Grassroots Fundraising Journal

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A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

Communications & Technology

Strategic Communications for Year-Round Engagement

Infographics for Outreach, Advocacy & Fundraising

Communicating Your Case to Donors

CRMs & Fundraising Campaigns

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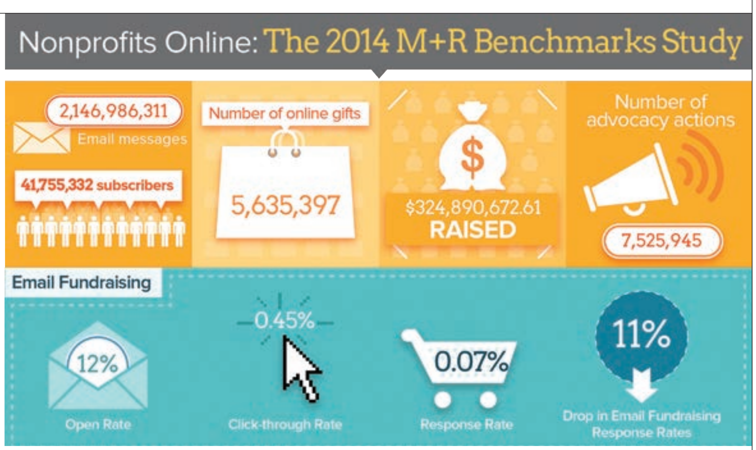

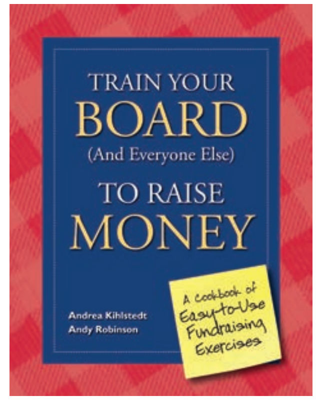

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Collective Brilliance in Baltimore

ONE OF THE HIGHLIGHTS OF MY SUMMER was finally getting to meet so many of you—folks whose names I have been seeing on *Journal*-related correspondence for years—at the Money for Our Movements Conference in Baltimore. Of course, it is also wonderful to reconnect with old friends, some of whom I only see every other year at our gathering. And to those of you who just learned about the *Journal* at the conference—a warm GIFT welcome to you! We were thrilled to host over 650 grassroots fundraisers like you for a weekend of skill sharing and community building. You can check out photos, download workshop handouts and the program book, and share your feedback with us at grassrootsfundraising.org/conference.

The conference program was up to its usual stellar standard this year (thank you, presenters!), and we would be remiss if we didn't include some of that content with all of you in the *Journal*. Joleen Ong opens the issue with tips for staying in touch with donors throughout the year. Next, we share an adapted version of Idealware's report on infographics to explore how you can use visual representations of data to further your cause and communicate the impact of your work. Andy Robinson and Andrea Kihlstedt follow with a training exercise to prepare you and your fundraising team to make an effective case to support your group's work. Tomás Aguilar and Mark Sherman complete the issue with a guide for choosing a CRM (Constituent Relationship Manager) that will meet your needs, providing examples of groups using their CRMs to maximize their fundraising effectiveness.

Remember—this is *your* publication, so please always let us know what you'd like to see covered or if you are ever interested in writing an article.

Here's wishing you a hugely successful fall fundraising season!

Jennifer

Jennifer Emiko Boyden

Strategic Communications for Year-Round Donor Engagement

By Joleen Ong

ONLINE FUNDRAISING HAS COME A LONG WAY from just having a "donate now" button on an organization's website; it is now an integral channel for fundraising. In the past year alone, revenue raised through online fundraising increased 14 percent with more than 5.5 million total gifts and nearly $325 million raised, according to the 2014 Nonprofit Benchmarks Study.[1]

Social networking, in particular, has amplified the peer-to-peer fundraising approach. But while online fundraising continues to grow, best practices for donor stewardship remain the same: nonprofits need to cultivate and maintain relationships, demonstrate effectiveness and impact, and acknowledge donors for their support.

Nonprofits often make the mistake of waiting until the end of the year to contact their donors for donations. There is so much we can be doing year-round to ensure "the ask" is not a cold one. Think about the donor experience with your organization: aside from the year-end ask for donations, what other messages are they receiving from you? Are those messages conveying why they should donate? Or are they just messages asking for their donation?

Consistent online communication from nonprofits year-round through channels such as social media, blogs, and email newsletters can help cultivate and maintain good relationships with donors, as well as attract new ones. There is no shortage of ways to harness the power of the social web to support fundraising goals, but before you try to utilize all these channels, consider the key ingredient: content.

Online fundraising is powered by good content. Let's step back to the fundamentals of creating effective and powerful content. In what follows, we will explore: trust-building and fundraising; the importance of thinking "content first" instead of "channel first;" getting all staff members involved in creating content; and a case study of one small nonprofit that boosted its annual fundraising efforts.

Build Trust

Try this exercise: Ask some of your colleagues, "What nonprofits or causes have you donated to, and why?"

Chances are, they will respond by telling you that they have donated to a cause either because someone they knew asked them or because they feel passionately about the cause. Then take it a step further and ask your colleagues, "Out of all the nonprofits in the world that work on this cause, why did you pick this nonprofit to support?" In a recent poll that I informally conducted with colleagues on the latter question, the responses were similar: they donated because they 1) agree with the organization's approach; and 2) ultimately trust the organization to effectively put their donations to work.

Trust in nonprofits highlights the main link between communications and fundraising: if people trust your organization—to be impactful, fiscally responsible, and reliable—they will be more likely to donate to your organization. Communicating regularly will help to establish the needed relationship to build trust. Think about it—would you ask a stranger for a favor and expect to receive it? Probably not. Neither would you, as a representative of a nonprofit, cold call someone and ask them for money without providing a reason.

Think of the social web as a hub of communications. Looking at the figure on the next page, the social web is a platform through which you can meet and engage potential donors. Engaging donors shouldn't always involve asking for money but rather offer an invitation: "subscribe to our newsletter," "link to us," "attend an event." These are year-round actions that lay the foundation of engagement and trust for a successful "ask."

When you consistently communicate your message—whether it's about impact, effectiveness, or milestones—it plays into the principle of effective repetition. According to the Edelman Trust Barometer[2], the majority of respondents reported that they need to hear information three to five times to believe messages.

1 http://mrbenchmarks.com

2 http://www.slideshare.net/EdelmanInsights/global-deck-2013-edelman-trust-barometer-16086761

Image source: leighhouse.typepad.com/advergirl/2008/09/fundraising-and.html

“Content First” not “Channel First”

Create content that informs your community, and then bring your story to them. Social media, email newsletters, blogs, and text messages are just channels to communicate. Creating a consistent stream of content is the challenging part. That is precisely why it is important to ensure that all of your staff members are involved in creating content to ensure their activities are accurately represented. Think “content first” over “channel first.” Nonprofit staff members have incredible stories to tell about the work they are doing to change the world, so don’t wait until the end of the year to tell donors about it!

Having staff and/or board members regularly contribute ideas and content for communications and fundraising is a goal that every nonprofit should strive for in order to ensure the integrity of their work. Inspire staff members to create content by letting them know what you are going to do with it, how it will help align with their strategic goals, and what its potential impact will be. It is also interesting for staff members to receive analytics on their work and feedback from the community. This imbues staff with a sense of ownership and satisfaction, making them a part of the internal process and understanding the impact of their efforts.

Communicating across various channels is also a great opportunity for nonprofits to showcase their personalities and let audiences get a behind-the-scenes look into the organization. Nonprofits are interesting and funny places to work; allow your supporters to fully experience your nonprofit’s culture. (For inspiration, check out workingatanonprofit.tumblr.com). The information you post does not always have to be serious; the most effective communication ensures a balance between content that reports on relevant activities and content that captures the culture of the organization. Showing this personality can help raise funds because, ultimately, fundraising is about connecting with people.

Just as every person in a nonprofit should be involved in fundraising, they should also be involved in communications. But putting this all into practice can be daunting. The following case example demonstrates how to build a culture of reporting within an organization, even if you have limited funds and staff capacity.

Case Example: Social Accountability International

The first nonprofit position that I landed was in a communications and fundraising role at a small human rights organization based in New York called Social Accountability International (SAI). SAI had layers of incredible, award-winning activities, but as in the case of many small nonprofits, they didn’t have the capacity to communicate it out strategically to a non-technical audience.

The biggest challenge was creating an culture of reporting within the organization—a culture where we would consistently generate interesting and accessible content about the organization’s activities, which could then align with our fundraising strategy. We had staff members traveling to workplaces around the world conducting auditing trainings to detect human rights abuses in factories. The staff’s expertise was so technical and complex that it was hard for them to communicate what SAI actually did to potential donors.

I worked with our development director and executive director to distill the technical language into easier to understand text that focused on demonstrating the organization’s impact and effectiveness. To do this, we had to listen deeply to our audiences. A common question we got asked was, “Why do sweatshops still persist?” After years of trying to answer this, we sprang at the opportunity to publish the article, “Seven Reasons Why Sweatshops Still Persist,”[3] later published by McGraw-Hill. This pushed us to educate our audience with easy to understand content that was not too technical in nature. Understanding our audience’s needs was crucial to building relationships and positioning our organization as an educator and thought leader.

Before setting up any accounts on Facebook and Twitter, the monthly email newsletter became the top priority of our communications strategy. Internally, it was a way for all staff members to participate in creating content; a rolling monthly deadline systematized this. Sharing metrics—open rates and community feedback—with staff members helped them understand the im-

3 http://www.triplepundit.com/2013/04/7-reasons-sweatshops-persist/

pact of their contributions and gave them an incentive to do more. When we had time, we conducted interviews with staff members about their activities to quickly get first-hand feedback and take the pressure off staff to prepare a feature article.

The newsletter was also a way to build our email list. After three years, we had more than a tenfold increase in newsletter subscribers, going from 1,200 contacts to over 15,000. We added a sign-up form on our homepage for people to subscribe to the newsletter and also included it in signature blocks. We found that partner organizations that were profiled in articles ended up sharing the newsletter, so we would see a spike in subscribers from their organizations. Once people subscribed to our emails, they would also receive the monthly newsletter, and annual and mid-year appeals.

After a year, we started to set up accounts on Twitter, Facebook and LinkedIn, following the hub and spokes communications model. All of this work was closely integrated with development work and this collective effort helped to boost our fundraising efforts from individuals, foundations and government agencies. All of the information reported was also repurposed and included in grant reports, which greatly supported the needs of our program directors and grant officers.

The most satisfying moment was when we started to see that some of our former donors renewed and/or increased their donations. When our field staff were in town, we invited our local donors to come and meet with them to learn more about our work. One of our donors actually stayed in touch with our program director in Nicaragua and ended up visiting him, after which he sent in a photo to include in the newsletter. We also saw an increase from donors that gave regularly, which gave us the confidence to keep doing the work that we did, even on the heels of the recession.

Bringing It All together

The bottom line: don't want until the end of the year to start fundraising. Your organization exists 365 days of the year. To get started today, here are four ideas and resources:

1. Conduct a communications audit. What are you currently communicating to your audiences? Are you constantly asking them for support, or are you offering balanced content? Chances are, it's time to refresh. During a slower period of the year (typically the summer), I like to conduct a communications audit to self-reflect, with metrics, in order to understand what content works and doesn't work as well as to understand the audience's experience with my organization. Nonprofit fundraising and marketing expert, Kivi Leroux Miller, offers a great free resource for a "DIY Communications Audit." It is also helpful to ask peers outside of your organization for their opinions. Community forums such as NTEN's Communities of Practice are great opportunities to connect with others to get feedback and share best practices.

2. Set up a content calendar. The instinct that most have when using the social web for communications is to use it solely to promote your work. As per point one, remember that you need to balance out the content that you put out so you're not just asking your audiences for something, you are demonstrating why they should donate to you. Of course, writer's block or just being plain busy might make it difficult to get creative. For inspiration, check out Weblink International's blog post, "6 Ways to Create Content Your Donors & Members Will Value," and sign up for free monthly writing prompts from Kivi Leroux Miller.

3. Establish an internal process for communications and fundraising. Remember that your colleagues are important stakeholders—they are implementing the work in the field that your donors are supporting. Getting internal buy-in and participation is critical for success. Show colleagues in other departments how effective, consistent communication benefits them and the entire organization, and ask for their help. Setting up an internal process to easily enable this ongoing collaboration, such as weekly check-in meetings, monthly communications workshops, or one-on-one support that aligns with their strategic goals, is also helpful. I keep Big Duck's Brandraising Pyramid handy as a way to constantly remind myself of what a proper internal process is for fundraising, from the inside out.

4. Stay connected. Stay on top of the latest trends in nonprofit fundraising and communications: Sign up for popular blogs such as *Nonprofit Tech for Good, Big Duck, Getting Attention, Nonprofit Marketing Guide*, and *NTEN: The Nonprofit Technology Network.* They offer helpful resources and articles to help you keep up with the ever-changing nonprofit landscape. Annual reports such as the *Nonprofit Benchmarks Study* also offer important context to see where your nonprofit stacks up. The *Nonprofit Tech for Good* blog also compiled a helpful roundup of nonprofit reports.

The level of trust that the public has in nonprofits should be realized through fundraising efforts that engage donors through compelling content all year round. This all starts with consistent communication that showcases your nonprofit's activities, impact and personality. ■

Joleen Ong is the marketing and publications director at NTEN: The Nonprofit Technology Network, where she works to help its community of over 50,000 nonprofit professionals meet their mission through technology.

Infographics for Outreach, Advocacy & Fundraising

By Kyle Henri Andrei & Chris Bernard

Editor's note: This is an adapted version of Idealware's report, Infographics for Outreach, Advocacy, and Marketing: From Data to Design.

OVER THE PAST FEW YEARS, nonprofits of all sizes have been under increasing demand by funders and others to become more "data-centric." As we strive to measure our work more closely and track a number of metrics about the health of our organizations and programs, we're up to our eyeballs in data. How can we make sense of it all?

Data visualization is not new. It has been around for centuries, in fact—as long as people have wanted to make visual sense of information instead of reading it.

Infographics—essentially any combination of information and image used to tell a story by visually representing data—are a relatively recent extension of data visualization, rising in both popularity and importance as a way for nonprofits to present and make sense of their data in a more digestible format. They thrive on social networks like Facebook and Pinterest in the form of simple charts and graphs, minimalist diagrams, and full-color illustrations.

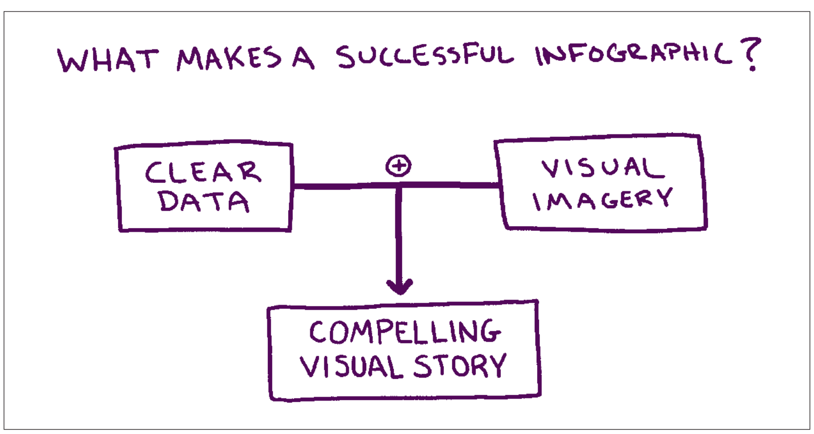


Figure 1

As images increasingly rule the world of social media, grassroots fundraisers have both a challenge and opportunity before them to use infographics to build interest in their issues and ultimately build their base of supporters. Though creating effective infographics can require a lot of labor and/or money, small nonprofits can still find value in using infographics to meet their goals and convey their data in a clear, easy-to-understand format. Idealware has written this article to help you think through the process of creating an effective infographic.

Visualizing Data

Infographics cover a wide range of visualizations from basic pictograms and photos to diagrams, maps, charts, and tables—all the way up to full-page packages of photos and charts. Some of those graphics convey a lot of dense data, others very little. See Figure 2 on the next page for the spectrum of visual representations, represented visually.

Pictograms are a common example of visualizations that use a picture or icon to represent some segment of a data set. Think of a *USA Today* graphic illustrating a real estate story in which each figure of a house represents 100 foreclosed homes in the state. A picture may be worth 1,000 words, but pictograms aren't worth a lot of data—you may need to add a caption to give context to the story you're trying to tell.

Once you add a caption to the picture, you are wandering into the realm of memes. In this context, a meme is a snippet of a pop cultural artifact, often a picture or still frame from a movie or TV show, labeled with a brief caption. In internet culture, a meme spreads as users create new examples that mimic a specific phrase or style of the caption. Though such images travel widely through social media, they offer very little information or data, and as a result, they're not likely a good choice to display your data except in very specific instances.

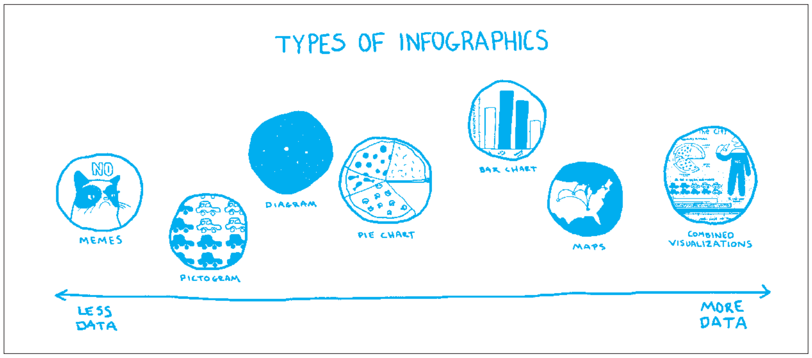


Figure 2

For a more data-rich visualization that manages to also be illustrative, we turn to diagrams. Diagrams are often hand-drawn and may display systems or processes.

For examples, think of the diagrams of the solar system or of photosynthesis you saw in school. Another type of diagram, the process diagram, is less pictorial, but can explain complex processes from input to output simply. Similarly, flowcharts—a type of diagram—can be useful for explaining a thought process.

Moving along the spectrum of data visualizations, we come to pie charts and bar charts. Charts are widely-used and therefore familiar to viewers. They are particularly useful when you want your audience to compare data within a set. Pie charts are frequently used to display results of yes/no questions, or questions with two-to-four possible responses. Any more options than that make a bar chart a better option. Pie charts have the advantage of roughly identifying the differences among possible responses at a quick scan.

Maps offer a more data-rich format, and different mapping styles are useful for different types of data. Simple location data can be conveyed through pins on a map, like on "Google Maps." Most people are familiar with thematic maps in the context of election results—each state's electoral votes can easily be shown by coloring within states, for example.

Finally, we can combine multiple visualizations into a larger graphic. By combining multiple charts, maps or diagrams, we can illustrate a more complicated story and provide more context around the data.

So what makes a good infographic? The data should be sorted, arranged, and presented in a manner that is visually clear and framed with more meaningful context within a narrative. Basically, a good infographic is a clear, understandable visual presentation of data that tells a story. Don't just create an infographic for the sake of creating one—make sure you have a purpose and a clear, actionable goal in mind before you start.

Five Considerations for an Infographic

1. Shareability. Infographics have proven to be popular content for social media. In particular, they are favored by channels that place value on visual content, like Facebook and Pinterest, and those that value brevity, like Twitter. Images with a broad appeal might be easily and quickly passed from friend to friend on those channels until they go viral.

On the other hand, you may have a very specific, targeted audience. You might not want to reach a lot of people, but need to provide more detailed information to a certain group such as foundations or current or prospective donors. This could be thought of as a spectrum, from detailed niche interest data—which might warrant a less-easily shared resource, like a report—to more general interest content that could easily go viral, like memes or straightforward infographics.

2. Digestibility. You also have to consider content. On the one hand, you have dense information that requires some time to think; on the other, concise, scannable-at-a-glance data. A large amount of data can overwhelm potential readers, but an infographic can serve as a powerful means of conveying one key piece of information with two or three data points that support your message. It can guide your viewers to the same conclusion as a report but in a clearer, more accessible method.

3. Interest. A report might speak to your audience's head, while an infographic can speak to its heart. A detailed map plotting out demographics data might, similarly, have more intellectual than emotional appeal, while a picture of cute kittens captioned with statistics on the stray population provides little data but wields a lot of emotional heft. This emotional connection can produce greater impact and underscore a call-to-action. If readers feel a graphic speaks to them, they might be inspired to share it through social channels. Your communications strategy should ideally strike a balance between this more emotional appeal and the intellectual appeal.

4. Appeal. What is the audience appeal of an infographic? In many cases, people will be drawn to visualizations because they present data or an argument in a different, more novel way than what they're accustomed to—in other words, the "wow" factor. On the other hand, the appeal of a written report is the "thunk" factor, an imposing appearance or impressive tactile heft. A 100-page report sounds, looks and feels definitive.

5. Depth of Content. Finally, you want to think about how much information you are actually providing. Data visualization, in general, seeks to present data in a more accessible, easy-to-read format. A written report conveys a lot of dense, detailed information, but at the expense of accessibility. On the other end of the spectrum are memes and pictures, which are easy to understand but convey little to no meaningful data. A good infographic will strike a balance between these two extremes, and be easier to digest than a lengthy report but more informative than a simple picture.

Principles to Create an Effective Infographic

Data Clarity: Keep it simple. Infographics are expensive, so the temptation is to try to stuff as much information as possible into each one. Perhaps you're thinking, "Hey, we already have all this data, so why not use it all?" The problem with this line of thinking is that a "shotgun" approach to presenting your data weakens the story you want to tell, and makes your infographic confusing. Try to refine your infographic by picking one key piece of data to highlight, and maybe two or three related pieces of data to support it.

Telling a Story: Your infographic should tell a story. If you collected or analyzed your data, look for the story you want to tell with it. Part of being comfortable with data is the ability to recognize a significant trend. Your infographic is a way to make that story clear to people by using visual communication to tell the story that the data tells you.

An important and often overlooked part of presenting your data is telling your audience where the data came from. Make sure to attribute the sources or methods that led to the data. Your story should also fit the data, not the other way around. If the data you collected doesn't support the story you want to tell, your story isn't true. Find the story told by the data, and present it truthfully

Visual Clarity: Once you have both your data and the story you want it to tell, it's time to think about the design. In general, when trying to convey a clear message, less is more. Don't use images or designs that don't reinforce the narrative or story—the objective is to make your data clearer and more understandable, not more complicated.

You should also avoid adding "stuff for stuff's sake." If you have to make your graphic more complicated to make it comprehensible—for example, putting heavy lines around things to emphasize them—then an infographic may not be the best choice. Consider using a basic bar chart or another more appropriate means of data representation.

Don't let your data get lost in needless design. Instead, try to complement the data by stripping away anything that doesn't actively support or reinforce your story. You'll end up with a much clearer, more understandable infographic.

Call to Action: If an infographic is the story of your data, then the call-to-action is how it ends. Once people have seen your infographic and are aware of the problem (and perhaps how your organization is working toward the solution), what do you want them to do? A useful call-to-action could be directing your audience to your online donation page. If you have a compelling infographic that speaks to the hearts of your target audience, you are in a very good position to make an ask for support. Your desired goal for your infographic informs how your story ends. What is the audience supposed to do once they have seen it?

Setting Goals & Measuring Impact

Before you can measure any sort of impact, you need to define a clear, measurable goal for your infographic. First, a good goal is specific, with a detailed outcome targeted at specific individuals. This is the "who" of your goal—who do you want to reach? For this example, let's say you want to reach an audience of college students and young adults (age 18 to 24).

Next, a goal should be measurable. You should craft a goal that has associated metrics and benchmarks. For our example, we set a benchmark of 10,000 unique page views, which we can easily measure through website analytics or Facebook Insights.

You should also make sure your goal is attainable—can you actually accomplish the goal you set? It's unlikely your infographic can change the world in the sense of "ending world hunger," but it can focus on a more manageable goal under that aspiration, like urging your audience to donate to a canned food drive.

Your goal should also be realistic. Can you realistically achieve this goal based on your past campaigns? Striving toward something completely unprecedented can, at times, be helpful on the broader scale, but can also be discouraging from day-to-day.

Finally, your goal should be timely, meaning it should have a set time frame. Getting 10,000 viewers in a week is much different than reaching that amount in six months.

Now that you have identified a clear goal for what you want to accomplish with your infographic, determine what you can measure to identify its success or impact. The specific numbers you use, or metrics, will depend on your stated goal. For example, if your goal is for your audience to donate to your organization, your primary metric for measuring success will be your number of new donations since releasing the infographic.

For such advocacy goals as getting people to support your cause, easy metrics might include how many people signed your petition, pledged to vote for your cause, or made a phone call or sent an email to their lawmakers.

Creating Infographics

Do you need to pay for a graphic designer, or can you just make an infographic on your own? This might be the most important question you ask throughout this process—and the answer is usually the one you don't want to hear: yes, you should probably hire a designer. You want your infographic to be shared all over Facebook and Twitter, seen by thousands of people—many of whom have never heard of your organization before. The impression your infographic makes on your viewers might mean the difference between whether they take the call-to-action—making a donation or signing your petition—or click away to something more interesting. Think of your infographic the way you would your organization's website—would you leave that responsibility to someone who never built a site, or would you hire someone who specializes in web design?

If you have a designer on staff who is already familiar with your brand, you probably don't need to hire outside help. If you or someone else on staff isn't, strictly speaking, a designer, but has knowledge or experience in graphic or communication design, you might also be able to create an infographic in-house. While you don't have to pay for outside help, remember that you'll be taking up a considerable amount of staff time. Because creating an infographic can be a laborious process, especially for someone who doesn't normally work in design, the costs of your staff time could approach the cost of hiring an experienced designer.

DIY Tools & Tips

If you choose to create your own visualization and have the knowledge or skills required, there are a number of software packages you can use. For charts or graphs, the software you used to analyze the data—like Microsoft Excel—may suffice. Such tools usually provide basic bar, pie and line charts in addition to scatterplots and more complicated styles, like bubble or doughnut charts. Google Drive's Spreadsheet offers similar chart types in addition to other visualizations, including maps for displaying location-data. Other low-cost or free tools include infogr.am (which will create charts and graphs or infographics) and Many Eyes.

If you have more artistic talent, design software like Adobe's Creative Suite—which includes Adobe Illustrator—will be essential for creating your own infographic. This software will help with a wide variety of graphics, from tweaking or improving photos to improving charts or graphs you've made in Excel to illustrating diagrams or assembling larger infographics. This software tends to be expensive, especially purchased as the full suite, but is often available at a discount to nonprofits through TechSoup.

Even if you don't have enough talent or experience to use one of those tools, you may be able to create a basic, but still decent, infographic using Microsoft PowerPoint or a similar application. These much-maligned tools are present at most organizations and provide a means of combining charts, images and text with minimal artistic skill. You can save slides as PDFs or image files like .JPG or .PNG for publishing online, import charts and data from Excel, and create flowcharts or process diagrams using the built-in SmartArt features. As with any design tool, however, it is just as easy to make a terrible graphic as a good one if you don't know what you are doing, so pay attention to the best practices discussed earlier in this report.

A few free online tools like Visual.ly and Easel.ly can help people with less design experience create their own basic infographics. Both are designed to be easy to use and let you create your own themes or templates or tweak preexisting ones—which tend to be very illustrative or suited to a specific use—for your own needs. One disadvantage is that the visualizations they create all tend to look similar.

Whatever tool you use to create an infographic, you will still need to know how to use the software. It can take a relatively little amount of time to familiarize yourself with Excel or Google's applications, for example, but a considerable deal more for Adobe Illustrator, so make sure you plan accordingly. You will also need to familiarize yourself with the basic principles of design, including line and color, in order to make a graphic that stands out (and not in a bad way).

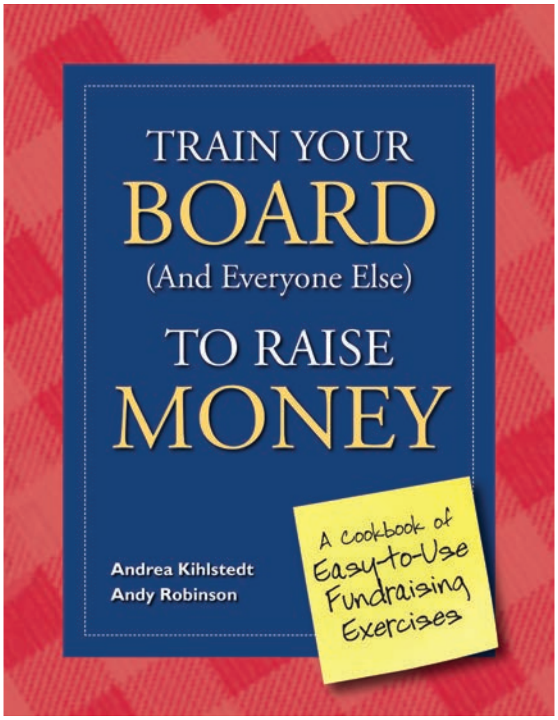
Getting Started

Now that you have an idea of what an infographic is, and some basic guidelines for how to create one, it's time to do so—but what will yours look like? The best way to get ideas is to see what is already out there. A number of sites collect infographics from a wide variety of sources, including Beth Kanter's Infographics board on Pinterest and *Good Magazine*, which tends to show more illustrative graphics.

For an idea of how you can use infographics for advocacy goals, take a look at RAD Campaign's War on Women series. For examples of how to use infographics for annual reports, Nick Felton—who does data visualization for Facebook—has a number of reports on his website.

As we have seen, it is easy for an infographic to go from good to bad. You could have the wrong data, a messy or confusing design, or just a boring and unremarkable product. Even if you hire a designer, things can go wrong if you don't clearly communicate what you want. Don't let any of this discourage you—making an infographic is within the grasp of almost any nonprofit, as long as you follow these best practices, stay true to your data, and keep your desired goal at the forefront. ■

Kyle Henri Andrei is a research analyst at Idealware. Chris Bernard is Idealware's editorial and communications director.



The Case, Simplified

By Andrea Kihlstedt & Andy Robinson

This exercise is adapted from a new book, Train Your Board (And Everyone Else) to Raise Money: A Cookbook of Easy-to-Use Fundraising Exercises, *published by Emerson and Church, emersonandchurch.com. Used with permission. The 50-plus exercises in the book were contributed by the authors and nearly a dozen other trainers and consultants.*

FOR THOSE WHO DON'T KNOW what to say to a donor, this exercise offers a quick and easy way to outline a fundraising pitch. It reinforces the idea that your staff and volunteer leaders already know enough about your work to go out and raise money.

Why Do This Exercise?

To reduce some of the mystery about how to talk with donors

Use This Exercise When

You want a fun, thoughtful activity that engages people and makes them feel knowledgeable

Time Required

30-45 minutes

Audience

All participants in your fundraising campaign: some combination of board, staff and volunteers

Setting

Anywhere you gather to work on your campaign plan and train your participants

Materials

- Stopwatch
- Bell or whistle (optional)
- The Case, Simplified – Worksheet

Facilitating the Exercise

1. Photocopy the worksheet on the next page in advance.
2. Hand out copies of the worksheet with the following instructions: "Please write your name on the top of the page. We're going to fill in this form one question at a time and do it quickly—so please don't work ahead. Write as legibly as you can. First question: What are we proud of about our organization? Write down three things you're most proud of. You've got one minute for this question. Go!"
3. After one minute—give them a little more time, if needed—ring the bell. Ask for volunteers to read one or two items on their list; keep doing this until you've heard several of the items.
4. Read question two with the same instructions: "You've got one minute. Go!"
5. Continue this process through the final question, giving participants two minutes to make notes about their favorite anecdotes. Once they're done, recruit two or three volunteers to tell their favorite stories. You can also ask for feedback: "What made that story effective? How could the storyteller improve it?"
6. Debrief this exercise with the following questions:
   - What was your experience filling in the form? Did you find it easy? Challenging? Why?
   - When we discussed our answers, did you hear any that really stuck with you? Which ones? Why?
7. As you complete the exercise, make the following point: "Each of you just wrote a fundraising pitch, because when we're talking to donors, these are the things we talk about: What makes us proud of our work? What makes our work unique? Who are we trying to involve and engage? And finally: What is the story that sums it all up, that creates the emotional connection?"

8. Collect the worksheets, and recruit someone to compile and edit them. When this task is complete, you will have a great two-page summary any solicitor could use with an actual donor. Thinking more broadly, this case material is also useful for fundraising letters, email appeals, grant proposals, and so on.

Training Tip
As with any timed exercise, follow your instincts about how flexible to be on the timing. How many of your colleagues continue writing after one minute? How many are sitting around looking bored? Pay attention to their body language, and adjust the time accordingly. As a general rule, it's better to move things along rather than let the exercise drag.

The Case, Simplified: Worksheet

What are we proud of? What's our impact in the community? Write down three things about our organization that you're most proud of:

1. ______________________________

2. ______________________________

3. ______________________________

Differentiation: What distinguishes us from other organizations?
What do we have or do that no one else has or does? It's okay to think about this geographically: "We are the only group in Washington County that …"

1. ______________________________

2. ______________________________

3. ______________________________

Market segmentation: Who are we trying to reach?
List the audiences we want to reach for any purpose: education, service delivery, fundraising, advocacy, collaboration, and the like.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

What's your favorite story?
Write notes about your favorite anecdote or example that describes the impact of our work. Remember, "Statistics raise eyebrows but emotions raise money"—so go easy on the data and jargon. Pretend you're talking to a friend or neighbor.

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Bernie White supported Got Green's 2009 Hip Hop Video that put a racial justice spin on the green economy and launched their online media presence.

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CRMs & Fundraising Campaigns An Integrated Approach

By Tomás Aguilar & Mark Sherman

AT THE PROGRESSIVE TECHNOLOGY PROJECT (PTP), we have been supporting grassroots organizations carry out their missions since 1998. Among the key lessons we have learned is that taking a holistic view of raising money for your mission makes for a stronger overall fundraising program. Our integrated model of fundraising, based on grassroots fundraising, membership and major donors, includes the following key components:

- Cross team communication supported by a comprehensive database;
- Good data practices to support meaningful information and integrated non-duplicated data;
- Powerful messaging and communications skills; and
- Technical infrastructure and skills to make it all work.

Having the right technology, infrastructure and staff involvement to support your organization's fundraising work is critical. If you are responsible for upgrading your organization's donor software, the reality is that it will be neither a simple process nor a trivial decision.

Choosing the Right CRM to Manage Donors

Let's first address some terminology questions. CRM, in business speak, is a Customer Relationship Manager; in nonprofit speak, it stands for Constituent Relationship Manager. If you manage fundraising for your organization, you have probably heard of Donor Management System (DMS), which is a specific type of CRM.

For-profit enterprises generally have not had a need for software to manage donors. This was at least true before we entered the age of Kickstarter and Indiegogo. And in many cases, even Kickstarter donors are really just future customers. Businesses have customers, vendors, owners, and employees. Their CRMs are used by employees to keep track of customers for the benefit of their owners.

Nonprofits, on the other hand, have clients or constituents, vendors, employees, and donors. They have a specialized need to raise funds from foundations, individuals, and, in some cases, contracts for services. The CRMs that were developed for nonprofits were Donor Management Systems (DMS). However, since most nonprofits don't exist solely to get donations, a DMS by its very nature falls short of covering nonprofits' software needs.

One reason for keeping donor management separate from broader CRMs is that many nonprofits don't have a reason to manage a base of constituents. They may be organizations that provide confidential client services and can't let the development department into the case database, for example. Another reason for limiting investigation to DMSs may be that the CRM product arena has had less in the way of donor management functionality. That is changing, however. IdealWare's latest review of Donor Management Systems in October 2013 includes a list of CRM and DMS systems.

Looking for a Good CRM?

Here is a baker's dozen (plus one) of questions to consider when looking for CRM that will suit your needs.

1. How many of the functions of your organization can it support?

You want a CRM that can support the work you are doing. It may turn out that the CRM is stronger in some areas and than others. In the areas where it may not be perfect, does it meet your needs enough so that you can do your work effectively?

2. Can it grow as your needs grow?

Where you are today may not be where you will be next year, especially if your work is successful. A good CRM will be able to grow with your organization.

3. Is there support and training?

When thinking of purchasing a CRM, you should think of the type of support, if any, if included or available. What happens if there is a bug in the software? Will you know how to fix this? Is there someone you can call? What kind of training support is available? As an added bonus, does the vendor know your work well enough to offer strategic advice on using the CRM?

4. Is email integrated with fundraising?

Having a robust email sender that is integrated with your CRM gives you access to your entire database and allows you to segment appeals based on donor history.

5. Can you integrate donations and email sign ups with your website?

A good CRM will allow you to either create a webform to embed into your website or to create a donation/sign-up page that will look just like your website.

6. Is your CRM secure?

What if there is a security breach? If the CRM is hosted in the cloud, do you know how your data is kept secure? Is it backed up? A good CRM will be secure, and your vendor will be able to explain, using common language, how your data is kept secure.

7. Who controls your information? Who owns your information? Do you have complete access to your information? Can you access it anytime you need to?

If you read the terms of service of some of the free services like Google, you will see that they can have access to all your data if they so choose.

8. Do you get a view of everything your donors are doing from email opens and donation history to issue interest and event attendance?

A good CRM will give you a 360 degree view of your data.

9. Does your CRM offer you the option to have dashboards?

A good dashboard offers you a view of key elements of your fundraising efforts: new donors, current donations, etc.

10. Can you export your data into commonly used formats?

A good CRM will allow you to take your data with you. It won't trap your data in an obscure format that is difficult to use.

11. Can you integrate your CRM with a variety of credit card processors and merchant service accounts?

You want to have options when it comes to handling credit cards. Merchant service fees vary widely and you will want to have a choice about who to use.

12. Can the CRM be customized by a non-technical person to meet your specific needs? In other words, can your technology or administrative staff member customize your CRM, or do you have to rely on a developer?

A good CRM will have training or documentation on basic customizations.

13. Does the CRM support a membership model?

If your organization has members, does the CRM allow you to keep track of membership fees?

14. Does the CRM support multiple languages?

Some organizations do grassroots fundraising work in communities where English is not the dominant language. Can your CRM, for example, support the use of Chinese characters? Another consideration is the language of your database itself. Can it be switched to the language that your staff might be using?

A robust, comprehensive CRM includes functions that are not typically part of donor management systems. For one thing, a CRM is much more flexible then a DMS. Salesforce (a CRM), for example, offers tools aimed at helping sales people market to customers (it is called Salesforce after all), but it also offers a robust add-on ecosystem whereby others can offer components that extensively modify the basic paradigm of "sales" to other functions. Likewise, CiviCRM, an open source platform that PTP uses for its PowerBase hosted software, has modules being added by its users, including the likes of the New York State Senate, WikiMedia and the Electronic Frontier Foundation.

A CRM can be complex to learn, but it is less complex than having to master a system for donors, another system like eventbrite.com for events, and another like verticalresponse.com for email. If the CRM is well structured, the skills needed for running one function will be applicable to running others. This makes staff training easier and creates opportunities for a staff member to do another's job in a pinch. It also gives you one point of entry for managing your passwords and authorized users. The crowning argument is that it gives you a complete 360 degree view of your base: their interests, their relationships, their financial support, and their engagement.

At PTP, we are interested in helping social change organizations build power to reach their goals. To us, this involves both building constituencies and building donor relationships to raise funds. So, for the groups that we serve, a CRM should offer sufficient donor management functionality to raise funds through all the traditional means—donor asks, events, direct mail—as well as the new techniques that edge into crowdfunding turf by use of customized email, tell-a-friend, and personal fundraising pages, in conjunction with social media pushes.

If you are on the development team and have been charged with picking software for fundraising, the first step is to widen your horizon by asking yourself, "What software does my entire organization need?"

CRMs in Action through Sprint Fundraising Campaigns

To illustrate how CRMs can help to provide the technological backbone to fundraising work, we are going to look at a few examples of sprint fundraising campaigns. A sprint campaign has a limited duration with a specific fundraising target and sometimes a specific social justice component. The idea isn't particularly new, but the methods and techniques have evolved rapidly lately.

Give to the Max Day

Many states have a collective fundraising day, modeled on GiveMN's annual Give to the Max Day, on which the entire nonprofit sector sends a push email and calls for donations on a particular day. The attraction is that it gains attention for the sector, and organizations with weaker development capacity can piggyback off the widespread media attention. The disadvantages are that organizations are competing with each other, and it is challenging to get a specific message out to a new set of potential donors. Large campaigns have also been known to crash servers. In the end, the development team for each organization has to pull data from the centralized shared server into their own databases for future follow up with the same donors.

At PTP, we are fascinated by what groups are doing with their own short-term sprint campaigns. Small can be beautiful when it comes to these local campaigns driven by local grassroots groups. Dan McGrath of TakeAction Minnesota, referring to a word of mouth campaign that led to the defeat a voter ID constitutional amendment, said, "The messenger is more important than the message." This is also true when local organizing groups are fundraising. The big advantage for them is that in communities of color, local groups are trusted because their work is visible. There is already a culture of giving and sharing in many communities, and grassroots groups have found creative ways to integrate that into their efforts.

Get Money & Green Justice on Earth Day

Got Green in Seattle organizes to drive an agenda for "an equitable green economy to fight poverty and climate change." They take a long-term approach to movement work by developing leadership among those most affected by our economy: women of color and low-income women.

One of their most creative and effective fundraising efforts is the "Green-A-Thon," in which teams compete and raise funds to support the organization. Once the fundraising is completed, the teams spend a weekend day canvassing door-to-door in the Rainier Beach and Skyway neighborhoods to deliver CFL light bulbs and their vision of "going green." Last year, they raised $18,000 and repeated it again this year. As important as the funds were, the event helped achieve their organizing goals by mobilizing their supporters and increasing their neighborhood reach.

Got Green's fundraising software allows them to set up web pages for each team to collect funds towards its respective goal. Team members promote their own pages to their friends, and the team web page has a scrolling donor list and fundraising thermometer to provide immediate feedback. Since the donor pages are integrated with the organization's CRM, all donors go directly into the database. This is a great way to get new donors, but donors who come in this way may not get what the organization is all about. Thus, they will need targeted follow up to build their knowledge and support of the organization's future campaigns.

El Pueblo United in Raising funds

Raleigh, North Carolina's El Pueblo is a Latino community building organization with a tireless commitment to grassroots organizing and grassroots fundraising. Their issues include immigration reform and access to higher education for all youth in the community. They are also successful in using new technology to raise funds from individual donors in their community and beyond. Within weeks of launching their new CRM database last year, they were running a bilingual online fundraising campaign resting on a tripod of targeted email, social media and video. The goal was $15,000 in five days, which they met and exceeded in their first attempt. It went so well that they successfully repeated the campaign eight months later.

El Pueblo used a dedicated fundraising web page that was highlighted on their home page. Fundraising thermometers dominated both their home page and the campaign donation page. A daily series of emails in Spanish and English promoted the page. Online donors received automatic thank you emails as soon as their contribution went through. Staff could tell who clicked on the email and made a donation. In addition to email, El Pueblo used social media and in-person outreach in their community to implement their campaign.

Succeeding at these efforts takes planning and persistence. El Pueblo Executive Director Angeline Echeverría commented, "We met our goal, and we would never have been able to process

El Pueblo's online donation form.

so many donations so quickly, have our donors directly inputted into our database, and have a page that looks so nice without the technology and support." Their first time running the campaign had more technology glitches than the second. The learning curve is steep on some of these projects, but once you get organized, the payoff comes with repetition.

New Approaches to Grassroots Fundraising

PTP has developed an integrated fundraising training model based on a pilot we ran last year. The pilot program took fundraising consulting one step deeper than usual by connecting fundraising advice with concrete actions community organizers could quickly implement using their CRM and communications tools. The pilot tested how an integrated approach to fundraising would affect a community organization's fundraising capacity and success.

An integrated approach to fundraising is driven by the idea that fundraising is organizing. In any given community organization, everyone can participate, not just development staff. To achieve this, having a clear sense of best data practices is essential.

Here are some takeaways from our pilot that can apply generally to grassroots fundraising:

1. Train your team. Get everyone trained on good data practices, and involve everyone in keeping the data in your CRM current and accurate.
2. Develop dashboard measurements of your organization's progress in acquiring, renewing and recovering donors. Check the numbers, and adjust your approach if it is not working as planned.
3. Develop a clear fundraising message.
4. Motivate non-fundraising staff to spread the word about the importance of supporting your work. Short-burst campaigns work well for this.
5. Be clear about leadership and careful in planning to ensure successful fundraising campaigns.
6. Use multiple channels to deliver your message.
7. Prepare your technology in advance, and test it thoroughly.
8. Fit your fundraising campaign to your organization, not the other way around.

Pilot programs like this one point to a new direction for how development teams and fundraising consultants can interact. Changing up the mix of skill sets by adding professionals with technical knowledge of web, email and CRMs lifted a burden off the shoulders of the development team and created a space to launch new and more aggressive fundraising efforts.

Fundraising Success in the Field: Labor Community Strategy Center

It is a cardinal rule of organizing to raise funds from the base membership. Labor Community Strategy Center (LCSC) observes that rule—its members pay dues to support the organizing. However, low-wage workers and high school students don't have enough money to fund a large organizing campaign taking on the powers that be in a city the size of Los Angeles. Allies and other supporters are willing to contribute to campaigns, but it is not so easy to get them involved.

In 2013, LCSC participated in Progressive Technology Project's Fundraising PowerBase Pilot Program. Led by a PTP team that included a fundraising consultant and communication and database experts, this pilot included training, consulting, and database changes. LCSC staff participated in two trainings: one specifically on fundraising and a second on how to use their database for organizing. Both trainings helped prepare them for their fall fundraising campaign by highlighting different fundraising models and the methods for managing them.

As the year-end rapidly approached, LCSC decided to initiate a 15-day campaign to raise $15,000. LCSC worked with PTP's fundraising, communications and database teams to develop a fundraising push that included messaging, email, telephone, and website components, all driven by LCSC staff and board members reaching out to potential donors.

The campaign succeeded beyond expectations. They almost doubled their goal of $15,000. They also doubled the number of donors and the average donation from the previous year. Equally important, they found that their young organizing staff had stepped up enthusiastically once the campaign started, breaking through their initial reluctance to ask people for money.

Fundraising Success in the Field: Iowa Citizens for Community Improvement

Iowa Citizens for Community Improvement (CCI) is a powerhouse statewide community-based organization. Their tag line is: We talk. We act. We get it done. They mean it. CCI focuses on a range of issues including clean elections, family farms, clean water, a fair economy, and immigrant rights. The state of Iowa is changing, and Iowa CCI has changed right along with it. They have been growing as they have strived to create an inclusive and just state—but that takes financial support.

CCI has long had a robust individual donor program supported by a variety of fundraising software applications. They went through two different fundraising software applications over the last few years and finally switched to a CRM in May of 2012.

As their pilot project, CCI staff wanted to focus on raising money for their 501(c)(4) activities. And they wanted to aim big. In 2012, they raised $8,500 during their year-end campaign from 156 donors. They decided to really push themselves and go for $25,000 in 2013. Instead of running the campaign for a month as they had in years past, they challenged themselves to run the campaign for five days only.

Their prior campaigns consisted of direct mail, face-to-face asks, and phone banks. They developed a multi-channel grassroots fundraising campaign that included targeted email blasts, website presence, a Facebook campaign, and Twitter outreach. They recruited members, board and staff—25 in all—for the five-day campaign. Everyone agreed it would be a campaign that involved all staff, regardless of role.

CCI launched their fundraising campaign on the Monday of the last full week before Thanksgiving. By Wednesday afternoon, they surpassed their $25,000 goal. The campaign officially ended Friday evening. They doubled both their dollar goal and number of donors goal with a total of 650 donors. More important, they grew their donor base by receiving contributions from 159 new donors, in stark contrast to previous campaigns where they received little to no new donor money.

Bringing It All Together

Short-term campaigns work well, but they require close coordination of messaging and record keeping to keep all the parts organized. This is what a comprehensive CRM is good for. Campaign fundraisers can send a different daily email to those who haven't yet given. Soft credits can be recorded as the donations come in to keep an up-to-date list of which fundraisers are meeting their goals and where more attention is needed. Up-to-date contact information makes phone banking and other direct asks achievable. Too many campaigns flounder because of bad data practices.

All of these pieces rely on good organizational and cross-team data practices that bring meaningful data into your CRM. Knowing and understanding your data can help your team define the scope of the campaign and inform the selection of multi-channel strategies that will be most effective. Meaningful data collection will help you analyze the effectiveness of the campaign and support the follow up cultivation with donors.

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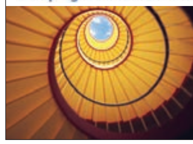

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