, City/State/ZIP), two checkboxes for email updates and remembering the user, two dropdown menus for selecting important issues and preferred reservations, and a date of birth section. A "Submit" button is at the bottom. A footer note states: "Magnets can be shipped to addresses in the continental US only. Available for a limited time, while supplies last. Limit of one magnet per household."

Winner: Integrated Fundraising Campaign



Defenders of Wildlife

- Cross-channel marketing campaign to convert activists into donors through promotion of calendar cover photo voting contest
- 58,000 total participating voters (12% of total file)
- Acquired 900 new contributing members
- Raised \$50k online using soft asks within two emails

The screenshot shows a website for Defenders of Wildlife with a navigation bar (Home, Support Us, Take Action, Adopt Now, eNews Signup) and a main heading "2009 Defenders Calendar Vote". Below the heading, it says "Help us choose the cover photo for our 2009 calendar, which will be sent to 1.5 million people... and seen by many more. The winning entry will appear in homes, doctor's offices, office cubicles and classrooms around the country." Three photos of wolves are displayed: A: Gray Wolf surviving the hunt, B: Timber Wolf pup in forest, and C: Timber Wolf resting on the ground. Below the photos, there is a "Pick Your Favorite Photo" section with a "VOTENOW" button. The email follow-up text reads: "Dear K, Defenders of Wildlife's 2009 Calendar is getting ready to go to print, and I need your help to pick the cover image. Choose your favorite from a selection of three beautiful images of wolves in the wild. Cast your vote online now! Our calendar is an important way that Defenders educates the public about wildlife. More than 1.5 million people will receive it, posting its spectacular animal photographs and informative text in homes, offices, classrooms and break rooms across the United States. The photo that gets the most votes will grace our next calendar cover -- Please vote now! We have to finalize the calendar's design by 5:00 P.M. Eastern Time next Thursday (April 3rd). Please cast your vote today... Best Regards, Karin Kirchoff, Vice President, Membership."

Winner: Online Fundraising Campaign

PLOUGHSHARES FUND

- “Peace Primary” campaign tied in with the launch of the 2007-2008 primary season
- \$100,000 grant offered to the organization with the most votes
- Provided buttons and banners for promotion in Social Networking and personal websites
- \$300,000 raised online in the two-month voting window



Winner: Special Events Fundraising



National
Philanthropic
Trust

- APIs allow participants to check in for event online and pledge to complete fundraising post-event
- Conditional content in participant center and emails
- Personal Events empowers participants to schedule training walks in their area
- Participants encouraged to use widgets
- Used surveys for recruitment and to make appropriate crew team assignments

A screenshot of the website for the 2009 Breast Cancer 3-Day event. The top banner features a woman in a pink shirt and headscarf, with the text "EVERYONE DESERVES A LIFETIME". Below the banner are several navigation buttons: "END BREAST CANCER", "EXPERIENCE THE 3-DAY", "DO SOMETHING BOLD", "REGISTER or request more info", "DONATE NOW", and "GET INVOLVED". The "REGISTER" button includes a dropdown menu for "please choose a city". On the right side, there is a "participant sign-in" section with a login form and a "search this site" box. At the bottom, it says "2009 REGISTRATION IS NOW OPEN" and lists navigation links: "home", "privacy policy", "contact us", "financial disclosure", "report card", "employment opportunities", and "forward this site".

Winner: Best Website



- Sleek design, rotating homepage story cube
- 9k registrations since September launch
- Multiple opportunities to engage - online pledges, polls, quizzes, take action links, unique donation programs
- Connects constituents with social media sites



Winner: Best Overall Use of Convio



TRISOMY 18 FOUNDATION

Building a Community of Hope through Support, Advocacy, and Research

- Organization started with \$50k annual operating budget and now raises close to \$10k per month online using Tributes, TeamRaiser and Fundraising
- 400 new registrants/month and grown unique website visitors increased from 8,000 to 20,000 in one year
- Provide great service and community online
- Implementing Convio Common Ground

The screenshot shows the homepage of the Trisomy 18 Foundation website. At the top, there is a navigation bar with links for 'Sign In / Register', 'Tell a Friend / Contact Us', and a 'Sign Up!' button for staying updated on the Trisomy 18 Cause. Below this is a main header with the organization's name and tagline, and a secondary navigation bar with links for 'What is Trisomy 18?', 'Get Support', 'Get Involved', 'Research', 'For Professionals', 'Media Center', 'Donate', and 'About Us'. A central banner area features three main sections: 'Join Our Community' with a 'Register Now' button, 'Remember a Child' with 'Legacy Pages', and a 'Together we can bring every family comfort & compassionate care' message. Below this is a section for 'Information, guidance, and emotional support' with a paragraph about the foundation's mission and a 'Learn what you can do to help' link. There are also two featured articles: 'Meet the Guthrie Family' with a photo of a pink lotus flower and 'Eliot's Story and 99 Balloons on Oprah This Week!' with a photo of a baby. A sidebar on the right contains news about the foundation's online move and the passage of the Pre-natal and Post-natal Diagnosed Conditions Awareness Act (S. 1810). The footer includes copyright information, contact details, and a 'Powered by Convio' note.

2008 Winners

- Advocacy campaign – **Freepress**
- Constituent empowerment 2.0 – **Children International**
- Email communications – **KQED**
- Email list growth – **National Relief Charities**
- Integrated fundraising campaign – **Defenders of Wildlife**
- Online fundraising campaign – **Ploughshares Fund**
- Special events fundraising – **National Philanthropic Trust**
- Website – **United Nations Foundation**
- Overall use of Convio – **Trisomy 18 Foundation**

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come true.**

