



Basics that You Should Consider for End-Of Year Fundraising

Presenter: Patrick Hansen



About Your Presenter

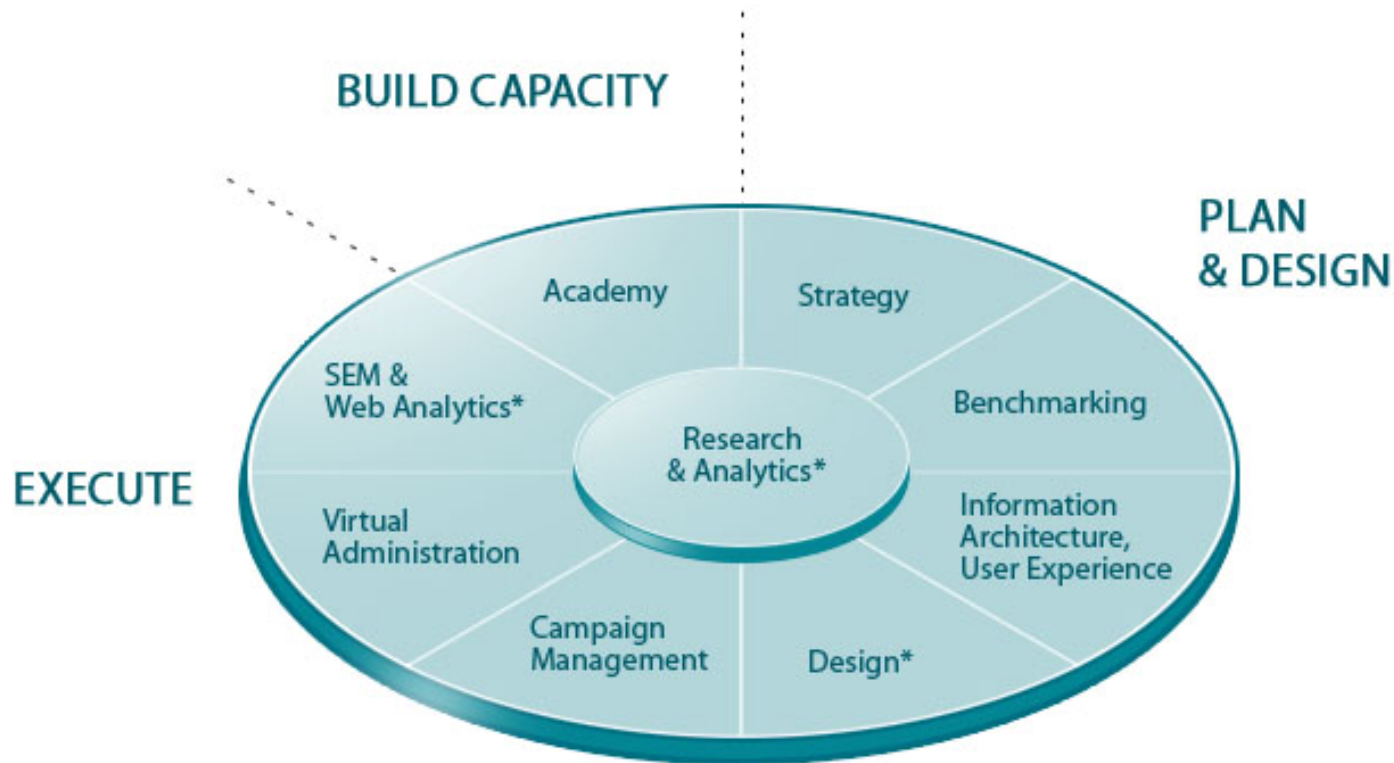


Patrick Hansen **Senior Interactive Consultant**

- Eight years experience in the non-profit and technology space
- Four years R&D with IBM
- Published author with 12 patents
- Manager of the Convio Go! Program
- Client list includes America's Second Harvest, National Relief Charities, National Women's Law Center, Paul Anderson Youth Home, and others

About Convio's Client Success Services

50+ person agency within Convio to provide clients with the strategy, interactive services and online marketing best practices to achieve ongoing success



* Utilize specialized partners

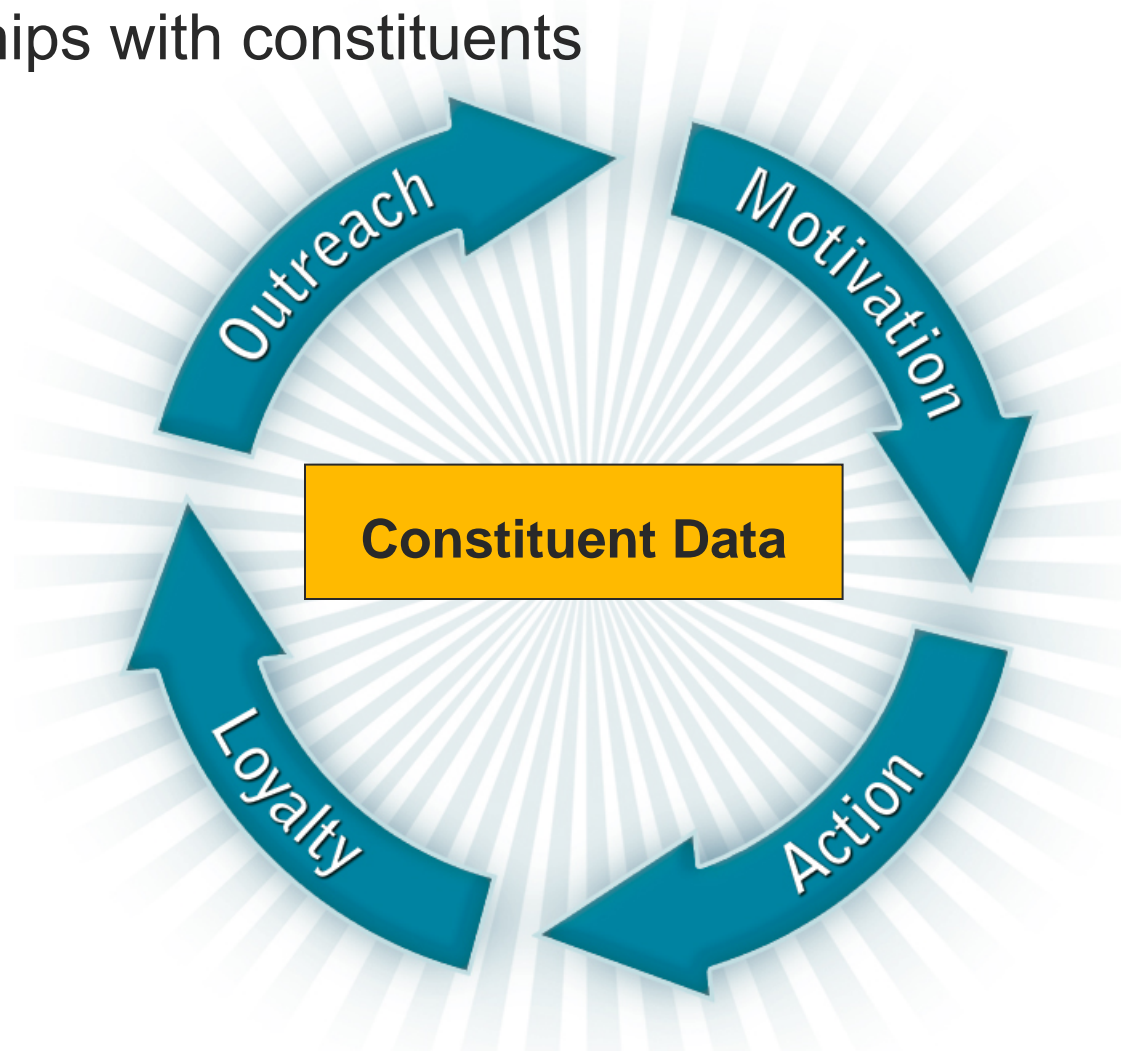
Today's Objectives

A four-point year-end online fundraising plan

1. Grow your email list
2. Communicate regularly
3. Plan a year-end campaign
4. Need help? Consider Convio Go!

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents



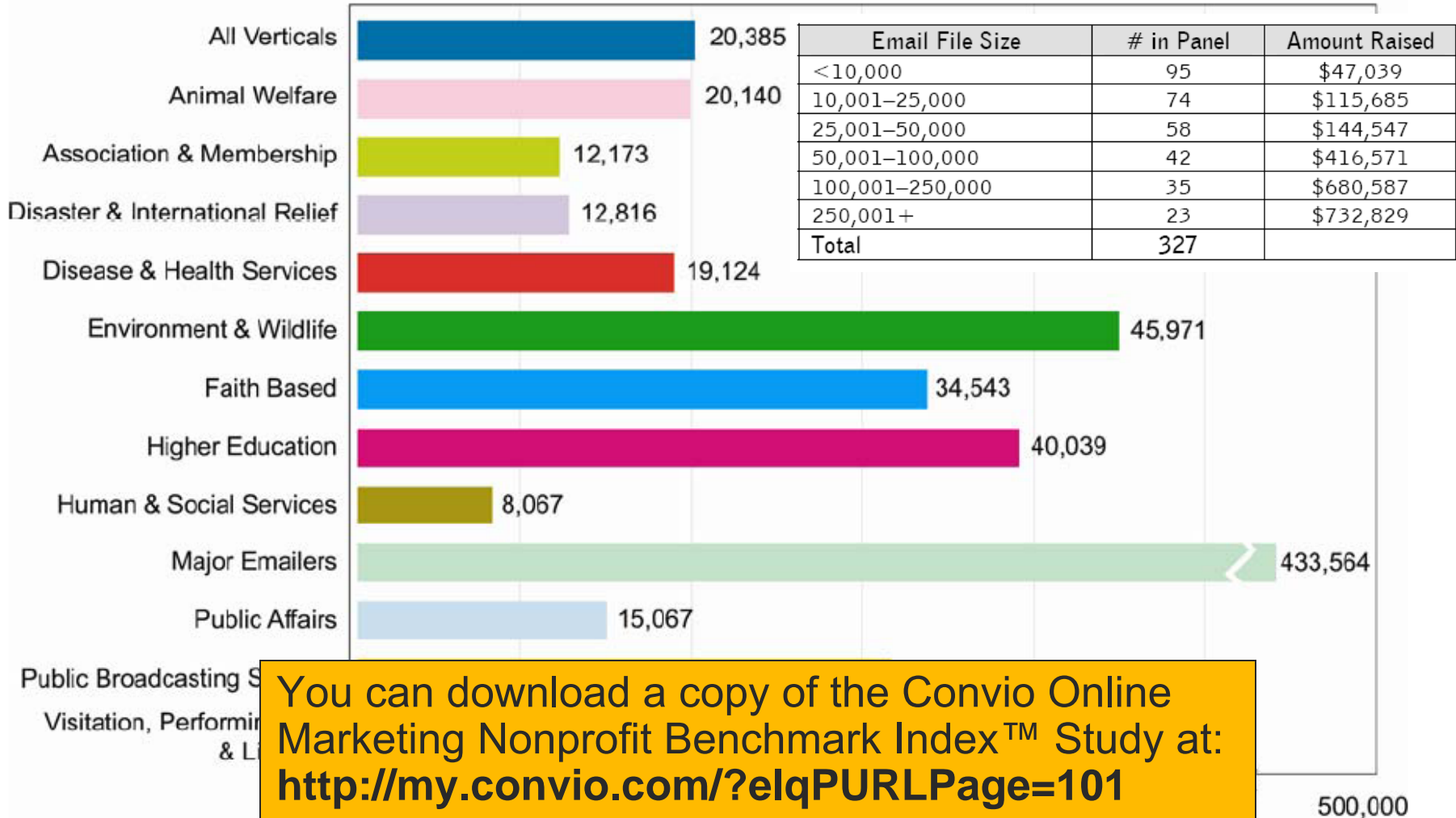
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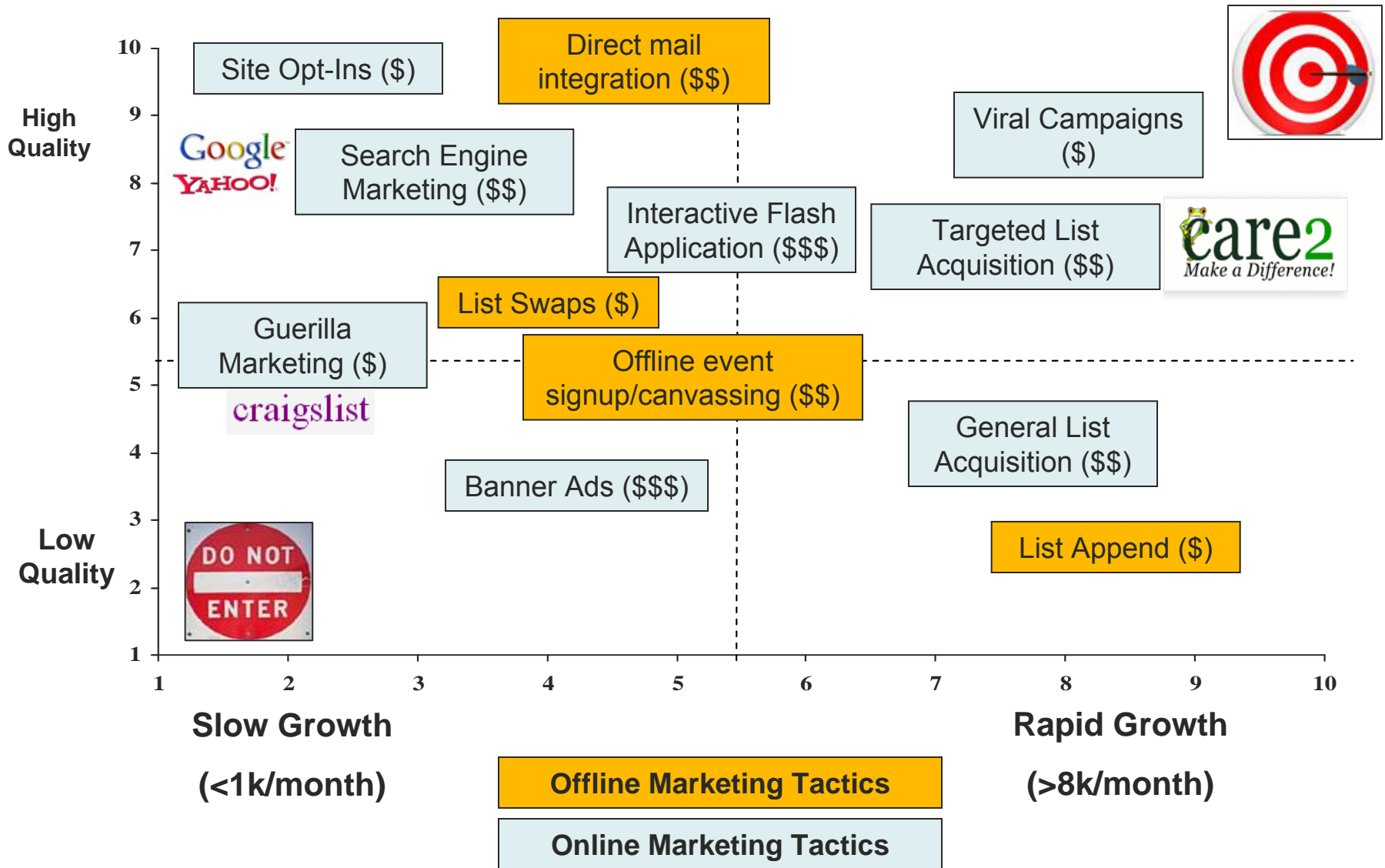
Non-Profit Email File Size Trends

Median Housefile Size as of June 30, 2007, n = 419



You can download a copy of the Convio Online Marketing Nonprofit Benchmark Index™ Study at: <http://my.convio.com/?elqPURLPage=101>

Sources to Build Your Housefile



Site Opt-ins

- Are sign-up opportunities prominently placed on your site?
- Do you have one or more opt-ins on your homepage?
- How are your opt-ins positioned?

The screenshot shows the homepage of America's Second Harvest of Wisconsin. The header includes the organization's name, logo, and navigation links: About Us, Virtual Tours, How You Can Help, Agency Info, News, Employment, and Donate Now. The main content area is divided into several sections:

- Seasonal Promotion:** A red banner for "Future Events" with a "Learn More" link.
- Second Harvest News:** A red sidebar with links for Newsletters, Features, Press Releases, Annual Report (pdf), and Hunger in Wisconsin 2006.
- BBB Accredited Charity:** A logo for BBB Accredited Charity with a link to "Click to check our charity report".
- BACKPACK BUDDIES:** A section with a cartoon character logo, text describing the program, and a "View this event" link.
- HIKE FOR HUNGER:** A section with a logo, text describing a 2.5-mile walk, and a "View this event" link.
- FEED YOUR SOUL:** A section with a logo, text describing a charitable art auction, and a "View this event" link.
- Opt-in Form:** A sidebar on the right with the headline "Until hunger is gone, we'll be here." and buttons for "DONATE", "REGISTER" (with an "Email Address" field and "GO" button), and "TELL A FRIEND".
- Footer:** A blue bar with navigation links and copyright information: "© 2008 Second Harvest Food Bank of Wisconsin. All rights reserved. Created by Red April, LLC".

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A four-point plan to impact year-end online fundraising:

1. Grow your email list

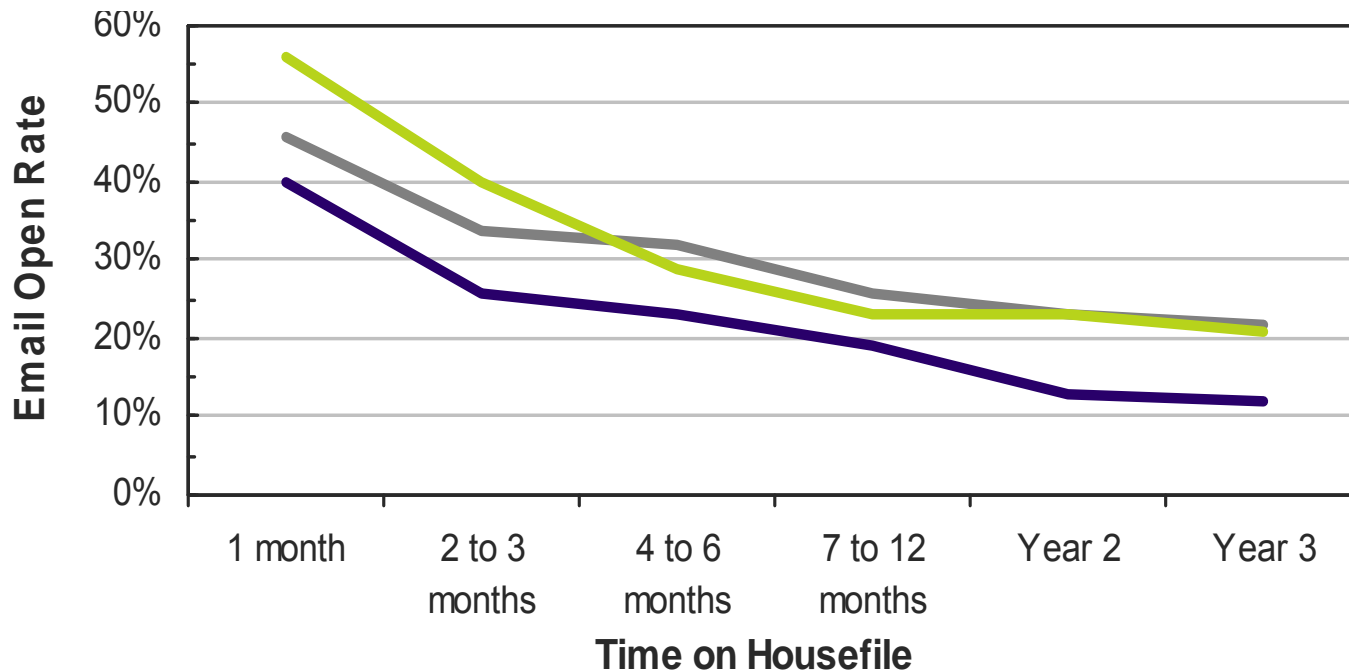
2. Communicate regularly

3. Plan a year-end campaign

4. Need help? Consider Convio Go!

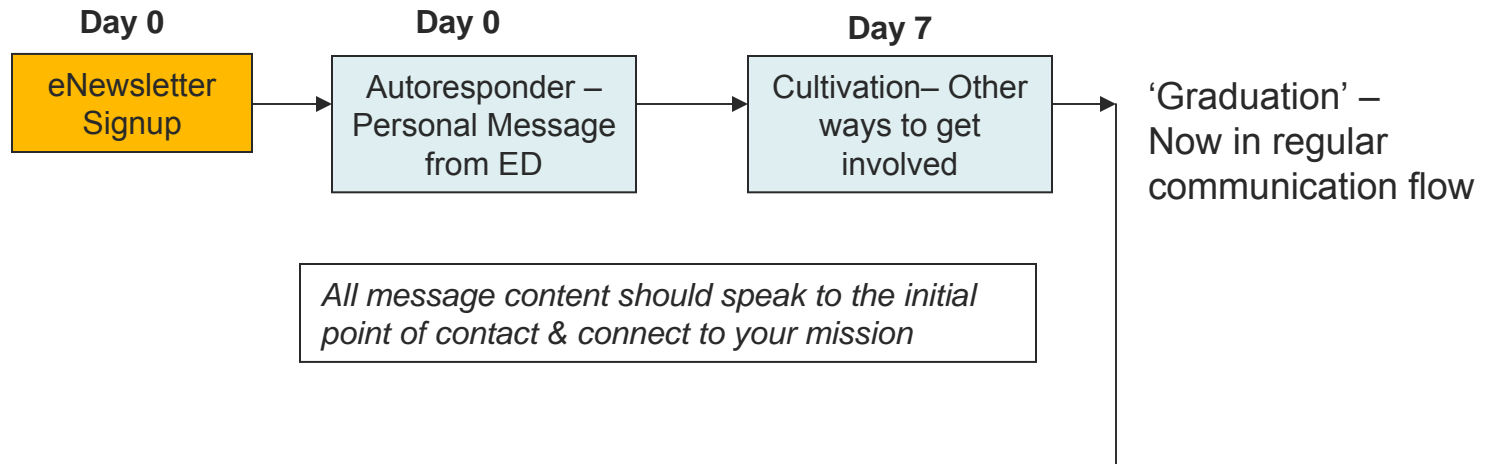
How do you welcome new constituents?

- Nonprofit organizations lose access to a stream of new online constituents as time progresses



Source: Analysis of 3 major nonprofits

Welcome Messages: First Impressions Matter



New Constituent is suppressed from general communication until 'graduation'.

Ongoing Communication Flow



Put a human face on all messages by highlighting specific goals, recent successes, inspirational stories, etc.

Welcome Messages – Adding a Personal Touch


■ Do your initial messages:

- ▶ Establish your brand?
- ▶ Establish your voice?
- ▶ Reinforce your mission?
- ▶ Convey warmth?
- ▶ Invite action?

■ Simplicity works:

- ▶ Basic stationary
- ▶ Simple layout
- ▶ Easily reproduced

If you are unable to view the message below, [Click Here](#) to view this message on our website



Dear System,

This letter is my first opportunity to welcome you to the new DPS Officer's Association website and online support initiative. The DPSOA serves the men and women of the Texas Department of Public Safety as their voice and advocate. I have enjoyed a long and warm relationship with our supporters and I am excited about this new approach. It will be informative, helpful, and rewarding.

The DPS Officer's Association will continue all the programs with which you are familiar including the Scholarship Program, Emergency Relief Fund, Anti-Drug Education, and also provide useful information. For the first time our visitors and supporters will be able to not only donate online but they can purchase all of the DPSOA merchandise on line as well. This is a welcome departure from the manner we have done business in the past, and I sincerely hope it is an enjoyable experience for each of you.


Thank you for your past interest and support of the DPSOA and our programs. The DPS Officer's Association depends on public donations and that makes you the most important part of DPSOA. Without your help would be impossible to accomplish many of the things we do. My life long commitment has been improvement in the general welfare of DPS personnel makes for safer streets and highways and better communities.

I pledge to be open, honest, and responsible with the financial support you give to DPSOA. Please take the time to think about DPSOA and what you can do to support us.

Thank you,

Brian Hawthorne

From the desk of




Brian Hawthorne

[Donate Now](#)

[Tell A Friend](#)

Our Mission:
We are the DPS Officer's Association. We serve the men and women of the Texas Department of Public Safety who daily pledge their lives to protect us. To act on their behalf is our calling, our mission.

2007 Successes:
>> DPSOA grew to 3600 members
>> DPSOA Granted \$119,929.00 in scholarships, and \$82,500 in officer death benefits.

POWERED BY 

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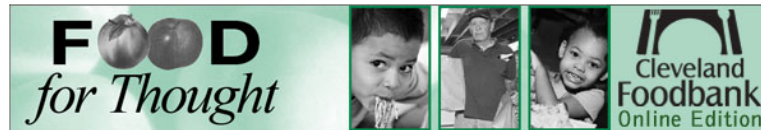
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Establishing Regular Communications

eNewsletter Template

Announcement Template

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Forward to a Friend | Donate | www.clevelandfoodbank.org

Welcome to the first online edition of Food for Thought!

Your support of the Cleveland Foodbank is allowing us to do more than ever to feed hungry men, women and children across Northeast Ohio - so much that we can't say it all in our offline newsletter. Our online edition includes last-minute updates and news available only to you as a member of our online community. Like what you see here? Please [share this message with others](#) and ask them to join us in the fight to end hunger in our community

Great News - Foodbank to Receive Much Needed Food



Relief for hungry northeast Ohioans should arrive soon, thanks to approval of the Farm Bill by the Congress last week. The long-awaited Farm Bill could not come at a more important time, as the demands of a falling economy and rapid increases in food and fuel prices escalate the need for hunger relief. At the Cleveland Foodbank alone, we estimate that we will be able to provide an additional 1.5 million meals in northeast Ohio in the year ahead, once this bill is finally enacted.

Our service territory's Members of Congress who voted in favor of the Farm Bill included Sen. Sherrod Brown, Rep. Stephanie Tubbs Jones, Rep. Dennis Kucinich, Rep. Steven LaTourette, Rep. Betty Sutton and Rep. Ralph Regula.

Please take a moment to contact these members' offices and let them know how valuable their support of the Farm Bill is. For Senator Brown, visit <http://brown.senate.gov/contact>; for Representatives, visit <http://www.house.gov/> for a listing of members.

April 2008 was a record-breaking month at the Foodbank!



This April, we distributed more food in a single month than any other month in our history. The total was 2,275,648 pounds of food, which is enough for approximately 1.7 million meals for low-income people in northeast Ohio. Our distribution continues to increase in response to [the escalating need for emergency food in northeast Ohio](#). Just last year, our member agencies in Cuyahoga county served 1 million more meals than they did the previous year. Thanks to our great volunteers, food and financial donors, this critically important food is available. [We couldn't do it without your help!](#)

You are receiving the Food For Thought eNewsletter by request at support@convio.com.

[Click here to update your profile.](#)

[Donate Now](#)

You're Invited!
Harvest for Hunger Recognition Ceremony on Thursday, May 29 at 8 a.m. at the Cleveland Foodbank. Join us as we celebrate the success of this year's Harvest for Hunger campaign, the Foodbank's annual food and funds drive. **To RSVP, please contact Lindsay Doerr at 216-738-2046 or ldoerr@clevelandfoodbank.org**

Food Drive at the Lake County Captains Game
June 10th at 7 p.m.
Bring a non-perishable item and receive \$2 off the ticket price to the game. Visitors are encouraged to donate "Super Six" items, our most needed food items, which include peanut butter, tuna fish, cereal, beef stew, canned soup and canned vegetables. [For ticket information click here.](#)

Community Support at Work!
For every \$1 invested in the Foodbank's Fresh Produce Initiative, we can make 21 pounds of fresh fruits and vegetables available to hungry men, women and children in our community! Make a donation today to [help support this program and all of our food distribution.](#)

If you are unable to view the message below, [Click Here](#) to view this message on our website



The vital link between food and hunger

Tell a Friend | www.clevelandfoodbank.org | Donate

Dear System,

Welcome to the Cleveland Foodbank's online community—our most effective way to keep special friends like you up to date on the fight against hunger in our region.

We are grateful for your interest in our mission and want to share our work with you in a timely way. It is your generosity and concern that make our community's efforts to fight hunger successful. With community support, we can:

- Provide enough food for more than 55,000 meals a day
- Provide hot meals and nutrition education to at-risk children through after-school programs
- Distribute over 4,000 prepared meals a day for local shelters, hot meal programs and other feeding programs
- Distribute 5.6 million pounds of fresh fruits and vegetables annually to families in need

We look forward to updating you about our work—this is your community's food bank, and we want you in the loop! You can [update your profile or email address](#) or [unsubscribe from our email list](#) at any time.

Please share our news with your friends and family. Every bit of help you provide is important, whether it is through donating, volunteering, or helping to spread the word. We are glad to have you join us in the fight against hunger—together, we are making a real difference!

Sincerely,

Anne Campbell Goodman
Executive Director

From the desk of



Anne Campbell Goodman

[Donate Now](#)

Your subscriptions:

- Food For Thought
- Advocacy Updates
- Volunteer Updates

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What's in our Food for Thought newsletter?

[View a recent online-only edition »](#)

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15500 South Waterloo Road, Cleveland, OH 44110
Phone 216.738.2265

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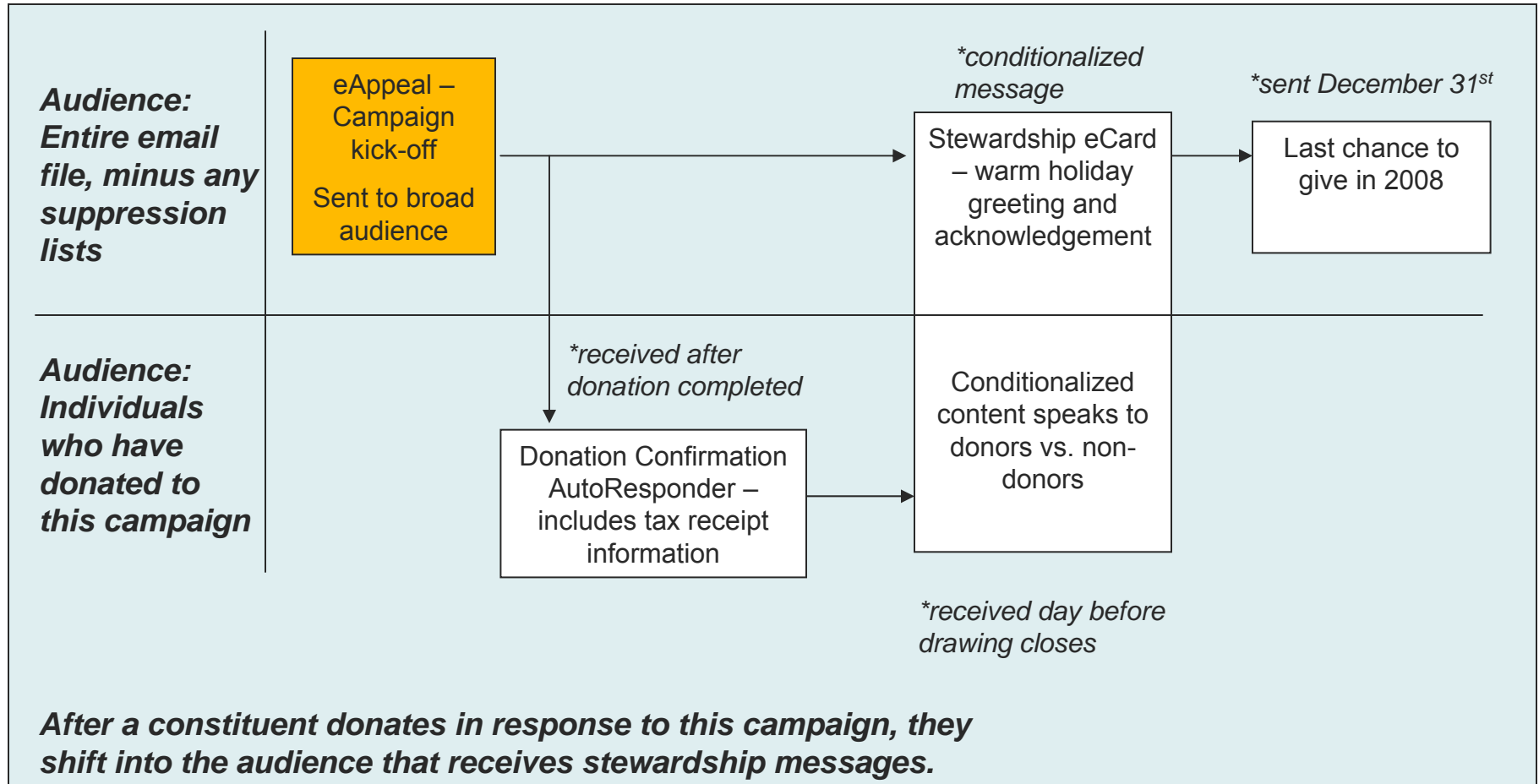
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Today's Objectives

A four-point plan to impact year-end online fundraising:


1. Grow your email list
2. Communicate regularly
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Year-End Email Campaign Structure



Year-End Campaign Example

Campaign Kick-Off


Spread Joy to the World
Donate

Your Gift of Jazz is Shared Around the World

Dear System,

As a Riverwalk Jazz listener and fan, you are part of a rapidly growing, global audience. I can't thank you enough for making it possible for me and the band to continue performing the music that brings so much joy to our hearts. Your love of classic jazz makes our life's work possible.

Help us bring this music to an even larger audience in 2007.

This is the first time I've written you, as part of our online audience, and asked for your support of Riverwalk Jazz.

I'm asking you to **SPREAD JOY TO THE WORLD** by helping the band and Riverwalk Jazz bring classic jazz to a global audience of online listeners in 2007. Your tax-deductible support of Riverwalk Jazz makes it possible for us to offer a wealth of music, history and commentary every week.



44 years ago, my father and I had a dream to create a jazz band to spread the music that we love.

Give \$40 and pay for the blank CDs used in the production of one broadcast.

Give \$100 to transfer one hour-long audio tape from DAT to CD, preserving the Riverwalk Jazz archive.

Give \$120 for us to purchase the rights for photos used in one JazzNotes.


Give \$500 to cover the cost of online audio streaming for one weekly broadcast.

Give \$1,000 and pay for the expenses to create and distribute Jazz Me News to more than 50,000 subscribers.



Our goal is to raise \$26,000 through the end of this year to cover the cost of audio streaming for all of 2007. Make a donation today to help us reach this goal.

I never dreamed our radio show would one day reach a global audience, but here we are 18 years later because of fans like you. I consider it a privilege to bring joy to the world through our music. I hope you will join me in this endeavor. Again, thank you for your love of classic jazz and your support of our work.

Sincerely,



Jim Cullum
Bandleader, Jim Cullum Jazz Band
President, Riverwalk Jazz


| riverwalkjazz.org |


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Last-Chance to Give


Spread Joy to the World
Donate

Your Gift of Jazz is Shared Around the World

Dear System:

Riverwalk Jazz is in its 18th year on the air, a feat I'm very proud to have accomplished with the help of you passionate jazz cats. Help us continue our online broadcasting next year with a tax-deductible, year-end donation.

To house the body of work created during the life of the project, including some 300 music documentaries broadcast as part of the Riverwalk Jazz radio series and more than 2,000 exciting performances by the band and their guests captured in live state-of-the-art digital audio, we formed a 501(c)(3) not-for-profit organization in 2005. Our mission is to present, preserve and promote classic jazz through not only the radio broadcasts and live music performances, but through an education curriculum to teach children to play jazz.

Jazz critic Nat Hentoff said, "What makes the Riverwalk Jazz radio series so distinctive is not only the quality of the music but also of the documentary programs that become valuable additions to jazz history."

We have set our sights high—to share this amazing legacy of music with listeners around the world. To do this, I wrote to you, a member of our online audience, for the first time recently to ask for your financial support of Riverwalk Jazz. I'd like to ask you to help us reach our goal of \$26,000 to be raised by the end of the year. Your online year-end donation towards the goal of \$26,000 to be raised by the end of the year. Your online year-end donation towards the goal of \$26,000 to be raised by the end of the year.

and seeing on our Web site, please make a year-end, tax-deductible gift which will play music out there for one and all. Your gift, large and small, will put the project on a more secure footing. We are this great music with an even larger audience in 2007.

spread jazz worldwide family and for the heartfelt messages. Keep those messages coming. We have your regards for a very Happy New Year!

Elliott


| riverwalkjazz.org |


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Stewardship eCard



Happy Holidays to You and Yours from The Riverwalk Jazz Family...

and Santa's little helpers Elliott, Sebastian, and Jac!

Listen – Greetings from Jim Cullum

Donate | **Share this Greeting with a Friend** | **Listen**



| riverwalkjazz.org |



Unsubscribe | Update Profile

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Does Your Organization:

- Believe that the Internet is a critical channel but wonder how to get started?
 - ▶ You have no online marketing plan, or
 - ▶ You're having difficulty executing on a plan, or
 - ▶ You have executed on a plan, but you're not sure what you've accomplished
- Have limited resources to create online content?
- Have difficulty reaching internal consensus on how to get started?
- Believe that learning best practices from experts and industry peer groups is a key to success?

Introducing Convio Go!

Convio online fundraising software



A proven action plan



**A team of your peers and
Convio coaches to guide you**



**Tangible results today and the
knowledge to build on and expand your
online programs**

How Does it Work?

- Your software solution deployed in an **established, best practice configuration**
- A **proven plan** to achieve specific results in your first year
 - ▶ Grow your house file size
 - ▶ Begin regular communications to your constituents
 - ▶ Launch fundraising campaigns
- A **virtual team** to ensure your success
 - ▶ Convio executes quarterly campaigns incorporating best practices
 - ▶ Broadcast monthly or quarterly email communications
 - ▶ Review and explain results
 - ▶ Lead best practices sessions to connect you with peers
- The **in-house expertise** and **product knowledge** to build future programs

What Is Included?

- An **email newsletter** template and **fundraising page** layout based on industry best practices
- A **registration form** and **widgets** to drive registration from other parts of the site
- Specific campaigns managed by Convio to:
 - ▶ Grow your email list
 - ▶ Cultivate new opt-ins
 - ▶ Convert prospects into donors
 - ▶ Convert one-time donors into recurring donors
 - ▶ Maximize year-end fundraising


Email & Campaign Templates

Convio's Responsibility

- Provide templates and content guidelines for using the templates
- Produce, test & schedule emails based on content you provide

Your Responsibility

- Provide copy & photos that meet the content guidelines
- Manage internal approvals to meet Convio Go! program deadlines

Convio 

VELOCITY ONLINE NEWSLETTER WORKSHEET

Client: [org full name]
Client Convio Short Name: [Convio short name]
This completed form due to Convio by: [specific recurring date]
Sender email address: [org email address]
Sender name: [org name]

Submission instructions – Send this completed form to getready@convio.com. Your organization's Convio short name, the word "NEWSLETTER", and your due date. For example, 4/11/08. If you submit your newsletter multiple times prior to your deadline, all but your last one will be ignored. **Please note that if you miss your submission deadline, submit an incorrect subject line of your email submission does not follow the required format, your submission will be delayed or canceled.**

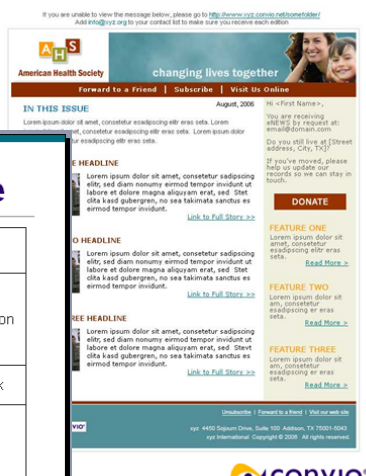
NEWSLETTER SUBJECT LINE	
Requirements 60 Characters or less (approximately 10 words) [Enter your subject line here]	Best Practices Think of your online new constituents are most like constituent only reads the want him or her to know communication, dedicate your constituents build faith another part to a "teaser" relevant right now. This theme of this edition or a
IN THIS ISSUE Requirements 300 characters or less (approximately 50 words) [Enter your content here]	Best Practices Avoid using this space to readers will quickly learn of your newsletter) if this providing more information related to the subject line paragraph a supporter re him or her to know?

Some examples:

- November News: [unclear]
- Winter Newsletter costs down
- Monthly eNews – record

eNewsletter Example


- Personalized
- Tell A Friend and Donate links above the fold
- Excerpt-style newsletter, with monthly headline feature



Deconstructing the eNewsletter Template

- Top-priority links & branding consistent from month to month
- Headlines & graphics change, but dimensions stay the same
- Color scheme changes, but placement is consistent

Branding	
In this Issue	Personalization
First Headline	Donate Link
Graphic & Lead Story Copy	Feature #1
Second Headline	Feature #2
Graphic & Second Story Copy	Feature #3

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Typical Campaign Calendar

	Q4 2008	Q1 2009	Q2 2009	Q3 2009
Experience	Year-end Campaign	eNewsletter Launch	Housefile Building Campaign	Fall Fundraising Campaign
Consulting	Best Practices: Maximizing year-end giving	Best Practices: Cultivating & Motivating New Supporters	Best Practices: Outreach tactics for finding new supporters	Best Practices: Creating a compelling ask for support
Community	Q&A: Donation forms and fundraising appeals	Q&A: Email production and recurring messages	Q&A: Tell-a-Friend, eCards and Rewards programs	Q&A: Donation forms and fundraising appeals

Your Virtual Team

- Product Specialist
 - ▶ Six initial sessions with a product specialist to get your software up and running
- Convio Interactive Consultant
 - ▶ A Convio interactive consultant will lead you in two best practices calls per quarter
- Peer Group
 - ▶ Regular “peer group” calls to discuss results and share best practices

Build a Strong Foundation

- We'll “teach you how to fish” and build your in-house knowledge through...
 - ▶ Proven practices based on our years of online marketing experience
 - ▶ Clearly defined goals focused on results
 - ▶ Best practices in technology, marketing and other industry topics

- After one year, you will know how to:
 - ▶ Develop campaigns to grow your email list
 - ▶ Convert prospects into donors
 - ▶ Build a sustainer campaign to turn one-time donors into recurring donors
 - ▶ Maximize year-end fundraising
 - ▶ Run reports to track campaign progress
 - ▶ Use the core Convio Fundraising and Email Marketing products



Convio Go! Success



“The highly-structured, best practices approach of the Convio Go! program gives us the confidence we need to make this key investment. The whole premise of the program is a detailed, proven plan with expert assistance in executing this plan. This low-risk approach is very appealing.”

Yellowstone Park Foundation



“Convio Go! provides us with not only world-class tools at a reasonable price, but we have a virtual team to support our online success, access to a community of peers to share ideas and solve problems, and the ability to grow into the full Convio solution.”

Mitochondrial Disease Action Committee

For Additional Information

- Learn more about Convio Go! please visit:
www.convio.com/go
- Questions? www.convio.com/contactus