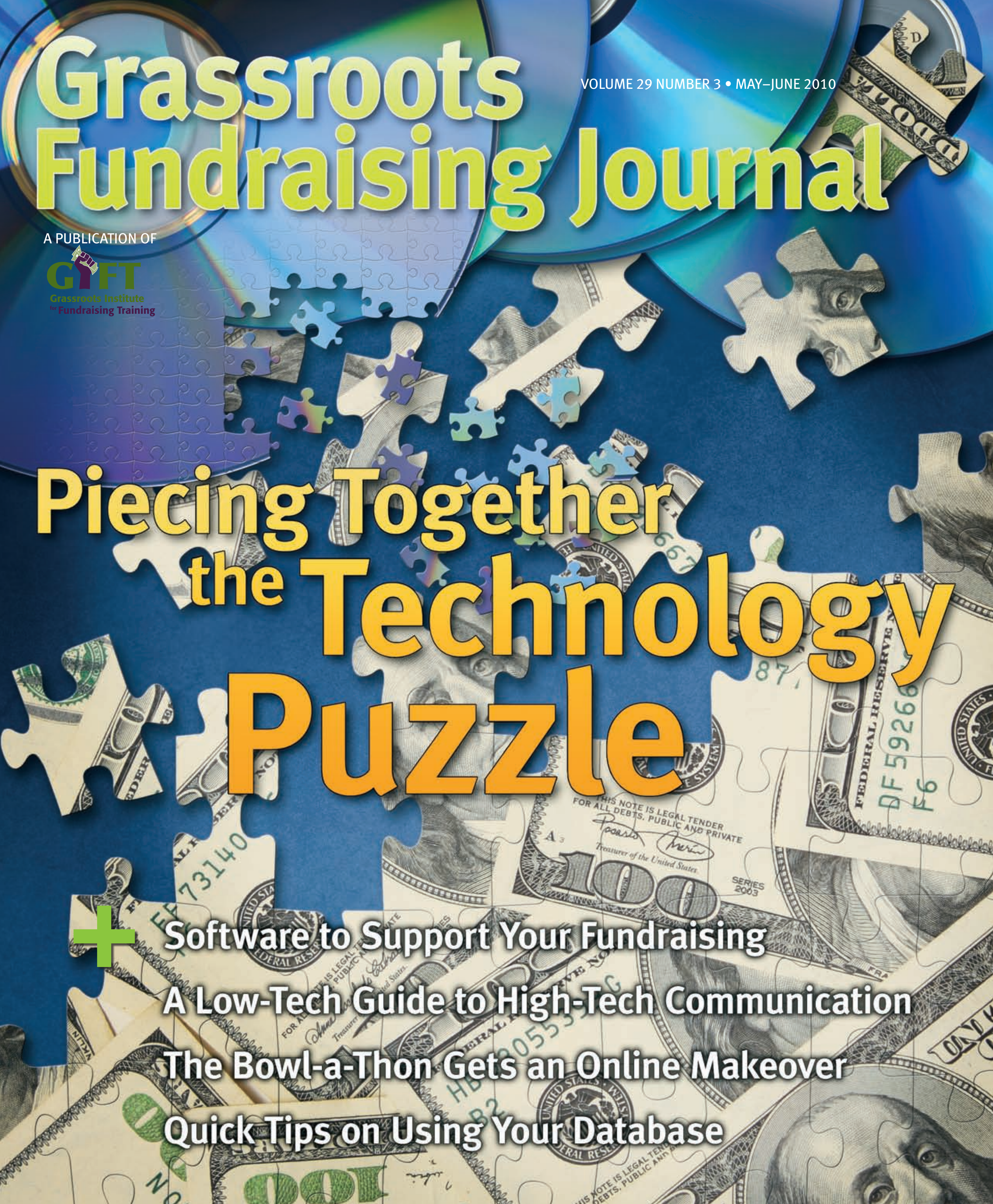

Grassroots Fundraising Journal

VOLUME 29 NUMBER 3 • MAY–JUNE 2010

A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

Piecing Together the Technology Puzzle

+ Software to Support Your Fundraising
A Low-Tech Guide to High-Tech Communication
The Bowl-a-Thon Gets an Online Makeover
Quick Tips on Using Your Database

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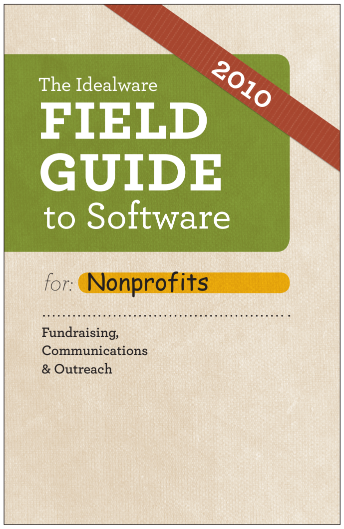

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Simplifying Fundraising Technology

By Priscilla Hung

TECHNOLOGY FOR FUNDRAISING used to mean having a donor database. Then email appeals and website donate now buttons became indispensible. Then blogs, online photo sharing, and social networking. Now, virtually any fundraising and communications work that happens off-line can also have an online component. Making sense of all these tools and figuring out how to prioritize and integrate them take time, research, and energy.

The basics of good fundraising still hold true—that fundraising is about building relationships—but now our toolbox has grown with these new tools. These tools have pros and cons, obvious and hidden costs, and require different skills and understanding.

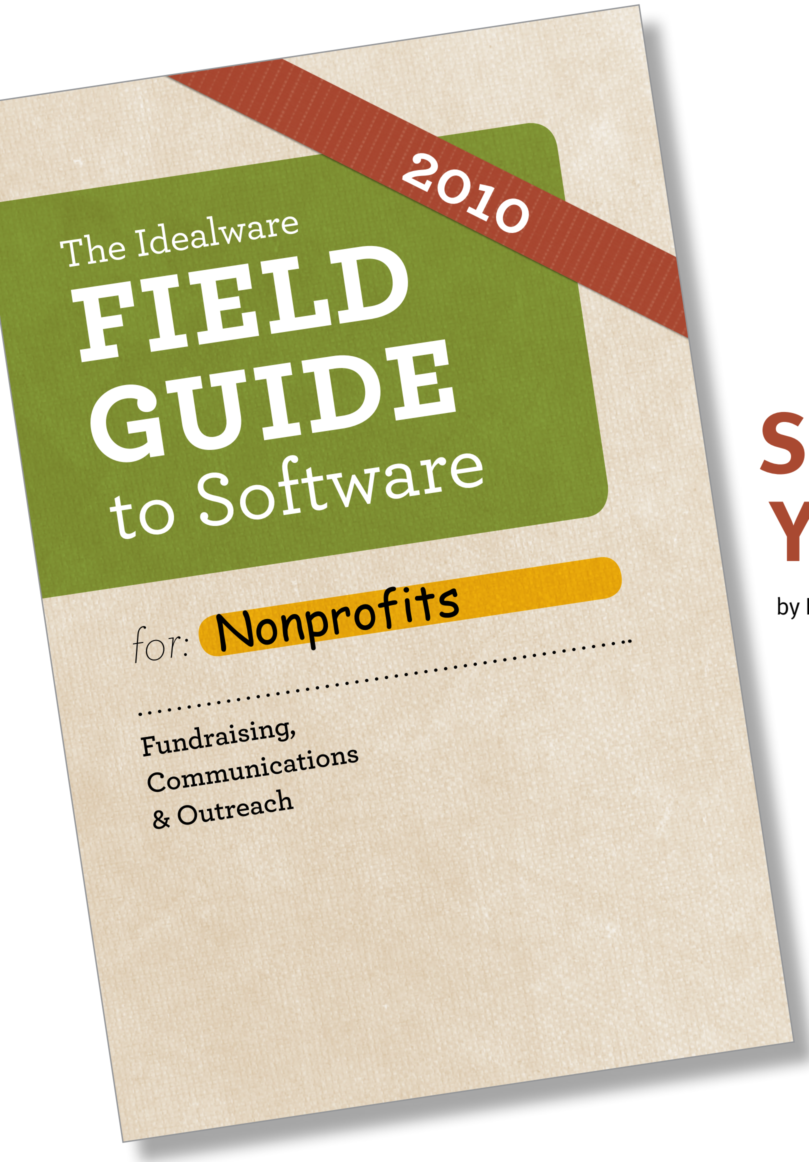
This issue is focused on helping make sense of the myriad fundraising-related technologies that have come along. Laura Quinn of Idealware.org, one of our favorite nonprofit technology sites, provides a basic overview of the most useful types of fundraising software available, neatly organizing them so you can see what makes sense for your organization. Yee Won Chong of Western States Center shows straightforward ways to add Web 2.0 to your fundraising and communications program. Yasmeen Perez offers a case study for using online pledge-raising software for their annual bowl-a-thon. To round out this issue I share some quick tips on how to use that core piece of technology, the database, for better fundraising.

Here at GIFT we are taking a deeper dive into the technological realm—subscribers now have the option of receiving their *Journal* online and have free access to our online archives. To take advantage of these offerings (or to get your login info if you're already a subscriber), subscribe today at grassrootsfundraising.org/subscribe or call us at 888-458-8588.

Taking it one step further, we've launched a blog! In a 2008 survey, *Journal* readers expressed a desire for a GIFT blog to round out the longer articles—items that are quicker to read, more timely and provocative. Special thanks to our Editorial Board for their blogosphere research, and to our new blog team! To meet them, read our first posts, and share your feedback, please visit grassrootsfundraising.org/blog.

And for offline inspiration, we're pleased to announce the next GIFT conference, Money for Our Movements: A Social Justice Fundraising Conference in Oakland, CA (not to worry, there will be WiFi available at the entire conference site). Save the date now: August 12-13, 2010. Information on registering, sponsoring, and exhibiting will be kept current at grassrootsfundraising.org/conference. And we'll send you updates on speakers, workshops, and other features as they become available.

Because in-person interaction can't be replaced by technology, we hope to see you there!



Software to Support Your Fundraising

by Laura Quinn

NO PIECE OF SOFTWARE IS GOING TO RAISE MONEY for your organization all by itself—but it can certainly help. In this article, adapted from Idealware's new book, *The Idealware 2010 Field Guide to Software for Nonprofits: Fundraising, Communications and Outreach*, we walk through the types of software that are often helpful in the fundraising process.

Of course, this isn't a one-size-fits-all kind of topic. It likely doesn't make sense for an organization to invest in cutting-edge software before it has its basic infrastructure in place. Thus, this article is divided into four sections—what software every organization needs, what software every organization should strongly consider, software to keep ahead of the curve, and cutting-edge software for those looking for the latest and greatest.

Every Organization Needs...

Most fundamentally, you'll need some kind of software to track your donors. Excel spreadsheets are great for maintaining a family Christmas list, but they quickly show their weakness when you begin tracking even just a few donations from the same person. A good database should let you store all the information you'll need about your donors. In fact, it's worth considering a system that will let you track all your constituents—not just donors, but volunteers, event attendees, clients, and more—in one place.

What type of system you use will depend on your specific needs. There are three basic types, each ranging widely in cost depending on the features you want.

- Donor Management. These systems provide targeted support to track donors, prospects, pledges, premiums and giving levels, matching gifts, and sometimes grants and corporate sponsorships. Some provide support for additional constituents, such as event attendees, volunteers, or members. However, these systems are best suited for organizations where individual fundraising is one of the top organizational priorities. Giftworks, eTapestry, and DonorPerfect Online are common, fairly low-cost donor management systems (see sidebar, More About Donor Management Systems, on page 3).
- Constituent Relationship Management (CRM). These systems are designed to track comprehensive data about each constituent—not only their donations and membership dues, but also, potentially, their event attendance, volunteer record, and anything else you might care to track. These systems are not designed to specialize in any one specific function. Instead, they're typically flexible to let you tailor them to the processes you need to support. If constituents have complicated relationships with your organization, or tend to cross organizational boundaries—for example, program alumni often become donors—a CRM can be a useful way to get a full picture of each constituent. Salesforce.com, CiviCRM, and Sugar CRM are common systems in this area. All three are free for small organizations, but they take some technical skills to set up.
- Integrated Online Systems. These types of systems combine different online functions in a single package. For example, they'll often let you track donors and other

constituents, send broadcast emails, take donations and event registrations online, and even manage a website, all in one system. It can save you a lot of time and hassle to have all this data in one place, but make sure your other needs are also met—these online specialty tools often aren't as strong at helping with direct mail processes and donor list-generation tasks as donor management systems. To take full advantage of these tools, small organizations typically use them to replace any existing constituent databases. Wild Apricot, Z2 by Neon, and Salsa by Democracy in Action are some common, less-expensive integrated systems.

In practice, these three basic system types aren't as distinct as they might seem. For instance, some systems offer a lot of support for donor management, considerable flexibility to track other constituents, and some support for broadcast email and online donations. Are they donor, integrated online, or CRM systems? It doesn't matter, as long as they meet your needs.

MORE ABOUT DONOR MANAGEMENT SYSTEMS

Donor Management software provides specialized functionality to manage donors, gifts and prospects. Almost all of these systems let you easily log gifts and track contact information, giving history, and notes. Most also allow you to mail-merge letters, create reports, or query to find subsets of donors. More sophisticated systems offer considerably more functionality for tracking different kinds of gifts—for example, grants, online gifts, major gifts, and planned gifts—and advanced features, but require more technical savvy from fundraisers and IT staff.

Increasingly, many systems include substantial functionality beyond core donor management. Some provide online payment functionality that could potentially replace Online Donation or Event Registration systems, and others offer some email functionality (though it may not be as robust as even inexpensive broadcast email software). Some Donor Management systems move toward the realm of Constituent Relationship Management, providing reasonable functionality to track volunteers, event registrants or other constituents in addition to donors.

Inexpensive systems like Giftworks, eTapestry, and Donor Perfect start as low as a few hundred dollars. Mid-priced systems, like Blackbaud's Raisers Edge and Donor2, can cost well over $10,000 to implement. At the high end of the spectrum you could easily spend $100,000 or more.

Regardless of what system you choose, make sure you think through how you'll integrate your donor data with other types of constituent data, as many donors likely interact with you in other ways as well. Can you import and export files? Are there programming interfaces (called APIs) that allow a programmer to create automatic processes to pull data in and out of the system? Does it make sense to use a very flexible system or a Constituent Relationship Management system that can track more than just donors?

Strongly Consider...

Most fundraising programs can benefit from an online component. To get started, you'll need online donation software—like Network for Good's Donate Now, Click& Pledge, or AuctionPay—that lets you accept credit cards online, either for one-time donations or on a recurring basis. Online donation tools typically are used hand-in-hand with broadcast email software—an online tool that allows you to email hundreds, thousands, or hundreds of thousands of people at once. The online donation tool provides a way to accept a donation, but email fundraising inspires donors to actually give (see sidebar, More About Broadcast Email Tools, on page 4).

A rich, engaging website is also an important part of an online fundraising strategy. A strong, frequently updated site will engage donors, show them why your organization is worth supporting, and make it easy to see how to help. You should be able to update your website easily yourself with new information or events as they happen so that the site feels timely and relevant.

A consultant can help with website updating in a pinch, but a website Content Management System (CMS) can be invaluable for this purpose, as it will allow your staff members to update the site themselves, regardless of how technically proficient they are (or are not). Unfortunately, it's not easy to add a CMS into an existing site, but almost every organization should consider using one when building a new site (see sidebar, More About Web Content Management Tools, on page 4).

Although you can use separate systems to manage donors, online donations, and broadcast email, you'll need to synchronize and integrate data among them. Many organizations find it useful to instead use a single Online Integrated System that manages all this information in one place.

Keeping Ahead of the Curve...

Enlisting staff, volunteers, or close friends to help fundraise is common practice. Several tools are available that help manage the logistics involved. Friend-to-friend fundraising tools let supporters create their own fundraising web pages online, customized with their own photos and text. Nearly everyone

MORE ABOUT BROADCAST EMAIL TOOLS

Broadcast email software lets you email a group of people all at once—as many as you want. It also helps you create attractive emails (often through graphic templates), manage email address lists, and let people subscribe and unsubscribe. In addition, more advanced tools help you collect email addresses on your website, "mail-merge" information into emails, send to particular segments of your mailing list by demographics, and report on how many recipients opened or clicked on each email.

Vertical Response is a good option in this area, offering nonprofits a sophisticated feature-set and up to 10,000 emails for free. Network for Good's Email Now is also feature-rich and attractive at about $30 per month for up to 20,000 emails. Other options include Constant Contact, Campaign Monitor, Topica, MailChimp, and iContact. WhatCounts provides compelling premium services targeted at those sending hundreds of thousands of emails a month.

If you email more than a few dozen people at a time, make sure you use an off-site vendor to send mass emails. Tools like Outlook aren't designed to support large-scale mailings, and won't help with the formatting and list management tasks critical for large lists. When you use them to email hundreds of people, you may reach more Spam filters than inboxes—or worse, your mail server might be blacklisted as Spam, blocking future email from anyone in your organization.

Note that many Donor Management, Constituent Relationship Management, and Integrated Online Systems provide some broadcast email functionality. While few can match the advanced features of dedicated software, you may find that your existing software meets your needs.

can raise at least a little money from their network, if they can be inspired to try. Social Networking sites like Facebook and Twitter can also provide some aid in raising money through networks, though organizations generally find them more effective as outreach tools (see sidebar, More About Friend-to-Friend Fundraising, on page 5).

Don't forget the software that can help your fundraising team coordinate with each other. Email Discussion Lists are a straightforward way to encourage people to talk to each other online—tools like Google Groups, Yahoo Groups, Electric Embers, and CollectiveX's GroupSites can help. If you have a very committed group, creating a Custom Online Community (essentially, your own private Facebook-like social network) can help your fundraising team with sophisticated coordination. Ning, KickApps, and Elgg are the most commonly used applications to create a custom community.

On the Cutting Edge...

A growing trend is to ask supporters to organize their own informal fundraising events—for instance, to throw a party at their house in support of your cause. There are some software tools specifically geared to help organizations display and

MORE ABOUT WEB CONTENT MANAGEMENT TOOLS

Web Content Management Systems (CMS) let you create and maintain customized websites, update their graphic design and navigation over time, and automate routine updates—for instance, removing events from your home page after they've come and gone. Most won't let you update existing sites built in other systems. Their real benefit is the ability to update site content and navigation without technical know-how or web design experience. Many organizations hire consultants to build the initial site in a CMS, and then use the system to maintain it.

Widely used open source options include WordPress, Joomla, Drupal, and Plone. These systems are free to download, but you'll need someone with technical skills to set them up. For more straightforward sites, consider simple tools like Homestead, SiteKreator, or Squarespace that let you define navigation, pick a graphic design template, and enter text and images on simple web-based forms.

What if you want to update an existing site? Other desktop tools, like Adobe Contribute, Adobe DreamWeaver, or Microsoft Expression Web (replacing FrontPage), can also let less-technical people update websites, but they work by directly changing the code for individual pages. They may or may not work with your specific site, depending on how clean and standards-compliant your website is. These are the only tools that will help update existing sites, but they limit your ability to make updates that are more substantial or affect multiple pages. CMS systems are the better approach if you're building a site from scratch.

promote all the individual events and that help the organizers collect RSVPs. Tools like MeetUp or Evite allow some minimal functionality in this area, but specific house parties and meet-up software like Party2Win and Blackbaud's Sphere offer considerably more support.

MORE ABOUT FRIEND-TO-FRIEND FUNDRAISING

Friend-to-Friend Fundraising, also called Online Distributed Fundraising, Group Fundraising, Team Fundraising, or Widget Fundraising, involves recruiting supporters—including staff members, core volunteers or passionate advocates—to fundraise for an organization. This technique can result in a lot of new donors, but since they're often personally connected to the individual fundraiser rather than the organization, they may not be as likely to participate in other programs or to give again.

Many Friend-to-Friend Fundraising tools, including FirstGiving, ChangingthePresent, and Change.org, let potential fundraisers create their own personalized fundraising pages, and all offer a version that's free except for a percentage of donations. Pages can have customized pictures, text, and easy links to give online, and they can stand alone or be associated with particular events, like walk-a-thons. Individual fundraisers direct their own friends and family to their pages and take donations.

Some tools also offer fundraising "widgets" or "badges." Widgets usually take the form of a small box—often with a logo, text, and a "donate" button—that can be added to existing websites, blogs or social network profiles, if you know a little HTML (the language of websites). Popular tools that provide widgets include ChipIn and SixDegrees.org, both free except for a percentage of donations.

More sophisticated tools also let organizational staff members easily oversee a campaign's progress or organize fundraisers into teams. Blackbaud Sphere Events (formerly Kintera's "Friends Asking Friends") and Convio TeamRaiser both provide more sophisticated, though considerably more expensive, organizational support in standalone packages. A number of Integrated Online Systems and Donor Management tools also offer some of this functionality (see related article in this issue, "The Bowl-A-Thon Gets an Online Makeover," by Yasmeen Perez).

Large organizations have also begun to experiment with fundraising through Mobile Text Messaging campaigns. In the U.S., organizations can ask donors to give directly by texting to a certain number (the donation is added to the donor's cell phone bill)—but these donations are capped by the cell phone industry at $10. While these small donations can add up—as shown by the recent success of mobile fundraising after the earthquake in Haiti—consider whether it might also discourage larger, more thoughtful giving.

Organizations have also seen some success with mobile phone pledge campaigns. In this case, donors are asked to simply pledge via their cell phone, and the organization follows up to collect the pledge.

CauseCast Mobile offers a particularly good deal in this area, starting at $99/month to support mobile giving or pledging. Mobile Commons, Distributive Networks, and Mobile Accord are more fully featured but more expensive options, and generally cannot accept mobile donations for organizations with budgets of less than $500,000 per year.

Wrapping Up

We certainly don't mean to imply you should be using all of these tools. Just the opposite: you should be carefully thinking through where you are as an organization and what can bring the most value. If you're a small organization trying to put up your first solid website and get an email campaign underway, it likely makes sense to wait until you're comfortable before diving into more complicated waters like friend-to-friend fundraising or mobile giving.

But don't discount the advantage that good software tools can give you. They won't replace good fundraisers, but they could multiply your fundraisers' reach and options—multiplying the money that you raise. ■

Laura Quinn is the founder and director of Idealware. Through research, reports, articles, and training, Idealware allows nonprofits to make smart, informed software decisions.

BUILDING BLOCKS TO EFFECTIVE COMMUNICATION AND FUNDRIASING

A Low-Tech Guide to High-Tech Communication

by Yee Won Chong

A FEW YEARS AGO, the word "communication" in the nonprofit world meant reaching out through the press—TV, radio stations, and newspapers. Today, nonprofits are increasingly aware that communication occurs in a lot more places than the press. More and more, the electronic venue is the medium of choice for telling the world why your organization exists and how people can join you in being part of change that matters.

There are two main reasons for this trend. First, nonprofits have started to embrace the importance of communication in furthering our causes and begun to adopt the practices for doing so more common to for-profits, such as marketing, branding, and public relations.

Second, the rapid growth of Web 2.0 over the last decade has made it easier for people to share information and interact with each other through the World Wide Web. Consumers share ratings across the globe for movies, hotel rooms, even hiking trails. Friends create Web communities through social networking sites like Facebook and MySpace. Blogs cost next to nothing to post and can reach thousands of people. Web 2.0 has left the old, static World Wide Web in the dust.

(High-Tech) Communication Amplifies Your Message for Fundraising

In her book, *BrandRaising: How NonProfits Raise Visibility and Money Through Smart Communication*, Sarah Durham explains that nonprofits communicate for three goals: fundraising, outreach, and advocacy, with the audiences for these goals often overlapping. The key is how to reach those goals and those audiences most efficiently and effectively.

Attend any fundraising training and you will hear that fundraising is about relationship-building and that the best way to build relationships is in person (or on the phone). Of course, no organization has the time for personal contact with every donor, and some donors may not want the in-person interaction. Others may live too far away to make such relations feasible. Communicating in print is one option. Print and electronic newsletters, for example, are great ways to update your donors about your programs, organizational changes, and progress on what you said you were going to do. It's basic accountability, letting donors know that their investments are being put to good use, and it increases the chances for more donations in the future.

But the print medium is still mostly a one-way interaction. High-tech communication technology opens up two-way interactions between you and your current and prospective donors. New technology enables you to deliver news to your donors regularly and inexpensively and, equally important, allows donors to communicate with you.

Jumping on the tech bandwagon is cheaper and easier than it used to be, but it can still seem overwhelming. In this article, I take you step-by-step through the basic building blocks, how to combine their features to amplify your message, and how to use them to increase your fundraising potential. (For more on specific software programs, see "Software to Support Your Fundraising" by Laura Quinn in this issue.)

JUMPING ON THE TECH BANDWAGON IS CHEAPER AND EASIER THAN IT USED TO BE, BUT IT CAN STILL SEEM OVERWHELMING.

Three Building Blocks to Get You Started

There are three basic building blocks you will need to get started with electronic communications:

- A website Content Management System (CMS)
- An Email Service Provider (ESP), also known as broadcast email tools and email blast service
- A Social Networking website (the best site to get you going is Facebook)

Website Content Management System (CMS)

Your website is "information central" about you, and your homepage gives the first impression about your organization. It's important to present your most current work and news on your homepage and keep it updated frequently—at least monthly. Your homepage should also show clear ways for people to join your email list, donate to your work, and become your fan on Facebook.

Navigating your website should be a breeze for the visitor, so it's important to organize your information well and label the sections clearly (see sidebar, Organizing Your Website Content, on page 8). Remember to always include your website address (URL) in your printed materials—you want people to get used to going to your website.

Turn your website into an interactive platform by adding comment fields to each of your enews articles and blog entries. Have your web programmer and designer include add-on tools, such as ShareThis and AddThis, to make it easier for people to share your web page, articles, and blog entries with friends via email or social networking sites like Facebook

Email Service Provider (ESP)

Your "enews" emails serve as an update and announcement tool that also direct people back to your website. To get started, send enews once a month.

Do not pack your emails with tons of information—people read the top of the email, then scan as they scroll down or sometimes skip the rest completely. Provide short and exciting blurbs and images of two to three articles that will grab the reader's attention and give them a click-through option to read the full articles on your website. Enews targeted to donors should say clearly how their investments in your work made these program successes possible. If you use your emails to announce events, provide links for more information to the Calendar section of your website and include an online RSVP form there.

E-alerts tend to express a sense of urgency, so send them when you have pressing news and actions, such as when you want your readers to sign an online petition, call their legislators, or give money to an emergency need.

E-appeals can be added to your offline fundraising campaigns, for example by sending an e-appeal as a follow-up to your mail appeal. You can also have an electronic-only fundraising campaign by sending a series of e-appeals. With a series, you can update people on your fundraising progress, but be careful not to overdo it. Three to four emails are enough. All your e-appeals should direct people to the Donate page on your website.

Social Networking

Facebook is the most commonly used social networking site in the U.S. Millions of people are using it to connect to their friends locally as well as throughout the country and the world. Increasingly, the for-profit and nonprofit sectors are using Facebook to build their brand and interact with consumers and constituencies. If you do not already have a presence on Facebook, now is a great time to start by signing up at Facebook.com.

To start you will need to sign up for Facebook as an individual. Next, you will need to create a presence for your organization on Facebook. For this, there are two tools that often baffle people—"Page" and "Group."

Page is the best Facebook tool to build your organizational presence because it allows you as an organization to interact with your "fans." Page is to an organization what your personal page is to you. It is a good tool to direct people to your website and blog, so be sure to post a link to your Page wall whenever you publish something new on your website, like an article or blog entry. Page is indexed by search engines, so people can find your Page in Google. To create a Page, go to http://www.facebook.com/home.php#!/pages/create.php.

In Group the organization acts as a backdrop for individual members to interact with each other, with Group membership limited to 5,000. Group is not indexed by search engines. It is best used for specific set of people, such as an alumni group or book club. To create a Group, go to http://www.facebook.com/home.php#!/groups/create.php.

Facebook has two other tools that are also useful for nonprofits: "Causes" and "Events." Causes allow people to donate to your organization. You can have multiple Causes linked to your Page, a different cause for each fundraising campaign. For example, Oxfam has a Page that lists updates about all of their work and a Cause specifically to raise funds to respond to the earthquake in Haiti. Events allow individuals to invite their friends to events you organize. This is a great tool to spread the word about fundraising benefits and house parties.

I recommend Facebook because it is a thriving virtual community, costs nothing to use, and has a sophisticated infrastructure already built for you. It is an easy way to tap into the social networks of your fans in a way that you couldn't a few years ago, allowing your fans to spread the word about you and also to fundraise for you.

Making Your Building Blocks Work for You

Here is how my organization, Western States Center—a group that builds leadership for the progressive movement in the West—puts these building blocks to work. Our program, Uniting Communities, supports organizations of color to be

ORGANIZING YOUR WEBSITE CONTENT

Find a website programmer and designer who understand your vision and the brand aesthetics that represent your organization. Check with other nonprofits whose websites you like to see who they use. You may need to talk to a few website designers to find one who is in alignment with what you want. Once you have someone to work with, you can start organizing the content for your new website. A typical nonprofit website has the following sections:

1. **About Us.** Your history, mission and vision, staff and board information, and contact information.
2. **Program(s).** Depending on the nature of your work you may have more than one section (or one web page) for your programs.
3. **Get Involved and Donate Now.** Online petitions and volunteer recruitment, plus a way for visitors to your site to donate to your work.
4. **News.** Press coverage of your work or issues you cover, including excerpts from your electronic newsletters and annual reports.
5. **Resources.** Helpful links and useful documents.
6. **Calendar.** Particularly useful if you organize many events or need to let people know of actions you are taking.

Top Content Management System Functions and Features

Here are some features I highly recommend:

1. Form Generation

Form generation allows you to create simple forms right on your website. Forms can be used to accept RSVPs to an event, collect feedback, and create simple surveys.

2. Donate Link

Most online donations will come through your website. People should be able to donate right on your site instead of printing a form from your site or being redirected to a third-party website. Sign up for an online donation service that allows you to embed a donation form in your website to maintain the overall design of your site.

3. Mailing List Sign-up

A sign-up option can appear in several pages in your website and can be linked directly to your Email Service Provider to allow people to be added automatically to your list.

4. Search Box

A search box makes it easy for people to find what they are looking for within your website.

5. Blog

A successful blog, perhaps relating information about your ongoing work or its issues, has to have frequent posts—at least once or twice a month. A blog is a great vehicle to post something quickly, between your electronic and print newsletters. It's also a great way to add personal stories and voices. In addition to having your staff contribute to a blog, invite board members, program participants, volunteers, and allies to blog for you.

6. Comment

A place where readers can leave comments about your articles and blog posts.

TIPS ON GETTING STARTED

Here are some tips to make using high-tech tools less overwhelming.

1. Explore, test, learn, and repeat

The Web 2.0 world is very dynamic. New sites with fancy tools and features are developed every day. It's true that what is "hot" today may not be "hot" next week. The reverse is true, too. Remember how Yahoo ruled the search engine world? Google entered the arena in the late 1990s and not only now dominates the search engine world but has entered territories no one imagined a little search engine could. There is no final frontier. Be curious and fearless!

2. Be OK with mistakes.

Making mistakes is part of the lesson. Perhaps your first attempts to drive traffic to your homepage haven't resulted in many hits. Look around at what other nonprofit sites are doing and learn from your own mistakes and their successes.

3. Be prepared to deal with negative feedback, but don't let it stop you.

User-generated content means that people who don't like what you do may write negative comments about you in the public sphere, such as on Facebook or as a blog comment. Don't ignore them, but don't let them stop you from entering this world. Talk to others about how they have handled similar situations. And evaluate the feedback—you may need to do things differently based on it. People who give constructive criticism are invested in your organization's success.

4. Start with small goals

Set small goals at first. You don't have to begin with a comprehensive communications plan for your organization. Small goals can be reaching 500 Facebook fans in two months or moving from quarterly enews to monthly enews. But once you are familiar with these basic building blocks and how they relate to each other, you should work on a communications plan.

5. Don't create it then ignore it.

In the online world your website is the first impression a visitor gets of your organization, so make sure the look is fresh and the content is updated frequently. If you don't, you will defeat the purpose of using these building blocks to communicate about your work. Create a schedule for updating your website, posting information on Facebook, and sending eNewsletters.

6. Use the content that you already have…

Use some of the content that you've already created for your printed materials such as newsletters, annual reports, and appeal letters. Add more timely information and a bit of pizzazz like slideshows, video, or audio clips.

7. …but avoid using content from a grant proposal.

Grant proposals are formal, filled with jargon, and loaded with details. Web and email writing has to be more concise and usually more informal. Most people are scanning for information, so you need to grab their attention. Short and to the point works.

8. Start with a centralized model

While the fundraising staff should be the central coordinator for this work, that doesn't mean that they have to write all the content. Spread out the writing to other staff. But make sure that someone is tracking the writing assignments and posting the updates.

more inclusive of LGBTQ members of their communities and helps the organizations take a public stand on LGBTQ equality.

Earlier this year we launched Uniting Communities: The Toolkit, a handbook with exercises for groups to start the conversation about how LGBTQ issues connect to their current work and case studies that look at strategies for jump-starting these difficult conversations. We wanted the Toolkit to get as much visibility as possible, so we engaged all our communication building blocks.

Homepage links to the program page. Right before launching the Toolkit we updated our website home page with a short blurb that links to the Uniting Communities program page.

Program page links to downloadable Toolkit samples and order form. At the Uniting Communities program page, visitors can read about the history and purpose of Uniting Communities and the Toolkit. That page includes links to download the Toolkit's table of contents and a sample exercise and to order the Toolkit. When someone downloads the sample, we capture their name, email address, and organization.

Email follow-up. We send email updates to people who have downloaded the Toolkit samples describing how others are using the Toolkit, asking them to join our monthly enews list, and giving them an opportunity to donate to the project.

Enews links to our website. We announced the release of the Toolkit in our monthly enews, with a catchy blurb with a link to the full article on our website. This drives further traffic to our website, with its links to the Uniting Communities page.

Links from our Facebook Page. We also used our Facebook Page to drive traffic to our website by posting a link and an announcement about the Toolkit article on our Facebook Wall.

Fans can give a "thumbs ups" showing their enthusiasm for the Toolkit, write comments on our Facebook Page about the Toolkit, and even repost on the link to their Page, where their Friends can see this feedback in their Facebook News Feed. The more fans take these actions the more our story appears in News Feeds, expanding the number of people reading about it and being encouraged to become Fans of Western States Center. In the days following the posting on our Page, we saw a higher than usual increase in new Fans.

Blogging about the Toolkit. We have invited guest writers to blog on our website about their experiences with the Toolkit. To help drive traffic to the blog, we have posted it to our Facebook page.

In-person promotion. In person and at conferences and other events, we hand out flyers about the Toolkit that direct people to the homepage where the Toolkit blurb appears prominently.

House party fundraising. We are planning several house parties to fundraise for the Toolkit. House party hosts are sending invitations by postal mail and email. The printed invitation includes an RSVP card and reply device (invitees who can't attend can still send in a donation). The printed invitation also includes our homepage URL, where there's a link to an online RSVP form for guests who prefer to RSVP online.

The email invitation also has a link to the online RSVP form and to our donation page, with a prompt for people to give even if they cannot come to the event. The RSVP form links to the Toolkit article and the Uniting Communities program page so people can easily get more information.

Some hosts will also use Facebook's Events feature to invite their friends. This feature has the capacity to reach not only the hosts' friends but also friends of their friends. Invitees can RSVP right on Events and they can see who has been invited, who is coming, and who isn't. They can also write on the Events "Wall" about their excitement for the event. Hosts can include a link to an online donation page. You can set the privacy to "closed" or "secret" if you do not want just anyone on Facebook to know about the event. However, don't put too much stock in Facebook for generating turnout for an event. Although Facebook is a convenient tool to reach lots of people, most of your turnout will come from reminder calls, personal emails, and face-to-face contact.

As you can see, there are simple ways to link your print and electronic building blocks so that you can amplify your message. The more you use the same tools your supporters are using, the more likely that your message will reach and engage your audience (see sidebar, Tips on Getting Started, on page 9).

It Takes Building Blocks to Make a Hill

There is a saying in my home country of Malaysia: "Sedikit-sedikit lama-lama jadi bukit," which means "Little by little, over time you have a hill." These building blocks interlink to form a strong structure. You can think of the ways you currently communicate also as building blocks: print newsletters, annual reports, and brochures. By adding new blocks—website, email, Facebook—your blocks build a hill. If you remove one block, the structural integrity of your hill will be compromised. Your hill might still stand, but take out another building block and it might start to crumble. A building block on its own is tiny. Stack them together and you have a solid hill from which you can broadcast your messages more widely. ■

Yee Won Chong is the development and communications director at Western States Center (westernstatescenter.org). Yee Won is a member of the Progressive Communicators Network and serves on the Board of Directors of GIFT.

The Bowl-A-Thon Gets an Online Makeover

by Yasmeen Perez

FIERCE (Fabulous Independent Educated Radicals for Community Empowerment) is a membership-based organization building the leadership and power of lesbian, gay, bisexual, transgender, and queer (LGBTQ) youth of color between the ages of 13 and 24 years old in New York City. We were founded in 2000 on the principle that LGBTQ youth must realize and manifest our social and political power to change our conditions, shape our futures, and become effective agents of change in our communities. We are dedicated to developing politically conscious leaders who are invested in improving ourselves and our communities through youth-led campaigns, leadership development programs, and cultural expression through arts and media.

One unique element of our organizing model is that youth members of FIERCE coordinate and lead our grassroots fundraising work—raising more than $60,000 a year. We began organizing a youth-led bowl-a-thon extravaganza fundraiser in 2008 that has become an annual event bringing together more than 150 community members to raise more than $25,000 to support FIERCE. Community members are recruited to create bowling teams of five or six people who ask friends and family to pledge to them. Currently, about 25 teams participate in the event. Their efforts culminate in a day-long bowling party and celebration.

When we decided to take on this event, we got support from other organizations with experience doing it. Seattle Young People's Project also has a youth-led bowl-a-thon, and Strategic Actions for a Just Economy (SAJE) had been doing bowl-a-thons for a long time. SAJE recommended that we take the event online to make it easier for team members to get pledges from their friends and community members.

Taking It Online

To go online with the bowl-a-thon, we decided to purchase Kintera, now owned by Blackbaud, as our event software. This software allowed us to make a website with all the information about the event and how people could get involved. People could register on the website as a team member and set up a personal web page to track their fundraising efforts. These web pages displayed the team member's name and their fundraising appeal, and had a donation portal to process donations for that individual.

Fundraising online greatly increased the amount of money team members were able to raise. They could reach out to people in other cities and states (32 percent of 659 donors were from out of state), and they didn't have to follow up with people in person to collect on pledges. Having online software also meant that 95 percent of the money raised from the event had been collected before the actual day of the bowl-a-thon.

The online strategy also significantly cut down the amount of administrative work for the event. The software tracks all donor and team member contact information, and its database can easily produce reports that can be used to print receipts, make registration lists, and do post-event follow-up.

One of the drawbacks is expense: the software we chose has a start-up fee in addition to an annual fee and processing fees. When we purchased it in 2008, the software, set-up fee, and annual fee came to $1,600. The subsequent annual fee is about $1,000. Credit card processing and Blackbaud fees ate approximately 9 percent of our total online donations. So, for the first year's use, if you raised $10,000 in online donations, your cost for using the online system would be $2,500. Clearly, the software is more cost effective with higher levels of online giving. Because the software greatly increased the amount of money this event brought in, we felt that these costs were ultimately worth the investment.

The software worked well for us, and donors for the most part found the website easy to use. Our main complaint was that donors occasionally had trouble processing their credit cards on the site. We tried contacting the company about this problem but had trouble getting through, and because it occurred inconsistently and would usually resolve in an hour or so, we didn't persist; we know that some donors gave up after two or three tries.

Regardless of what software you choose, these features are essential for any -thon event software:

- Team members can register for the event and collect online donations
- Donors can easily search for a team member and/or team
- Instructions for using credit cards are clear
- Software can track and produce reports of all necessary participant info
- Software can track and produce reports of all necessary donor and giving info
- Team members and donors can see team members' fundraising progress and track how much money the event is raising.
- Software sends automatic email thank you letters and donation receipts.

Making It Personal

Setting up the software was fairly easy. We drafted our own text and chose site features we thought would be most helpful for our event. The design features of the software are fairly limited. You can pick colors, fonts and sizes, and add images, but the layout itself is a standard template that cannot be changed.

We trained event organizers (staff and youth interns) in how to administer the site, add donations manually, fix mistakes that donors and team members made when entering their information, and solve other problems that came up.

Team captains were given a brief training on how to use the website during a team captain orientation meeting. Our outreach emails and team captain packets had detailed instructions on how to get registered online and begin using the site. In some cases, event organizers had to walk team members through the registration process by phone, but most found the site to be friendly and easy to use.

Most team members enjoyed having the online platform. There were small design features that allowed them to personalize their pages with a picture and wallpaper.

John Blasco, a member of FIERCE's staff bowling team said, "I liked that I was able to log in to my own account. I had control of my page, I could see who was giving me donations, and I liked that I had a scroll on my page that listed who gave to me and how much they donated. The scroll motivated me to get more donations so I could see more people on my page."

Keeping Volunteers Motivated

The software helped us keep team members motivated and excited about the fundraising.

The program sent a participant a congratulatory email when they reached 50 percent of their fundraising goal, encouraging them to keep up the good work. It also sent an email to let team members know when someone registered for their team and when they received a donation. Event organizers could see right away through the website which team captains were raising lots of money or recruiting team members, and would email them with props for their success.

To encourage the competitive types, the website keeps a scroll on the home page that lists the top five individual fundraisers and the top five fundraising teams. As one team member put it, "I think deep down everybody likes a little competition. To see your team's name in first or second place was really cool. I was even trying to beat my own team members. I didn't think it was possible for me to meet my fundraising goal of $500, but the website really helped me. When I saw other people's fundraising amounts go up rapidly, I knew I had to keep going. I ended up raising $520!"

The ticker on the home page also let us see how much the event had raised in total. As the event day got closer, many participants started checking the website hourly just to see the exciting progress. For example, in 2009, about 40 percent of the more than $27,000 we raised came in during the last two weeks of fundraising. It was a boost to be able to watch the numbers go up in those last days.

Out of the total raised, 85 percent came from individual donors and team members (and about 90 percent of that came in online), and the rest came from businesses and organizations who purchased ads in our event program book or sponsored the event. Selling ads and getting sponsors is a great way to complement the online fundraising and generate more income from the event.

The website also gave us an easy way to see which teams weren't motivated to fundraise—alerting the event organizers that they needed to check in with them and give them a pep talk on how to get started.

Don't Forget the Off-Line Work

In addition to the automatic thank you email donors got from the program acknowledging their gift and providing them with the necessary tax information, we sent a hard copy acknowledgement letter with a personalized note to every bowl-a-thon donor. This level of personalization is important for building relationships with donors, but it's time-consuming, so you need to keep up with it! We received around 650 donations for this event, and event organizers, with some staff help, easily spent more than 15 hours personalizing thank you notes on the official receipts we sent out.

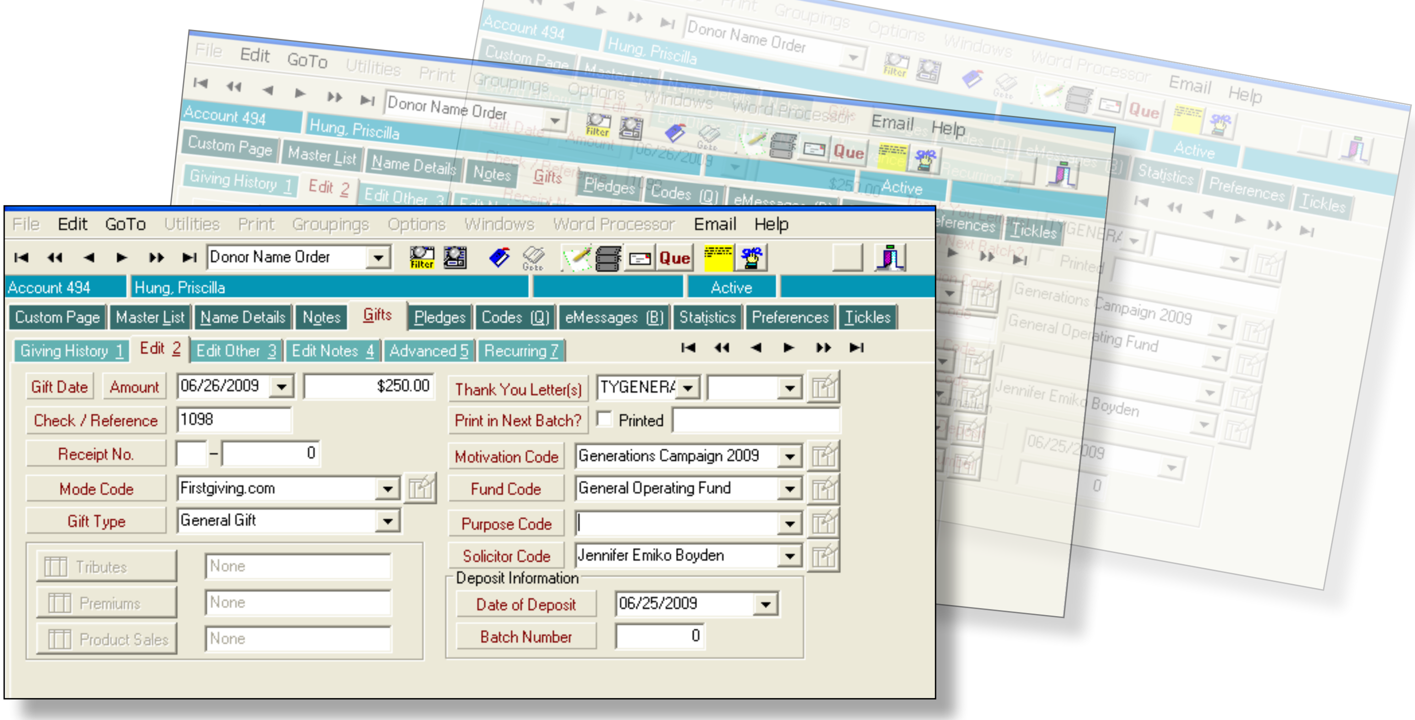
Many teams and participants also collected donations in person. They were asked to bring check and cash donations to the event or send them in before the event. These offline donations were entered manually by event organizers so that all donations for the event were tracked through the software and were reflected in the fundraising totals on the website.

Each year, one to two teams have chosen not to use the website and to do all of their fundraising offline. Often times this decision was due to last-minute registration or teams who decided not to ask for money from others but to donate personal gifts themselves. Some people were also reluctant because they found online fundraising intimidating or felt that registering online was too much of a commitment. Generally, teams that never got online were more isolated, less engaged in the event, more likely to drop out, and were less accountable to their fundraising goal. Most offline teams brought in between $150 and $300, whereas many of the online teams raised between $500 and $1,000. If you have a reluctant team, I recommend coaching them as best you can to get them online.

Conclusion

Taking the bowl-a-thon online greatly increased the capacity of the event and made it even more fun and competitive. Even if you don't have the resources to purchase expensive software, there are free and low-cost versions with similar features. The most important thing is to be able to receive donations online and to track participant and donor information accurately through the site. It's worth it! Good luck to all you fundraisers out there! ■

Yasmeen Perez is the former leadership development director at FIERCE. Trained in grassroots fundraising skills at age 18 by racial justice organizers in Seattle, Yasmeen has been proudly doing youth-led, politically grounded grassroots fundraising for the last 10 years. For more information about FIERCE and how to get involved in the bowl-a-thon go to fiercenyc.org.



Quick Tips on Using Your Database

by Priscilla Hung

HERE ARE SOME SIMPLE WAYS that you can use your donor database not just to store data, but to actually help you raise more money. Most organizations with even a basic donor database should be able to do these things. If you have a more complex fundraising program and sophisticated database you will be able to do much more.

Personalizing Donor Appeals

When doing a print or electronic appeal, use information in your database to personalize your communication and maximize your returns. Your database should be able to export all of this information for you to merge into your appeals:

- **Contact information**. The donor's name, preferred salutation, and email or mailing address. People will be more responsive to an appeal that has their name on it than one that begins, "Dear Friend."
- **Gift information.** The donor's most recent gift, the date it was given, and the specific amount you are requesting. Many of us use the phrase, "Thank you for being a donor. We hope you can give $50, $100, or whatever you can afford." But consider how much more effective it is when you can say, "Thank you for being a donor. Your last gift of $50 that you sent last September really made a difference. We are hoping you can renew your gift of $50 this year."
- **Solicitor name.** If you had a friend-to-friend fundraising campaign and you are now asking those new donors to renew their gift, mentioning the name of the friend who solicited them is also important for reminding them of why they gave.

Contact information, recent gift information, and solicitor name are also useful when phone banking, and should be included on the list of people you are calling, in addition to phone numbers, giving history, and any other notes on the donor.

Evaluation and Planning

Your database should be able to generate key reports for evaluation, including how much you raised and how many donors gave per fundraising activity. If you can print reports according to gift size, you can also use them to determine the median gift size and how many donors are giving at each level. For example, if you know that $50 is your median gift size, you can better estimate future fundraising goals. If you know that the vast majority of your donors are giving less than $50, then you may want to increase your efforts to upgrade your donors.

Also look at how many new donors you brought in and how many you lost – donors who gave the last year but not this year (LYBUNTS for short). If you are losing more than one-third of your donors from year to year, you may want to look more closely at your retention efforts. If fewer than one-third of your donor base are new donors, it may mean that you're not bringing in enough new donors each year.

If you are working with a fundraising team, you will also want to see how much money and how many donors each member of the team brought in. This will help you know who to recruit for next time and who might need more support or training. It can also be used to reward those who meet certain goals.

Another way to use your database is to see when gifts came in response to your email appeal series. At GIFT, we send a series of five emails at the end of the year to people on our listserv who have never given before, and we use the data to see which specific email generated the most response. Seeing this level of data is easy if your database can print reports according to the gift date.

In addition to what your donor database can tell you, use your accounting database to figure out fundraising expenses and include qualitative evaluation, such as donor surveys or feedback from staff and volunteers, to help round out the evaluation of your fundraising program.

Segmenting Donor Lists

Segmenting your donor list is key to more personal and effective fundraising. Rather than sending the same fundraising letter to everyone in your database, segmenting allows you to tailor fundraising activities and messaging to different audiences. The most typical ways to divide up your donor list—or segments—are by gift size, recency of giving, longevity of giving, and connection to the organization. More sophisticated organizations may combine segments for more personal strategies. You will find this information in the giving history and in the codes and groupings you create in your database.

Here's an example of how GIFT makes this work.

Gift amount. Let's say a major donor is someone who gives $500 or more. We create a list of everyone who gave $500 and up in 2009. These major donors will get a special letter, a phone call, and a visit to renew their gift. Those giving $100-499 will get a different letter and a phone call asking them to upgrade their gift. Those giving less than $100 are divided into two groups by longevity. Those who have been donors for at least two years will get a letter and an email follow-up asking them to become monthly sustainers at $10/month. First-time donors giving less than $100 will get a different letter simply asking them to renew their gift.

Recency of gift. Another way to segment is by recency of gift. People giving less than $100 who gave in 2008 but not in 2009 will get a friendly letter early in 2010 letting them know that we didn't hear from them last year and we hope they can give now. People giving more than $100 who didn't give last year will get a personal phone call. Current monthly sustainers will not get a letter until their pledge is fulfilled. Finally, prospects in our database who have never given will get an invitation to an upcoming event.

Connection. Yet another way to segment is based on the donor's connection to the organization or what prompted their giving. This is also a way to help integrate your fundraising with your program work. For example, our interns raise $500 each for GIFT through their own contacts. Many of these donors are not likely to give again to a general pitch for the organization, so as part of the interns' training, they do phone banking to people who gave to interns the previous year.

You can use fewer than the multiple segments I've just described to keep things more manageable. Or you may want to plan out your fundraising calendar according to segment (for example, January and February are focused on LYBUNTS, March is for new prospects, and so on), which saves you from doing a number of different mailings to different segments at one time.

Conclusion

The data in your donor database can be a treasure trove of information. Once you have a database and processes to consistently enter gifts, take this next step of using your data to boost fundraising efforts. ■

Priscilla Hung is the executive director of GIFT and interim editor of the *Grassroots Fundraising Journal*.

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