Convio Fundraising

Convio Fundraising has helped hundreds of nonprofit organizations raise millions of dollars online. It includes every tool you need to build online fundraising campaigns as part of your organization's existing Web site or as a stand-alone fundraising site. Donation forms, gift processing, and tools for communicating through Web pages and email give you the essentials for building sustainable donor relationships online while raising money and membership revenue.

Using Convio Fundraising, you can quickly build campaign-specific online donation forms and easily modify them for your different types of fundraising campaigns such as annual pledge drives or capital campaigns, or quickly create a micro-site to drive giving in response to a natural disaster or other urgent event. As you create online campaigns, Convio Fundraising guides you through online fundraising best practices built directly into the software.

By helping you collect and leverage knowledge about your constituents, Convio Fundraising also allows you to tailor campaigns to donor interests and motivations. You can customize online information, gift levels and campaigns to individual donor preferences for significant growth in online gifts. You also can identify online fundraising trends based on donor status, geography and other factors. These insights help you improve fundraising results by better understanding your donors.

Flexible Giving Options

Payment options. Allow donors to select to pay by credit card or bank account withdrawal, or set the payment method to your preferred selection.

Sustainer giving. Let donors set up recurring, automatic gifts, with either pre-set amounts and durations or flexible donor-specified commitments. Encourage monthly givers to pay by bank account for lower overall transaction fees.

Installment programs. Enable higher-dollar giving levels with payment programs that offer the benefits of large gifts but automatically pay out over the schedules you design and donors select.

Honor/memorial giving. Configure honorary and memorial giving forms to capture honoree information, and provide eCard designs for donors to send the honoree to acknowledge the gift.

> **The Convio Difference**
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> Designed to meet the unique needs of nonprofit organizations, Convio's integrated software suite includes products for fundraising, advocacy, events, ecommerce, online community, Web content management and email communications.
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> All products include Constituent360™, a sophisticated online database that centralizes constituent data and integrates with offline databases. It shares data about all online interactions, ensuring you have a complete view of each constituent, which is critical to effective online programs.

Gifts to specific programs. Constituents may apply all of a gift to one campaign or program, but you also can suggest fund allocation across initiatives. A general giving campaign can include standard levels and/or an "enter amount" for general purposes, but also request an "additional gift" for a program with urgent needs.

Membership. Automatically assign membership type and term with any online gift, setting or extending a constituent's membership. Propose the gift of membership, capturing both the donor's information and the giftee's.

Other gift types. Allow joint donations and anonymous gifts. Additionally, all the flexible options of Convio Fundraising are available to donors within Convio TeamRaiser™ (for special events) and Convio Personal Fundraising, formerly known as Tributes (for raising money in honor of a loved one).

Tools to Encourage Additional Giving

Personalized content. Configure fundraising emails and Web pages to automatically include personal information, such as first name, and content based on constituent interests, geographic location, history with your organization and more.

Premiums. Encourage larger donations by offering premium products and cross-promoting related premiums. Donors can search your premiums catalog and ship gifts to multiple addresses. Tax-deductible information is displayed online.

Matching gifts. Include employer look-up and matching gift information directly in your thank you page and autoresponder.

Rewards. Recognize and reward loyal donors by tracking involvement levels including giving frequency, donor referrals and more. Thank your most loyal constituents by developing an online loyalty program that motivates members to take action and distributes reward points for gift redemption.

eCards. Attract new supporters through the viral marketing abilities of email greeting cards. Convio eCards can be easily integrated into a donation flow to ensure your organization or campaign messaging is available for donors to send to their friends and family.

Tailored appeals. Increase ask amounts dynamically based on a donor's previous giving history with your organization.

Configurable Donation Forms

- Start with a dozen ready-to-use single and multi-page donation forms that are optimized for a variety of purposes. For instance, the honorary gift form appropriate for Mother's Day includes an optional checkbox for the donor to automatically repeat this gift every year.
- Design page wrappers most effective for each donation form. Modify forms for micro-campaigns that have their own branding. Minimize distraction by eliminating unnecessary navigation from the donation form wrapper.
- Make any form your own by previewing and clicking any element to modify it; the preview updates with every change. Tailor onscreen language (including labels, headers, help text, progress bar and buttons) to match your organization's terminology. Add or subtract screens, change the flow and order of data requested, insert helpful descriptions and images, and more. Specify gift levels, or give users the option to donate an amount they specify. Automatic validation ensures a form cannot be published without being fully functional.
- Activate or deactivate donation forms at pre-set times to correspond with fixed-duration campaigns.
- Make the most of a donor's online transaction by requesting or requiring any information to build the donor's profile, or present donors with email subscription opportunities that align with their motivations for giving to the campaign.
- Use the What-You-See-Is-What-You-Get (WYSIWYG) HTML editor tool to create a confirmation page with transaction details, and continue the online interaction by including personalized content in thank you pages and receipt emails. For example, in a thank you page, encourage non-volunteers to peruse volunteer training schedules or persuade first-time donors to contact their legislators about your cause.
- Easily link any email or Web content (graphics or text) to specific donation forms.

Raise more funds with flexible, easy-to-use donation forms

Donation Processing

Privacy and payment security. Transactions are processed in real time, and Convio never stores donors' credit card or bank account information. All forms that process personal donor information are encrypted with 256-bit AES. Convio is independently audited based on Payment Card Industry Data Security Standard (PCIDSS) requirements. Neither Convio employees nor your staff members have access to credit card or bank account data.

Flexible options for donation accounts. Let Convio set up an International Automated Transaction Services (IATS) account for you — quickly, and with no monthly use or overage fees. You also may use one of Convio's preferred merchant account providers.

Multiple merchant account support. Enable funds from different campaigns to be deposited in different accounts.

IRS-compliant gift receipts. Automatically send donors an IRS-compliant receipt in email or PDF format.

Fundraising Process Integration and Reporting

Fundraising dashboard. View statistics for one or more campaigns, showing real-time fundraising progress.

Campaign tracking. Define one overall campaign initiative and map multiple donation forms to it. The forms work in parallel to drive revenue while rolling up to one overall goal for reporting, letting you easily see which form performs best.

Email best practices tools. Use A/B testing capabilities to evaluate the effectiveness of one fundraising campaign against another. Check emails for elements that might trigger spam filters. Segment and target your donor base with tailored email appeals. Use email autoresponders to thank donors and encourage them to support your organization in other ways.

Marketing source tracking. Define user-friendly donation form Web addresses (like forest.org/environment) with source, promotion, and discount codes built in. These addresses can be easily read on the radio or printed in the paper, on posters, products and more. Transaction reports reflect assigned source codes to help you track ROI on each marketing effort.

Optional automated segmentation. Optionally assign donors to appropriate groups, depending on what campaign or donation level they choose. This allows for more targeted marketing in the future.

Optional large gift and "needs follow-up" notifications. Set a threshold to automatically notify administrators via email when large gifts are made online or when gifts require fulfillment of premiums, gift memberships and more.

Customer service. Donors who contribute on a regular payment schedule expect and deserve quick resolution when changing credit cards or skipping a monthly bank account withdrawal. Decide which modifications they can make, up to and including canceling their payment program. Offering online service can minimize calls and encourage hesitant donors to try giving a set amount each month, quarter or year.

Refunds. Quickly research donors' giving history and issue refunds of both online and offline transactions processed through Convio. Make full or partial refunds immediately when donors make a mistake or have a change of heart.

Flexible reports. Choose the granularity of your report (showing each gift, or at a higher level, each form or campaign) and then apply filters to view the data you want. All reports are downloadable as a comma separated value (.csv) file for reporting or mail merge.

Data synchronization (optional). Synchronize online donation records with your donor database using Convio DataSync. Use offline data such as a donor's last or largest gift amount to tailor appeals, or target those who gave last year but not this year for special campaigns.

Additional Fundraising Solutions

- **Convio TeamRaiser™** for team- or event-based fundraising
- **Convio eCommerce** for selling products and services, and executing innovative fundraising campaigns
- **Convio Personal Fundraising** for constituent-driven honor and memorial fundraising
- **Convio Events** for ticket sales