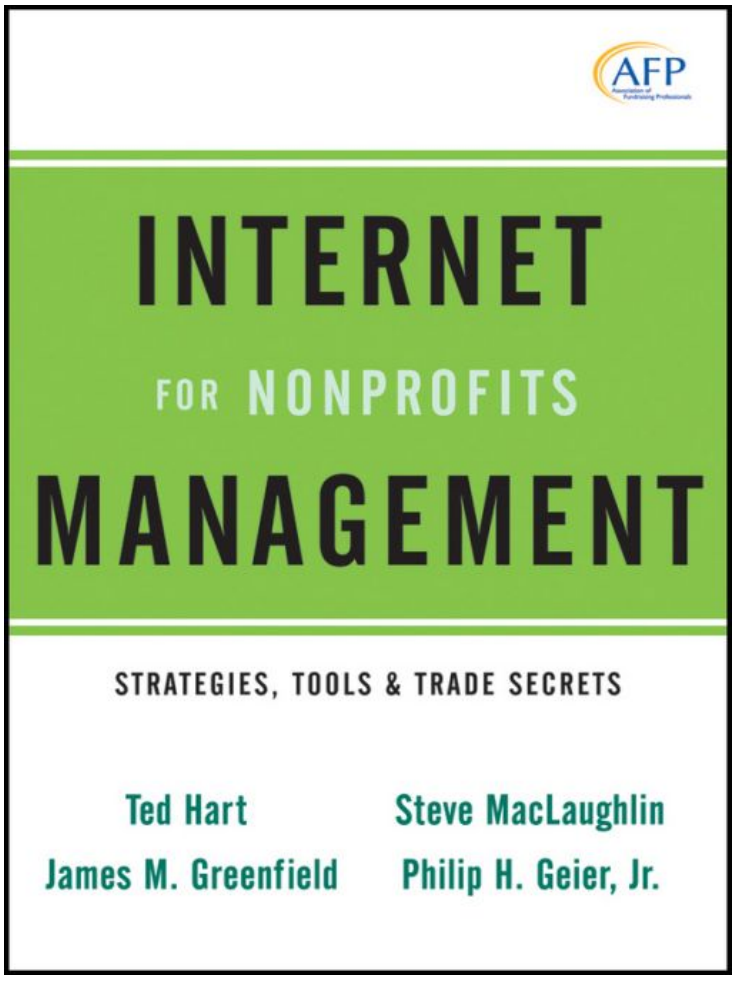
INTERNET FOR NONPROFITS MANAGEMENT

STRATEGIES, TOOLS & TRADE SECRETS

Ted Hart
Steve MacLaughlin
James M. Greenfield
Philip H. Geier, Jr.


AFP
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Internet Management for Nonprofits

Strategies, Tools & Trade Secrets

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The AFP Fund Development Series is intended to provide fund development professionals and volunteers, including board members (and others interested in the nonprofit sector), with top-quality publications that help advance philanthropy as voluntary action for the public good. Our goal is to provide practical, timely guidance and information on fundraising, charitable giving, and related subjects. The Association of Fundraising Professionals and Wiley each bring to this innovative collaboration unique and important resources that result in a whole greater than the sum of its parts. For information on other books in the series, please visit:

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THE ASSOCIATION OF FUNDRAISING PROFESSIONALS

The Association of Fundraising Professionals (AFP) represents more than 30,000 members in more than 197 chapters throughout the United States, Canada, Mexico, and China, working to advance philanthropy through advocacy, research, education, and certification programs.

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The editors and authors dedicate this book to the many volunteers and staffers who work every day to support millions of charities around the world. To each of them, we offer this book as a guide to making the most of the Internet to bring together communities of supporters in service to others.

Introduction

A PRIMER FOR BOARD MEMBERS AND NON PROFIT EXECUTIVES: INCREASED EFFICIENCY, EFFECTIVENESS, AND SUCCESS THROUGH USE OF THE INTERNET

For those of us who work everyday to manage and govern charitable organizations, making decisions for how best to use some of the broad array of Internet technologies available can be a daunting task. Multiple online technologies are now available globally with expanding web sites linked to social networks in an increasingly mobile universe, all of which can be confusing to even to the most seasoned practitioner. This is why the comprehensive book, *Internet Management for Nonprofits: Strategies, Tools & Trade Secrets,* has been prepared, to answer both the “how to” along with “how to succeed” using an increasingly fast-paced, overly complex and always challenging asset, the Internet.

On some level we all know that managing the use of digital and Internet vehicles for marketing, communications, and fundraising purposes is essential to our ability to build the broad-based communities of advocates and supporters we require. We also know that mastering these techniques at some level is required to move toward the efficiency and effectiveness demanded in today’s business environment. Yet, how to accomplish so much can seem a mystery beyond our organization’s technical ability and fiscal constraints.

Using the voice of over 25 experts from around the world, this book is for board members, executive directors and CEO's, vice presidents and managers at all levels who know they must address channel confusion, must establish the return on investment (ROI) of any of these initiatives, and must know what measurements of success are possible and the path to get there using Internet, digital, and mobile services. The goal of this book is to help you to understand the tactical opportunities and to create outreach strategies based on objective analysis and audience development - not based on just the technologies themselves. Consider this book a "pitch free zone" where we are not promoting any services over another, but instead we are providing practical usable advice that both the expert and novice can use to better manage their organizations.

For managers in the large, well-established nonprofit to the smallest more entrepreneurial charity, the Internet has become an essential tool for managing marketing, communications, and fundraising alongside day-to-day operations. It is very easy to establish a web presence these days, but that is not enough. Build it and they will not necessarily come. It takes serious strategy to succeed online—just as a smart nonprofit manager or board member knows, it takes serious strategy to succeed offline as well.

Nonprofits who have carefully built brands and broad-based relationships offline risk damaging all they have created when they pursue ill-conceived Internet strategies. Yet every charitable organization cannot avoid the necessity of ever-increasing utilization of digital management for their organization if they want to compete successfully today and into the future.

This book has been prepared for all those who want to expand on the technological opportunities available to them

and for those who want to learn how their organization can effectively and efficiently seize these opportunities.

The Internet provides every nonprofit three types of opportunities: 1) it links them directly to supporters, donors, and the larger community; 2) it lets them, even small ones, compete on a more level playing field because a smart strategy developed for a small charity has just as much opportunity for success as one developed by a much larger one; and 3) the Internet and mobile technology represent tools that can be used to develop and distribute services, information, and networking opportunities with multiple audiences not available through more traditional offline means.

As you prepare to use this book at board meetings, committee strategy sessions, and staff gatherings, here is a brief summary of the content prepared specifically for you by the international group of experts the editors have assembled.

World-renowned Internet expert Beth Kanter provides board members and charity managers a “users guide” to the Return on Investment (ROI) of social media in Chapter 1. Beth tells us, “Social media is propelling nonprofit goals to build a movement around a core advocacy issue, improve customer service or programs, reach new donors, and spread awareness of a nonprofit brand around the world.” Yet, as you will learn, social media require a different skill set than do other more traditional forms of outreach for marketing, communications, and fundraising purposes. As Marnie Webb, co-CEO of TechSoup Global said, “Nonprofits can no longer ignore social media or they risk becoming irrelevant.” In Chapter 2, Michael Sola and Tim Kobosko provide a unique approach to understanding the path to managing your charitable organization using online tools from the perspective of someone managing and/or

governing a nonprofit. Unlike any other chapter in this book you are placed in the office as lessons are learned. Drawing heavily on these authors' experiences at the National Wildlife Federation (NWF), this chapter helps even novices understand the important steps needed to manage and succeed with your online resources.

E-Governance is a concept whose time has come, and our experts Dottie Schindlinger and Leanne Bergey help the reader learn how to improve board leadership through the use of online technology. In Chapter 3 this essential text helps board members and administrators learn exactly how they can bring the efficiencies they know exist to their own governance process to board recruitment and benchmarking to policies that successfully bring transparency to nonprofit operations that donors and supporters demand. Learning from Dottie and Leanne will help make succeeding in their efforts easier, more secure, and efficient for board members.

One of the "payoffs" all nonprofits can expect from increased use of the Internet is the ability to raise both more awareness for their cause and more money. The powerful team of Russell Artzt, John Murcott, and Mark Fasciano came together in Chapter 4 to guide us to strengthen our collaboration with staff members, board members, and volunteers. This strategy often can be scary to traditional minded managers and board members because collaboration often means letting go of control. But these three experts help us maneuver through those issues and help to maximize the time and money savings to be found in the hidden economies of scale and empowerment of the organization's stakeholders.

Loyalty and donor insight are two key strategies we learn to leverage, predict, build, and manage in the excellent Chapter 5 written by the legendary Roger M. Craver and

Ryann Miller. Using prediction models, building strategy around those who can influence your outcomes and learning how to manage the new donor-centric world are techniques managers will now understand and implement. The main benefit in this chapter is to learn the strategic tools that can best turn donor insight into trust, loyalty, volunteer activism, advocacy, and a thriving bottom line.

Just when you thought you understood how to manage your organization along comes the Internet with its own language, tools, and metrics. Learning how to understand all the data can be mind numbing for even a seasoned techie. For the rest of us we just fear we either won't get it, or can't keep up. Fear no more. In Chapter 6 Blackbaud's Steve MacLaughlin brings his expertise to our desk. We already know that what we measure and how we measure it can spell the difference between successful strategy and failed initiatives. But through the use of easy-to-understand language and models, Steve helps us not only know what a click-through rate is or what benchmarks should be met, he helps managers and board members use data in a more powerful way that can inform the strategies that will lead to more efficient and successful initiatives.

Part II of this book has been specifically designed to focus our attention on fundraising and building the sort of online communities that can support our growing need for a stronger financial foundation.

It is always best to start at the beginning. In Chapter 7 Adrienne Capps provides a primer on tools and techniques for managing fundraising and building strong communities online. This is a must read for all board members who want to learn the opportunities available to their organization's management and for everyone in leadership positions at charitable organizations to expand their horizons as they seek to build the bridge between traditional and online

fundraising and community building activities. Adrienne's advice is solid as it urges all nonprofits to take a step forward, not necessarily a leap toward building and outfitting their online efforts. She inspires and motivates as her skill helps you make sense out of the Internet that helps you raise more money.

No nonprofit can succeed for long without strong volunteers and capable leadership. Without a specific volunteer recruitment and retention strategy what is successful short term will be lost over time. No one knows this topic better than Walter "Bud" Pidgeon, the author of Chapter 8. We knew this seasoned executive and prominent author will help you leverage tools as diverse as e-mail to web sites to social networking. Bud helps you bridge from "old line" or more traditional approaches to the efficiencies to be gained by deploying Internet and digital methods to build a strong, well-connected network for recruiting and retaining volunteers.

If you are engaged in the use of social networks like Facebook, LinkedIn, MySpace, or others or even if you have just been thinking about them, questions that quickly come to mind are: "How do I know if this works?" and "How do I know if we are successful?" You are not alone in asking these important questions; experts Danielle Brigida and Jonathon D. Colman in Chapter 9 will help board members and managers alike understand that social media are not a waste of time, but can be an integral set of tools that can bring a great level of success to your communications and marketing efforts. Like any social situation, mistakes can be made when you don't know what is expected of you; Danielle and Jonathon will help you become online social butterflies. Measuring the impact of your success using the power of social networking and understanding how the tools, opportunities, and ideas all must be managed are

presented as this chapter helps you learn to “improve, learn, reassess, and grow” through the use of social media.

Anyone involved with a fundraising strategy for more than five minutes learns about the traditional “Pyramid of Giving.” Everything old is new again, because to succeed today we now learn in Marcelo Iniarra Iraegui and Alfredo Botti’s Chapter 10 that success comes from understanding that the old pyramid has a secret hidden gate, a different entrance that can be accessed by making a donation. The traditional pyramid also has an extra level that “admits nonfinancial, digital supporters who arrive via new media, web sites, social networks, e-mail and the increasingly popular short text messaging (SMS), or other wireless access points.” Here is a new concept - those who try you out, before they give or even identify themselves. How to manage this level of contact and build on these nonfinancial relationships is one of the greatest mysteries for many nonprofits. This chapter leads you through the hidden gate to a new level of strategic success.

I have always thought that Philip King was a smart guy, but never so much as after he submitted Chapter 11 for this book on social networks. His chapter will help you understand that while I refer to the tools and techniques available through online platforms and social networks, the first step to making this all work is to internalize a basic truth that Philip brings to us: “Social media networks are not [really] tools; they are collections of people.” People ready to be engaged, ready to take action, ready to be inspired. Hundreds of millions of people already are on social networks around the world and what comes with this engagement is a demand for honest self-assessment and conversation. As Philip points out, social media aren’t just a new piece of technology; they’re a new form of engagement. Harnessing this power can have dramatic

effects on your outreach in marketing, communications, and fundraising initiatives.

The “shotgun approach” to fundraising never really succeeded offline and it is certainly not the path to success online. Lawrence C. Henze lives and breathes data and in Chapter 12 you can understand how to use prospect modeling and prospect research to develop a more informed fundraising strategy. So much rich data are available to nonprofits that can allow them to more easily target the prospects for support with the highest likelihood of success. Yet many nonprofits have barely heard of online giving analytics, demographic and lifestyle cluster data, data mining, predictive modeling, or any of the other methodologies available. Once you read this chapter and begin integrating these measures into your fundraising strategy (both online and offline), you will see a dramatic change in the ability to target your donors and execute your plans.

The editors of this book have developed a series of useful strategic approaches for board members and nonprofit managers around the world. Regardless of where you are located there is always some other place that can be described as “international” relative to where you are. Reaching beyond your own borders can be a successful way to fundraise for many charities, yet the cost to do so has traditionally been a deterrent. International fundraising experts Andrew Mosawi and Anita Yuen in their Chapter 13 share details on how your organization can harness the globalization of fundraising, as it expands along the trade routes of global “economic, technological, socio-cultural and political forces.” This powerful duo demonstrates ways an organization can take advantage of this trend while leveraging the latest tools to fundraise internationally. Whether or not you plan to develop an internationally focused fundraising program, you must read this chapter,

because it is a certainty that nonprofits outside your borders are targeting your donors and you must, at the very least, understand how they plan to do it.

Part III of *Internet Management for Nonprofits* provides expert advice on how best to make technology work for your organization. And it all begins with Chapter 14 where Allan Pressel shares the seven key components and five web site criteria necessary for success, and then adds such important topics as interactivity; site traffic; stickiness; return visitors; search engine rankings; and most important, results for your nonprofit. Allan also provides an analysis of how to manage these tools to help you accomplish all of them.

Now that you have developed a top-notch web site you also will want to make sure you have integrated fundraising tools that will maximize your chances of success. No longer is a “donate now” button enough; it takes a multichannel, integrated approach to succeed as Michael Johnston and Matthew Barr share from their years of experience in Chapter 15. They provide an analysis of multichannel effectiveness with accompanying case studies along with the staffing (human resource) issues you must address to manage your fundraising online efforts. Linking your online and offline fundraising strategies is key to long-term success.

The last thing anyone wants to happen is for their donor data to be stolen. The confidence and trust your supporters have placed in you will be compromised, in an instant, with the theft of sensitive and confidential information. Yet many boards of directors and nonprofit managers have very little knowledge and have given only passing thought to what is essential to protect their organization from violations of this sort. Catherine Pagliaro has spent years building her expertise in the ever-changing world of online and theft

identity protection and in Chapter 16 she provides you with an 12-step primer on how to understand security issues that will protect your organization. Cybercrime is a serious and growing problem. “The Aberdeen Group estimates that more than $221 billion is lost globally every year to identity theft! Cybercrime is difficult to investigate and prosecute because it is borderless.” Protecting your supporters using Catherine’s advice is an important management topic.

The tragic earthquake in Haiti has increased the use of mobile giving, just as September 11, the Southeast Asia tsunami, and Hurricane Katrina put online fundraising and social networking at the forefront of all nonprofit board members and managers. A larger percentage of the world’s population holds a mobile device than have access to high-speed Internet service. Ben Rigby’s Chapter 17 will help you understand mobile technology and how it can be successful deployed by nonprofits. You will learn how texting can be used as an initial campaign hook, and then built into a successfully integrated online and offline campaign. And, although this topic seems new, Ben reminds us that it is already a primary method of communication between donors and supporters. Now is the time for you to learn how to “navigate the often-overwhelming variety of options” available in mobile giving.

The Internet also is richly designed for bringing together communities of supporters. Often activists for a cause are able to gather together, multiplying the effect of one man’s voice to that of an entire community, sometimes even overnight. Frédéric Fournier shares the case study story of what the Nicholas Hulot Foundation learned of how to transform activists into donors. Fred details their dedicated event web site, targeted e-mail promotions, and the “power of thanks.” You will learn the keys to their success.

It has been a privilege for me to work with my fellow editors Steve MacLaughlin, James Greenfield, and Philip Geier, along with our many authors and our friends at John Wiley & Sons to develop this book. We are all thrilled this book was chosen to be included in the highly successful AFP/Wiley Fund Development Series.

One last thought. We urge you to sign up for e-mail updates at http://www.p2pfundraising.org. As is pointed out in Chapter 10, given the new paradigms introduced by electronic media, perhaps Heraclitus, who was a Greek philosopher living on the coast of Asia Minor more than 2,000 years ago and couldn't possibly have imagined that his wise advice would still apply today, was right in saying, "There is nothing permanent except change." We believe this book provides an excellent background for everyone involved in charitable organizations to more effectively and efficiently manage them using tools, strategies, and techniques offered by the Internet, digital media, and mobile technology.

Ted Hart, ACFRE, Senior Editor
Washington, DC
February 2010

About the Editors

Ted Hart, ACFRE is considered one of the foremost experts in both online and traditional fundraising around the world. He is sought after internationally as an inspirational and practical speaker and consultant. He serves as CEO of Hart Philanthropic Services (http://tedhart.com), an international consultancy to non-profits and nongovernmental organizations. He also created People-to-People Fundraising, a movement housed online at http://www.p2pfundraising.org. He is founder of the international ePhilanthropy Foundation. Hart has taken a leadership role in helping nonprofits become green by founding GreenNonprofits (http://www.greennonprofits.org). Hart has served as CEO of the University of Maryland Medical System Foundation and as chief development officer for Johns Hopkins Bayview Medical Center. He is certified by the Association of Fundraising Executives as an Advanced Certified Fundraising Executive (ACFRE).

Hart is the editor or coauthor of several books, including *Major Donors: Finding Big Gifts in Your Database and Online*, *Nonprofit Internet Strategies*, *Fundraising on the Internet*, *People to People Fundraising*, and *Nonprofit Guide to Going Green.* He resides in the Washington, DC, and New York City areas. He lives with his daughter, Sarah Grace, and son, Alexander Michael.

Steve MacLaughlin has spent more than 14 years building successful online initiatives with a broad range of Fortune 500 firms, government and educational institutions, and nonprofit organizations around the world. MacLaughlin is

currently the director of Internet solutions at Blackbaud and is responsible for leading the company's development of online solutions for its clients.

MacLaughlin serves on the Nonprofit Technology Network's (NTEN) board of directors and supports its focus on both the growth and the professionalism of the nonprofit technology sector. He is a frequent speaker, an active blogger (http://www.blackbaud.com/connections), and writer whose insights have appeared in several nonprofit-sector publications.

MacLaughlin earned both his undergraduate degree and a master of science in interactive media from Indiana University.

James M. Greenfield, ACFRE, FAHP Jim Greenfield has served since 1962 as a fundraising executive to three universities and five hospitals on the East and West Coasts and in between. He retired from Hoag Memorial Presbyterian Hospital in February 2001 after 14 years as senior vice president, resource development and executive director, Hoag Hospital Foundation, where more than $120 million was raised during his tenure.

The author and editor of ten books and more than 40 articles and chapters on fundraising management, his books and articles on measuring fundraising results for effectiveness and efficiency are among the first to tackle these difficult and challenging issues. Recent books Jim has coedited with Ted Hart and others include *Nonprofit Internet Strategies: Best Practices for Marketing, Communications and Fundraising* (2005), *Major Donors: Finding Big Gifts in Your Database and Online* (2006), and *People to People Fundraising: Social Networking and Web 2.0 for Charities* (2007).

Jim and his wife Karen reside in Newport Beach, California where he continues to serve nonprofits and the fundraising profession with speaking, teaching, volunteering, and consulting services.

Philip H. Geier Jr., an advertising professional, became chair and CEO of the Interpublic Group of Companies in 1980. He retired from that position at the end of 2000. In February 2001, Geier formed the Geier Group to provide consulting and advisory services in the areas of marketing, communications, and venture capitalism. Geier also is a senior adviser for Lazard Frères & Co., and he serves on the boards of directors of AEA Investors and Fiduciary Trust International, and he is retired from the boards of Alcon Labs, Mettler-Toledo International, and Foot Locker. Geier's philanthropic director and trustee relationships include Memorial Sloan-Kettering Cancer Center, Save the Children, Autism Speaks, Columbia Business School, the Whitney Museum of American Art, and the International Tennis Hall of Fame. Geier holds a B.A. in economics from Colgate University (1957) and an M.B.A. in marketing and finance from Columbia University (1958).