INNOVATIVE FUNDRAISING, LLC

STORIES
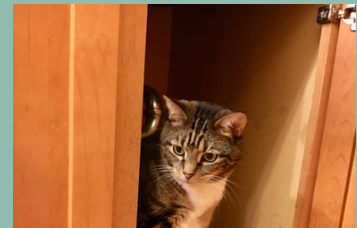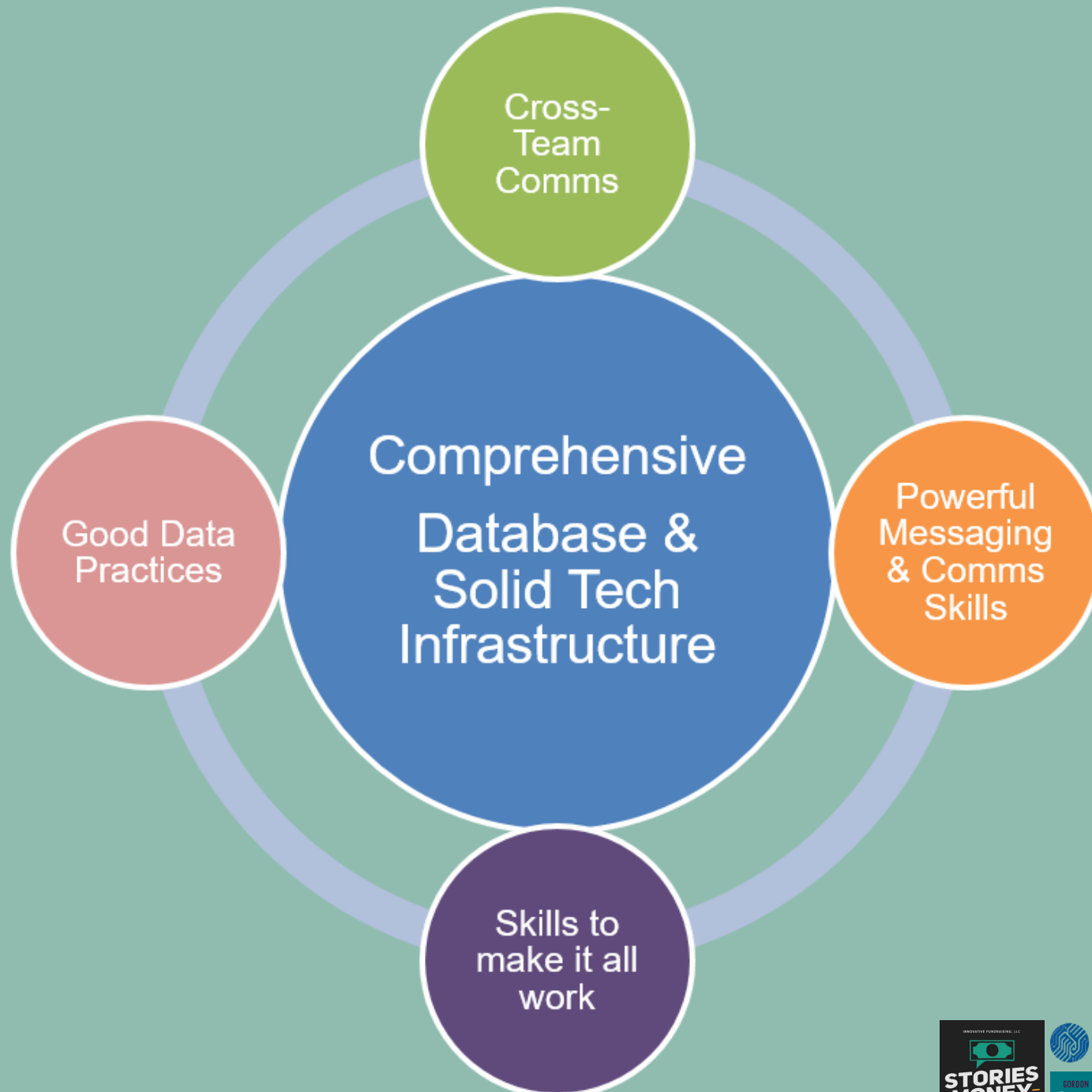+MONEY=
CHANGE!

ptp

GORDON MAYER
Communications
Your Story Here

Data+Communications

= Fundraising

Results depend on infrastructure you create

1

Infrastructure, aka herding cats

Data & Tech

Org Culture

Audience

I LIKE CATS
HANDMADE CARDS

Cross-Team Comms

Good Data Practices

Comprehensive Database & Solid Tech Infrastructure

Powerful Messaging & Comms Skills

Skills to make it all work

Technology + Data

- **Silo-ed vs Integrated CRM and Organizational Culture**

- **CRM staff & board development, training, and agreements**

Technology + Data

- **Infrastructure needs and various tools for different campaigns (especially in times of covid-19 and climate change!)**

    Traditional email/mail campaign, e.g. EOY campaign
    Peer-to-peer or Sprint campaign
    Phonebanking
    Virtual event
    Gala, house party, face-to-face event (when we can do that again)

Comparing Fundraising Activities

Fundraising Approaches	Direct Mail	Phone Bank	Email Appeals	Personal Asks	Peer to Peer: Personal Campaign Pages	Gala Events	Proposals	Convert to Sustainers	Canvass
The Amount of Effort	Moderate to Low	High	Low	High	High	High	Low	Low	High
Who	Staff or Vendor	Staff; Members; Board	Staff	Staff; Members; Board	Members with Staff Support	Staff; Members; Board	Staff	Staff	Staff
Coordination Rquired	Low	High	Low	High	High	High	Low	Low	High
Additional Cost	Expensive	Cheap	Cheap	Cheap	Cheap	Expensive	Cheap	Cheap	Expensive
Organizational Visibility	Moderate	Low	Moderate	Low	High	High	Low	Low	Very High
Conversion Rate	Low	Moderate	Low	High	High	Moderate	Depends	Moderate	Low
Payback for Effort and Cost	Low	Moderate	Moderate	Moderate	High	Low	High	High	Moderate
Frequency	Quarterly or less often	Can be annual, quarterly or monthly	Quarterly or more often	Annual	Annual or semi-annual	Annual	On going	On going	On going

Donor Activity Matrix

Fundraising Approaches	Donor Capacity	Direct Mail	Phone Bank	Email Appeals	Personal Asks	Peer to Peer: Personal Campaign Pages	Gala Events	Proposals	Convert to Sustainers	Canvass	Frequency of touches
New Prospects		Maybe	Maybe	Maybe		Yes	Yes			Yes	Once or Twice
New Donors	<100	Yes	Yes	Yes			Yes	Yes		Yes	Twice
	<250	Yes	Yes	Yes	Maybe		Yes				Twice
	>250				Yes		Yes				Twice
Renewing Donors	<100	Yes	Yes	Yes			Yes		Yes	Yes	Annually
	<250	Yes	Yes	Yes	Maybe		Yes		Yes	Maybe	Semi Annually
	>250				Yes		Yes	Yes	Yes		Quarterly
Recover Lapsed Donors	<100	Yes	Yes	Yes							Annually
	<250	Yes	Yes	Yes	Maybe		Maybe				Annually
	>250				Yes		Yes	Yes			Annually
Grassroots Members	<100	Yes	Yes	Yes		Yes	Yes		Yes	Yes	Monthly
	<250	Yes	Yes	Yes	Maybe	Yes	Yes		Yes	Yes	Monthly
	>250 (Usually N/A)				Yes	Yes	Yes	Yes	Yes		Monthly
Foundations					Yes		Yes	Yes			Quarterly

Technology + Data

- **Data dashboards & worksheets**

CiviCRM Home

> Configure Your Dashboard

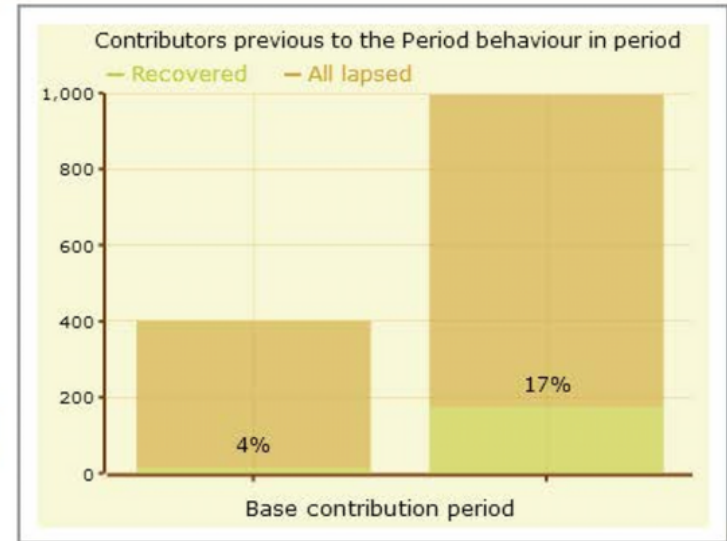### ▾ Key Numbers Report   🔍 ✕

	This Year	Percent Change	Last Year
Total Number of Donors	277	-38%	446
Amount Raised	$ 17,556.00	-69%	$ 57,087.00
Amount Raised From Individuals	$ 17,556.00	-69%	$ 57,087.00
Average Donation From Individuals	$ 63.00	-50%	$ 128.00
Individual Donors who Increased their donation	22	1000%	2
Sustaining Members	0	0%	0
New Contacts in Database	49	n/a	0

▾ New Contributors by Quarter   🔍 ✕
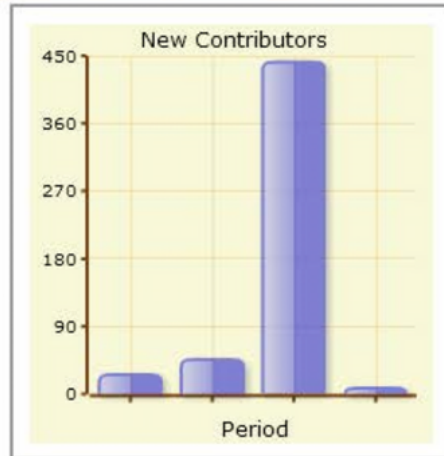
New Contributors

▾ Contributor Recovery Report

Contributors previous to the Period behaviour in period
— Recovered   — All lapsed
17%
4%
Base contribution period

▾ Annual Renewal Rate

— Renewed   — Lapsed
100%
98%
100%
42%
Base contribution period

9
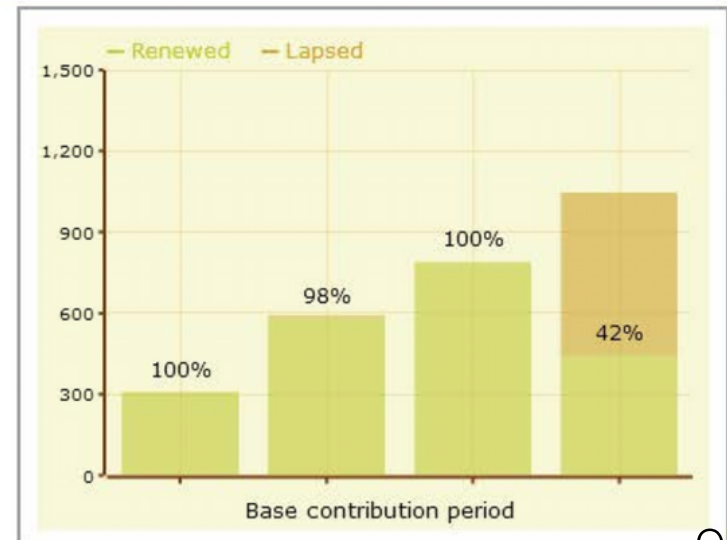
DashBoard Worksheet

Dashboard	Current	Last Year	Target	Notes
Number of individual donors				
Amount raised from individuals				
Average individual gift				
Number of new donors				
Renewal rate				
% of donors who increased their gift				
Number of sustainers				
Number of new contacts added to PowerBase				
% growth in database				

Technology + Data

Sprint Campaign Case Study

Iowa CCI: $50,000 in 5 Days (2020)
5 day email campaign
Personal Campaign Pages
Personal calls & phonebanking
Gathered seed funds for donor matches

Raised over $106k

See what YOU did!

December 1, 2020 7:34 AM

From: "Adam Mason, CCI Action Fund" <cciaction@cciaction.org>

To: "PTP PowerBase Support" <support@progressivetech.org>

View in your browser

WE'RE RAISING $50,000 CCI

$16,974

IN FIVE DAYS **DONATE NOW**

Support,

CCI Action members are the BEST! 215 of you donated $16,974 yesterday. Holy cow—thank you!

Today, I have a birthday challenge for you. Yep, it's my birthday —I'm 43. **Help me celebrate by keeping up the momentum towards our big five-day goal!**

Today we have a $2,000 match!
Double your gift, double your impact!

Click here to DONATE right now!

This year's been a heck of a trip around the sun – for all of us.

Through it all, CCI Action members were there: bringing people together, organizing, and helping us stand up for what we believe in.

WE'RE RAISING $50,000
IN FIVE DAYS
CCI **ACTION FUND** **DONATE NOW**

TOGETHER, WE RAISED CCI

$106,246

THANK YOU!

Help Katie raise $500!

Help me help an organization I love. Donate!

Love & Anger & Action & Justice.

I almost posted this quote at about 3am election night, thinking it a slightly amusing bookend to the "Rahm is Garbage"/Cubs Win pic I shared the week before:

"You never want a serious crisis to go to waste. And what I mean by that is, it's an opportunity to do things you think you could not do before." - Rahm Emanuel

Don't get me wrong; Rahm is still garbage.

But it's a good quote, and somehow matched up with how I was feeling after the results:

--Strong, defiant, clear.

--Fully aware of my privilege.

--Focused, ready to get to work and think big.

When cracks like this election season open (or expose) a problem – someone's going to step in with a solution, the way

Goal $ 500.00
100% towards our goal

HONOR ROLL

Anonymous
$ 1.00

Erica And Josh Johnson
$ 100.00

Me - K To The B!
$ 50.00

Lacev

[Stop]

$ 825.65 raised

👍❤️ 18

1 Comment

STORIES MONEY CHANGE! ptp Communications

12

Technology + Data

Virtual Gala Event Case Study

Texas Campaign for the Environment:
Trash Makeover Challenge 2020
https://www.trashmakeover.com

Raised $90k

VIRTUAL TRASH MAKEOVER CHALLENGE
10TH YEAR
DEEP IN THE SOUL OF Texas

TEXAS CAMPAIGN FOR THE ENVIRONMENT

August 29
7:00 pm

MORE INFO AND TICKETS AVAILABLE AT TRASHMAKEOVER.COM

TEXAS CAMPAIGN FOR THE ENVIRONMENT

10TH YEAR

VIRTUAL TRASH MAKEOVER CHALLENGE
DEEP IN THE SOUL OF Texas

ONLINE FASHION SHOW & AUCTION

TEXAS ECOREGIONS
1 High Plains
2 South Western Tablelands
3 Central Great Plains
4 Cross Timbers and Prairies
5 Texas Blackland Prairies
6 Eastern Central Texas Plains
7 Western Gulf Coastal Plains
8 Gulf Coast Prairies and Marshes
9 Southern Texas Plains
10 Edwards Plateau /Hill Country
11 Chihuahuan Deserts

Hashtags

Facebook & Twitter
Most effective to stick to 1-2 hashtags per post.
#TrashMakeoverChallenge
#RecycledFashion
#TrashMakeoverChallenge2020

Instagram
The more hashtags the better. Use up to 10-20.
#TrashMakeoverChallenge
#TrashMakeoverChallenge2020
#DeepintheSoulofTexas

More:
#RecycledFashion
#Upcycle
#GoingGreen
#LandfilltoRunway
#TrashtoTreasure
#conscientiouscatwalk
#dumpsterdiamonds
#SustainableFashionShow

STORIES + MONEY = CHANGE!

ptp

GORDON MAYER Communications
Your Story Here

14

15

It takes a village to put on a fashion show...

'People infrastructure'
- Use your CRM more/better -> team
- Own your data
- Value the work

Using [CRM] at [Organization]

We use [CRM] to track donations and key contacts. It can help you manage relationships and communicate with friends and supporters of [Organization]. It's a good way to ensure we share what we know with each other. If you have questions, talk to [CRM 'owners' at your organization]

1. Getting Help

CRM help documents, webinars, account key contacts, any other resources

2. Entering Constituents

Types of Constituents (Individuals, Families/Households, Organizations)
Relationships might be important – eg board members, leaders, program officers related to organizations, foundations, etc. (or this might not matter to your org)
Most important Tags/Flags/Activist Codes

3. Entering Gifts

Ledger codes, Solicitation/sub solicitation, and/or source codes. Note: Cleanup database at beginning of each fiscal year with new codes, eg Annual Fund 2020, Annual Fund 2021, etc.

4. Sending thank you letters, acknowledgements, etc.

Receipts, thanking gifts, end of year cumulative thank-yous.
Most CRMs have a place to upload a thank you letter for your campaigns (and each campaign should probably have its own thank-you letter- save time and write the thank you when you plan the campaign you and co-workers will be able to acknowledge gifts faster).

5. Pulling Names, Lists & Reports

From pulling a single name to making a list by tag or code – this is probably the most helpful information for the whole team. Consider giving a few examples that you know will be relevant to colleagues. Workflow probably different for different types of reports (eg mailing list, donor report)

6. Sending Email

If you use your CRM to communicate directly with constituents, include a workflow for this – even if it is just "talk to [teammate] to schedule a targeted email

16

Your org + your constituents:

How well do you know each other?

Infrastructure of expectations & relationships

Audience expectations & relationship

When/how often do they expect you?

- Campaign Monitor 2021 benchmarks for all industries - Average open rate: 18.0%; Average click-through rate: 2.6%; Average click-to-open rate: 14.1%; Average unsubscribe rate: 0.1%

How well do you know them?

- Segmenting & personalization

How do you talk to them?

- Writing - draft for your audience, tone, length

Audience expectations & relationship 2

Asking politely and what happens after?

- A clear ask cycle - beginning middle and end of the ask - and the epilogue (what happened with the campaign)

How helpful are they?

- Peer 2 Peer & other tools

Thanks!

Let us know how it goes

Alice Aguilar, alice@progressivetech.org
Gordon Mayer, gordon@gordonmayercommunications.com

**Handouts at
https://network.progressivetech.org/data-communications-fundraising**