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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 than 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, Wiki-Media 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 crowd-funding 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

English | Español

El Pueblo, Inc.

Home - Advocacy - Culture / La Fiesta del Pueblo - Youth - Health - Public Safety - Resources

\$15 Mil en 5 Días! \$15K in 5 Days!

PLAYLIST \$15 Mil en 5 Días / \$15K in 5 Days

\$15 Mil en 5 Días / \$15K in 5 Days

0 \$0 112% \$15,000.00

Raised \$16,733.00 of \$15,000.00

\$15 Mil en 5 Días

143 Donors

¡Apoya la capacitación, capacitación y acción comunitaria! Support Latinos to raise awareness, build capacity, and take action!

Campaign ended on May 30, 2014

Learn more.

Un grupo de voluntarias y voluntarios junto con el personal de El Pueblo destacan el trabajo de nuestra organización por medio de nuestra campaña \$15 Mil en 5 Días, una campaña para recaudar \$15,000 para apoyar nuestros esfuerzos por la justicia social.

Nosotros apoyamos a El Pueblo y le invitamos a que haga lo mismo. ¡Contribuye hoy para ayudarnos a recaudar \$15 Mil en 5 días!

A group of El Pueblo staff members, volunteers, and board members are highlighting the impact of our work this week through \$15K in 5 Days, a campaign to raise \$15,000 to support the organization's social justice efforts.

We support El Pueblo and invite you to do the same. **Donate today** to help us raise \$15K in 5 Days!

Contribution Amount / Cantidad de contribución

☐ **\$ 500.00** Apoya a un grupo a participar en 4 sesiones de liderazgo / Supports a group to participate in 4 leadership sessions

☐ **\$ 250.00** Apoya a un miembro a que participe en un retiro / Supports a member to participate in an overnight retreat

☐ **\$ 100.00** Apoya a promotores/as a participar en un evento comunitario / Supports outreach workers to participate in a community event

☐ **\$ 50.00** Cubre los costos de transporte para que un miembro pueda viajar a Washington DC a cabildear / Supports transportation costs for a member to travel to Washington DC for advocacy

☐ **\$ 25.00** Cubre el costo de cuidado de niños para un taller de liderazgo / Supports child care for a leadership workshop

☐ Other Amount

☐ Quiero donar esta cantidad cada mes / I want to give this amount every month

E-mail - correo electrónico*

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.



PROGRESSIVE TECHNOLOGY PROJECT

*Strengthening Community Organizing
with Kick-Ass Trainings & Effective Technology*

① **Grassroots Fundraising & Technology - An Integrated Approach:** Learn how to get real results from a Fundraising Sprint Campaign. Next training in Austin, Texas in early 2015.

① **PowerBase:** The CRM database for community organizers who want to raise change and make change.

email: ptpinfo@progressivetechnology.org
web: www.progressivetechnology.org
call: (612) 724-2600
facebook: bit.ly/ptpfacebook
twitter: [@ptptweets](https://twitter.com/ptptweets)

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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