**Nonprofit 911 – December 3, 2009**

# The Procrastinator's Guide to Year-end Fundraising

with Alia McKee and Mark Rovner of Sea Change Strategies,
Kathryn Powers of Conservation International,
and host Eric Rardin of Care2

Sponsored by Network for Good and Care2

The MP3 audio transcript can be found at
www.fundraising123.org or www.nonprofit911.org

**Rebecca Higman:** Welcome to the December 3 Nonprofit 911 sponsored by Network for Good and Care2. My name is Rebecca Higman and I am a member of the marketing team here at Network for Good, and I will be serving as one of your moderators today along with our special guest host from Care2, Eric Rardin.

I am really pleased to welcome you to this special Nonprofit 911, which I mentioned is being hosted in association with Care2.

The Nonprofit 911 series is a free teleconference series that is designed to help nonprofits really grow their online fundraising and marketing program, in case you haven't joined us for one of these before.

In the two years since we have started this program, more than 40,000 nonprofit fundraisers and marketers just like yourself have registered for these free teleconferences. So you are in really good company, and we are so excited to have you on the line today.

In terms of today's agenda, I just want to go over one or two quick housekeeping items and then we will get started and dive into the Procrastinator's Guide to Year-end Fundraising.

For a bit more background of how Network for Good helps nonprofits raise money online, we offer an online fundraising solution called Custom DonateNow. It is an online donation processing service for nonprofits to accept credit card gifts on the web. And at just $29.95 a month, it is one of the easiest and most affordable tools available.

Our presenters today are going to speak about how to optimize your DonateNow page. And we are really excited that Network for Good can offer an online fundraising option that gives you the flexibility and the customization you want to make the most of your year-end fundraising efforts.

So if you are interested in learning more about it, particularly after you hear all of the great advice from our speakers today, I really encourage you to reach out to our team for more information. Just send us an email to fundraising123@networkforgood.org. Put something like "Custom DonateNow" in the subject line and we would be happy to follow up with you.

Also, to help you in your learning during and after today's call, there are slides that you are going to want to make sure you check out online. Just visit www.nonprofit911.org, and then below today's date and presentation title, you will find a link to these slides. There is also a bonus link there which is the full white paper, The Procrastinator's Guide to Year-End Fundraising, so you can delve deeper and read more advice for all the steps that we are going to go over today. So I would encourage you to download both of those whenever you can.

Your host Eric Rardin or I will share as many questions as time will allow during the call, and then again following the presentation during our larger Q&A.

So without further ado, I would like to turn the floor over to Eric to introduce today's speakers and our topic for the day. Eric?

**Eric Rardin:** Thanks Rebecca. My name is Eric Rardin and I am from care2.com, and we are an online community of 12.5 million people who want to make a difference in the world. We make our living by recruiting donors for nonprofits. And having been around for almost 13 years, we have helped hundreds of nonprofits recruit hundreds of thousands of supporters, activists, donors, and volunteers.

I am really thrilled to be…Well, I am thrilled that Mark and Alia from Sea Change Strategies allowed us, Care2, to be associated with the Procrastinator's Guide to Year-eend Fundraising. This is an updated version of the guide for this year, but they wrote the initial version several years ago, and I have been a big fan of it ever since. We have added a whole new chapter on social media this year, which kind of, I think, adds a lot of interesting spin to this.

Just quickly about our speakers. And also, I am thrilled to have Kathryn Powers on the line, who exemplifies a lot of the guidance that Mark and Alia have put forth in this paper.

So Alia McKee is a principle at Sea Change Strategies, and she helps nonprofit clients innovate engaging, inspiring, and successful online fundraising and advocacy in marketing campaigns. She is currently working with the Monterey Bay Aquarium, Environmental Defense Fund, International Rescue Committee, and Conservation International, among others. Alia has a Master's Degree in Public Policy and Communications for the LBK School at the University of Texas at Austin.

And Mark Rovner, another principle, perhaps the only other principle at Sea Change Strategies, is one of the pioneers of using the Internet for fundraising, organizing, and strategic communications. Over the past 10 years, he has led online efforts on behalf of a host of organizations, including the World Wildlife Fund, Amnesty International, The Christopher Reeve Foundation, Environmental Defense Fund, the Monterey Bay Aquarium, and the International Campaign for Tibet. Mark is also very proud of the fact that he is an avid scuba diver, and he is not as proud of the fact that he is a lawyer.

Kathryn Powers. Kat is at Conservation International. Prior to Conservation International, she was at The Cheetah Conservation Fund where she was Director of US Operations, and used that to hone her online fundraising skills, and prior to that was the Membership Coordinator for the Society for Conservation Biology.

So the Procrastinator's Guide to Year-end Fundraising is very much what it sounds like. It is not too late to do a lot of things to improve and maximize your year-end fundraising. And my colleagues here have some great ideas and suggestions.

The format, just quickly, of this program is that we are going to start about working about halfway through the 11 steps that you can take between now and the end of the year to maximize your online fundraising. And about halfway through, we are going to pause and spend about 15 minutes taking some questions to kind of break things up a little bit. And then, we will go back to finish the presentation, and then we will finish up with a final round of Q&A. We will answer as many questions as we can until the end of the program.

So with that, I am going to turn it over to Alia.

**Alia McKee:** Great. Thank you so much Eric and Rebecca. We are all really excited to be here today. So everyone, this is Alia. This is my voice. Kat has a very different voice, which you will hear very shortly. And we are going to be presenting off the PowerPoint slides that hopefully you all have up in front of you.

But I want to remind you that there is a ton of auxiliary information in the guide itself. So please make sure to dive into it to get more detail on the examples we will be discussing. And I am going to let you know when you need to push forward on the slides, etc, as we move through this.

So right now, we are going to stop procrastinating and we are going to get started on slide three. So it's December 3rd, right? It is the busiest month of your fundraising season. It has arrived. Many of my clients raise anywhere from 40% to 60% of their annual online revenue this month.

You might be in the very small group of fundraisers that have planned for this moment for the past 11 months and have all your bases covered. I would call you the Virgo's in the group. I am a Virgo. Or, you might be a procrastinator, and that is OK. I work with lots of procrastinators.

**Mark Rovner**: Including me. I have been practicing procrastination for decades.

**Alia McKee:** [laughs] Mark is a procrastinator. I am not. But procrastinators don't have to panic, because there are some concrete actions you can take now to help maximize your year-end fundraising results and prepare for next year.

So let's go to the next slide. Today we are going to cover 11 steps to better online fundraising. And yes, that is Billy Mays cheering you on. I thought we needed a little bit of energy on this call today.

And basically, what we are going to be talking about is starting out by inspiring your donors everyday. We are going to talk a lot about optimizing donation forms. We are going to talk about how you can smoothly and quickly get would-be donors to that donate form. We are going to talk about test driving your online donation process, creating a "Why Donate?" page. Next slide.

We are going to talk about thanking your donors, providing for a warm welcome, launching a two-pronged cultivation plan, using social medias to engage your supporters and would-be supporters, measuring and testing. Next slide. And finally, how you can avoid procrastinating next year.

Mark, do you have anything you want to say before we dive into the steps?

**Mark Rovner**: No. As a seasoned procrastinator, I do want to underscore the fact that there are a lot of things you can do between now and the end of the year that A, won't cot you a lot of money, and B, will bring in more money. So it really isn't too late.

**Alia McKee:** Great. All right. So let's talk about this first step, inspiring your donors everyday. We are now on slide seven. I think that this is possibly one of the most important steps we are going to talk about today.

Right now, an inspiration gap exists between donors and the causes they support. According to the Wired Wealthy study, which was a study done by Sea Change, Convio, and Edge Research, it really looked at how you can use the Internet to connect with middle and major donors. We found that only a minority of donors find communications from the organizations they support make them feel more connected to the cause. This is a major lost opportunity. Slide 8.

So people give money to nonprofit organizations in large part because it feels good. And if you have made the effort to inspire your donors and really build passion over the last year, you are probably going to do well, even if your website breaks every usability rule.

And right here on this slide, we outline the Sea Change Passion Principle. It holds that online giving is a function of donor passion, on one hand, and good usability on the other. But passion counts more. So our passion principle formula is two passions times one usability equals lots of money coming in the door.

Let's go to the next slide, and then I am going to definitely pause to let Kat and Mark talk about some examples of these ideas. A question people ask me all the time is, "Well, how do you build this passion? And considering it is December 3rd is it too late to do it this year?" Well it is not too late to do it this year, but building passion is definitely something you are going to want to prioritize as part of your annual strategy.

So as far as some concrete ideas, there is a full list in the guide, but we are just going to highlight a few here. The first really important idea is that you should tell stories, and you shouldn't riddle those stories with statistics and data.

The stories you tell could be your organization's founding story or simply an emotional and engaging story that connects your donors to your work. Don't be afraid to build this out in a picture slide show or video if you have gorgeous photo assets. An amazing way to build passion is by not using words at all, by showing people, through video and through photos, how their support is being used in the field.

So if you go to slide nine, you will see a gorgeous photo, which is a great example of Charity Water's recent story of a Ugandan woman in a village that had just received a Charity Water well.

The woman, Helen, said she no longer lived in shame as she had when she had previously sacrificed bathing and washing her children's uniforms so that her family could drink and have cooking water. Before the Charity Water well, there simply hadn't been enough water in the village to go around.

And what is really striking about this story is that the hero of the story is Helen. It is not Charity Water, right? You are looking at this woman and are just inspired by her. The donor feels a tangible connection to her through their gift to the organization. So I would say that this is a passion win.

And then, as far as how you could do this now, I say before you begin your year-end solicitations, tell at least one story like this to your donors. It is going to be a great start. And then remember to continue telling stories like these throughout 2010.

Mark and Kat, do you guys want to chime in here?

**Kathryn Powers:** Sure. I will chime in. In fact, I am going to reference your Procrastinator's Guide. A good example of what CI does to tell stories and cultivate donors is through the CI Insight Network, which was adjusted to us by Sea Change Strategies.

And basically, we created a group of users, Mark can probably actually articulate this a lot better, but sort of as a small group, like a survey group, and surveyed them and asked them questions about things that they would like to see.

But one thing that I want to point out, not so much the CI Insight Network, was what we did a couple months back when we did the Qual Board with CI scientists. Mark, you can probably explain that a lot better, but I think it is a perfect example.

**Mark Rovner:** It really was like a weekend workshop on marine biology where we gave a small handful of donors an opportunity to pose questions and interact with three of the senior marine scientists. I think the scientists were incredibly inspired by the curiosity and the interest and really got into it. And the donors just couldn't believe they were given this much exposure to the staff.

I want to back up on that picture of the Ugandan woman. We do not work with Charity Water. And just to say, we, in putting the guide together, did not only look at clients or projects we worked on, but we went all over looking for stuff that we really like. And almost everything Charity Water does is amazing. Whoever is in charge of their fundraising communications is doing just a bang-up job.

One of the things that I love about this story about this Ugandan woman is that it was 999 words. It was a 1,000 word email, which breaks all the rules, but it was so good and so compelling, and so well written, you read every word. And it just goes back to that storytelling point, Alia, you were making earlier that narratives trump rules if you can do good narratives.

**Alia McKee:** Absolutely. And just to bring back to Kat's point about the CI Insight Network, that is an amazing opportunity. It is very important that you build passion with your donors by listening to them and reporting back what you hear from them. And I particularly think that is what is really powerful about the Insight Network.

There is a quote in the guide from someone who is a part of the Insight Network. I am going to talk about it here. They say, "The old leadership maxim is that people support what they help create. It applies to just about everything CI seems to be doing. By having this forum, we have been made to feel like our opinions matter, and we are helping to create something. So in the end, we are even more involved."

**Mark Rovner**: And by the way, I know a lot of you calling in are from smaller nonprofits, and you are going, "Well that is great. CI, they have got more money than God. They can do stuff like this." You could easily build a network like this on Ning, which is free. And, in fact, that is probably where we are going to take it in a couple years.

So this is not necessarily a high budget kind of activity, although it may be a bit much between now and December 31st.

**Alia McKee:** Absolutely. Or, you could just send a survey and report back to that donor group what you learned. I think a lot of organizations are very comfortable sending surveys, but not as good at reporting back the feedback that they receive from their donors.

**Mark Rovner:** That is a great thought.

**Alia McKee:** So I think closing the loop is a critical piece of that. We are going to talk a little bit more about listening to your donors later in the Webinar, so I going to move us along.

The final point on inspiring passion that I want to talk about is not being afraid to offer real glimpses into the life of your organization. Authenticity is arguably the paramount value in marketing communications these days. So don't be afraid to show who you are.

There is an example in the guide of a video that I just love that Environmental Defense Fund has done. And it is basically just a thank you video from their staff people thanking the donors and activists for helping to achieve the successes that they achieved throughout the year.

They usually send this the week of Thanksgiving. I would argue that it is probably not too late for you guys to send a thank you message if you haven't yet done so before your year-end solicitations. But definitely keeping true to who you are. Don't be afraid to show what a day in the life of your organization is like.

All right. With that, I think we are going to go to step number two. We have talked about inspiring our donors every day, step number one. Step number two goes to the usability side of things, and it is all about optimizing your donate form. And for those of you who have the slides, we are now on slide 11.

So I want to ask you guys all on this call: Do you guys want to run away when you look at your donate form? Because I know there are a lot of organizations I work with that I look at their form and I am just like, “Oh, I want to run away.” And if that is you, this is probably going to be the most important discussion you have had all year, because small but significant changes to a donate form can yield huge returns. I can’t emphasize this enough.

If your form is scary and long, if you require or even list unnecessary fields, if you include multiple non-giving options, if it is easy to leave the page because you have got global navigation all over the page, I beg you to go through our checklist in the white paper to clean up your form before the year-end season.

So Mark and Kat, what I thought I could do is just go through some highlights of things people can do to clean up their forms. Is there anything you want to say before we go into that?

**Mark Rovner:** Before we get to the form, I think the easiest thing you can fix that will make a usability difference is putting your address and phone number on your homepage, because there are a lot of people that want to give you money who either want to call in a pledge or write it in. And people do have short attention spans. It is just such an easy thing to do that can make such a big difference.

**Alia McKee:** Great. All right. So a full list of these tips is featured in the guide, but we are going to talk about some right now. The first tip that I suggest is suppressing global navigation. So many organizations I work with actually fight us on this, and Kat is included! [laughs]

But if what you want is for somebody visiting your donate page to make a donation, then for goodness sake, don’t give them your website’s full range of navigation options. That is like begging them to leave the form.

So if you can before the end of the year, just remove the global navigation. Of course you want to have a very clear link to get back to your homepage. But you definitely don’t want to just serve up all 31 flavors to people, because when they are given lots of options, they tend to use those options and not finish that donation.

Kat I sort of singled you out on that one. Do you want to say anything?

**Kathryn Powers**: [laughs]. No. Actually, I will only say that I am trying currently to figure out ways to test that through Google Analytics to see if we can actually track if people are leaving the page. But I will take your word for it. We will get there eventually!

**Alia McKee:** And Kathryn has a great point. That is something that you can definitely test, and we will get to that. I believe that is step 10 in the guide.

The second thing you can do is minimize your giving choices. Many donate pages bristle with options. There is, “Give Monthly,” “Join,” “Donate,” “Renew,” “Check out planned giving,” “Corporate Giving,” right? The safe course, for year-end in particular, is to provide a single donate choice to keep folks on task. Or you could test one other option, like monthly giving, but definitely try to simply your form. And it takes discipline, and sometimes it takes hard choices, but we really do recommend removing a lot of those different giving options.

The third step here is don’t ask for information you don’t need. Any additional field will suppress response on a form. So again, this is where that discipline comes in. Do we really need a donor’s business number? And even if it is not required, it makes your form look long and it can suppress results.

Mark talked about adding your mailing address, phone number, and email address to your form. That is an absolute must. I think another important addition is to add third party endorsements like a Four Star Charity Navigator Bug if you have got one, or even positive testimonials from noteworthy people who are consistent with your brand. So this could be like the Dalai Lama, maybe. Cameron Diaz? Probably not, right? So definitely choose your testimonials well.

**Mark Rovner:** Cameron, if you are on this call, our apologies.

**Eric Rardin:** Yeah, I think let’s think about Britney. Definitely not!

[laughter]

**Alia McKee:** Very nice. Britney; we will talk about Britney. All right. Again, there is a full list in the guide, but to make sure we can get through everything today, I just want to emphasize that you want to make sure your error handling doesn’t suck. And you know what I am talking about. I hate it when I skip a field and submit a form and then I am required to enter in all my information again. So go through your donation process yourself and make some errors to see if your form passes the test. Because probably, when you have tested it before, you have done it all right. Just make sure that you are checking yourself for error handling.

And in the guide, again, we show an example of Care’s web form, and I think this is a fabulous donation form. It abides by about 99% of the recommendations we lay out. So definitely check it out, and I think it is a good form to aspire to.

We just did a revision of our old form, so our old form was very, very basic, and a lot of our revisions were based on Alia’s recommendations that has just given. Obviously, not the global navigation, but we did add things like a testimonial and information about how funds were used. And then some of our information on our form does not necessarily jive with what is in the Procrastinator’s Guide, but we are testing right now the old form versus the new form. And we just started this test like a week ago, so unfortunately, we don’t have data to share. But just at a brief glimpse, it does seem to be performing better with some of these additions.

**Mark Rovner:** If you are willing to share the data, we would be happy to post it on our blog for anyone who is interested in how that test comes out.

**Kathryn Powers:** OK. We will probably run it for another week before we finalize everything.

**Alia McKee:** Great! Wonderful. All right. So let's talk about step number three. And for those of you who have the slide show in front of you, we are now on slide 13. The third step is to blaze trails to your donate page. So we have talked about inspiring your donors, you have optimized your donate page, now what, right? You really want to make it easy for your donors to get to your form as quickly and smoothly as possible. Again, a full list is featured in the guide, but here are some primary tips for you.

Make sure you have multiple donate links on your homepage that goes straight to your donate form. One link to give off your homepage isn't enough. I say three. I say four. Make it very easy for people whose eyes are drawn to different areas of your homepage to find that donation form.

I suggest using consistent language for buttons and links, and focus on directed words like "give," "donate," or "contribute." Words like "join" that sort of connotate membership are very tough for organizations that aren't the ACLU, that membership isn't a core part of their brand. So think twice before you use "join." I also think that "support" can be a little bit of a loaded word, because there are many different ways people can support an organization, from volunteering, to doing peer to peer fundraising, or taking action for people. So I would be very directive about "give," "donate," or "contribute."

The third tip is to create keyword ads only Google. And only if you are maximizing your Adwords outreach should you move on to other search engines like Yahoo and Bing. Just so you guys know, Google has about 80% of the market share. So definitely, for resource strapped organizations, we suggest focusing on a Google Adword account.

And what I suggest is, for the last week of the year, to just get your brand terms, your organization's name, major topics related to your organization, buy those keywords and create a little ad that talks about year-end giving, that talks about tax deductions. If you have a match going on, mention the match in that ad copy and see if you can drive some traffic to your donate forms through search.

Does anyone have anything that they want to add on the search point? All right. And then the last thing I want to talk about here, as far as blazing trails to your donate form, is it is really important to consider a website hijack or an overlay. And I will define what that is.

It is a special screen that appears during appropriate giving campaigns that has its sole purpose generating donations. You can see an example in the guide from the International Rescue Committee. And they actually have a splash screen up right now. So if you don't have the guide and you have access to the Internet, you can go to www.virc.org and you can see an example of a homepage hijack that is up that is really trying to take people directly to the donation form in advance of year-end fundraising.

So let's go to the fourth step, which is test drive your online donation process. And for those of you who have the slideshow, we are now on slide 15.

I talked a little bit about this during the optimizing your donate forms section, where I was saying you should test drive your donation process to make sure the error handling doesn't suck. But it is very important that not only you test it, but that you get some unsuspecting subjects to test your donation process.

So on slide 16, for those of you who have it, you will see my dad, my husband, and my friend Kristen. I think these are really nice photos, so hopefully you guys will get a chance to see them.

**Mark Rovner:** [laughs] I agree.

**Eric Rardin:** These are very real people.

**Alia McKee:** Very real people. And whenever I am in doubt, I will ask three people like these to make a donation to whatever organization I am working with. I give them $10 and I ask them to make an online donation through their credit card. And I will sit down with them, and I watch what they do without saying a word. And these are the things I look for.

How did they navigate to the site? I didn't give them the URL. I just gave them the name of the charity and then I ask them to get to their site on their own. So I look for that. How did they get there?

Which link did they click off the homepage to get to the form? How long did it take them to navigate through the homepage to find those links? Once they get to the form, do they stumble over the form? Did they leave the form for some reason? There is that global navigation coming back. Did they forget a field? Did something frustrate them? Did they submit the donation and it didn't go through?

I just had a client have a problem with their donation finish page where a donor was like, "I wasn't sure if my donation actually went through. I got landed on a thank you page that didn't confirm that my donation had been made." So those are the kinds of things we are looking to identify during this process.

A lot of people will pay a lot of money for this kind of usability testing, and you can get it for $30 and three volunteers. So I can't tell you how amazing it is that you can identify usability speed bumps by recruiting your friends.

All right. Sounds like the peanuts are quiet. [laughs] All right. For those of you who have the slides, we are now on slide 17, which is step number five. And this is the last step before we are going to break for questions.

Step number five is create a why donate page. For every person who is prepared to give you an online donation, you have a dozen or more would-be donors who are researching a potential gift.

In fact, a recent Convio survey, I just saw this yesterday, said that 44% of online consumers said a nonprofit's website is the most useful resource in choosing which organization to give to. So you definitely want to make sure that you are not only appealing to people who came to your site to make a gift, but people who came to your site to research making a gift.

**Mark Rovner:** And by the way, that 44% includes people who may not give online. They may just come visit your website online and then write a check.

**Alia McKee:** Exactly. So if you go to slide 18…

**Eric Rardin:** And actually Alia, let me just pile on there. I was at a fundraising conference earlier this week, and that point that Mark just alluded to was also made there. I don't remember the statistic, but the point of it was that increasingly, before somebody pulls out a check to write a check for a charity, they go to the website and they research. And if they go to that website and they are not finding what they want, exactly as these guys are saying, they will go to another website. They may keep the checkbook out, but they will go to another website, or they may just put the checkbook away. So definitely make the case.

**Alia McKee:** Great. And there is an example on the slideshow on slide 18, and then also in the guide, of a "Why Donate?" page for the Monterey Bay Aquarium. And this is a real simple way you can address these people's needs and make a strong case for giving in a centralized location.

So our thought is that you would create a new webpage called "Why Donate?" and provide links to this page from your donate form and your "About Us" section. This is something that I am totally OK linking to from a donate form, because it helps people who aren't ready to seal the deal get ready to seal the deal.

You should include a simple pie chart of where your money comes from and where it goes. You should, again, include your accolades; that four star Charity Navigator Bug is coming back again. If your organization is a "Worth" or "Money" magazine pick, if there is something that you want to tout there, this is where you want to do it.

If you organization is a great steward of funds, I would make sure to say that here. "95 cents of every dollar goes directly to our work in the field," or something like that. And then from this page, you can provide links to your full financials or to that PDF of your annual report that most people won't read; I promise you that.

And then the last thing I want to talk about here is don't forget to inspire. Don't forget step one. Yes, you are making a case for giving, but you also want to appeal to the heart strings. So you can use images and words that do this. And I think the aquarium's page which we gave you as an example is an excellent way that they used visuals and inspiration in tandem with some information that appeals to the head strings to really make a strong case for giving.

**Mark Rovner:** They had me at the Leopard Shark.

[laughter]

**Mark Rovner:** One important point of clarification Alia, and that is the "Why Donate?" page should not be put in the user flow in between the donate button and the form. The donate button should go straight to the form. And if you send them to a page like this, you will lose donations.

**Alia McKee:** Correct. This is just for people who need a little more convincing. This should not be considered a barrier to get to the form.

**Eric Rardin:** Yeah. The biggest thing that I have seen on websites when I am looking to donate, and may people have a similar complaint, which is if there is a donate now button and I click donate now, it means I am ready to donate now. So if I don't arrive on a form where I can donate now…

**Mark Rovner:** You are toast.

**Eric Rardin:** It is pretty frustrating. And lots of people abandon at that point. So wherever you have that donate button, the other side better be a form.

**Mark Rovner:** Yep. Well said.

**Alia McKee:** Agreed. All right. Well do we want to stop and take questions? Or what are you guys thinking?

**Eric Rardin:** Well Rebecca, have we gotten some questions? And if not, I encourage our listeners to send in any questions they might have at this point. And if we have some to work on, we can take a few now. And otherwise, we will keep going. And if we do just keep going, then please, if you do have any questions now or as we move forward, email them to the email address that Rebecca shared earlier.

**Rebecca Higman:** Excellent. Thanks Eric. To get us started, I will share a couple with the group. The first one was just to review a couple of the websites that you had mentioned. For instance, there was an example of a page. I believe you mentioned Care. Can you point people to where they can find that example of a good donate page or a good overlay?

**Alia McKee**: Yes. So the overlay page that is live right now is at www.theirirc.org. That is the International Rescue Committee. I am sure there are tons of other hijack sites that are up, but I just don't know them off the top of my head if they are live right now.

**Mark Rovner:** I have one more. Charity Navigator has a really good overlay site. If you go to www.charitynavigator.org and then click any link, it will pop up. I think it is very effective.

**Alia McKee:** Great. Terrific. And then, the Care form, I think this is in the guide. Let me see if it is live here. We are just doing this on the fly.

**Mark Rovner:** And Care, of course, is just www.care.org.

**Alia McKee:** Yes. So it is the general donate form off Care's website. So you can go to www.care.org and hit "Donate now," and you will see the form that I am talking about.

**Eric Rardin:** I have a couple of great questions as well. The first one I will send your way, which is quick but very important, is where you use the splash page, or you use the hijack.

**Alia McKee:** Certainly. It is funny. My thinking has changed on this since the last publication of the Procrastinator's Guide. Previously, I just used it on the homepage. And I would encourage clients to cookie it so that people coming to the site would only see it once a week. So if you had multiple visitors each week, they wouldn't have to go through this splash screen each time they came to the site.

But more and more, because of search, and just because of the way that information is shared on the Internet, people aren't coming to your homepage a majority of the time. They get to your site through a secondary page or a link that there friend sent them, or something else.

So our recommendation has shifted a little bit in that we recommend this overlay on all pages of your website, but definitely with a cookie so people don't have to see it multiple times in an experience.

**Eric Rardin:** That is great. I would have guessed a different answer, so excellent. So one other quick question from me, or from the other questions I have. And this is, I think, one that is on everybody on the call's mind, except probably Mark's, which is how often people should ask for donations in December via email. Just one email?

**Mark Rovner:** All the freaking time.

**Eric Rardin:** Like every day? Send an email every day? I bet that is not Mark's real answer, so what do you say?

**Mark Rovner:** It is close! Go ahead Alia.

**Alia McKee:** OK. Well, I definitely think that December is a time to be aggressive in asking for money. But I also think that it really depends on what kind of relationship you set up with people in the previous year.

If you haven't been emailing people at all and all of a sudden you take Mark's advice and you send an email appeal every two days, that is probably not the way I would recommend you go.

But just so you guys know, for most of my clients, it is very easy for us to go out 8-10 times through the month of December with a very increased period where we will go all out after Christmas. I see probably 60% of December revenue come in that last week of the year. So I think it is just a matter of trying to stay at the top of people's inboxes at that point. Short and sweet messages reminding them to make a tax deduction, to make that gift before December 31. But definitely increase your frequency after Christmas.

**Mark Rovner:** Two things. One is, if at all possible, it is important to take people who have given out of subsequent emails so that you are not asking them when they have already given.

And the other is to not let one or two complaints deter you. You should be judging the success of your December fundraising email blitz by the money that comes in the door and not the two or three trolls on your list who complain.

**Alia McKee:** CI is actually going out pretty aggressively this year. Do you have anything you want to add there?

**Kathryn Powers:** I do, actually. I just want to reinforce what you were saying about building up to the year-end fundraising with cultivation, too. Just a good little bit of backup to your opinion there.

I ran into someone a week or so ago who actually said to me, "There was about a month there where you didn't send us any emails, and we were worried. We thought something happened."

**Eric Rardin:** Wow.

**Kathryn Powers:** And it is because we send out such regular cultivation and people are actually watching us. It is almost like you are conditioning that audience to expect the emails to come in. And the people who don't fall of your list, who don't unsubscribe, are actually more dedicated supporters because of it.

This year, we are actually, in December, putting out…I am looking at the calendar right now…two appeals per week. And then after Christmas, almost one every day. And then we are doing different appeals for different segments, as well.

**Mark Rovner:** Most donors to most causes know that this is the giving season. It is sort of like those two giveathon periods on NPR where they are asking all the time, but we know it is going to stop in a week. So the rules are breakable in December as long as you don't do it 12 months of the year.

**Eric Rardin:** And even if you are only emailing your list…Say you have only sent 10 emails to your list, or five, the whole year. You can get away with more than one or two in December.

**Mark Rovner**: Oh, God yes.

**Alia McKee:** Absolutely.

**Mark Rovner:** Every solicitation is going to bring back money.

**Rebecca Higman:** Excellent. So I will just jump in with one last question before we move on with the rest of our steps. I just want to make sure this one doesn't get lost in the shuffle.

Valerie wanted to know if you have recommendations of how long that copy should be on the "Why Donate?" page. Do you have any recommendations, even so far as a word count? How long should we allow people to stay on that page before they kind of move on to the action?

**Alia McKee:** Well it is funny you asked this with me Valerie, because Kat and I always go back and forth. I tend to be too wordy, I think. I think you really need to be disciplined and try to cut it back to 50, 75 words on the "Why Donate?" page. Use an image that tells the story and does the heavy lifting for you, but try not to be too wordy. People aren't reading online these days.

And this is something coming from me. This is definitely a challenge that I have to face in my own work, is trying not to just throw it all out there for people. Definitely pick and choose the best message and stick with it.

**Rebecca Higman:** Excellent. So I think maybe we will table the rest of our questions until a little later in the presentation if you guys want to move on to the rest of the steps.

**Alia McKee:** Sure. So we are going to move away from the usability piece of the guide, and we are going to start talking about cultivation, because it is extremely important, as we just told you, to be very aggressive in your solicitations. It is also extremely important to be just as thoughtful about how you're cultivating these donors and how you are thanking them.

So for those of you who have the slides, we are now on slide 19. And the sixth step in the Procrastinator's Guide is to thank your donor at least three times. If you will go to the next slide, your donor didn't just buy Oxy-Clean or a Shamwow. They made the world a better place by giving you money. And it is important that you use the opportunity, after they just gave you a gift, to tell them that. Give them a real big hug.

You are going to want to use your finish page strategically. This is the page, again, that comes up right after somebody finishes making a donation. This should not feel transactional. This is not them buying a book off of Amazon. It is time for a warm hug, a nice big welcome, and an inspiring image. So make sure that you are thanking people, and that this experience feels really good to your donor.

Another thing that is sort of my pet peeve is that you really want to review your autoresponder thank you copy. Does it feel like an autoresponder? Have you not updated it for the last six months? If so, rework it before year-end.

**Eric Rardin:** Alia, if you want to make clear what autoresponder copy is?

**Alia McKee:** Oh, sure. Autoresponder copy is the automatic email that is usually generated when someone makes a gift and gets sent out to thank them for their gift.

**Eric Rardin:** And I recently got one that was three words, plain text that said, "Thank you for your donation." It didn't feel warm.

[laughter]

**Mark Rovner:** I have had panhandlers do better than that.

**Eric Rardin:** Yeah, totally.

**Alia McKee:** Guys, I am telling you. Look at your autoresponder copy. Make it beautiful. Make it warm. It shouldn't be transactional, and it definitely should not be "Thank you for your donation." [laughs] Try to give yourself a little personality here.

Another thing that I think could separate you from the pack is if you send another thank you email a few days later. People are conditioned to expect an autoresponder message. And they are not as much conditioned to get a secondary message saying "Thank you so much for your gift." So definitely consider doing that.

And then two other points here. The time to get transactional is during tax season. So something that Mark and I are very much in favor of is sending your donors a tax receipt at the end of each year that gives them a list of donations they have made to you. This transactional and helpful information is very much appreciated by your donors. So sometime in January, you might want to consider doing something that is a little more transactional but very helpful to them.

And then finally, a tip from the guide is that you might want to consider a sincere hand-signed letter or phone call for large gifts. Did a donor just give you $1,000? A genuine personal thank you is definitely in order and worth the effort. And CI is phenomenal at this. Kat, you guys have like a little process that flags when you get a large gift coming in, right?

**Kathryn Powers:** Yes. Notification is sent to the appropriate giving department, and then they contact the donor.

**Alia McKee:** Yeah. I mean guys, that is just so wonderful. And I think in the Qual boards and in the research that we have done with CI donors, they have mentioned this. So it really will make a lasting impression for these guys.

**Eric Rardin:** One thing just to add. I have to step back on sending people a tax receipt at the end of the year. That is a great opportunity for you to also ask your donors, "By the way, does your employer have a match and give program where they match charitable donations?" And these things really have to go hand in hand.

Care2 has a match and give program. When I give a donation to a nonprofit, Care2 matches it. But at the end of the year, when I am trying to find that receipt so I can submit my form to Care2 so they can also make a donation, and I am the least organized paperwork guy in the universe…

**Mark Rovner:** No. You are second.

**Eric Rardin:** OK. Well, you are up there. So if suddenly in my email box between Christmas and New Year's I got a receipt, the likelihood that I would do the paperwork to double my donation to you would increase 50 fold. So send the tax receipt and ask people to check with their employer if they have a match and give program.

**Alia McKee:** Great. Cool! So definitely, you can't thank your donors enough. And I am guilty of not doing it enough. I am sure we are all guilty of not doing it enough. But definitely make that a priority for yourself.

And this is thanking donors after they have made a year-end gift, but it couldn't hurt you to send out a thank you, if you haven't already done so, to donors before you do your solicitations.

All right. So for those of you who do have the slideshow, we are now on slide 21 and step number seven, which is provide for a warm welcome. So now that you have thanked your donors sufficiently, it is important to get the cycle of inspiration off to a strong start.

And I have a couple of ideas here. The first, there is an example of it on slide 22. And basically, this is an example of an EDF message, a message from Environmental Defense Fund, that reports back on how much money they raised and how it will be used. And they do this after every concerted fundraising effort they do.

So definitely planning a follow up email after every fundraising campaign you do, letting your donors how much money you raised, how you are going to put that money to use, and that you are going to keep them in the loop about how whatever you are doing is going to transpire is really a very easy way that you can give them a warm welcome.

A second thing that you can do is send one or two orientation emails to your new donors. And yes, I am sure a lot of you are very familiar with a new subscriber welcome series, but it is equally important to do something like that for new donors, because you can strengthen this new bond that you have with them.

So like you would do with new subscribers, you could send them a link to your greatest hit content on your website. You could send them a donor survey asking for donor preferences and information. Or you could send them links to recent news coverage. These are all great ways that you can solidify that bond between you and your new donor.

And then finally, the last thing about providing for a warm welcome is just sending updates throughout the year that don't include a donation ask. It is important that all of your email communications, all of your online communications aren't solicitations. So definitely keep this in mind, which brings us to our next point, which is launching a two-pronged cultivation program. But before I go there, I just want to make sure that my cohort here doesn't have any additions for the warm welcome section.

So now we are going to launching a two-prong cultivation plan. This is step number eight in the Procrastinator's Guide. And for those of you who have the slides, we are on slide number 23.

So the first prong of our two pronged cultivation plan is that you should launch a monthly communication with the principle aim of re-inspiring your donors. If this is going to be your newsletter, it better be good, not a parking lot of random stories.

I know when I was the marketing director at the Jewish Community Association of Austin, I know that is a mouthful, gosh, I hated monthly newsletter time, because it is when all the program directors would come and assault me and say, “Why am I not getting any kind of coverage online? I want to get in the newsletter.” So definitely be wary of this. You don’t want it to feel like it is a parking lot to satisfy your program directors.

On the slideshow, if you can look at slide 24, you will see an example of the Monterey Bay Aquarium’s e-newsletter. And for those of you who can’t see it, that is OK. It is just a gorgeous photo and one story. And each month, they ask themselves a simple question, which is, “What is the most inspiring thing that has happened at the aquarium this past month?” And that is what they send out for their e-newsletter.

So definitely make sure that that monthly communication’s main intent is to re-inspire your donors.

And then the second piece of the two-pronged cultivation plan is to make listening a key element in your plan. Ask for feedback in surveys. Answer incoming donor email as quickly as you can. Play around with a donor’s blog or another public forum. And again, report back what you are hearing. We talked a little bit about this in the inspiration section, and it definitely crosses over here into cultivation.

Anybody have anything else to say? All right. Kat, actually, I want to put you on the spot here, because I think CI does an excellent job of cultivation. And I was hoping maybe you would talk about the summer series you guys did, “Our World in Focus.”

**Kathryn Powers:** Not a problem. It was shortly after we wrapped up our fiscal year fundraising campaign. In July, I think, we started our World in Focus series. And it was largely Sea Changes idea. And there is a sample of it in the Procrastinator’s Guide, one of the messages.

But the idea was just to simply appeal to people on a visual level; to give them a big beautiful picture that they could download as their desktop, a very short message about something that we were doing in that region, like in the Coral Triangle or something like that, and then send them to visual assets on the website, like a video they could watch, or a photo gallery, or an article, and things like that. So it did very well; very, very well. People really liked that.

**Alia McKee:** And I know there is hesitation sometimes about just sending out cultivation. Are we missing a giving opportunity here? But guys, I promise it will definitely come back to you 10 fold if you try to create an annual cultivation calendar.

**Mark Rovner:** One of the threads that is going through a lot of this, and Kat, just to throw the props back to you, because what is very much not Sea Changes idea is the stunning visuals that are a real hallmark of everything Conservation International does.

I cannot over emphasize the importance of good imagery, good photography; not five white guys in a suit in a little thumbnail, which a lot of people have. And I think if you go to CI's site, you can get a flavor of what they do and get an emotional jolt about what they do without reading a single word.

And not everyone has a mission that is as visually amazing as CI's, but most people do. Most people have kids, or animals, or something that they can highlight. And really, spending as much time on the photography as you do on the words could really pay back.

**Kathryn Powers:** The same user that I mentioned earlier who missed our emails for a month also commented on how they didn't get any pictures that month.

**Mark Rovner:** [laughs] There you go!

**Alia McKee:** Absolutely. All right. So we are just plugging through here. We are now on step nine of the Procrastinator's Guide, which is the new chapter, which is a brand new chapter for us, which is called "Engage your supporters through social media."

And while questions remain about what role social media will play in the future of nonprofit fundraising, creating a social media presence is a great way to build your brand and connect with your supporters and potential supporters.

For those of you who have the slides, go to slide 27 now, because this is the big disclaimer. Before we even talk about social media, I have got to say this. Before you dive into social media, make sure you have your online basics covered. A compelling website with several clear calls to sign up for more information, an optimized donation page, basic email marketing campaigns. We are not focusing a lot of attention on email marketing for this Webinar, but you want to make sure you have a lot of those email marketing campaigns in place before you start thinking about social media. It is almost like the new shiny tool that everyone is really excited about, which is wonderful, but we want to make sure that you are not neglecting some of these old tried and true methods that work to raise money online.

**Mark Rovner:** And to pick up on something Kat was saying, I was at a meeting with Seth Goden recently, who said, and there were about 100 people in the room, "Anyone who thinks if they stopped Tweeting, someone would say, 'Hey, where did your tweets go?' raise their hand." And no hands went up.

**Alia McKee:** Very good point Mark. That is very good. But we are fans of social media. We just want to make sure that we are putting it in context.

So all right. If you go to slide 28, we are going to start talking about some ideas for maximizing your social media channels, only if you have your basics covered. Remember that. A full list of idea is featured in the guide, but here are some primary tips.

We are going to first focus on Facebook. The first thing you can do is create a cause on Facebook. And put simply, Causes is a Facebook application designed to bring people together to accomplish specific fundraising goals.

So once you set up your cause, it is a matter of sort of registering it, you can recruit friends to join and make a gift of support through the application without ever leaving Facebook. And I believe those donations are processed by Network for Good. Am I right on that?

**Rebecca Higman:** Yes you are.

**Alia McKee:** So keep in mind that anyone can create a cause, from an organization to its biggest fans and supporters. So this might be something you want to work to your advantage. Let's say you are strapped on time but you have a volunteer who is really gung-ho about you. Urge them to create a cause on your behalf and raise money for you on your behalf.

There is a lot more detail about setting up a cause in the guide, but it is definitely a great first step to get your feet wet in social media.

The second thing that you might want to consider about Facebook is if you have a fan page or a group, just make sure there is a clear path to donate, either via your cause, or even your website donation form, and mirror some of those appeals that you are sending out. You can definitely post different messages about your fundraising campaign. It probably shouldn't be the majority of the messaging that you are throwing out via your social network sites, but definitely nearing some solicitation is important throughout year-end.

Mark, do you want to say anything, or Kat, about Facebook?

**Kathryn Powers:** I will just check in a little sidebar about Facebook. It is very important to engage people on Facebook, and you get great conversations and great feedback. And I am seeing a lot more traffic coming from Facebook over to our website and to our donation page.

And coming from someone who doesn't have anyone else to manage that page, I know that it is difficult sometimes to take the time to post on Facebook or Twitter. And the easiest thing I found to do is actually just to pencil it into your schedule ahead of time. A week before, make your pre-Tweets and your pre-posts for the next week and then just dump them in that day. It just saves you a lot of time in the long run, because when it gets busy this time of year, you won't have time.

**Alia McKee:** That is really great feedback Kat.

**Mark Rovner:** And between Facebook and Twitter, Facebook 90% and Twitter 10%. That would be my subjective allocation of time.

**Eric Rardin:** Mark, let me have you expand on that a little bit, because a question came through right on this point, which was, "What two social networks should this charity," which we don't know who they are, "but if you were going to pick two places in the social media universe, where would you be? Is it Facebook and Twitter and then you would go from there?" And that is, again, assuming they are maximizing their Google Grant, their webpage is perfect, and they have got an awesome email series.

**Mark Rovner:** I think you are going to get three different answers from the three of us, which is interesting. I would say Facebook and Facebook.

**Alia McKee:** I would say Facebook and your own organizational blog.

**Mark Rovner:** Oh, better answer! I vote for her.

[laughter]

**Alia McKee:** Kat, what would you say?

**Kathryn Powers:** I would say definitely Facebook. Twitter users tend to like lighter content. Definitely, you are going to get more substantial content and more cultivation advantage out of your blog and your Facebook posts.

**Mark Rovner:** So there you go! We all agree. We must be wrong.

[laughter]

**Alia McKee:** And on that note, we are now going to talk a little bit about Twitter.

[laughter]

**Alia McKee:** And I actually thought about this. I wanted to introduce this. We are going to now talk about the T word, which is Twitter. Now, if you are already using Twitter, let's say you have already gone through the trouble of setting it up. You have got followers. It is definitely important to create a series of Tweets that correspond to the timing and messaging for your year-end fundraising. And definitely intensify them throughout the end of the year.

But this is the big point I wanted to talk about Twitter. All your Tweets shouldn't be direct links to donate, because remember the inspiration piece of the passion principle? Charity Water…And there is an example on the slides. I am sorry you guys don't have them. It is slide 29. They Tweet out a photo of the day to grab their readers attention and encourage re-Tweets. And I see these things getting re-Tweeted like mad.

And I believe Conservation International does…I am not sure if it is a photo of the day, but you guys are really great about sending out photos. We did a trivia around Copenhagen and climate change a little while ago that I think was really well done on Twitter.

But definitely think…I am going to say out of the box. Oh, God! I just said us think out of the box! But think out of the box about the different communications that you want to send out via Twitter, and just try to make them as engaging as possible.

All right. And then the last thing I want to talk about on social media is encouraging word of mouth on your donate thank you page, that finish page that I have been talking about. And if you have got the slides and you look at slide 30, you will see a great example from Wikipedia about how they are encouraging word of mouth via social networks on that finish page.

And what they are doing is they are including buttons, content, and links people can easily snag and repost on all social media channels showing they just donated to your organization. You want to make it easy for people who were inspired enough to donate to spread the word on your behalf after they donate.

And if you want…Oh, gosh. Yeah, there is an example of this in the guide. I was just thinking if I could redirect you to this without having you make a gift. I don't think I can. So definitely, if you don't have the slides or the guide yet, take a look at this page, because I think it is really well executed.

Do you guys have anything else on social media before we move on?

**Mark Rovner:** I, [laughs] if you haven't been reading between the lines, I think Twitter is certainly in right now. There is certainly a lot of traffic. It is certainly worth spending a little bit of time on. I think it remains to be seen whether Twitter is really a vehicle for establishing or maintaining relationships. And I confess I have my doubts.

**Kathryn Powers:** I think it has its purpose. We are about to use it in Copenhagen to sort of indicate when and where our staff will be and when Russ Mittermeier, the president of CI, will be available for questions and comments for the media; things like that.

So it is definitely got its value. From what I have seen from our users though, I would tend to say that Twitter is like the base level of your cultivation. It may be the first step of getting them into that cultivation loop and then they move up to Facebook, and perhaps even go up to the blog.

**Mark Rovner:** I think that is an interesting way to think about it. I did, in fact, just get a Tweet from someone on the call who said, "I think you can do some really cool stuff with Twitter if you have a strong community engaging with you." I think that is a big if, but I agree. If you really have people who you are connected with, who you are exchanging views with, who are responding to you, then there may be something there.

**Alia McKee:** Cool! Wonderful. That was a great use of Twitter. Thank you to that user who did that!

All right. So let's talk about step number 10, "Measuring and testing." For those of you following along in the slides, we are on slide 31.

So it is important to test the tactics you use so you can quantify their benefits and optimize them for better results. And definitely, testing at year-end is a terrific opportunity, number one, probably because you are going to have much more traffic and better data to use on your test, and number two, it will just help inform all of your campaigns for the rest of the year.

So if you go to slide 32, you will see some suggestions that we have for testing, and these are all bulleted out in the guide as well. I will just review some of them here. Some things you can think about with testing are elements of your donate form. Kat has shared with us that they are doing significant testing for year-end right now. Some of the things you could think about testing are layout of that form, a one column versus two column form. You could test suppressing global navigation. You could test different images.

For the person who was asking about copy length, you could test that. You could do something that has just a photo and maybe a "Donate now to help us do X, Y, and Z," or you could have a photo and a bit of a longer introduction copy, and you can see if one or the other lifts responses.

Now when you do this, you are going to be measuring completion rates, which is the number of people who make a gift on that form divided by the number of people who landed on that form. So you are going to be wanting to take a real good look at completion rates.

Another thing you can do with forms is test one page versus multi-step donation forms. Most nonprofit organizations have a one step donation form. Mark, do you want to take this one? I think I have heard this be strong on your list.

**Mark Rovner:** I think it is starting to matter less as people get comfortable with Internet transactions. Most people who give online get their feet wet with Amazon or other kinds of e-commerce. And as e-commerce providers shifted from a multi-step form to a one page form, I think it got easier to sell the single page form, which is the standard now.

It is still worth testing. I am guessing some organizations, particularly organizations with newer Internet users, say an organization that deals with either a low income population or a senior population, might have better luck with a multi-stage form. But right now, I think things are tending to settle on the single page form as the standard.

**Alia McKee:** Other things you can test are email copy. You can do a transactional versus heartstrings. You could do a long versus short message. And with that, you would be measuring clickthroughs, response rates, and completion rates.

And then, you could also do subject line tests, but I have to just caution you that open rates are probably the most unreliable metric that you have got. You can trigger false opens through preview panes or inaccurate information if people don't download your images. So with open rates, you are really going to want to look for trends more than just specific stems of results.

So definitely test things away. Anything else that you guys want to talk about as far as measurement and testing?

**Mark Rover:** I actually want to back us up one step, because I have been mulling on social networking since we talked about that. And I just wanted to give a shout out to Eric and to his colleague Allison Capon [sp], whose FrogLoop blog is probably the best single place to get sane information, sane backgrounds, and thoughtfulness on where social networking fits into fundraising. And Eric, you might want to give a URL of that, because I think there is a lot of really great stuff there.

**Eric Rardin:** Thank you Mark. It is pretty easy. It is www.frogloop.com. And yeah, it is a blog about online fundraising, advocacy, social media, etc. Allison, Justin Perkins, and several folks have put a lot of effort into looking at the intersection between social networks and fundraising. And I think there is some valuable stuff there. Thanks Mark.

**Mark Rovner:** It is in a nice middle ground between the crazy over the top evangelists and the skeptics like me.

**Alia McKee:** [laughs] All right. So guys, we have reached our last step, which is a pretty important step, even though we are all on the throws of 2009 fundraising. And it is to avoid procrastinating next year.

It is time that you put aside time, maybe not now, but in January to plan better for next year so you can map out an annual strategy, and you won't find yourself in the procrastinator's boat next December 3rd.

So the ways you can do this is review your budget and make sure your outreach strategy includes both the acquisition of new supporters and the retention of your existing reporters.

You are going to want to outline goals for your online communications. And great places that I usually tart are by identifying online engagement that the organization I am working with values beyond fundraising. Do they value advocacy? Do they value cultivation messages? Do they do house parties? What are the kinds of engagements and communications that I am going to be sending out that are not fundraising related?

I also really like looking at where are your best opportunities for list growth and lead generation. This is critical. So while you are cultivating your current donors, you are constantly looking for new blood, new donors, to your organization.

I like to look at what outlets have worked for the organization in the past. Where did their best donors come from? Try that. And then I like to try different things. Care2 is a great source of co-registration names. It is interesting to try blog ads. Definitely looking at search engine marketing as a way to try to get new recruits. Definitely thinking about different email publications that might send out a standalone on your behalf. Really thinking about the different outreach areas you want to test in the next year is important.

I think a key is investing in new subscriber and new donor cultivations. So if you are not happy with your welcome series, if you are not happy with how new subscribers and new donors are being cultivated, I would make that a priority in 2010. I mean it is so hard to get them that once you do, you don't want to squander that opportunity. That is golden right there.

You want to plan for ongoing cultivation and listening. We talked about a number of ways you can incorporate listening into your work, and there is more outlined in the guide.

You are going to want to continue optimizing your website. And for me, the Virgo in me, I would calendar it out, and I would say, "In January, I want to be testing my donation forms. In February, I want to create a more supped up "Why Donate?" form." Think about ways that you can ease your troubles next December.

You are going to want to grow your social media presence. I think you are asking the right questions. Where should I grow? How much resources should I put into each?

And then, always remember to inspire. So as you are planning for 2010, just remember, your goal is to inspire your donors every day.

**Mark Rovner:** And I think that is the really important flipside to the advice we gave to hammer the crap out of them in December, which is the other 11 months of the year, you shift the balance the other way. And the proportion of cultivation and inspiration should be drastically higher than that proportion of solicitation.

**Eric Rardin:** Absolutely. That was fantastic. Thanks Alia, and Kat, and Mark. We, Rebecca and I, have accumulated a whole pile of fantastic questions. And I think we should get right into them. And we are just going to kind of go back and take turns coming up with questions. And I think we are going to keep this going as long as we can. So folks that are listening, if you can stick around, please do. I think that there is some real value coming ahead still.

So I am going to start it off. We got several questions about the balance between online email appeals, online fundraising, and offline fundraising. Where do you put the emphasis? What are some thoughts about integrating?

So I am going to actually read one from Trisha that says, "There have been some questions within my organization about how much energy we should put towards email solicitation versus mailing strategies. Do you recommend focusing on email or should we continue to do a combination of email and direct mail?" I will throw that out there and hear what you guys have to say on that.

**Mark Rovner:** If you look at the big picture statistics, there is still much, much, much more money coming in by direct mail, snail mail, than coming in online. Eric, you may remember the last stat, but I think something like 5% of all money given by individuals is coming in online at this point. I remember when it was like one tenth of 1%, so I will take 5%.

So if you are mailing and you have donors who are giving to you by mail, for the love of God, don't stop mailing. If you are just getting started and you are trying to acquire a donor base, that is a different conversation. We could take up a two hour session on that. It is getting more expensive and more uncertain to try to build a donor base through direct mail acquisitions just because the cost is so high, response rates are dropping, etc, etc.

The ideal strategy, as you suggested Eric, is an integrated one where what people are seeing in the mail, what people are getting in their email box, or their Tweet deck, or their Facebook are all coordinated both in terms of the messaging and time.

So the short answer to her question is, for the time being, both.

**Eric Rardin:** Yeah, I would echo that. I think you hit it just right Mark. And just a quick example for the questions about integration. Well first, yeah, if you were starting from scratch and you have never done direct mail, this probably is not necessarily the time to start that. Acquire donors online and then mail to your donors that have come to you online.

But in terms of integration, a great example. Defenders of Wildlife sends me an email saying, "Choose the wolf that is going to be on the 2010 membership card." Then they announced through email which image won. And then, in the mail I got a membership card with that new wolf's image on it in the expectation that I would return a check.

And then, I got an email saying, "Hey, did you get your membership card?" And they do the same thing with the calendars. Two days after I get my calendar, I will get an email saying, "Did the calendar arrive?" And I am pretty sure they know it did.

[laughter]

But you know what? It is like, "So we know that you know that we know that we gave you a gift. So we know that you know that we will know if you give us a gift, as well."

**Mark Rovner:** I agree that Jeff Friedman at Defenders of Wildlife has taken integrated fundraising pretty much as high as it will ever go.

**Eric Rardin:** It is truly remarkable.

**Mark Rovner:** Yep. Indeed.

**Rebecca Higman:** Great. Well I will hop in and share a question. This gets to Alia's point about inspiring donors. So Susan wrote in and said, "My organization considers itself to be in the information providing business. Thus, communications is a separate area from fundraising, and many communications are information giving. And that way, many communications are sent without donor cultivation in mind. What can I do to convince management that all of our readers are potential donors and that it should be viewed through that lens? Thanks for your help."

**Mark Rovner:** Well first of all, welcome to our world.

[laughter]

**Alia McKee:** That is a great question.

**Eric Rardin:** You are not alone.

**Mark Rovner:** The best way is expensive, but almost foolproof. And that is to get a bunch of your donor prospects into a focus group room and get your director on the other side of the glass. It is always quite the epiphany that as you realize that human beings are not purely left-brain information processing individuals. In fact, we have done entire sessions on the irrationality of fundraising and how to connect with that.

Alia is there anywhere we could steer people quickly, either to the thing we did in Austin or to a book that could be used as fodder to convince people that the emotional side of the conversation is equally important?

**Alia McKee:** Yeah. Well, I think of Deborah Small, who is a professor of marketing and psychology at Wharton. You can Google her, and I believe some of her studies are available online where she really connects the dots between how emotional communication is important. I think it goes directly to inspiring gifts, but I don't think it goes directly to the point of showcasing that the people who are receiving your messages aren't donors. I hear that all the time. They are journalists or they are people who just want information from us. They are not potential donors.

So she is a great resource to just show why emotional messaging is important for fundraising. Let me think.

**Rebecca Higman:** Actually, I am happy to hop in with another suggestion from Network for Good's own Katya Andreson. She mentioned Paul Slovic's work. In fact, Katya put a presentation of his up on her blog. And if folks aren't familiar, that is nonprofitmarketingblog.com. And he really talks directly about emotion and gifts and is a big researcher in that area. We consider him a guru for that.

**Mark Rovner:** And Katya is as well, by the way.

**Eric Rardin:** Absolutely.

**Rebecca Higman:** Excellent. Well, let's see. We are coming up on the end of our 90 minute period, but maybe, Eric, you and I can sneak in another question or two.

**Eric Rardin:** Yeah. I have got, I think, an important one. This person asks, "How can we provide people alternative ways of giving if the donate now button goes just to the form? So what about if we are asking them to donate stock or frequent flyer miles, or to volunteer and so forth?"

I will start this by saying that the donate now button should not lead to a page that gives people a list of all the ways they can help, but you should absolutely have that on your site, and you should have a tab or a link permanently located on your website that says "Get involved" or something like that. I am sure that Alia and Mark have actually tested to find the exact word that it should be. And when they go there, they get multiple opportunities to give so that if somebody is looking for alternative forms of giving, they can find them.

But if somebody is clicking on a donate now button, they are saying, “I have got my credit card out. I want to give you money right now.” And that is a good time to let them go with that impulse.

**Mark Rovner:** Indulge them!

**Alia McKee:** Yeah. I would use a link that says “Other ways to give.” And yeah, absolutely do not make a barrier between the donate now button and the actual form.

**Mark Rovner:** But Alia, would you agree that “Other ways to give” button is OK on the date form; that is one of the exceptions…

**Alia McKee:** I would say that is OK on the donate form.

**Eric Rardin:** But not at the top of the donate form.

**Alia McKee:** No. I would say that it could be like a little sidebar.

**Mark Rovner:** At the top of that donate form is that heart wrenching picture that is going to get…

**Eric Rardin:** Actually…I am sorry, but I would like to squeeze in a build-on to this question. Somebody else asked, “What are your thoughts on images or even a short video at the top of the donate form with the goal of inspiration in mind?”

**Alia McKee:** I have tested video for fundraising, and I…OK. I haven’t seen video lift response rates. I have actually seen it suppress response. Which, I was a true believer, and I fought Mark on this, because he was skeptical. And I said, “Absolutely not. If you put a gorgeous video on a donate form…Barack Obama was doing it. This is going to work.”

But whenever I have done it, it hasn’t worked. So it is definitely something to test, because I am not willing to throw it out, but I have seen video suppress response.

**Mark Rovner:** And if you are raising money for Barack Obama, ignore this advice.

**Eric Rardin:** And I would actually bet that the people who watched the video have a less likelihood to donate than the people who went straight in and could have watched the video or could just donate. Obama was smart in that in no way did they suggest that you really should watch the video first. It was just there.

**Mar Rovner:** One of my frustrations, and this is a constant topic of conversation in the fundraising community, is that the Obama people broke most of the rules and got away with it because, guess what. It was Obama!

**Eric Rardin:** Yeah. If you are Obama, definitely do…Well, if you were Obama last campaign…

**Mark Rovner:** Don't go there, please!

**Alia McKee:** I definitely think a beautiful image is right on target for a donation form. Just make it so it is not so big that it pushes the form down so people can't tell it's a form. But I think a nicely sized image is really great.

**Rebecca Higman:** Actually, I do have one more image question. Barbara's says that her organization has a challenge in that their stories are, as she put it, "heartbreaking," and they don't necessarily have good visuals. She represents a public interest law firm. Any thoughts on how you can apply the principles you have been speaking about with regard to graphics?

**Kathryn Powers:** Are there any success stories?

**Mark Rovner:** The visual doesn't need to be a literal illustration of the work. Take a little bit of artistic license. If you work with an urban poor population, find a really amazing black and white photo of a kid.

**Eric Rardin:** Yeah, on a swing set. In a community garden. For a law firm, I could see an image of a happy family rather than an image of a courtroom.

**Alia McKee:** Yeah. Kat made a good point, the success stories. Is there a family smiling after the firm was able to get them some kind of win? I think looking at your success stories is a great place to start.

**Mark Rovner:** And even if you don't have any, have an uplifting image.

**Eric Rardin:** And another angle on that, [laughs] because I am just going to extend this question instead of asking a new one, related to a question I got was, "What do you do if you want to talk about your heroes or their success stories, but there is confidentiality involved, beside the obvious, which is to ask?" And I bet some people who could expect confidentiality would still be wiling to sacrifice that confidentiality.

**Mark Rovner:** That is our experience. Or change their name.

**Alia McKee:** Change their name. Ask for confidentiality. Ask if they would be willing to share their story. Most people who have been touched by an organization and recognize that their story could help that organization reach more people are willing to make some concessions.

Eric Rardin: Well, it is 3:35 and we have gone for 95 minutes. On behalf of Care2, I want to first let you all know that I did not get to the question that says, "How do we grow our email list?"

Mark Rovner: [laughs] I am dreading it!

**Eric Rardin:** And I thought you might suspect that I wrote that question. But if people do want to know how they grow their email list, Alia did have some good suggestions, and Care2 has some thoughts on that as well. So feel free to contact us.

Thanks so much to Sea Change Strategies and to Kathryn Powers from Conservation International. And a huge thanks to Network for Good for helping build this promotion and for taking the 2009 Procrastinator's Guide, and its circulation, and its sharing to a whole new level.

**Mark Rovner:** Now get out there and raise a ton of money.

**Alia McKee:** Exactly!

**Rebecca Higman:** So thank you to our presenters, and of course, thank you to all of our participants who joined us today. We are really excited and hope you took something from this. So thank you all, and have a great rest of your day! Good luck with your fundraising.

**Mark Rovner:** Thank you guys.

**Alia McKee:** Happy fundraising everyone!

**Eric Rardin:** Good luck everyone. Happy Holidays.

**Rebecca Higman:** Bye-bye.