

FOURTH ANNUAL
Convio Summit
November 16-18 **2009**

Moving the Needle: How to Increase Event Fundraising

Brenda Miele, Director of IT Projects, Event 360, Inc.
Christy Van Heugten, Project Manager, Event 360, Inc.
Noel Beebe, Interactive Consultant, Convio, Inc.
November 16, 2009



Welcome!

■ Introductions

- ▶ Who's who?



■ Why are we here?

- ▶ Help you assess how your event is performing
- ▶ Provide you with the tools to plan your next event

■ What's in it for you?

- ▶ Get a jump on event planning
- ▶ Learn & review proven best practices
- ▶ Look great in front of your boss/board
- ▶ See what everyone else is doing

Materials

- Find this presentation on the Convio Community
- Two exercises from today's session
- Event Planning Workbook:
 - ▶ Articulate & revisit event purpose
 - ▶ Review metrics from past events
 - ▶ Set goals for upcoming events
 - ▶ Think about new ideas for event planning
 - ▶ Design event communication plan

<http://community.customer.convio.com/>

Agenda

Topic	Timeline
Introduction	3:00 – 3:15
Measuring Success	3:15 – 4:00
Exercise: Setting Goals	4:00 – 4:15
Break	4:15 – 4:30
Segmentation and Communication	4:30 – 5:15
Email Review: What Not to Do	5:15 – 5:30
Q&A /Discussion	5:30 – 6:00

Measuring Success

In the following sections, we'll explore these questions:



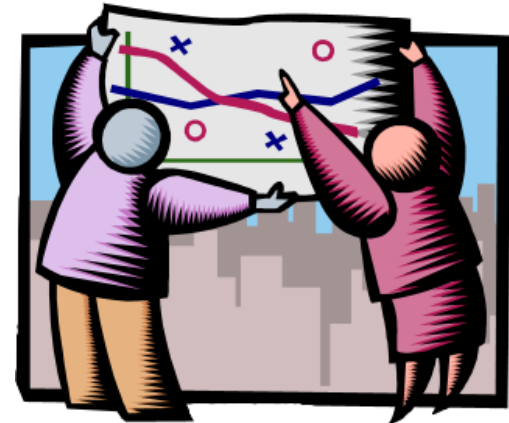
What metrics should I use to measure success?

What reports should I run?

How do I to set goals for next year's event?

Metrics to Watch

- Event Launch Timing
- Recruitment
- Recruitment Performance
- Participant Center Usage
- Fundraising Activity
- Post Event Activity



Metrics to Watch – Event Launch Timing

- Quick Survey – Everyone Join In!

When do you start online registration?

3 months from event

6 months from event

1 year from event



Metrics to Watch – Event Launch Timing

- Not the same for every event type
- Looking at registration highs and lows to determine your timing
- Considering an Annual Event Cycle
 - ▶ Longer registration period requires a strong communication plan
 - Keeping your members engaged & “in the know”
 - ▶ Longer time to fundraise
 - ▶ More holiday opportunities for fundraising campaigns
 - Participants can use Christmas, Halloween, birthdays, etc to raise donations rather than gifts!



Metrics to Watch - Recruitment

- Repeat participants vs. new participants
 - ▶ Know who is returning and why
- Conversion of your current members
 - ▶ Reach out to all prospects
- The marketing trigger
 - ▶ PSA, Radio, TV, Print, Friends / Family
 - ▶ Sponsorship
- The participant's connection to the cause
 - ▶ What is their reason for being at your event?
- Previous Team Captains / Team Members
 - ▶ Utilizing your team captains as recruitment soldiers

Metrics to Watch – Recruitment Performance

- What is your most successful time of year?
 - ▶ Source code reporting
 - ▶ Discounted registration fees
- Did they correspond with certain media sources?
 - ▶ Reviewing your media avenues
 - ▶ Connected to a specific holiday
- Are certain emails having a higher open / action rate than others?
 - ▶ Source coding links
 - ▶ A/B Testing

Metrics to Watch – Participant Center

- The goal here is action!
 - ▶ What can you do to get people using the participant center and sending emails asking for donations

- QUIZ TIME!

What directly affects fundraising?

- ▶ Logging into your website?
- ▶ Changing their personal page?
- ▶ Building a contact list?
- ▶ Sending a donation ask email from the Participant Center?



Metrics to Watch – Participant Center

- Email Sent Out from Participant Center
 - ▶ Average fundraising of “emailers” vs. “non-emailers”
 - ▶ Difference in fundraising between email users and participants who don’t use email
 - Participants who send email raise x% or \$x more
 - ▶ Average number of emails sent by the participant
 - Direct measure of a participant’s ask for donations



Metrics to Watch – Fundraising Activity

- What percentage of participants are fundraising?
 - ▶ Non-fundraisers (just show up for the event)
 - ▶ Self-donors
 - ▶ Active fundraisers

- Finding average fundraising amounts broken into 3 tiers:
 - ▶ All Participants
 - ▶ All Fundraisers
 - ▶ Active Fundraisers



Metrics to Watch – Fundraising Activity

- Suggested personal fundraising goals set compared to average amount raised – what is an appropriate suggested personal fundraising goal?
- Look at top 5% of Fundraisers – know them
- Fundraising levels for team members vs. non team members
 - ▶ Team members on average raise more donations for your event
 - Camaraderie
 - Healthy Competition

Metrics to Watch – Post Event Activities

- Thank You Email
 - ▶ Highlight the success of your event
 - How many people participated
 - How much was raised
 - What that money is going to do for your organization

- Post Event Survey
 - ▶ Segment your survey by fundraisers vs. non-fundraisers
 - ▶ Did they enjoy the event?
 - What worked, what didn't
 - ▶ Understanding their online experience

- Attendance Tracking

Metrics to Watch – How Reporting Helps

- So many ways to get started!
 - ▶ Reports Classic
 - ▶ Report Writer
 - Add filters to groups, security group, fiscal year, etc
 - Pull cross TeamRaiser reports
 - Filter transactional information
 - ▶ Tasks
 - ▶ Query
 - ▶ Groups



Setting Goals

If you don't know where you are going, you will probably end up somewhere else.

~Lawrence J. Peter

Setting Goals

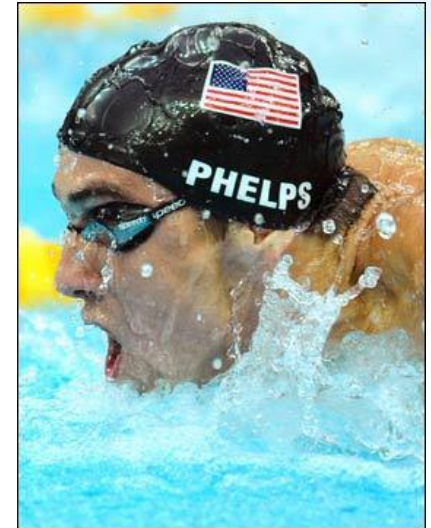
■ Goal-setting Theory:

- ▶ For goals to increase performance, they must be specific and difficult to achieve
 - Easily-attainable goals tend to correlate with lower performance
 - Goals can become more specific through quantification and task definition



Setting Goals

- Compete with yourself
 - ▶ Industry standards may not apply
- Start with last year's achievements
 - ▶ Assess where you are now
- Work forward into your goal
 - ▶ Think about the tactics you'll employ and how they will help you grow
- Avoid the abstract
 - ▶ \$1Million (or \$10Million or \$100Million) sounds good, but may not be attainable



Setting Goals

- Examples of Specific, Quantifiable Goals:
 - ▶ Strategy: Increase Fundraising by 15%
 - Tactic: Increase average gift size from \$55 to \$60
 - Plan: Increase lowest suggested giving level to \$60
 - Plan: Provide information on what \$60 “buys” the organization, i.e. *“Every \$60 buys a mammogram for an uninsured woman”*
 - Tactic: Increase number of donations/participant from 1 to 2
 - Plan: Ask participants to raise 2 or more donations
 - Plan: Provide incentives for participants with 3 or more gifts



Setting Goals

- Choose & use your metrics

Metric	2007	2008	2009	2010 Goal
Registrations	19,505	20,450	20,991	?
Fundraising	700,929	882,870	851,074	?
Number of Teams	976	1,081	1,192	?
Gifts per Participant	.72	.83	.78	?
Avg. Gift Amount	49.50	49.61	50.90	?
Number of Gifts	14,053	17,012	16,378	?

Setting Goals

■ Natural Growth/Attrition

- ▶ If you do nothing differently, what can you expect next year?

Metric	2007	2008	Growth	2009	Growth	2010 Goal
Registrations	19,505	20,450	5%	20,991	3%	
Fundraising	700,929	882,870	26%	851,074	4%	
Number of Teams	976	1,081	10%	1,192	10%	
Gifts per Participant	.72	.83	15%	.78	6%	
Avg. Gift Amount	49.50	49.61	0%	50.90	3%	
Number of Gifts	14,053	17,012	21%	16,378	4%	

Setting Goals

■ Focus

- ▶ If you choose one area to focus on, where can you improve?

Metric	2007	2008	Growth	2009	Growth	2010 Goal
Registrations	19,505	20,450	5%	20,991	3%	
Fundraising	700,929	882,870	26%	851,074	4%	
Number of Teams	976	1,081	10%	1,192	10%	
Gifts per Participant	.72	.83	15%	.78	6%	
Avg. Gift Amount	49.50	49.61	0%	50.90	3%	
Number of Gifts	14,053	17,012	21%	16,378	4%	

Setting Goals

■ Causality

- ▶ Are there causal relationships between certain metrics?

Metric	2007	2008	Growth	2009	Growth	2010 Goal
Registrations	19,505	20,450	5%	20,991	3%	
Fundraising	700,929	882,870	26%	851,074	4%	
Number of Teams	976	1,081	10%	1,192	10%	
Gifts per Participant	.72	.83	15%	.78	6%	
Avg. Gift Amount	49.50	49.61	0%	50.90	3%	
Number of Gifts	14,053	17,012	21%	16,378	4%	

Setting Goals

- Environment
 - ▶ Can you expect the same trends as last year?



Setting Goals

■ Event Trends

- ▶ How mature is your event?
- ▶ How saturated is your market?
- ▶ Can you expect huge growth rates?
- ▶ Is your event participation/fundraising declining?



Exercise: Goal-Setting

- The Foundation for Jeopardy Losers - “Trebeck Trek” 5k
- Help determine appropriate goals for 2010
- Identify tactics to achieve these goals



Consider:

- Your Metrics – which metrics should you study?
- Natural Growth/Attrition – what can you expect if you do nothing differently?
- Area of Focus – what are you trying to achieve (#1 priority)?
- Causality – what causal relationships do you see?
- Environment – what else should you consider?
- Event Life Cycle – can you expect more growth this year?

Exercise: Goal-Setting

- Discussion:
 - ▶ What were your results?
 - ▶ How did you reach them?
 - ▶ What tactics would need to be employed?
 - ▶ Do you currently have a goal-setting process?
 - ▶ What works? What doesn't?

Agenda

Topic	Timeline
Introduction	3:00 – 3:15
Measuring Success	3:15 – 4:00
Discussion: Setting Goals	4:00 – 4:15
Break	4:15 – 4:30
Segmentation and Communication	4:30 – 5:15
Email Review: What Not to Do	5:15 – 5:30
Q&A /Discussion	5:30 – 6:00

Segmentation & Communication

In the following sections, we'll explore these questions:



What is segmentation and why is it important?

Who should I target in my event communications?

How do I know if my event communications are effective?

How often should I e-mail constituents?

Understanding Your Audience

- What is segmentation?
 - ▶ The practice of dividing your e-mail audience into like groups, so you can adjust your messaging for each group and “hit home” with more readers
- Why segment?
 - ▶ People are more likely to respond when they feel the call to action directly pertains to them in some way

Understanding Your Audience

- Typical Event Segments:
 - ▶ Past Participants
 - ▶ Registered Participants
 - ▶ Donors
 - ▶ Past Donors
 - ▶ Not yet registered/donated

- Within each segment, tailor the message and the call to action...



Understanding Your Audience

■ Past Participants – Re-engage

▶ Call to Action: Register

- Team Captains: Register your Team
 - Should be the first call to action to set the benchmark for team members
- Team Members/Individuals: How can you remind them of the event experience they had to motivate them to register again?
- Responses from Past Registration or Post-Event Survey:
 - Athletic Motivation vs. Cause Motivation
 - Directly affected (patients/survivors) vs. indirectly affected (friends)

Understanding Your Audience

■ Registered Participants – Support

▶ Call to Action: Fundraise

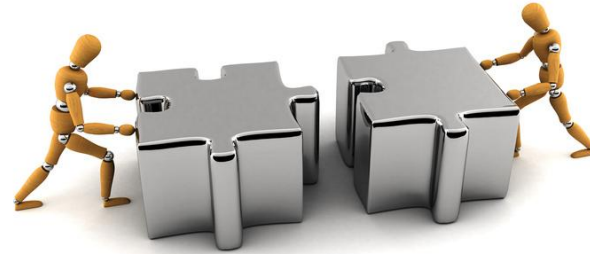
- Non-Fundraisers: \$0 or no e-mails sent
 - How can you help them get off the \$0 mark?
- Average Fundraisers: \$1+ or e-mails sent
 - How can you help them take it to the next level?
- High Rollers: Above average fundraisers
 - How can you make them feel appreciated as well encourage them to keep up their high energy fundraising?

Tip: Your high roller fundraisers can bring in more than 50% of your fundraising dollars. Know who they are....by name and story. These are the folks that almost always have a close connection to the cause.

Understanding Your Audience

■ Registered Participants – Support

▶ Call to Action: Recruit



- Team Captains: How can you help them recruit more team members?
- Team Members: How do you help them ask their friends/family to join them?
- Individuals: How do you help them form a team and recruit friends/family?

Understanding Your Audience

- Donors – Plant the seed
 - ▶ Call to Action: Get Involved
 - Current Donors – foster pathways to other engagements, like volunteering, participating, etc.
 - Past Donors – Donate again or register this year



Understanding Your Audience

■ New Leads – Find the spark *Mission vs. Experience?*

▶ Partners/Corporate Leads

- Retail Stores
- Corporate Participation
- Medical Organizations

▶ Community Leads

- Church groups
- High schools
- Social Groups
- Volunteer Groups

▶ Friend/Family Leads

▶ Media Leads

- Radio/TV Stations

▶ In-house Leads

- Volunteer List
- Grantees List
- Board of Directors

▶ Advocates

Understanding Your Audience

- How do I capture info about my audience?
 - ▶ Basic site interactions (register, donate, etc.)
 - ▶ Surveys, interests, registration questions
 - How did you hear about us?
 - What is your connection to the cause?
 - What is your main motivation for participating?
 - ▶ Queries, tasks, reports
 - Map survey questions to constituent record
 - ▶ Source codes

Communication Plan

■ Timeline

- ▶ The key to communication is picking the right timeline to keep people engaged
- ▶ The ultimate goal: All year
- ▶ Doesn't necessarily require earlier launch
 - ▶ Could be year-round fundraising, informed of what your organization is doing or active volunteering year-round



Communication Plan

- **Keep Talking** - No matter the time of registration for an event, keep the communication going with your participants
 - ▶ A mistake is to assume that since they are registered, they will fundraise/train/recruit all on their own. Do not wait 2 months to send a participant an update about the event or guidance on how to fundraise/train. This could attribute to your retention rate
 - ▶ Use segmenting to target participants who are/aren't fundraising, are/aren't using their Participant Center to send emails, etc.
 - ▶ Discussion – how do you keep participants engaged/excited about the event – incentive programs, local events, training walks, updates, etc?

Communication Plan



Yin and Yang

The goal is to find balance

- ▶ Over-communication can turn people off of the event and/or organization if they feel harassed
- ▶ What is the general rule of how often to communicate? Monthly, Weekly, Bi-weekly, Once every 4 days?

Trick question. Remember that the rule is that there *is no* rule for “one size fits all” communication

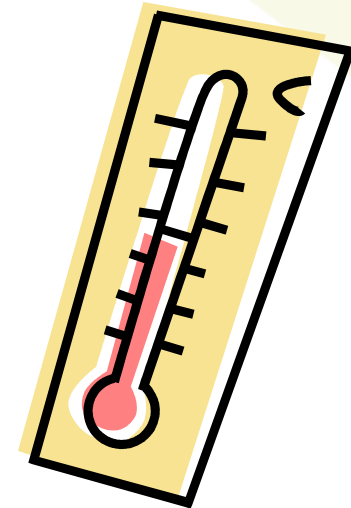
- ▶ Watch your opt-out rate
- ▶ Avoid same day emails: Coordinate event communication with overall organization Communication Calendar



Communication Plan

■ Take your Temperature

- Open Rate
- Click-Through Rate
- Action Rate



Cross Campaign Summary

This report reflects totals or averages across all messages for all campaigns. These statistics are recalculated daily.

Number of Messages Sent:	0
Total Number of Emails Sent:	0
Average Number of Recipients:	0
Average Open Rate:	0.0%
Average Clickthrough Rate:	0.0%
Average Action Rate:	0.0%
Average Number of Forwarded Messages:	0
Average Number of Tell-A-Friends Sent:	0

- Include questions about communication on post-event survey

Communication Plan

- Realize that your communication plan is organic and can change while measuring your success rates

Timeline	Group	Message
Launch Day	All non-participant constituents	Event Announcement
	All past participants	Event Announcement w/ conditional content for top fundraisers and team captains
5 days prior to end of Early Bird discount	All constituents	Last chance for Early Bird discount
8 weeks out	\$0 Participants	Call to action
	Average Fundraisers	Fundraising Tips #1
	Top Fundraisers	Thank You w/ fundraising targeted messaging
6 weeks out	All non-registered constituents	Event Reminder / Call to Action
	\$0 Participants	Call to action
	Average Fundraisers	Fundraising Tips #2
	Top Fundraisers	Thank You w/ fundraising targeted messaging
4 weeks out	\$0 Participants	Call to action
	Average Fundraisers	Fundraising Tips #3
	Top Fundraisers	Thank You w/ fundraising targeted messaging
Continued ...		

Communication Plan

Email Communication Tips

- ☑ Clearly outline the points you're trying to get across in an easy to understand format
- ☑ Before sending, always reread your message and double check for grammar and misused words
- ☑ Use specific subject line descriptions
- ☑ Avoid shortcuts and abbreviations
- ☑ Use short paragraphs
- ☑ Get personal
- ☑ Limit text formatting like BOLD, italics and underlines
- ☑ Use Convio to send out mass emails to avoid being SPAM filtered
- ☑ Always include a mission-focused message
- ☑ Limit amount of topics in each email
- ☑ Be aware of email frequency
- ☑ Opt out page should allow them to receive LESS info without opting out of all email
- ☑ Link to tell-a-friend
- ☑ Always include a call to action

Email Review: What's wrong with this email?

- ▶ Review the handout email example in teams (your table)
- ▶ See if your team can find the most errors in this message
- ▶ You have 10 minutes

Email Review: What Not to Do


■ List of errors

- ▶ Misspelled words
- ▶ Multi-colored font
- ▶ Long and general subject line
- ▶ Bad From email address
- ▶ BOLDED subject line & sentences
- ▶ Using too many exclamation marks
- ▶ Content is too long
- ▶ Referring to event in general terms
- ▶ Using shortcuts and acronyms without explanation
- ▶ Smiley faces
- ▶ Bad grammar
- ▶ Different uses of first person and third person
- ▶ Wrong use of there/their/they're and its/it's
- ▶ Run-on sentences
- ▶ Using And at the beginning of a sentence
- ▶ The list goes on...

Questions?

Thank You!





Text **CNV105** to **30644**
to take a quick survey
about this session.

Don't forget to visit the Expert Lab!