BE PREPARED WHEN YOUR MISSION CALLS

BEST PRACTICES FOR NONPROFITS

Preparing your organization for rapid response to disasters, emergencies, and other unplanned events

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February 2010

Download an electronic version of this guide at http://www.convio.com/rapid-response

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INTRODUCTION

For charities, is there ever really such a thing as the quiet before the storm?

In early January 2010, most nonprofits were breathing a short sigh of relief following the always hectic end-of-year fundraising season. Direct mail gifts were still being processed while online and telemarketing results were starting to undergo analysis. Renewal appeals were going out on schedule and everyone was anxious to know how their peers fared in the rough economy of 2009.

Then an earthquake struck Haiti.

Whether or not your nonprofit does work in Haiti, or even disaster relief work of any kind, we were all thrown into disaster response mode. Organizations like the American Red Cross, World Vision, American Jewish World Service, and countless others sprang into action — mobilizing organization-wide to provide relief and fund the effort. Everyone else in the nonprofit industry paused briefly and quickly regrouped to change their immediate communications and fundraising strategy.

A disaster like the one in Haiti reminds us all that we need a rapid response plan.

A disaster like the one in Haiti reminds us all that we need a rapid response plan. Think about it: Nonprofit emergencies and opportunities come in many forms. Beyond natural disasters and acts of war, Political advocacy organizations need a plan for the day a Supreme Court justice retires, or their issue rockets onto front page news (such as when Michael Vick was arrested for his involvement with dog fighting). Social services agencies and hospitals need a plan for the next “snowmageddon,” heat wave, or epidemic.

There is no calm before the storm, so before things return to normal, we should all evaluate our readiness for whatever disaster, emergency, or other unplanned event we will almost certainly someday face.

WHAT DOES IT TAKE TO RESPOND QUICKLY?

From a communications and development perspective, responding quickly to an emergency or other situation means employing exactly the same elements required to run any kind of campaign: a plan, someone to call the shots, the ability to execute, and the communications and tools to get it to the public. But, responding to an emergency or time-sensitive situation requires much more.

Approvals have to happen in record time. Key individuals may not be accessible. Business rules have to be in place so you know how donations are being used and how you will fulfill donor expectations and intent.

So you need everything in advance, with step-by-step instructions and a back-up plan for the decision makers and functional staff members it takes to get it all done.

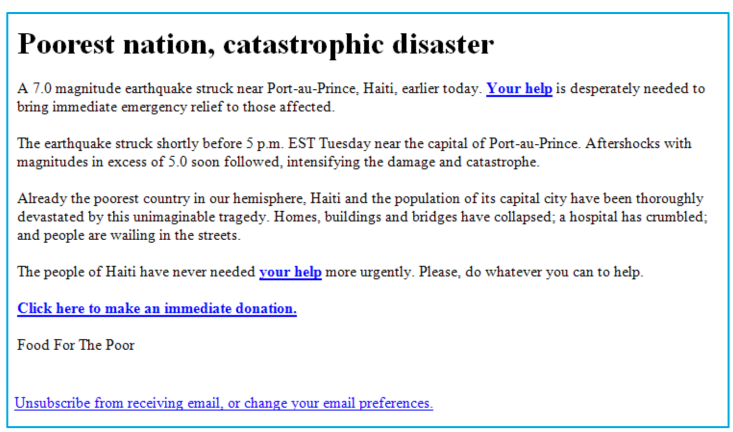
Responding rapidly

Within hours of the earthquake in Haiti, some nonprofit organizations had updated their home page, moved their PR machines into action, sent emails to their house file — even launched Google AdWords campaigns and set up text donation campaigns specifically for Haiti. Others scrambled to get a message out the next morning.

Is one day later a day too late? Consider that if the emergency is the top news story of the day and your organization name is in the news constantly, your online fundraising, including email communications and social media efforts, can increase by as much as 50x within 24 hours and 100x within two days — and more than 50% of your emergency-related online funds may come in within the first four days. A few statistics from nonprofit response to the earthquake in Haiti demonstrate the high levels of fundraising that can occur immediately following an emergency:

- In the first 24 hours after the disaster, Oxfam America received contributions totaling more than $800,000. At least $10,000 of that came in through a Facebook™ cause the group set up for earthquake relief efforts.
- Donations to Save the Children's relief efforts totaled $279,000 a day after the earthquake struck.
- Within three days of the disaster, AmeriCares had raised more than $500,000 for Haiti relief.

Because of the immediate need and the passion that people have for helping after a disaster or emergency, it's more important to get a solid, simple, straightforward communication sent out as soon as possible than to have all the details and the most polished design. Food for the Poor did just that, sending a simple message within three hours of the earthquake striking Haiti.



Poorest nation, catastrophic disaster

A 7.0 magnitude earthquake struck near Port-au-Prince, Haiti, earlier today. **Your help** is desperately needed to bring immediate emergency relief to those affected.

The earthquake struck shortly before 5 p.m. EST Tuesday near the capital of Port-au-Prince. Aftershocks with magnitudes in excess of 5.0 soon followed, intensifying the damage and catastrophe.

Already the poorest country in our hemisphere, Haiti and the population of its capital city have been thoroughly devastated by this unimaginable tragedy. Homes, buildings and bridges have collapsed; a hospital has crumbled; and people are wailing in the streets.

The people of Haiti have never needed **your help** more urgently. Please, do whatever you can to help.

Click here to make an immediate donation.

Food For The Poor

Unsubscribe from receiving email, or change your email preferences.

Food for the Poor sent an email to their house file within three hours of the earthquake striking Haiti.

Your website is a little different though, and you probably want something more polished. The US Fund for UNICEF had a website plan — an "emergency mode" home page version based on a simple design. They simply had to update the headline ("Earthquake in Haiti"), choose a relevant image from a set of pre-planned options, and publish. Perhaps even more important, a donation form was already published and ready to accept and identify donations in response to the disaster, so it was easy for the organization to track response and follow through on donor intent for every dollar received.

The US Fund for UNICEF was prepared to "hijack" their home page to respond to emergency situations on a moment's notice.

In general, think about your emergency response in three phases: 1) generating awareness of the emergency through email, social media, web pages and forms, 2) communicating the urgent need, and 3) driving a response such as giving or volunteering. The more of these items that you can have prepared in advance, the faster you will be able to respond.

Adjusting your message

If your organization is not directly tied to an event, you typically have a little more time to respond and change your message should it be needed. But, it's sometimes inappropriate to raise funds for your organization if the situation is not directly linked to your mission and programs. The Polly Klaas Foundation — a national nonprofit committed to promoting child safety — demonstrated a unique way to adjust its message to help with emergency response while remaining true to their mission.

In the aftermath of the Haitian earthquake, the Polly Klaas Foundation sent an email to their house file urging people to donate to specific international disaster relief agencies that "focus on protecting children who have been separated from their families, and helping those children reunite with family members." This was an exceptional example of an organization living their mission and adjusting to the disaster despite the fact that donations would support other organizations.

Knowing the plan

When you work too quickly, you typically make mistakes — mistakes that lead to missed opportunities, offended donors, or worst of all: PR problems. And, the number one mistake an organization can make online is not having the right message on the right donation form at the right time.

As a cautionary tale, consider what happened to one relatively large organization that practices disaster relief as one part of its mission. The charity didn't have a set, tested plan in place, but they had a good idea: replace their home page with a donation form to collect funds for Haiti relief and minimize clicks to get there. They hadn't set up the emergency version in advance and the staff member responsible decided to add some custom coding to the form and then published the new donation form as the site home page. Unfortunately, the custom code was never tested.

After realizing donations weren't coming in, the organization called Convio support for help and was quickly able to correct the error. The organization immediately started receiving about 1,600 donations per hour. Sadly though, several hours had elapsed before anyone noticed something was wrong. Between 3,000 and 4,000 donations, likely hundreds of thousands of dollars, were never realized — not due to technical error, but due to human error and lack of planning.

Having a plan, testing it, and ensuring everyone understands it are critical to avoiding costly mistakes in times that demand quick response. Here's a suggested checklist for a basic online emergency plan:

- ❒ A list of your organization's highest risk emergencies.
- ❒ A calendar of who is "on duty" to alert key decision makers and contributors who will need to move into emergency response mode in a crisis.
- ❒ Individuals assigned to make decisions/approvals, project manage, and execute the response.
- ❒ A list of key contacts in the field or in programs who can keep you updated.
- ❒ Reference materials for development and marketing staff members to get them quickly up to speed on your work and services under emergency conditions.
- ❒ Your emergency home page and web content.
- ❒ Urgent update and appeal email templates.
- ❒ Updated Charity Navigator information — this is particularly important so that media and potential donors can verify your organization's legitimacy in times when scammers tend to emerge.
- ❒ An audience — create an email audience and check it every quarter (or more) to make sure it is up to date and ready to send to on a moment's notice.
- ❒ A project plan to execute in an emergency.
- ❒ A back-up resource plan, e.g., sharing documentation on your plan with your technology provider so they can jump in to help when you need them.

- ❒ Some social network presence and fans/friends/followers. Even if it's small, it can grow quickly under emergency circumstances. Make sure updates are part of the plan.

- ❒ A plan for communicating with new, existing, and prospective donors after the initial few days or weeks of emergency response.

Practicing the drill

You might be surprised: the number one reason people called Convio for support the day after the earthquake in Haiti was because of small mistakes made in haste. That stress and risk is avoidable if you not only create a plan, but also practice your plan regularly. Fire departments do it, police stations do it, even schools and business offices practice fire drills — with and without warning. And, nonprofit organizations need to do it, too.

Building a scalable technology infrastructure

Another challenge that organizations face during crisis is one of technology infrastructure. Typically, organizations build their software and technology platform to support their normal operations with room for growth. Often that infrastructure becomes inadequate during unexpectedly high volume and usage.

The best preparation, plan, and practice will not work if you don't have an infrastructure that delivers the high performance, availability, and reliability needed to support the communications, fundraising, and donor management demands in an emergency or other unplanned event. Choosing the right technology infrastructure is a critical component of your response plan.

Consider this: in the three days following the earthquake in Haiti, Convio clients raised more than $32 million dollars per day, sent millions of emails, and saw nearly four times the web traffic of previous record system usage. The previous single-day fundraising peak was just over $19 million dollars given through campaigns on December 31, 2009.

> Choosing the right technology infrastructure is a critical component of your emergency plan.

Many small-to-medium size and volunteer-driven organizations don't have the resources and expertise to build and maintain the technology infrastructure needed to manage thousands of donors, power robust websites, and solicit and process hundreds of thousands of donations. One option that many nonprofits are successfully using to meet this need is the Software-as-a-Service (SaaS) model. It provides nonprofit organizations of all sizes access to the same tools and scale as the nation's largest and best-known nonprofit brands. An added benefit of the SaaS model: funds are available right away for more timely use in response to urgent needs.

A prime example of this is Free the Kids. Free the Kids is a volunteer-driven nonprofit that runs an orphanage in Haiti that was damaged by the earthquake. The organization raised more than $250,000 in the first two weeks following the quake through the use of email to supporters and by empowering them to help tell their story via social media channels such as Twitter™. In comparison, Free the Kids raised $160,000 online in 2009 — their first year of online fundraising.

With more than 600 children at risk, it was critical that Free the Kids tell their story and empower supporters to help reach and inspire more people to support the orphans they serve. When the earthquake struck, they quickly got an email out to supporters and shared the organization's needs via social media such as Facebook and Twitter. When author Neil Gaiman re-tweeted about the plight of Free the Kids' children, web traffic, donations, and the number of people who provided their email address to learn more skyrocketed. Because of the SaaS model on which they built their infrastructure, they were able to scale to meet the demand.

"We could have never built that level of infrastructure or developed the expertise on our own," said Jami Vass, Executive Director for Free the Kids. "While we have a long way to go and the need remains great for our children in Haiti, knowing we have the infrastructure in place lets us focus on our mission and telling our story, not worry about technology."

7 TIPS FOR QUICK RESPONSE DURING A TIME OF NEED

The first days following a disaster or other emergency can be crucial for organizations as they reach out to supporters and request help. At a time when many organizations may not have the time to outline a formal strategy, the following seven tips can help any organization looking to make the greatest impact during a time of need.

1. **Hijack your homepage** to make the emergency the focus. Use clear calls to action to donate and share through social media or tell-a-friend capabilities.

2. **Include a clear description** in news articles and relevant forms of your organization's role in the relief effort.

3. **Make it clear what people are donating to:**

    a. **Avoid sending people to a general donation form.** With general forms, savvy donors will question where the money is going and other donors will assume it is going to relief efforts for the emergency. Remember, though, that your systems must be set up to clearly designate where the money is going, or your organization will not be able to fulfill the donor intent, which can also lead to PR problems.

    b. **Make it clear if donations will go to the specific relief effort.** Monitor how much you are raising, and make sure the funds are designated to that effort — they cannot be repurposed elsewhere unless you make it clear that once the need is met, additional funds will go to preparedness for another need.

    c. **Consider promoting a general relief fund.** If you're concerned about the degree of designation you can support for online giving, then offering a general relief fund is a good idea. But, make your purpose clear. Use language like "Donations to this fund go to emergency relief work." Cite examples where you will use the funds, e.g., in response to natural disasters such as hurricanes, tornadoes, tsunamis, earthquakes.

4. **Be careful how you're using monthly giving.** You probably don't want it on a form designated to a specific emergency if your ability to use the funds for that emergency is limited. On the other hand, if your organization will have a long-term relief effort, offering sustaining giving as an option in follow-ups to emergency donors can be a compelling and relevant ask.

5. **Pay attention to form design**. Make sure forms are short (using the minimum number of fields), and display any third party verifications of your effectiveness/legitimacy in the effort, including Verisign, Charity Navigator ratings, Charity Watch ratings, or Better Business Bureau status. (See Appendix for links to these resources.)

6. **If you have a social media effort, put it to use.** Re-tweet or post links to news articles that will provide value to your friends and followers, but only post when you have something of value and interest to say.

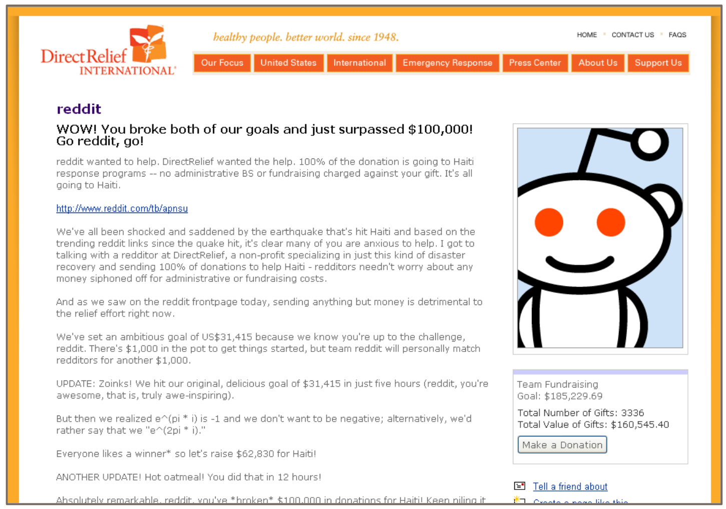
7. **Plan to send follow-up email messages** including information educating donors about your broader mission and offering them the opportunity to become a regular member or monthly donor. If monthly donor gifts (or any additional gift) help your organization to prepare for emergencies and ensure rapid response, be sure to make that part of the appeal.

CULTIVATING NEW DONORS IMMEDIATELY AFTER AN EMERGENCY

Fundraising efforts in response to disasters, emergencies, and other time-sensitive events typically yield large numbers of new donors. What do you do with them after their initial gift? It is critical to continue to cultivate new donors to ensure that they support the immediate need as well as future emergency appeals or — even better — become regular donors or volunteers for your organization.

Following up after the initial gift

Be sure to not only thank new donors for their initial gifts, but also follow up with an update on what your organization is doing in response to the emergency. At this time, ask for another gift if you still need funds for your efforts, or ask for their support in other ways, such as volunteering, asking their friends to donate, or setting up their own personal fundraising pages to help raise funds for your organization. If you have received all of the funds you can use for the emergency, focus on other areas of need for your organization.



Direct Relief International promoted the option for supporters to create a personal fundraising page in support of the Haiti relief effort. Reddit (an online community) created a page and encouraged their users to give. Within weeks, the community raised more than $175,000 from over 3,700 new donors.

Getting the right asks to the right people at the right time

Take this opportunity to segment your next communications and reach out to more than just your new donors. For example, segment your list into everyone who donated to the relief effort and everyone who hasn't yet. Or take it to the next level with: 1) new donors acquired through your emergency fundraising, 2) existing donors who donated, 3) existing donors who haven't supported the effort, and 4) prospective donors. Your communications should recognize an individual's specific contributions (if applicable), provide updates specific to the effort he or she supported, and evangelize the need for ongoing support beyond the emergency. For your prospective donors or donors who haven't responded yet, consider stressing your need for more funds in support of the emergency or your need to prepare for future emergencies.

Promoting monthly giving

The lifetime value of monthly donors is much higher than single gift donors — they give more per year and have higher retention rates. Offer monthly giving as an option to new donors and create pathways to encourage single gift donors to become monthly donors.

> Supporters can feel disconnected from an organization when they make a donation and then never hear anything about the impact being made.

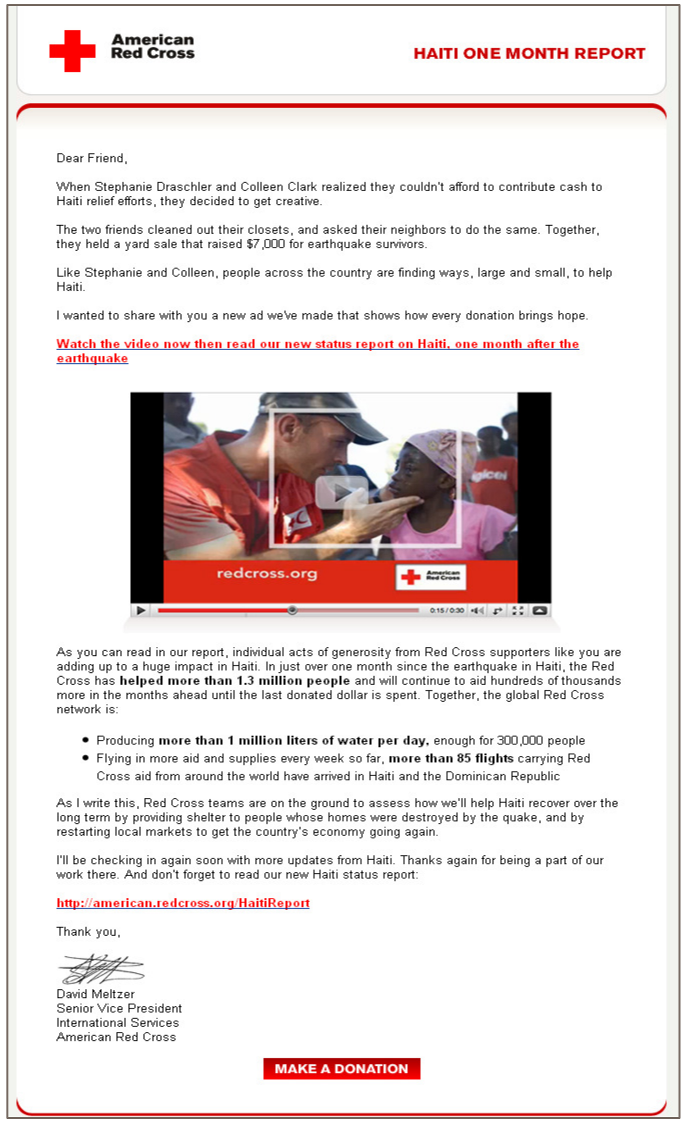
Giving ongoing feedback

While most fundraising professionals ensure that every donor gets a thank you message of some kind, they don't always keep the supporter informed about what the organization did with the donation. Supporters can feel disconnected from an organization when they make a donation and then never hear anything about the impact being made. They may ask themselves, "What happened to my donation? Did it make a difference?"

To keep donors involved after the urgency of the emergency fades, be sure to continue giving feedback. Send donors an email update on a regular schedule to let them know how close the organization is to meeting its goal for that campaign. Then, send them another update to let them know how the organization used the funds. With this simple act, donors will never feel as if their donations were meaningless because they will always know the results of their gifts. And, they'll be more likely to become monthly donors or give again when they receive your next appeal.

Continuing to communicate about your mission

After a respectful pause following the specific emergency, continue your normal mission-related email communications to your new, existing, and prospective donors. Start by acknowledging the emergency and the initial need to fund relief efforts, and then mention how your fundraising and emergency response efforts were able to help. Then, find linkages between your organization's mission and its response efforts to make these communications salient.



American Red Cross

HAITI ONE MONTH REPORT

Dear Friend,

When Stephanie Draschler and Colleen Clark realized they couldn't afford to contribute cash to Haiti relief efforts, they decided to get creative.

The two friends cleaned out their closets, and asked their neighbors to do the same. Together, they held a yard sale that raised $7,000 for earthquake survivors.

Like Stephanie and Colleen, people across the country are finding ways, large and small, to help Haiti.

I wanted to share with you a new ad we've made that shows how every donation brings hope.

Watch the video now then read our new status report on Haiti, one month after the earthquake

redcross.org

As you can read in our report, individual acts of generosity from Red Cross supporters like you are adding up to a huge impact in Haiti. In just over one month since the earthquake in Haiti, the Red Cross has **helped more than 1.3 million people** and will continue to aid hundreds of thousands more in the months ahead until the last donated dollar is spent. Together, the global Red Cross network is:

- Producing **more than 1 million liters of water per day,** enough for 300,000 people
- Flying in more aid and supplies every week so far, **more than 85 flights** carrying Red Cross aid from around the world have arrived in Haiti and the Dominican Republic

As I write this, Red Cross teams are on the ground to assess how we'll help Haiti recover over the long term by providing shelter to people whose homes were destroyed by the quake, and by restarting local markets to get the country's economy going again.

I'll be checking in again soon with more updates from Haiti. Thanks again for being a part of our work there. And don't forget to read our new Haiti status report:

http://american.redcross.org/HaitiReport

Thank you,

David Meltzer
Senior Vice President
International Services
American Red Cross

MAKE A DONATION

American Red Cross follows up with supporters to praise donor and volunteer efforts and to provide detail on how gifts have been used on the ground.

SUMMARY

No matter what your organization's mission, a disaster like the earthquake in Haiti reminds us all that we need a rapid response plan for unplanned events. By planning ahead, practicing the plan, and cultivating donors after the urgency of the situation fades, you will be prepared for whatever emergency you will almost certainly someday face.

APPENDIX: RESOURCES FOR EMERGENCY RESPONSE

Be sure to update your organization's information on the following websites, and/or display any third party verifications of your effectiveness/legitimacy in the quick-response effort. This is particularly important so that media and potential donors can verify your organization's legitimacy in times when scammers tend to emerge.

Better Business Bureau: **http://www.bbb.org**

Charity Navigator: **http://www.charitynavigator.org**

Charity Watch: **http://www.charitywatch.org**

Verisign: **http://www.verisign.com**

ABOUT CONVIO

Convio is passionate about helping nonprofit organizations use software and services to fulfill their missions. The company is the leading provider of online marketing, fundraising, advocacy and constituent relationship management software and services to nonprofit organizations. The company's online marketing suite offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its database system, Convio Common Ground™ CRM, helps organizations efficiently track and manage all interactions with supporters. All products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations.

For more information, please visit **http://www.convio.com**