2010 RESOLUTIONS GUIDE

Do-it-yourself tips to revitalize your nonprofit's online initiatives

INTRODUCTION

Last year proved to be challenging for many nonprofit organizations, but the outlook for 2010 is promising. There's no better time than the new year to get a fresh start with online fundraising, marketing and communications initiatives that will move your mission forward. More organizations now view their online initiatives and integration with their traditional channels as a mission-critical function. And, with good reason:

» Prospects and donors say email from the organization has the same level of influence as direct mail on a person's decision to give.[1]
» Nearly half of online consumers and more than half of the "wired wealthy" visit a charity's website before making a donation, regardless of whether they donate online or through traditional channels. [2]
» Yet, more than half of these prospects and donors do not believe nonprofit websites are providing the information they need to make a gift.[2]
» While most online consumers and the wired wealthy now say they prefer to give online, they are multichannel donors – 61 percent of online consumers report writing and mailing a check, 38 percent gave at an event, and 16 percent responded to a phone call.
» The lifetime value of a donor who engages with a charity through online and offline channels is three times more than that of those who engage offline or online only.[3]

The second annual Convio Resolutions Guide on how to make nonprofit initiatives more successful is based on discussions with nonprofit professionals, industry experts, and partners who are deeply engaged in the nonprofit sector. With the difficult economy and the trends favoring online and integrated marketing, starting the new decade on the right foot is more important than ever.

Because many of you expressed that it was difficult to select just one resolution, we selected the five most popular areas of focus that will support your fundraising, marketing and advocacy efforts:

1. Reconnect with donors by giving new options of engagement
2. Increase fundraising for participant-led events
3. Use social media to reach the next generation of supporters
4. Improve multichannel engagement/integration
5. Evaluate your website's effectiveness

Each section of this guide contains best practices and do-it-yourself 'DIY' tips that will help you keep this year's resolutions so you can make improvements and make a difference. We've also included some related success stories from your peers, along with information that showcases ideas contributed to our online community in 2009. The best part about resolutions is that you don't have to do an entire makeover to see results. Like a fresh coat of paint, a few creative ideas and planning could make this year the best one yet for your organization!

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[1]The *North American Technographics® Omnibus Online Survey, Q4 2009(US)*, a commissioned survey conducted by Forrester's Technographics® on behalf of Convio

[2]*The Wired Wealthy, Using the Internet to Connect with Your Middle and Major Donors*, Convio, SeaChange Strategies and Edge Research, 2008

[3]*Integrated Online Marketing (eCRM) with Direct Mail Fundraising*, a quantitative assessment prepared by Convio and StrategicOne, 2007

RECONNECT WITH DONORS BY GIVING NEW OPTIONS OF ENGAGEMENT

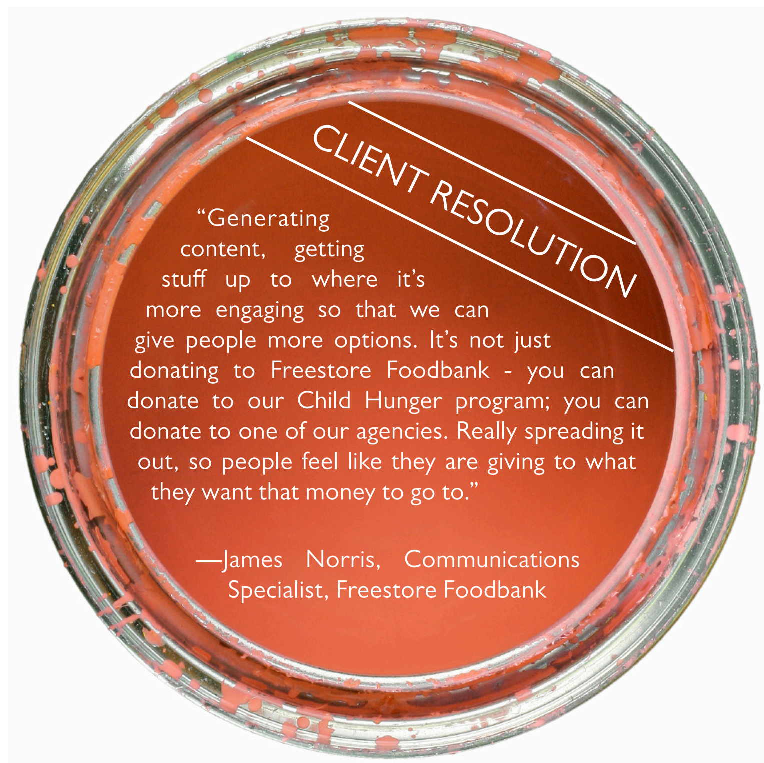
Your year-end fundraising efforts have wrapped up, and now you're scrambling to find new ways to reconnect with people who just gave to your cause. Or maybe you noticed that some of the usual donors didn't give this year, so you're trying to find a way to bring them back into the fold. Whatever the situation, there are a number of best practices that you can put into play to keep donors – past and present – engaged.

1. **Do your homework and use what you know.** Remember, the people who you are targeting are previous donors, not cold prospects. This means you have information about these individuals already. Sift through your donor data and group individuals based on different criteria (e.g., those people who gave at the end of last year, individuals who always give at an annual event, and those who didn't give at all this year).

2. **Create re-engagement strategies for each group.** After you have grouped your donors, you can start to develop re-engagement strategies based on their past interactions. As you develop these strategies, be mindful of the associated costs. You don't want to spend $25 to try to re-engage a donor who gave $10 two years ago! For donors who gave last year but unfortunately not this year, consider creating a targeted message that presents non-financial ways for them to stay actively involved with your organization. You don't need to openly acknowledge in your communications that these people haven't made a gift, but you should be mindful of possible financial woes. Work around that topic by reminding them about volunteer opportunities, suggesting a petition they could sign or asking them for names of friends or family that might be interested in helping.

3. **Get them involved before you ask.** The last thing you want your donors to think is that you only contact them when you want money. Show that you value your relationship with them by offering a few simple ways for donors to provide you with their input. Send them a survey or post a quiz on your website. Both options will get these individuals re-engaged in a way that would also benefit your organization. If an incentive might boost participation, then offer a free ticket to an upcoming gala or event.

4. **Promote premiums or benefits.** Premiums are a great way to give your supporters something in return for their donation. These perks can be particularly effective as part of a re-engagement strategy for lapsed donors. Remember, don't just ask ... bring your premiums to the forefront to show the donor value for their money. Get creative and consider unique premiums, such as an 'inner circle' meeting with your Executive Director, for higher-end donors who have demonstrated their strong affiliation with your cause in the past and deserve something special. During the difficult economic times, donors are often torn between giving a gift to charity or a gift to a friend or loved one – premiums or benefits allow them to do both.



5. **Communicate stewardship around affinities.** After a donor has expressed a specific affinity or interest, focus on that topic in future communications. Is a donor concerned about preserving a green space in their state? Then share with them your progress thus far and your plans to protect the area in the future. Don't be shy about mentioning your organization's additional needs for that particular program. A subtle ask might motivate the donor to make a second donation or engage with your organization in another way.

6. **Monthly giving.** Although it's not necessary to remind people of the troubled economy (trust us – they know!), it is acceptable to suggest monthly giving as an option to break down a larger commitment into a series of smaller ones. Promote this option to those donors whose gifts were noticeably smaller in 2009.

7. **Create a shopping experience based on actual needs.** A virtual e-store that ties giving directly to a need can be a very successful means of re-engaging donors by helping them feel a stronger connection to your cause. A donor realizes that they can't give you enough money to relieve an epidemic, but they can give you enough to buy a month's worth of medication for one person and thus have a positive impact on someone's life.

8. **Pick up the phone.** Email is a cost-effective means of reaching out to people, but sometimes a phone call can be the extra touch that makes all the difference. Of course, this strategy might not be feasible for all groups in your list; it is best suited for a limited number of targets, such as major donors. But before you pick up the phone, take a look at the individual's giving history so that you can talk about topics that are meaningful to them.

9. **Do some spring cleaning.** Data hygiene is a necessary evil if you want to keep your list clean and response rates up. Email donors and ask them to verify the contact details that you have on file, as well as their email subscriptions. Take this opportunity to request new information that might be missing – a zip code, postal address – and encourage them to check out new information on your website.

10. **Make sure it's relevant.** Don't promote something just because it's important to you. Your donors don't care about your new logo or that you just moved offices. They want to think that you are speaking to them and know what matters to them. So, before you press 'send,' put yourself in your donors' shoes and ask yourself, "If I were them, would I care about this topic?" If the answer is "no," then press 'delete.'

DIY: GET YOUR SUPPORTERS ENGAGED

ENGAGEMENT » LOYALTY » GROWTH

Follow these five steps as a means of engaging and empowering your volunteers, donors and other supporters, increasing their loyalty over time, and growing your organization's revenue.

1. **Opportunity:** You have to offer a way for constituents to work with and for you, and the offers must be numerous and varied. Treat constituents as individuals – if they are going to work on your behalf they want to have some say in what kind of work they do. Provide different kinds of opportunities, ranging from personal fundraising pages to event participation, content sharing to profile badges; each opportunity should occur across a variety of time frames and campaigns. According to research by Forrester's Technographics® for Convio, more than 40 percent of all online consumers report that traditional word-of-mouth and social networks influence their giving and nonprofit engagement. Give your best supporters the opportunity to influence family and friends.

2. **Encouragement:** Empowering constituents is no "field of dreams" effort. Simply making an offer doesn't mean they will come. Organizations need to build momentum by providing encouragement and examples. Have your staff use the opportunities personally. Try specifically reaching out to your most active constituents, or offer incentives to your entire constituency. Communicate how great the opportunity is, what it means, and how easy it is to take action.

3. **Education:** Getting constituents engaged in personal efforts is only half the battle; the other half is making sure they are successful. Choose tools that incorporate guidance and best practices or provide how-to guides in written and video formats. Check in periodically with your empowered constituents and ask them if they need anything. If you hear the same answer a lot, provide a public, easy solution.

4. **Promotion:** You should make sure your organization's audience is aware of these individual efforts. Incorporate success stories from your empowered constituents into your homepage content and your newsletter. Use social media tools to broadcast the efforts of those constituents who consent.

5. **Recognition:** Everyone likes to be recognized for their efforts. Be sure to let each empowered constituent know how much you value them and how their efforts are helping the organization's mission. Highlight the successful efforts in every place you can. Provide a rewards schedule and follow through with it.

CLIENT EXAMPLE

Feeding America (formerly named America's Second Harvest) feeds America's hungry through a nationwide network of member food banks and engages our country in the fight to end hunger. Convio's single integrated platform allows Feeding America to practice true constituent relationship management (CRM) by driving constituents through a pathway based on their stage of engagement with the organization. The organization has increased its capacity to find new prospects and build deeper relationships with their existing donors. Feeding America can now easily and quickly send out donor cultivation communications, build and modify online donation forms, and effectively segment, test and measure results, enabling the organization to customize online information, gift levels and specific campaigns to individual donor preferences.

By partnering with Convio Strategic Services, Feeding America was able to plan and launch "Fill America's Fridge," an engaging interactive email campaign to increase per person giving and create and execute a strategy involving corporate partnerships online. This creative online fundraising campaign included a series of three email appeals and a specially designed landing page with a virtual refrigerator that "filled up" based on the size of the donor's gift. The landing page indicated how many meals the donation would provide, and included a link to a donation form that was pre-populated with the pledge amount. Those individuals who went to the landing page first donated more per person than those who went straight to the donation form. Providing supporters a visual representation of their giving was so popular that other nonprofit organizations have since used a similar strategy. From the first annual "Fill America's Fridge" campaign, Feeding America raised $40,000 in online donations, in addition to funds received through a corporate partner match with Rent-A-Center. Within two years, Feeding America increased online donations by 40 percent and grew its email list by 10 percent.

For other stories of your peers' successes, visit: www.convio.com/our-portfolio.

INCREASE FUNDRAISING FOR PARTICIPANT-LED EVENTS

Participant-led fundraising events can be an extremely effective way to raise money for your organization because they enable you to tap into your supporters' networks of family and friends. But, as with any fundraising campaign, the implementation of best practices can boost results significantly and make your life easier over the long run.

1. **Start early.** It sounds obvious, but this best practice is one that is often overlooked, especially by those who tend to procrastinate! The earlier you start, the more opportunity participants will have to fundraise.

2. **Establish metrics and track performance.** Sift through last year's information (if it's available) and use this valuable data to glean insight into metrics to track for your upcoming event. Below are a few suggestions, divided by category:

   » Timing of event launch – Look at registration highs and lows to determine the best time to launch your event (e.g., before or after a certain holiday; in a certain month).

   » Recruitment – Track the number of repeat versus new participants, lead sources, connections to your cause, and responses to recruitment emails.

   » Fundraising activities – Measure the percentage of participants who are actively fundraising, the number of gifts received per participant, the breakdown of fundraising results of team members versus non-team members.

   » Post-event activities – Launch a survey to find out what people liked, what areas you can improve upon, and if people plan to participate again.

3. **Set goals.** Use the metrics you establish to set quantifiable goals for your next event. Include a couple of stretch goals to keep everyone motivated. Your goals should span several different areas, such as registrations, donations, teams, and gift size. The idea is to keep you focused on the main drivers that will maximize fundraising results.

4. **Creating a communications plan.** Before registration opens, think about the different messages you want to send, when it makes sense to send them, and how you want to segment your audience (e.g., athletes vs. people who are invested in your mission). You should communicate regularly with your various audiences to keep them engaged. As you execute the plan, track how well your emails perform, and watch your opt-out rates. You might need to tweak some elements (e.g., graphics, copy) as your event gets closer.

5. **Get to know your top five percent of fundraisers.** These individuals bring in more than 50 percent of the fundraising dollars for participant-led events. Take the time to get to know them, their needs, and why they do it. Understand what ties them to your cause. Equipped with this valuable information, you can reach out to them personally each year to show your appreciation and encourage their ongoing loyalty.

6. **Target past participants and active fundraisers.** Those individuals who have taken part in your event in the past, or those who are already fundraising actively for the event, are the people most likely to be successful fundraisers. If you are strapped for time and resources, concentrate your efforts on keeping these individuals motivated and actively soliciting donations.

7. **Tailor your email messages.** Although it requires more effort, tailored messaging will increase response rates and boost fundraising results. Create customized emails for each audience – team captains, past participants, new participants, past donors, new donors, and prospective participants. Determine calls to action for each group.

8. **Use multimedia.** Videos are a fun, interactive way to engage participants and teach them how to use the fundraising tools you have made available to them. Many people would prefer to watch a five minute clip, rather than dig through pages of content to find answers to their questions. You can also use videos to promote the event and recruit participants. For example, American Heart Association promoted their *Jump Rope for Heart* event, targeted at students, through a YouTube video that featured a teen pop star.

9. **Provide participants with email templates.** Make it as easy as possible for participants to send out fundraising emails to their friends and family. Minimize the obstacles involved by preparing a template for them, which they can then customize as they see fit. Encourage participants to include their personal stories. Remember, your email template should be compelling enough to generate donations even for those participants who are too busy to modify the message. The sample wording should explain your organization's mission and provide a clear call to action. More than 25 percent of online consumers say an email from a family member or friend influences their decision to give, so making it easy for participants will help your fundraising efforts.

10. **Use incentive programs.** By offering prizes to participants or by entering their name in a drawing, you can coach them towards important fundraising milestones. Incentive programs are also a great way to learn about what motivates your participants. Making these people feel special might be enough to persuade them to return next year. Don't be shy about asking sponsors to donate items so that you have something to give away.

For best practices of individual fundraisers, download *A Race Against the Clock: How to Maximize the Fundraising Success of Your Event Participants*, which also includes a one-page tip sheet.

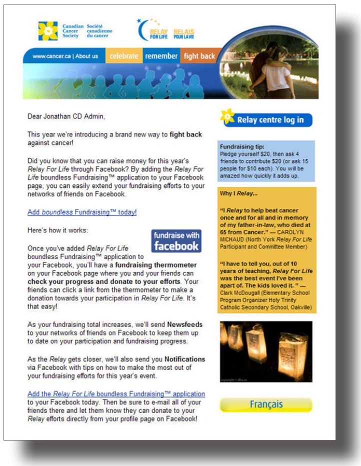
DIY: TIPS FOR EMAIL COMMUNICATION[1]

- ☑ Outline the key points you want to make in an easy to understand format
- ☑ Reread your message and double check for grammar and misused words
- ☑ Use a meaningful description in the subject line
- ☑ Use short paragraphs
- ☑ Get personal
- ☑ Limit text formatting like **bold**, *italics* and underlines
- ☑ Include a mission-focused message
- ☑ Limit the number of topics in each email
- ☑ Coordinate your message with other departments
- ☑ Opt out page should allow them to receive LESS information without opting out of all email
- ☑ Link to tell-a-friend
- ☑ Include a call to action

[1] Moving the Needle: How to Increase Event Fundraising, a presentation by event360 at 2009 Convio Summit

CLIENT EXAMPLE

The [Canadian Cancer Society, Ontario Division](), a provincial division of the national community-based organization of volunteers, whose mission is the eradication of cancer and the enhancement of the quality of life of people living with cancer, used Convio functionality to send email strategically for recruiting past Relay For Life participants, converting past donors into participants, and increasing overall participation, fundraising, and retention of the current year's participants.



The comprehensive email marketing plan ensured consistent messaging across more than 100 Relay for Life events. The emails, which consisted of nine recruitment messages and 13 engagement messages, were sent on a predetermined schedule based on each individual event's date. Emails focused on recruitment utilized personalized content and segmentation to target previous participant messaging, whereas engagement messages included conditionalized fundraising tips for registered participants. The emails were also used to introduce and help promote a new revenue channel, the Boundless Fundraising™ application for Facebook®, which utilizes Convio APIs to allow participants to fundraise for an event on their Facebook pages. Email open rates reached as high as 45 percent, and nearly five percent of event registrants were sourced from recruitment emails.

USE SOCIAL MEDIA TO REACH THE NEXT GENERATION OF SUPPORTERS

For Generation Y, social media tools are plentiful and form a fundamental part of their everyday life. For you, this means that you must choose from the many tools available – from social networks like Facebook and MySpace to video sharing sites like YouTube and microblogs like Twitter. But don't get wrapped up in the debate that social media and online is only for the young. According to research, 60 percent of seniors say they plan to give online and boomers are the fastest growing adopters of social media and 65 percent of boomers plan to donate online!

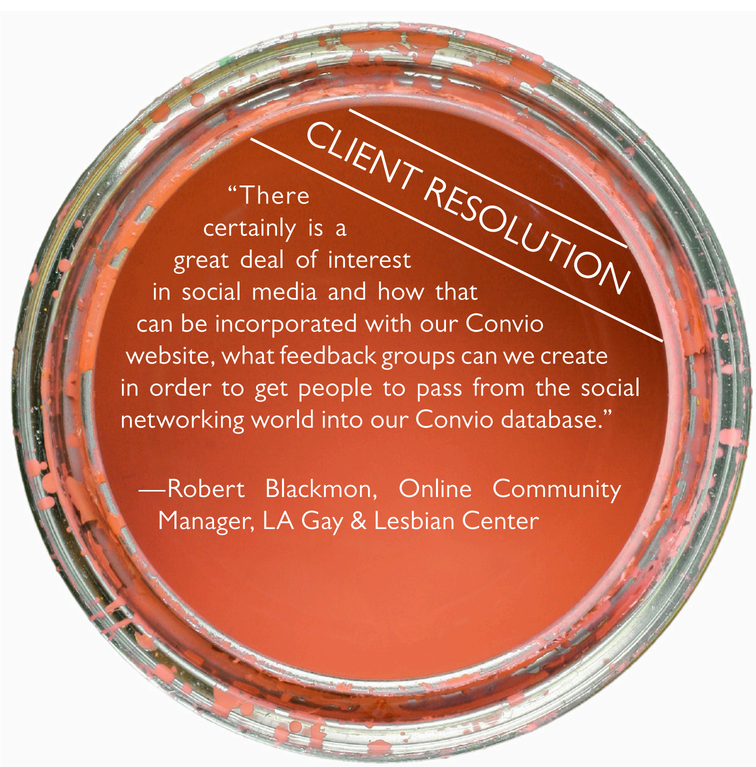
Social media tools represent the ideal channel for engaging this next generation of supporters and helping them influence others. While younger audiences might not have the financial resources to give to your organization today, don't discount them based solely on that factor as volunteering and engaging in telling your story is important to them. Follow these best practices during 2010 and you'll be on track for building long-lasting relationships with Generation Y, your future donors – you might even reach a few boomers and seniors along the way.

1. **Overcome skepticism.** This new generation is skeptical about just giving money – they question the impact of their gift. You need to make it tangible. As noted by Premal Shah, founder and president of Kiva.org, "If you can be transparent about how the money is being used, be it through MySpace-type profiles, it can motivate a lot of people to participate." This rings especially true in the world of social media, so phrase the value of your ask in terms that the person can relate to. And, make sure the ask is appropriate. These individuals don't have deep pockets, so acknowledge as much with donation forms that include smaller amounts.

2. **Offer alternate opportunities for engagement, not just donations.** Take the time to engage with Generation Y today and encourage them to get involved with your organization now through non-donation related activities. Again, their funds are limited, so you need to respect that. Use social media to bring these volunteer opportunities to their attention, and to also promote other action-oriented ways to get involved.

3. **Identify the influencers.** Folks of Generation Y are unlikely to join your Facebook group or follow you on Twitter based solely on outreach from your organization. Bombarded with so much media, they use their friends or influencers as filters to determine what they should pay attention to and what they should ignore. These people are more likely to watch what several key influencers in their lives are doing first. With this in mind, you need to identify a core group of people who care about your organization and cause, and then engage them so that they can in turn influence their peers. The trickle-down effect is key to your social media success.

4. **Collaborate, don't compete.** Your organization might be dipping its toes into the world of social media for the first time, but don't forget that social networks have been up and running for years. There might be people doing something that you don't know about for your organization using social media. Don't usurp their efforts and alienate those who are already trying to help you. Instead, try to engage with them, support them and supplement their efforts by adding to the conversation. Start by finding out who is doing what using social media and then share your content with them. Keep the end goal in mind: You want to reach as many people as possible. And if the best way to do this is through an influencer's existing Facebook group, then figure out how you can add value or supplement their efforts, not circumvent them.



5. **Generate buzz.** The viral nature of social media is perfectly suited for boosting awareness of your organization's efforts and campaigns. A photo in Flickr, a Tweet, a t-shirt worn in a YouTube video – it's these types of actions that are going to get your organization on the radar of Generation Y. They may not talk about your cause during conversations, but the fact that they're wearing a baseball hat with your logo in their Facebook profile picture can be enough to create some buzz.

If these best practices seem like a distant dream, don't despair. You might be one of many organizations facing challenges trying to get internal approval to proceed with a social media strategy. In this case, you might want to start with these tips on championing social media within your organization[1]:

1. Create a SWAT team of evangelists internally who fight and work for the cause.

2. Show small successes along the way to keep people believing.

3. Find others internally who are interested or already engaged in social media in other places (personal blogs, etc.).

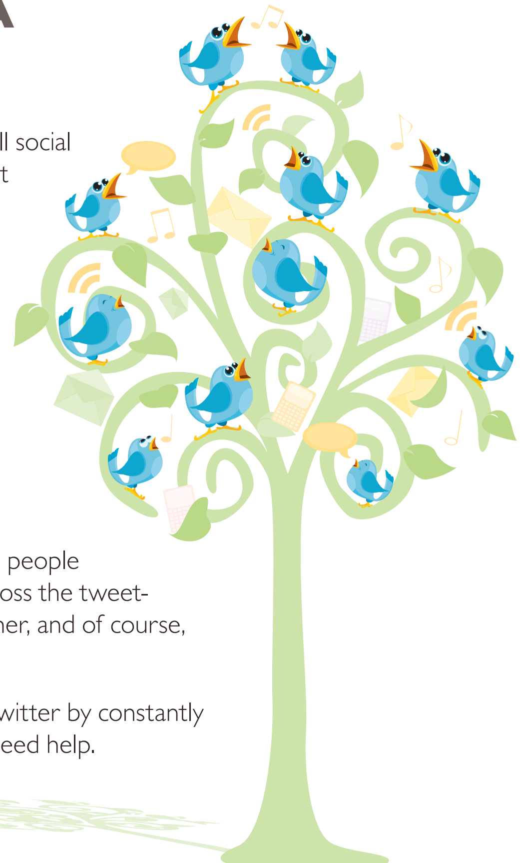
4. Recruiting older/more traditional people in the organization who don't get the worth and show them how viral and powerful these tools and channels can be to have them understand and evangelize with you (show how quickly things spread, how much more you can be doing with recruiting, teaching supporters in these spaces on top of other channels).

5. Find people in other respected organizations or competitors doing similar work and show them the success (or at least that these projects are not harmful!).

For more tips, visit: www.connectioncafe.com/posts/2009/march/championing-social-media.html.

[1] www.connectioncafe.com/posts/2009/march/championing-social-media.html

DIY: A LITTLE TWITTER GOES A LONG WAY[1]



Twitter is an easy way to reach a lot of people, if you provide great content. Like all social media tools, however, it takes nurturing. You must spend time building content that matters. Also, in Twitter, you can only reach as many people as your social graph includes, so be friendly, follow other people who share your interests, find people who care about your mission who also have a lot of followers and ask them to retweet your material.

These are some examples of nonprofits doing great, creative things with Twitter:

» **Sharing news** – Many nonprofits share news, articles, events, and resources via Twitter, simply by posting links in their tweets.

» **Tweet-ups** – The Blood Center of Central Texas held a tweet-up to encourage people to give blood. People from the Austin area who are on Twitter either came across the tweet-up or were informed by someone else via tweet, congregated to meet each other, and of course, donate blood.

» **Real-time customer support** – The MD Anderson Cancer Center listens on Twitter by constantly searching for keywords, in an effort to find people who are at the facility who need help.

[1] www.connectioncafe.com/posts/2009/march/things-to-do-in-twitter.html

Watch and Learn

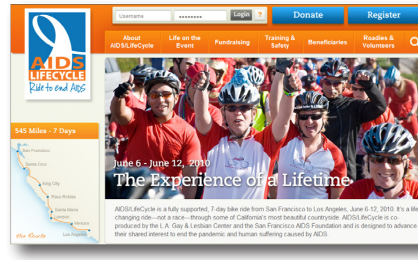
View a video of Convio Founder Vinay Bhagat speaking about video and social media as a key piece of online strategy.
Watch video »

Hear five recommended online tools for nonprofits, according to David J. Neff, former Director of Web, Film and Interactive Strategy, American Cancer Society High Plains Divisions.
Watch video »

Listen to five recipes for YouTube success straight from Ramya Raghavan, Nonprofit & Activism Manager at YouTube.
Watch video »

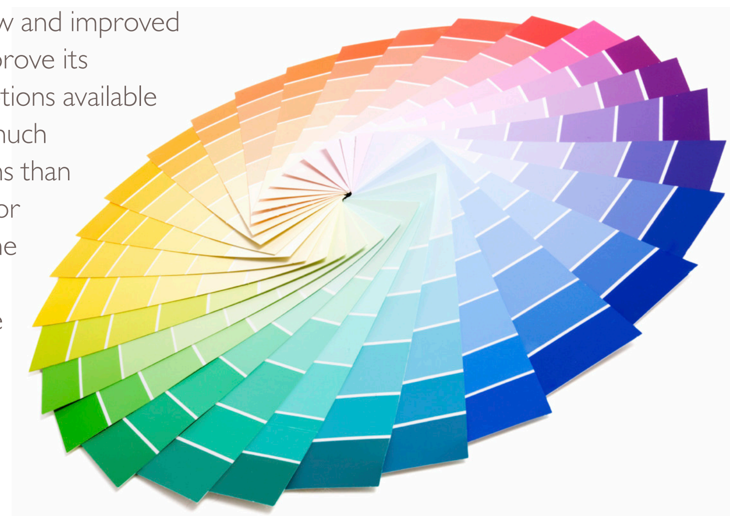
CLIENT EXAMPLE

The [L.A. Gay & Lesbian Center] and [San Francisco AIDS Foundation] created AIDS/LifeCycle, [www.aidslifecycle.org] a seven-day bike ride from San Francisco to Los Angeles that raises money and awareness for HIV and AIDS services. Using Convio TeamRaiser™, the two organizations were able to mobilize volunteers and give registrants the ability to use the web, email and tap into their online social networks such as Facebook to connect with friends and family to support their event participation. The 2009 AIDS/LifeCycle event was hugely successful, raising over $11 million dollars and recruiting 3000+ participants.



IMPROVE MULTICHANNEL ENGAGEMENT/INTEGRATION

Channels are proliferating, and with this proliferation come new and improved approaches to communication. Your organization needs to improve its multichannel engagement strategy to ensure you're using all options available as you aim to engage your donors. Most organizations spend much more time and money on traditional direct marketing programs than on their online efforts, but as donor demographics and behavior changes, integration of traditional and online efforts has become mission-critical. Not only do today's donors communicate and listen in a multichannel environment, they also give through the mail, online and at events – if your electronic communications and website are not consistent, they will give elsewhere. Follow our best practices and you'll be well on your way to maximizing conversion rates and boosting revenue.



1. **Ensure consistent and coordinated messaging across all channels.** Coordinate the timing of online and offline appeals to boost your response rates. For example, send a direct mail piece that mentions an upcoming fundraising campaign and asks the recipient to be on the lookout for an email in their inbox. The email, which can be sent a week or two after the direct mail pieces drop, should include an ask and reference the direct mail piece. If you decide to include an ask in both the direct mail piece and the email message, then ensure that the donation levels presented are not only consistent in both pieces, but also appropriate based on the recipient's giving history.

2. **Run multi-part appeals.** Emails may unintentionally get buried in the recipient's inbox, so sending a follow-up message can get your campaign back on your donor's radar. A series of emails is a cost-effective way to increase conversion rates. These multi-part appeals don't need to be fancy. If you don't have time to create different messages, then simply resend the original email with an updated subject line. Don't forget to suppress those individuals who responded to the original request. You want to show you're paying attention!

3. **Make strategic communication decisions based on real data.** A constituent relationship management (CRM) solution will provide you with a complete view of all your supporters' activities – past and present – as well as their preferences. It will give you an easy way to report on and segment your data, so that you'll be in a better position to create an effective communications strategy that spans multiple channels. You'll know when you should invest in reconnecting with a lapsed donor via direct mail, and when it makes sense to send an email instead. To better understand how CRM could be an invaluable tool to your organization, [download] the guide titled *Toolbox for the Modern Nonprofit*.

4. **Offer various opportunities for engagement.** From the early stages of your relationships with constituents, you should be driving them strategically toward a next step or action, such as giving, volunteering, or signing a petition. With this in mind, define engagement pathways for your various audiences. For example, you want subscribers to your email newsletters to become donors, and one-time donors to join your monthly giving program. Create these pathways and the corresponding communications plan to support them.

5. **Create a Moves Management strategy.** Moves Management is the set of processes nonprofits rely on to cultivate strong relationships with major giving prospects and move them towards major giving. After you have identified the best prospects for major giving, you can outline your plan for major donor "treatment". Part of your plan should include a highly personalized and donor-controlled web and email experience. You should also treat these individuals as serious program partners not only by providing opportunities for two-way communications, but also by using a high ratio of cultivation to appeal messages.

DIY: GET UP TO SPEED ON MOVES MANAGEMENT

Unfamiliar with the concept of moves management? Read a short article on the topic or download *Moves Management Made Easy: How CRM Puts You in Sync With Your Major Donors.*

6. **Encourage donors to give online in direct mail pieces.** In your direct mail pieces, encourage supporters to make their donation online. To increase response rates, you might have to offer incentives to direct mail recipients (e.g., their name will be entered into a draw for a prize if they give online, rather than by mail). Mention how an online gift will give your organization immediate access to much needed funds, and reduce the administrative costs of processing a check received by postal mail.

7. **Get direct mail addresses of online donors.** If you know where a donor lives, you can offer them additional engagement opportunities that are specific to their location. For example, you might have an event in their area, or perhaps another local supporter is throwing a house party as a fundraiser for your cause. If you have geographic data about your donors, you can expand the number of engagement opportunities available to them. But how can you get this information without pestering your donor? Try to collect a postal address as a second step in the email sign up process. Capture the individual's email address during the first step, and then ask for their postal address next. Communicate the benefit of providing this additional information. Similarly, you should try to get the email addresses of offline donors by encouraging them to communicate with your organization online.

8. **Understand the cost per lead acquisition.** As you develop your multichannel engagement strategy, you need to be cognizant of the cost of acquisition. In the traditional direct response world, this cost is very high, especially given the rising costs of postage. Testing through this channel can be cost-prohibitive, particularly when you are using a purchased list. Instead, use your website as a mechanism to build a steady stream of warm prospects who have a built-in interest in your organization. It is these individuals, not ones whose names you acquired through a purchased list, who are more likely to respond to a subsequent direct mail piece or telemarketing campaign.

9. **Understand that not all donors want the same thing.** As you develop your multichannel engagement strategy, keep in mind that different donors have different wants when it comes to their relationship with your organization. Some donors are best described as "Relationship Seekers". These individuals are most likely to respond to opportunities to connect emotionally with your organization online. At the other end of the spectrum are the "All Business" donors who do not appear to be looking for a relationship or a casual connection. Somewhere in between you'll find the "Casual Connectors", who want a bit of everything. By developing tailored communication strategies that reflect these different expectations, you should be better at delivering messages that resonate with each group.

10. **Respect communication preferences by generation.** If you group your constituents by generation, you'll likely find clear channel preferences for each group. The older, core grassroots donors are typically most responsive to direct mail and telemarketing. Yet, research indicates that even seniors are using the online channel before engaging with organizations. They will use the web and email but probably make the gift through traditional channels. Boomers are usually multichannel donors, many of whom prefer to give online. These people are used to using the Web at work and at home. Generation X is the group of emerging donors. Generally unresponsive to direct mail or telemarketing, these individuals will only give online or in person. Finally, you have Generation Y, or your future donors. This is the social media and mobile phone generation. In their world, landlines don't exist, and personal email is checked rarely. The best way to respect the varying preferences of these segments is to relinquish control and let donors decide how and how often you communicate with them. This approach will lead to a more balanced approach to offline/online communications, which will maximize the return on your investment.

11. **Invest in a donor database that can do more.** Traditional donor databases were developed before the Internet, social media and mobile technology became prevalent. Segmentation was easier as the channels and choices for engagement were fewer and the charity could often dictate the how and when of communication. Today's relationship management requires technology that is simple, flexible and easy-to-use; technology that breaks down the internal silos and provides all departments to access and share data, as well as allows donors and other supporters the opportunity to manage the relationship with your organization. Products like Convio Common Ground™ CRM are changing the donor database landscape.

CLIENT EXAMPLE

[People for the Ethical Treatment of Animals](PETA), the largest animal rights organization in the world, used Convio solutions to educate and advocate for an end to the annual Canadian seal hunt with Vancouver hosting the 2010 Olympic Games: www.olympicshame2010.com.

The campaign successfully leverages petitions and action alerts, email, online advertising, an interactive micro-site, the use of compelling video, social media, billboards and demonstrations, and as a result, over half a million people have taken action online.

EVALUATE YOUR WEBSITE'S EFFECTIVENESS

The role of your website is more important than you might think. Did you realize that a charity's website has the biggest influence on a prospective donor's donation decision? According to research by Forrester's Technographics®, more than 44 percent of people visit your website before making a gift, regardless of whether the gift is given through the mail, phone or online. The "wired wealthy," people who gave more than $10,000 annually, report visiting an organization's website virtually every time before they give – again, regardless of whether the gift is given online or through traditional channels. Don't miss your chance to make a first, second and third impression. This is the year to take an objective look at your website's effectiveness. Whether it's time to make some cosmetic changes or take it down to the studs, we know just where to start!

1. **Track information.** Before you make any changes, you need to track some important information that will help you make informed decisions. You'll want to monitor such data as where website visitors come from (e.g., referral links, search engines, paid search), what they do once they are on your website (e.g., click on the donation page, search for a specific term, give up), and how long they stay there.

2. **Use the information you track.** After you have collected this valuable information, analyze it. Is there one particular search term that is driving most of the traffic to your website? Then maybe it's time to use this term in paid search to boost website hits, or make this term more prevalent throughout your site. Are the majority of website visitors landing on your homepage and leaving without taking some form of action? Then perhaps you should revisit the content of your homepage and make your calls to action more obvious.

3. **Understand your audience.** Take the time to learn about and understand your website visitors, so that you can do everything possible to ensure your web presence meets their needs. If you create an engaging site, these individual will likely keep returning in the future. Aim to identify four to five major audiences (e.g., donors, advocates, volunteers) and then think about the needs and motivations of each group. After you have more insight into these groups, you can create relationship pathways, each of which has its own starting point on your homepage.

4. **Optimize your website for email capture.** On each page of your website, give visitors an opportunity to provide you with their email address. You'll need to clearly communicate the benefit of doing so (e.g., monthly email newsletter) and maybe even offer an incentive (e.g., free bumper sticker). Keep the required information to a minimum to avoid drop-off. For example, capture their email address first, and then ask for additional information such as postal address and interests. For a great example of how this multi-step process can be achieved effectively, look at the sign up box on the homepage of UNCF at www.uncf.org.

5. **Tell a compelling story.** Before you can convince someone to give you their email address, let alone support your cause, you must able to tell your story and tell it well. Does your current website convey what you do in an impactful way? Your core messaging must clearly articulate why you deserve this visitor's support and what you will do with it. By creating a tangible, compelling story, you might increase the length of a person's visit to your website and hopefully drive them to take a desired action.

6. **Take a closer look at your navigation.** Do your best to ensure that navigation is intuitive, consistent, and clearly defined. Try to follow the "7 plus or minus 2" rule ... any more and you'll likely overwhelm visitors. Not sure how you're doing on the navigation front? Take a test! www.connectioncafe.com/posts/2009/february/navigation-pass-the-test.html

7. **Examine your website structure.** Avoid making the common mistake of organizing your website in a way that makes perfect sense to your staff or internal stakeholders, but is sub-optimal for users of the site. Instead, ensure your content architecture reflects each of your priority audiences, yet allows you to communicate what's most important to your organization. It should also be scalable so that you can add information as your organization grows.

8. **Look objectively at your design.** Your website needs to deliver your message to visitors in a way that is clear and easy for them to understand. Of course you want to grab their attention and convey professionalism, but don't cloud your mission or your brand. Depending on the technical expertise that you have in-house, you should keep in mind that a graphics-heavy design might make it difficult – if not impossible – for your staff to update quickly and easily without engaging the assistance of a professional designer. Opt for a user friendly content management system (CMS) that enables even your least tech-savvy staff to make updates.

9. **Assess the freshness of your content.** Resist the temptation to call your website "finished". It should be an evolving piece, with content constantly being added and updated. Use a CMS that will provide you with the flexibility and control you'll need to easily add, edit and archive your website content. Ideally, it will also include functionality that enables you to present relevant, dynamic content to your site visitors. This customized approach to website content will result in a truly personalized experience for returning visitors.

10. **Ask your visitors for feedback.** What better way to evaluate the effectiveness of your website than by asking visitors for their feedback? Add an online survey to your website to collect answers to key questions, including: How satisfied were you? Why did you come to our website? Were you successful in finding what you wanted? If yes, why? The survey can appear randomly, so that visitors aren't asked to complete the survey every time they return to your website. The responses that you collect will not only serve as a baseline level of your user's satisfaction, but will also provide valuable data about opportunities for improvement.

DIY: HOMEPAGE DESIGN[1]

Follow the Ten Commandments of Effective Homepage Design and you will be well on your way to evaluating your website's effectiveness.

I. Thou shalt clearly state who you are and what you do.

II. Thou shalt be able to point to where your top 3-5 online goals are represented on the homepage.

III. Thou shalt offer clear, concise navigation.

IV. Thou shalt provide scannable, up-to-date content that entices visitors to click for more.

V. Thou shalt dedicate space to each of your audience groups.

VI. Thou shalt convey a visual hierarchy so visitors know where to look and what to do first.

VII. Thou shalt include 3-4 ways for visitors to engage.

VIII. Thou shalt avoid the Flash intro or any other gratuitous animation.

IX. Thou shalt make sure most relevant content is above the fold.

X. Thou shalt balance meaningful content with relevant supporting graphics.

[1] www.connectioncafe.com/posts/2009/november/10-commandments.html

Website Analytics

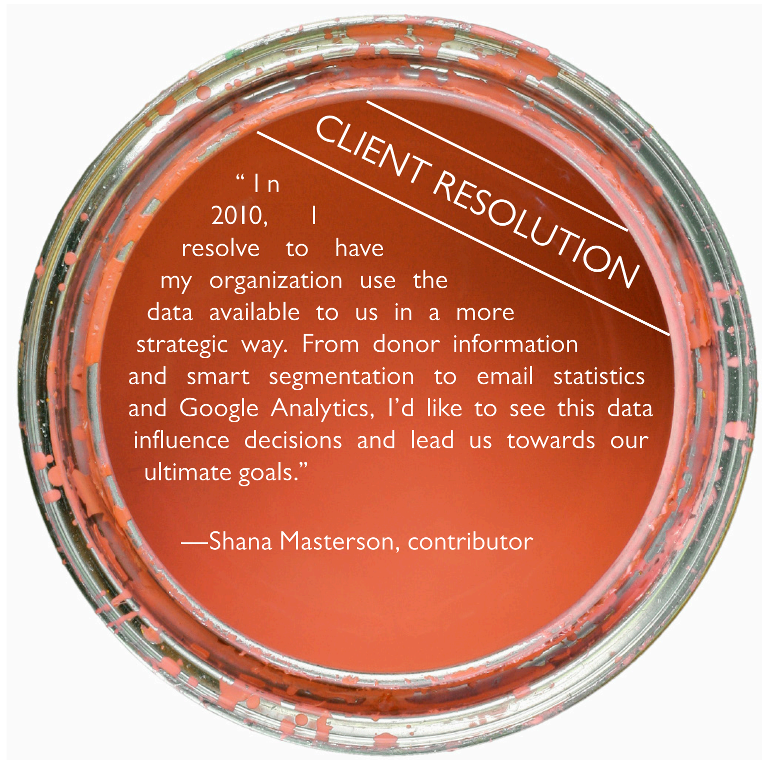
Is information about your website a black hole? Do you know where visitors are coming from? What they are doing after they arrive on your homepage? Where they are leaving your site? So many questions, so few answers…unless you have some you're using website analytics tools[1].

Start with Google Analytics – a free, easy to install service from Google that tracks user activity on your website. By using this tool, you will be able to identify trends with your website traffic. With detailed information about how visitors are using your site, you'll be able to make more informed decisions about improving your online presence. The interface is user-friendly and the reporting capabilities are surprisingly robust for a free tool.

Next, add Google Webmaster Tools. This product requires a little more setup, but once installed, it will give you valuable insight into your web presence. You'll learn how Google sees your site, and can then make adjustments based on your new and improved understanding of your web presence.

[1] www.connectioncafe.com/posts/free_tools_big_potential.html

Keep in mind that web analytics will tell you "what" users do, not "why" they do it. You should supplement the quantitative data that you collect with qualitative data to understand a user's perspective (e.g., where their attention is drawn, what content is overlooked, how they scan their homepage).



CLIENT EXAMPLE

Jewish National Fund, a global environmental leader working to care for the land of Israel, worked with Convio to redesign their website based on stakeholder and constituent research to create a more dynamic, personalized experience. The new site has enabled the creation of new online initiatives to improve education and awareness, while leveraging integrated fundraising tools to better engage donors and create a consistent web presence across all online properties.

Since the redesign of JNF.org in early 2008, the organization has experienced great success in driving traffic to the site from their existing constituency, as well as driving traffic from new supporters.

IN SUMMARY

New ideas can invigorate your organization and your constituents

With the new year comes new opportunities! Reinvigorate your organization and your constituents by implementing these fresh ideas that will improve your online efforts and overall results. You now have the fundamentals needed to make 2010 the best year ever. All you have to do is get started and keep your resolutions!

For the smoothest transition, work with a technology partner that understands your mission and objectives and provides not only the technology to help you scale, but also the guidance and services to drive results.

ADDITIONAL RESOURCES

» *Integrated Online Marketing (eCRM) with Direct Mail Fundraising*, a quantitative assessment prepared by Convio and StrategicOne, 2007

» *Moves Management Made Easy: How CRM Puts You in Sync With Your Major Donors*

» The *North American Technographics® Omnibus Online Survey, Q4 2009(US)*, a commissioned survey conducted by Forrester's Technographics® on behalf of Convio

» *A Race Against the Clock: How to Maximize the Fundraising Success of Your Event Participant*

» *Toolbox for the Modern Nonprofit*

» *The Wired Wealthy, Using the Internet to Connect with Your Middle and Major Donors*, Convio, SeaChange Strategies and Edge Research, 2008

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Partner Resolutions

Association of Fundraising Professionals (AFP)

"Be cool, candid and positive!"

Fundraisers must ensure that they keep their cool and do not panic. But what is perhaps even more important is ensuring that others associated with the organization – staff, board members, volunteers and key supporters instrumental to your fundraising efforts – do the same. Times are challenging, but you can still raise money and meet your goals. The economic malaise has sunk in, and even your strongest supporters may be losing their resolve and becoming unsure about how to proceed. The fundraiser must lead by example through words and action. Body language is critical in fundraising, so your organization's fundraising staff and volunteers have to not only say it, but understand it and BELIEVE it.

In addition, ensure your colleagues and volunteers maintain their perspective by being "realistically optimistic." Nearly everyone is affected in some way by the current economic situation. Talk frankly, but optimistically, about what is happening to your organization and what lies ahead. Volunteers and staff need to know the challenges – and opportunities – that your organization faces, especially from a fundraising perspective. Ignorance is NOT bliss. Board members and senior staff especially need to know what your organization's fundraising may look like so their expectations are not inflated. They also need to know the resources you need to be successful so they don't make uninformed cuts and eliminate mailings or other important programs.

Heller Consulting

"I will spend more time with my head in the cloud."

HELLER CONSULTING
your fundraising technology team

The Pledge: I will explore Convio's Common Ground. I will no longer be chained to archaic fundraising software – software that restricts my communication, that dictates how our organization relates to our supporters and stakeholders. I won't settle for "how we've always done it" or, even worse, "we won't do X because our software won't let us". (X = your great new idea for…getting the word out about your organization, creatively engaging your constituency, mobilizing your base, extending the reach of mission, doing things bigger, better, faster, smarter.) I will not blindly follow the status quo. I will look for a new solution to old problems, a proven approach to new opportunities. I will bring together people, resources and strategies for the greater good.

Sound overly ambitious? Only if you don't have the right tools. Sound like "I better get to work, nose to the grindstone, down to brass tacks"? We don't think so. We think you should look out the window, daydream a bit, remember why you do what you do, what inspires you. Get your head back in the clouds.

Rested? Refreshed?

Get Your Mind in The Cloud.

What's "The Cloud?" It's a new word for an established tool – the Internet. Why a new word? Because the Internet has been upgraded. The Internet is supporting more of your life than ever – news, banking, shopping, doctor's appointments, family photos, friendships. You're spending a lot of time in The Cloud, and so are your supporters.

Free Your Data, Free Yourself

But where's your information about your supporters? Where's your data? Underground. On a server … behind a firewall… in a closet… on a rack. Trapped - and you're trapped with it. Want access to your data? Ok, go to your office, sit at your desk, turn on your computer, login and cross your fingers that you can find what you want and interpret and use what you find. Not in the office? Too bad. Not at your desk? Too bad. Want access via a PC and a Mac and your phone, wherever you are? Sorry, nope. And viewing that information the way you want to? Good luck with that. Even worse, all that great information is in different systems – your donor database, online system, spreadsheets, Access, Filemaker, Outlook, - all of the above. It's trapped in separate cells inside your "data prison".

If only it could see blue sky again! Fight for your data's freedom, for your freedom! Explore The Cloud.

Start Today – Explore Common Ground

Where to start? Common Ground.

What is it? A whole new world for your information, for your supporters, for you. Practically speaking, it's Convio's fantastic fundraising and CRM system and it's all in The Cloud. It's a single tool that unites all the information about your supporters and enables all the strategies and day-to-day operations of your organization.

Get started on your resolution today: I will visit www.convio.com/commonground. I will explore Common Ground. I will enjoy my view from The Cloud.

Idealist Consulting

"Outcome measurement."

idealistconsulting
advance your mission

Your CRM is not a Rolodex, it's time to stop treating it that way. Start using the reporting functionality in your CRM to measure your outcomes more efficiently. By measuring outcomes, nonprofits gain a barometer to guide management, motivate staff and focus on the organization's mission. Moreover, having accessible outcome data also improves your organization's capacity to fundraise and advocate on behalf of your mission and constituents. For effective outcome measurement consider the following:

Learn it and use it.

Reporting is a great tool and can help you to manage your outcomes only if you use it. The more information you glean from reports, the more informed your business decisions will be. Accessible and easy reporting is a great way to inspire staff and to leverage your system in order to manage outcome. But you must also ensure they know how to use it as well.

Set goals.

Seeing where your organization is going is just as important as seeing where you have been. Setting goals and projections on fundraising, membership management, and other attributes of your organization are excellent ways to motivate staff. These goals also give your mission "development direction" as you move forward into the next year. Most CRM's offer a forecasting capability -- take advantage of it.

Make informed decisions.

Budgeting, staffing, events, and outreach can all be managed effectively by referencing your reports. For example, watching an event's attendance decrease by 5 percent over the course of the last five years may mean the event is losing its luster or it may mean that your promotional efforts are dated or ineffective. Referencing reports from your outreach efforts in combination with your attendance reports may reveal more than you anticipated.

Sharing your outcomes.

Foundation and private donors expect nonprofit organizations to demonstrate their effectiveness. More and more nonprofits receive funding based on performance. In addition, many funders require a periodic review of program outcomes. Because the outcomes of nonprofits are generally not market-driven, but closer to contextual standard bookkeeping, reporting is helpful but not as inclusive as a CRM. As a result, your CRM is essential for tracking the more complex reports that include concepts such as relationships obtained as well as captured donations.

KELL Partners

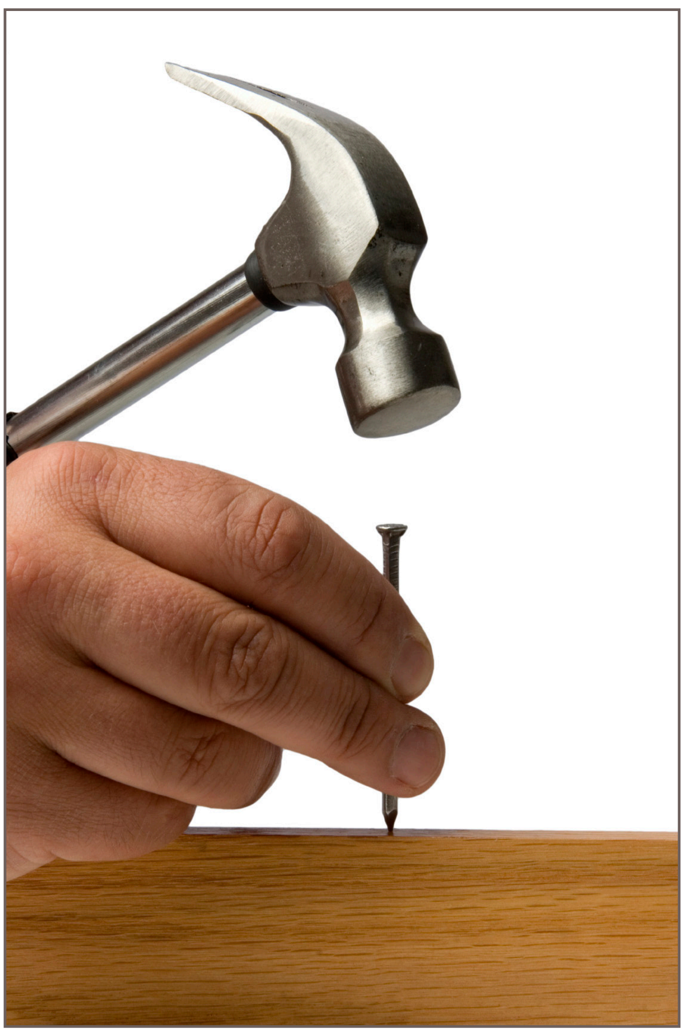
"I resolve to schedule time every week to keep our data clean and up to date."

Organizations purchase CRM tools (such as CommonGroundTM, Constituent360, etc.) to provide clear quantitative metrics for their organizations. If there is inaccurate or incomplete data within these tools, it can cause lower adoption rates, add to user frustration, and in the end lead to poor decisions due to inaccurate reports and metrics.

Organizations that stay on top of their data entry and review will reap many benefits. Since data should be the main driver of organizational decisions, accurate data is needed for correct decisions. Clean and complete data represents the true state of your constituent and client relationships, finances, activities, and productivity.

To keep data management from becoming an overwhelming task, organizations should schedule a set amount of time every day or every week (depending on the amount of data utilized) to focus on data quality. This means that someone's work should specifically include tasks around data quality and that it should be made a priority.

How do you ensure clean and accurate data? The first and most important step is to ensure that every contact, organization, event, donation or activity that is important to your organization is actually in the system. If they are not added, then they don't exist.



Another way is to create data entry systems to ensure that data is being entered in a consistent fashion (i.e. creating drop-down lists for data entry instead of open ended text fields). This means you get data like "Vice President" instead of "VP" "Vice President" and "Vice Pres."

In 2010, resolve to make sure your return on investment in CRM technology is as high as possible by maintaining accurate and complete data for your organization.

NTEN

"Be more transparent."

Outlandishly transparent. It won't be enough to share data or best practices or our budgets when people ask for them. We're going to put out everything we can for anyone to see, whenever they want. Why? Because the best way to convince people of your value is to show them, openly, sans spin. It's also the best way to find opportunities to work with our partners and create even more awesome in the sector. And we're all about the awesome.

Terpsys

"We recommend that for 2010, nonprofits continue to grow and evolve their web presence, seeing their online efforts as an extension of an ongoing, vibrant relationship with their constituents."

We work with many nonprofit clients who approach their web presence as a project they engage in every two to three years. At TerpSys, we believe that an organization's web presence is an extension of their mission – a living, vibrant entity working to achieve remarkable outcomes every day.

To ensure that organizations are constantly evolving, we have identified a cyclical engagement strategy that is grounded in four key activities:

1. **Listen:** The most important step in your relationship with your audience, listening to your constituents should be the basis of any online strategy. This can include user interviews, surveys, analytics, email open rates, online fundraising metrics, social media scanning and more. Jupiter Research recently projected that spending on email will surpass $2 billion by 2012. Yet online communications staff continue to focus on trends, or the need to increasingly send out irrelevant messages. A few hours of interviews with real life users might just bring a fresh perspective to your online engagement strategies.

2. **Share:** Communicating with your constituents through various online channels keeps them engaged, while also providing mission critical information from your organization. Through social media, email communications, mobile messaging and more, organizations that create an ongoing dialogue with their constituents reap the benefit of an engaged audience.

3. **Connect:** Building community around your mission also means connecting to those who have an affinity to your organization. According to the 2009 Nonprofit Social Network Survey Report, 86 percent of nonprofit organizations have a presence on commercial social networks. Creating an online experience that provides value, creates connections and fosters community can also help you identify key advocates for your cause.

4. **Move:** Websites have moved beyond the role of information dissemination and now act as a gateway to participation. Websites are designed to move constituents to action – whether that means making donations, joining an online community, e-newsletter sign-ups, advocacy, or connecting on social media channels. Online donations have increased 26 percent from 2007 to 2008 and this trend is likely to continue to increase. Make sure that your website has a distinct call to action that supports your organization's mission.

By implementing the fundamentals of this strategy, the American Health Assistance Foundation has realized a year-over-year (2008 vs. 2009) giving increase of 46 percent by executing a variety of these strategies. The important thing to note about this engagement strategy is that it doesn't end once you move your audience to action. Nonprofit organizations, along with any effort aiming to be "heard," must constantly connect with an audience bombarded by marketing messages. In order to reach your constituents and keep your mission on the minds of your constituents, you have to be in it for the long-haul and recognize that an online presence will evolve based on the success of how well you listen.

ABOUT CONVIO

Convio is passionate about helping nonprofit organizations use software and services to fulfill their missions. The company is the leading provider of online marketing, fundraising, advocacy and constituent relationship management software and services to nonprofit organizations. The company's online marketing suite offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its database system, Convio Common Ground™ CRM, helps organizations efficiently track and manage all interactions with supporters. All 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**.

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