

Convio TeamRaiser

Convio TeamRaiser™ is a complete online solution for reaching new donors by cultivating and mobilizing a wide-reaching support base of active constituent fundraisers. Organized around a central event such as a walk, your constituents can use TeamRaiser tools to create personal or team fundraising Web pages and send donation appeals via email to their networks of family and friends.

TeamRaiser tools are designed to improve your participant recruiting success, maximize your event revenue by increasing both the number of participants fundraising and their fundraising effectiveness, as well as building participant loyalty to your event and your organization. TeamRaiser also helps you manage all online elements of the event, from initial recruitment and team formation to pledge processing and gift acknowledgment, while offering the flexible online donation features now available in Convio Fundraising. By tapping your organization's existing constituents and their personal networks, your event administrators can empower participants to recruit new constituents and fundraise in support of your organization.

Event Greeting and Registration Page Configuration

Customizable event greeting page:

- Create compelling pages to describe your events using intuitive Web authoring tools. Include descriptions of your events, motivational messages and frequently asked questions.
- Display dynamically-generated lists of top teams and individual fundraisers, as well as a progress-to-goal thermometer.
- Showcase logos of event sponsors prominently.

Customizable event registration form options:

- Enable your constituent fundraisers to choose their level of participation — by starting their own team, joining an existing team, or registering as an individual participant.
- Request or require registration information such as participant name, email address, mailing address, phone number, date of birth, gender, emergency contact, employer name and occupation.
- Add requested or required information fields and custom questions. View responses to these questions in registration reports and, optionally, save them to the constituent's record.
- Offer an unlimited number of "upsell" items to help offset event costs or generate additional revenue (e.g., t-shirts, hats, bumper stickers, meal plans, etc.).
- Allow constituents to select their type of participation, such as choosing to run a full versus a half marathon.
- Empower a participant to set his or her own fundraising goal or use a goal suggested by your organization.
- Accept participants to honor others with their participation (for example, "I am running in honor of...").
- Allow participants to start their effort with a seed gift or additional donation when they register.
- Require participants to sign a customizable legal waiver.
- Attach files containing information packets and maps that participants can download.
- Process one or several registrations — such as registering an entire family — and any selected upsells, in a single transaction.

The Convio Difference

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.

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.

Special Configuration Options for Team-based Events

- Create divisions to differentiate between levels of team competition (e.g., corporate or family and friends), and dynamically display top teams by division.
- Choose whether to allow gifts to teams in addition to gifts to individual participants.
- Allow password-protected teams.
- Associate teams with their sponsoring companies.
- Create honorary teams captained by celebrities or local dignitaries.

Event-to-Event Links

- Easily link this year’s event to last year’s event.
- Give returning participants access to their previous years’ personal fundraising pages, donation history and more.
- View reports to see which participants are returning and which are not.
- Compare new events to past events for projecting revenue and giving trends.

Tools for Participants

Participant Center:

- Give event participants helpful hints, news, key dates and more on their own personalized, password-protected fundraising site.
- Customize instructions for the participant’s fundraising tools with text, graphics and colors.
- Enable participants to check their progress and increase their fundraising goal.

Personal fundraising page:

- Enable participants to quickly build a personalized Web page to support their fundraising effort by:
 - Editing the page headline and adding text, as well as uploading and inserting photos and artwork;
 - Selecting their own color and typeface style and the layout of the page elements;
 - Enabling the dynamic fundraising thermometer and scrolling gift honor roll; and
 - Automatically incorporating “support me” or “join my team” buttons.
- Include an automatic, boilerplate text section introducing your organization.
- Allow users to report inappropriate content to your organization.



Encourage event sponsorships through personal fundraising pages.

Email tools:

- Enable participants to easily reach out to their personal contacts using an online address book into which they can easily upload contacts from other address book applications — such as Google Mail, Yahoo Mail, Microsoft Hotmail, Outlook or Outlook Express, AOL and others — or manually enter the email addresses of their contacts.
- Allow participants to see an online history from previous events so they can determine who supported them in the past, and tailor email communications accordingly.
- Provide pre-written, rich text email message templates containing suggested text that participants can use to communicate with potential donors. Designate the subject and body of emails as fully editable, partially editable or read-only.
- Allow event participants to save the emails that they compose as reusable message templates.
- Provide an automatic link in all emails to the participant’s personal fundraising page.
- Give participants email tracking reports so they can monitor, by recipient, email opens, click-throughs and other metrics to see how their email messages are performing.

Progress and follow-up tools:

- Empower participants to drive traffic to their individual fundraising pages via personalized Web addresses (myrace.org/goto/RunningSam) which they can easily share offline with friends, family and other contacts.
- Let participants record gifts they receive offline in the form of checks, cash and pledges, as well as process gifts with credit cards to get the funds to your organization faster.
- Provide graphical and tabular reports that show participants both individual and aggregate fundraising results.
- Enable participants to easily identify and perform follow-up tasks, such as sending reminders to potential donors and personal thank-you emails to those who have donated.

Team management:

- Allow participants to form teams and designate Team Captains.
- Provide recruiting email messages for Captains to solicit team members.
- Empower Captains with special permissions and responsibilities:
 - Manage team pages and post messages to team members;
 - View the fundraising progress of individual team members, as well as the entire team;
 - Send thank-you emails for gifts made in honor of the entire team;
 - Change the team's fundraising goal; and
 - Promote other team members to co-captains.

Multi-day events. Motivate your participants to quickly meet their fundraising minimums by a certain date with the incentive of online tent-mate selection for long-distance events involving overnight stays in the field.

Online check-in. Organizations can leverage TeamRaiser Online Check-In APIs to create a custom application that allows participants to review their registration and fundraising information, sign all necessary waivers, and check in for the event from home.

Delayed and instant self pledge. For organizations using Convio's TeamRaiser API, the participant can agree to self-pledge any potential difference between their fundraising minimum, as set by the organization, and their actual fundraising progress. Participants can either set their self-pledge to happen automatically on the check-in date, or the participant can see the actual difference and initiate payment.

Online help. Empower participants to use TeamRaiser™ day or night, without needing your staff's involvement.

Loyalty rewards. Reward participants with redeemable points for the number of donations made on their behalf and/or the total amount of money raised.

Tools for Donors

Extensive search capability. Enable donors to easily find an individual participant or a team by searching first or last name, team name, race number, division, or company name from the TeamRaiser™ event-specific search page. Participants who do not wish to have their participation searchable can mark their participation as private.

Donor options:

- Provide donors with secure, immediate donation processing.
- Allow donors to give gifts anonymously.
- Allow donors to make sustaining gifts instead of single gift donations, or make a gift to your organization's general fund in lieu of event participation.
- Display an online acknowledgement and receipt to donors upon completing the transaction, and automatically send them an IRS-compliant receipt in email or PDF format that shows your organization's name and other details.

Donor communication tools:

- Enable donors to leave a message to the participant with their donation notification.
- Allow donors to opt into email from the organization.

Loyalty rewards. Reward donors with redeemable points for the donations they make and/or the amount of money donated.

Tools for Corporate Event Involvement

Company team coordination:

- Facilitate the formation and management of company teams through the role of a Company Coordinator.
- Allow Coordinators to create or modify special company pages, with company-specific information, corporate logos, lists of all company teams participating in the event, the top teams and more.

- Centralize all email communications to company team members.
- Allow 3 levels of Company team coordination: Local, Regional, and National.
 - Local Team coordination
 - Empower Local Company Coordinator to associate their company with a specific TeamRaiser event.
 - Enable participants to associate their team with their company.
 - Regional Team coordination
 - Empower Regional Company Coordinator to associate their company with specific TeamRaiser events.
 - Allow Regional Company Coordinator to manage the company page, which automatically includes dynamic fundraising tallies as well as event, team and individual rankings.
 - Enable Regional Company Coordinator to pull and view reports on progress of all teams associated with the company.
 - Enable participants to associate their team with their company.
 - National Team coordination
 - Empower National Company Coordinator to associate their company with a all TeamRaiser™ events.
 - Allow National Company Coordinator to manage the company page, which automatically includes dynamic fundraising tallies as well as event, team and individual rankings.
 - Enable National Company Coordinator to pull and view reports on progress of all teams associated with the company.
 - Enable participants to associate their team with their company.

Event sponsorship. Accept in-kind or cash gifts associated with your event. Reflect corporate gifts in reports and in the overall event progress-to-goal thermometer.

Discounts and promotion codes. Create discounts and promotion codes for corporate participants. Promote a sense of urgency by setting discount code usage limits and activation or expiration dates.

Tools for Event Administrators at Your Organization

Event configuration:

- Determine participation types, whether teams will be allowed, and the event or team divisions.
- Choose to allow participants to set up their own personal fundraising page and, if allowed, define the default page layout, including instructional or other text.
- Specify donation form levels, sustainer patterns, thank-you gifts and more.
- Customize default email autoresponders that are sent to donors or participants who complete fundraising milestones.
- Optimize the registration process by using built-in tools to “test-drive” the registrant experience.

Blueprints:

- Empower a senior administrator to create a “template” TeamRaiser with certain elements locked down, leave others editable, and expose the template to junior (possibly affiliate or chapter) administrators for use.
- Enable many junior administrators to quickly configure their TeamRaiser, customizing it to their specific needs while maintaining the integrity of the elements locked down by the senior administrator.
- Allow the senior administrator to make updates to the template and push the changes out to all existing TeamRaiser events built using the original blueprint.

Offline event registration. Enter and process registration forms received offline as well as any registration fees and seed gifts (cash, check or credit card payments) collected, either one-by-one or via upload tools.

Offline gift management:

- Review gift histories for participants at any time; filter gifts by type (offline/online) and status (confirmed/unconfirmed). Manage reassignments or refunds as needed.
- Record offline gifts made directly to the event or on behalf of any participant or team.
- Confirm, modify or reject offline donations that participants have entered in their gift history.

- Set thermometers and honor rolls to reflect expected (unconfirmed) gifts or only fulfilled (confirmed) payments, and easily report on unconfirmed donations for follow-up.

Event, participant, team, donor and gift look-up. View registration details, team settings, personal page and fundraising progress for each participant or team. Move people from one team to another or change Team Captain assignments. Disable specific participants to remove them from an event or hide an inappropriate personal Web page.

Email management:

- Track and follow up with participants who have registered, or those who were solicited but did not register.
- Add role-specific suggested email message templates (customizable by your organization) and specify if the message subject and body text are fully editable, partially editable, or read-only by participants.
- Promote viral fundraising efforts by sending automatic “forward to your friends” emails upon new participant registration. Customize the sender’s name, reply-to address, subject and message.
- Customize and add conditionals to the automatic emails sent to participants at key milestones, such as when they register, form or join a team, approach or reach their goal, and to notify them when a donation is made in their support.
- Include links to the appropriate company page, team page, and participant page of the sender in emails to participants who are a member of a company or team.

Reports. Run or download the following reports via Report Writer:

- **Performance by Event** — Tracks fundraising performance of TeamRaiser events. Provides data on funds raised both online and offline, number of donors, number of new donors, registration fees collected and personal donations made.
- **Performance by Event for Event Managers** — Similar to the Performance by Event report, this report tracks fundraising performance of TeamRaiser events. Provides data on funds raised both online and offline, number of donors, number of new donors, registration fees collected and personal donations made. Data is limited by the specific permissions of the event manager running the report.
- **Performance by Team** — Similar to the Performance by Event report, this report includes data for fundraising performance on teams participating in TeamRaiser events.
- **Performance by Team Division** — Similar to the Performance by Team report, this report includes data for fundraising performance on team divisions participating in TeamRaiser events. Additionally, this report can provide team roll-ups to a company level or breakdowns to individual team members.
- **Performance by Company by Event** — Similar to the Performance by Event report, this report includes data for fundraising performance on companies participating in TeamRaiser events.
- **Registrations Report** — Includes details of each participant registration, including contact information, team and participation information, tribute/memorial information and responses to additional questions for a specific event.
- **Cross-Event Registrations** — Includes details of each participant registration, including contact information, team and participation information, tribute/memorial information and responses to additional questions for several associated events.
- **Gift Details** — Includes details of each gift made to a specific event.
- **Gift Summary by Participant** — Tracks fundraising performance of each participant for a specific event.
- **Cross-Event Gift Summary by Participant** — Tracks fundraising performance of each participant for several associated events.
- **Performance by Security Category** — Displays to date fundraising performance of events within a specific security category.
- **Performance by Company by Security Category** — Similar to the Performance by Security Category report, this report includes fundraising performance of companies participating in events within a specific security category.
- **Event Surveys** — Tracks the additional questions and answers by participant for a specific event.
- **Coaching Email Constituent Performance** — Tracks the performance of coaching emails sent by participant for a specific participant.
- **Coaching Email Group Performance** — Tracks the performance of coaching emails sent for a specific group of participants.
- **Coaching Email Link Details** — Tracks the performance of a specific coaching email link.
- **Coaching Email Link Summary** — Tracks the performance of coaching email links for a specific campaign.
- **Coaching Email Messages** — Tracks the performance of coaching email links for a specific message.

In addition, existing reports remain:

- **Comparison Report** — Tracks fundraising performance of TeamRaiser events. Provides data on funds raised both online and offline, number of donors, number of new donors, registration fees collected and personal donations made.
- **Yearly Comparison Report** — Displays to-date fundraising performance of a current event compared with up to two previous linked events, projecting anticipated revenue for current event based on rate of growth versus previous events.
- **Participant Performance Report** — Tracks fundraising performance of each participant. Provides data on registrations, usage of fundraising tools such as if the participant has updated his or her personal page, the number of emails he or she sent from his or her Participant Center, and the percentage of fundraising goal achieved.
- **Participant Registration Report** — Includes details of each participant registration, including contact information, team and participation information, tribute/memorial information and responses to additional questions.
- **Event Check-in Report** — Includes information useful for tracking and recording final statistics such as each participant's emergency contact information, team and participation information, fundraising information and responses to additional questions. Results are sorted by teams.
- **Summary Report** — Includes data on selected TeamRaisers, including number of registrants, amount raised both online and offline, number of donations, number of donors and number of new donors. Additionally, this report includes statistical information such as average donation and average number of donations per registrant.
- **Division Summary Report** — Similar to the Summary Report, but broken out by division and participation type.
- **Team Summary Report** — Includes data for fundraising performance on teams participating in TeamRaiser events. Additionally, this report can provide team roll-ups to a company level or breakdowns to individual team members.
- **Transaction Report** — Lists registration and donation payments by each participant and donor, with information such as the payment Confirmation ID and billing address.
- **Administrative Reports** — Show remaining unpaid pledge amounts from sustaining gifts and company registrations.
- **Unconfirmed Gifts Report** — Identifies participants with outstanding gifts, as well as donor details for recorded cash/check gifts that were recorded but not received.
- **Company Gifts Report** — Lists the gifts received by each company in a selected TeamRaiser event by gift categories, such as company checks, sponsorships, pledges, in-kind gifts, registration subsidies, or matching amounts, plus primary company contact information.

Event Manager Center:

- Provide a streamlined interface for volunteer event managers running (and participating in) local events.
- Set granular permissions per manager, per event.
- Empower individual volunteers to do everything internal event administrators can do, as outlined above.



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