A PROCRASTINATOR'S GUIDE TO YEAR-END FUNDRAISING

Critical Action Steps for Raising More Money

Twas the Night Before Christmas, and all through the House,
Grownups were surfing and clicking their mouse.

The kids were asleep and the stockings were loaded,
With ipods and Wiis and things sugar-coated.

And now it was time to think of some others,
The poor, disenfranchised, sons, daughters and mothers.

Worthy cause emails came in by the scores,
Making the case for donations and more.

Which one to choose, and what to do then,
Join, donate, or give—oh how much and when?

But the sites were a mess and the forms were a tangle,
The wanna-be donors' nerves came a-jangle.

It was too much confusion and they were so tired,
You'd think it would be easier to make charity wired.

Donate tomorrow, they said to themself,
Was enough work today to be Santa's elf.

And so off to bed, the causes can wait,
If it had only been easier to give or donate.

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Sea Change Strategies

INTRODUCTION
Online fundraising is still very much a work in progress

98%
of visitors to an organization's donate page leave before making a donation

This whitepaper began its life as a brief overview of donate form design best practices to help maximize end-of-year donations. And for sure, sensible step-by-step guidance on form design is provided.

But in researching this paper it became quickly apparent that very little is known about what really works. It became equally apparent that most of the tactics that go into great year-end online fundraising are things you need to be doing all the time.

So this document offers you, the fundraiser, concrete guidance based on best available wisdom on how to design your web presence to maximize giving and broadly how to connect with new supporters, and communicate year-round to foster the best possible relationships with donors.

If you're looking for detailed email strategies or list-building or viral marketing—well, that's not this whitepaper. We do however touch upon the first few emails a donor might receive to get a new relationship off to a good start and where you might go to expand your community.

This much we know for sure—**the majority of would-be-web donors never complete their gifts**. In many cases, as many as 98 percent of visitors to an organization's donate page leave before making a donation. For landing pages linked to fundraising email, the numbers look better; but even then, most clickers do not go on to become donors.

On the following page, you will find concrete action steps for increasing the percentage of visitors to your donate page who actually complete a gift.

ONE WEBSITE, TWO PATHS

Online giving is more than online transactions. A growing body of research suggests that the vast majority of fundraising-related visits to your website are for research purposes. That is, many of your offline donors will have looked over your web presence as part of their personal due diligence in deciding whether to become a donor.

So we also offer tips on how best to provide this critical audience with the right stuff.

TEN STEPS TO BETTER ONLINE FUNDRAISING:

1. Inspire your donors every day

2. Blaze trails to your donate page

3. Optimize your donate form

4. Test drive your online donation process

5. Create a "Why Donate" page

6. Thank your donor at least three times

7. Provide a warm welcome

8. Launch a two-pronged cultivation plan

9. Measure and Test

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Inspire Your Donors Every Day: A Brief Rant

I have a theory—that if we spent half as much time re–connecting donors with the passion and vision that inspired them to give in the first place as we do trying to get them to give again and again, we'd all raise more money and keep more of our donors for life

Instead though, we tend to treat our email lists as faceless money trees, and give it a good shake as often as we dare. There's anecdotal evidence that aggressive email fundraising—and by this I mean sending e-appeals more than once a month—can produce more income in the short run. But it also can also generate anger and frustration, possibly diminishes your brand, and may alienate many potential supporters.

Online Fundraising 1.0—which is where we are today—looks a lot like direct mail. That's not necessarily a good thing. Every communication is an ask. Every ask is an emergency. Email lists are black boxes, into which we pour email appeals, and from which we extract money and data.

This is not a sustainable model. A November 2006 Chronicle of Philanthropy article sets out growing evidence that a donor back-lash against "database fundraising" is under way. It's taking the form of falling renewals and declining donor rolls.

If you've spent the past year pushing your email lists to the fundraising limit, it will affect your year-end giving, and there's not much you can do about it.

Conversely, if you made an effort to inspire your donors and to really build passion, chances are you'll do well even if your website breaks every usability rule.

People give in large measure because it feels good. Recent neu-robiology studies show that the act of giving actually generates endorphins in the brain—the same happy-making chemicals responsible for post-exercise "highs." We don't need the research-ers to tell us that emotion, more than reason, is the driver behind most charitable gifts.

The Sea Change Passion Principle holds that online giving is a function of both donor pas-sion or intent on one hand, and good usability and website strategy on the other. But passion counts more. So our passion principle formula is 2P x 1U = $$$ —where P represents donor passion and enthusiasm and U represents best practices for website, landing page, and forms usability.

HOW DO YOU BUILD PASSION?
Here are some concrete ideas:

Our World Thanks You for Your Support
Because of supporters like you, The Nature Conservancy continues to protect the world's most ecologically diverse places – ensuring that we have freshwater to drink, clean air to breathe and a home for endangered species across the globe.

When you donate today, your support provides the foundation for our success by allowing us to expand the scope, scale and pace of our on-the-ground research and conservation efforts.

Thank you for your support.

Tell your organization's founding story once a year.
Communications guru Andy Goodman calls this one of the "sacred bundle" of stories—a profound reminder of the deep values and moral struggle that gave rise to your organization's existence.

Have a genuine acquisition and cultivation strategy and calendar.
Send emails to donors that thank them, that report back on how you've spent their money, and that offer an inspiring anecdote or factoid. You can't thank donors enough, and chances are, you don't. Make it a point not to ask for donations in these communications.

Ask your donors for their feedback and opinions on a regular basis.
And use their advice when appropriate; it shows them that you know there are people behind those email addresses and that you're not only asking, but also listening.

Offer periodic live chats or phone-in briefings with your CEO.
This is a staple of major donor fundraising, inexplicably absent from the online giving scene.

Offer real-life glimpses into the life of your organization.
We are entering an era when authenticity is arguably the paramount value in marketing communica-tions—a potentially massive shift from the fakey-fake formula that still guides most direct mail. One recent example: a brief affecting and heart-felt thank you video The Nature Conservancy.

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Blaze Trails to Your Donate Page

Discussion: OK, you've spent the year inspiring your donors. Now what? Now you have to make it easy for them to give. Focus groups suggest that online donors are an impatient lot. Donors frequently say they set out to give to Charity A, but then something confuses them so they sail on over to Charity B and give there instead. So Job One in holding on to a would–be donor is getting them to your donate form as quickly and smoothly as possible.

TO-DO LIST:

Create "keyword" ads on Google and Bing. Link the ads straight to your donate form.
This is especially important at year-end and during intensive fundraising campaigns. Make sure the ad language is clearly fundraising-related. If your pay-per-click ads go to your home page and not a specially-designed landing page, your money would be better spent on lottery tickets.

Drive traffic through other advertising and outreach.
Keywords are high quality but can be low volume. Do you have a page on LinkedIn, Facebook, Twitter? Add a link. Also, consider selected advertising from high affinity sites through blog ads, email marketing from the right third parties, and other selected advertising (the key to finding the sites that work best for your cause).
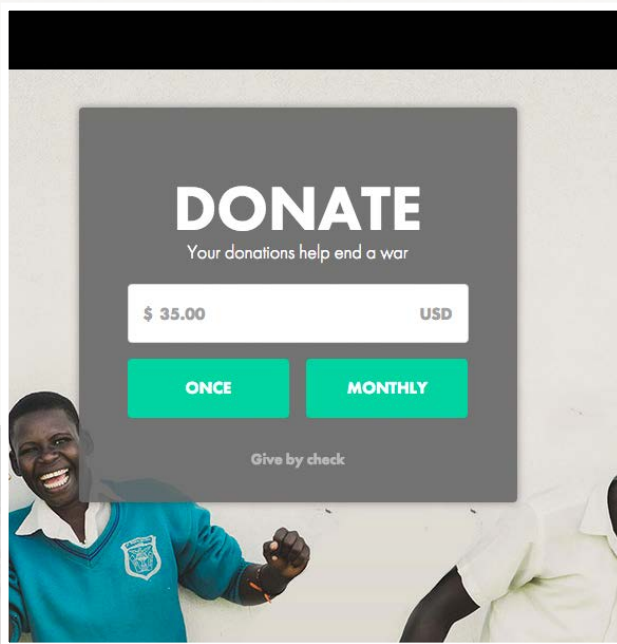
Make sure you have multiple donate links on your home page that go straight to your donate form.
In our experience, more links means more traffic to your donate page.

Consider a "home page hijack."
In the dark age of web 1.0, this was known as a splash screen. By either name it's a special version of your home page that has its sole purpose generating donations. A year-end splash screen should be big and brassy and offer no more than three options: donate now, learn more, and click to the usual home page. Or you can go for broke—make the splash screen your form!

"Homepage hijacks," aka splash screens, should go up at least for the last week of the year.

TO-DO LIST (CONTINUTED):

Use consistent language for buttons and links.

Focus on the words "Give," "Donate," or "Contribute"—and stick to that one word throughout the donation process. Asking people to "join" is problematic unless membership is truly core to your brand, e.g. ACLU or Sierra Club. Asking people to "support" you is largely meaningless to most users and does not connote giving.

Ask them to change channels.

Ask your offline donors to donate online. This will convert donors into using your least expensive giving channel, saving you money and allowing you to do more with theirs. And ask your email donors to give via the mail. The myth that email donors only give online is not true—multiple opportunities to give can frequently lead to multiple gifts.

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Optimize Your Donate Form

The 11 Deadly Sins of Donate Page Design

1. **Scary, long forms**
2. **Unnecessary fields**
3. **Multiple non–giving options**
4. **Long text, weird formatting, reversed out type**
5. **Amateurish looking design**
6. **Layout is not intuitive**
7. **Error messages are confusing**
8. **Submit & reset buttons too much alike**
9. **User required to create account**
10. **No security or privacy policy links**
11. **No address or phone number**

Direct mail fundraisers spend years and years testing every detail of the reply form that goes into a direct mail pack-age. E-commerce giants like Amazon likewise test and refine their shopping cart and checkout process on a constant basis. But almost no one in the online fundraising business tests the donate form on their website. With donor drop-out rates approaching 98% in some cases, that's just nuts.

Consider this an interim checklist of best practices, in des-perate need of a year or two of field-testing.

TO-DO LIST:
Suppress Global Navigation.
In his recent groundbreaking book The Paradox of Choice, psychologist Barry Schwartz argues that giving people too many options stresses them out. If what you want is for a visitor to your donate page to make a donation, then for god's sake, don't give them your website's full range of navigation options. It's like really wanting to sell vanilla ice cream but offering 31 flavors, and then hoping they choose vanilla.

Of course, when removing your global navigation, don't forget to keep in one key navigation link: the link back to your home page.

Minimize Giving Choices.

Paradox of Choice again. Many sites have a donation landing page bristling with options—give monthly, join, donate, renew, check out planned giving options, etc. Chances are (test this) those pages lead a lot of folks to do nothing. The safe course is to provide a single donate choice if possible and keep folks on task. One exception might be a link to a "why give" page—see below. (Test this).

Make sure people can tell that the form is a form.

Test your donate page design using different browsers, tablets, and mobile devices. Can you see that there are fields to fill out, such as name, address, etc., or are those fields "below the fold?" If the latter, you need to redesign the page to get some of those fields visible above the scroll line.

Do not ask for any information you don't need!

Commercial marketers say that every single additional bit of information you ask for drives some people away. Do you really need a donor's fax number? Do you really need to know which of your issues they care most about? Do you really need a business phone number? Be ruthless—if you don't need it right away, don't ask for it.

Provide your mailing address and phone number on your donate page, all fundraising-related pages and your home page.
Your mailing address and phone number really should be on every page of your website, but the above locations are critical. Remember those online researchers. It is simply amazing how many web-sites force a user to hunt for an address and phone number. Anecdotally, focus group participants say they look for a phone number as reassurance that there is someone to call if a problem arises with a transaction. **This is an easy fix and not doing it is simply throwing money away.**

Provide a taste of inspiration.
Remind them in a brief bullet point or two, or a well-chosen image, why your cause is so important. Avoid stock images and definitely stay away from gratuitous, negative imagery like starving children or clear-cut forests (babies and puppies never fail). There's plenty of evidence that bad news images just cause people to click away. A well-chosen concise endorsement from a moral authority (but not a random celebrity) is also a good choice.

Add a "Secure Transaction" graphic and a link to your privacy policy.
The Verisign badge is a well-known example of a secure transaction graphic. As for your privacy policy, even if no one reads it, the presence of the link is thought to reassure folks.

Make sure error handling doesn't suck.
Isn't it incredibly annoying when you accidentally forget a required field on a form, hit the submit button, and then get some sort of weird error message that sounds like it was written by a programmer overdosing on war games and Jolt Cola? Make a few mistakes with your donate form and see what happens. If at all possible, make sure donors thrown into error hell don't have to re-enter all their personal information!

Do not require would-be donors to create an account to make them donate.
You might as well just provide a link to another organization's donate page.

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Test Drive Your Online Donation Process

Discussion: The above to-do items will ensure that you've avoided the greatest known pitfalls. But all organizations are not the same. A small amount of time and 30 bucks could mean lots more money in the door. You'd be nuts to skip this step.

Recruit three test subjects.

Spouses and significant others are just fine, as long as they meet the following criteria: (1) they have donated to some group online in the past; and (2) you trust them to be honest with you; and (3) you won't have a huge fight with them if you don't like what they have to say.

Give each subject a ten-dollar bill.

Sit down with them in front of a computer with broadband Internet access (most online donors have it), and ask them to make a $10 donation to your organization. Do NOT give them the URL. If they won't use their own credit cards for this, lend them yours. Watch them launch the browser and find their own way to your home page (you'll be amazed). **Ask your test subject to verbalize all of their thoughts and reactions as they go along.**

Videotape your friend's efforts (try to get the screen in the shot) or have a colleague take detailed notes.

How did they get to your home page? Which link did they click? Did they stumble over the form? Did they leave the form for some reason? Did they forget a field? Did something frustrate them?

Ask for feedback once they've made the gift.

Where were they lost or confused? Where might they have bagged the whole thing if they didn't have to complete the process? What changes would they make to help the next would-be donor along the way?

Chances are, three good tests will surface as much as 80-90% of the major usability speed bumps.

Now that you know what they are, fix them!

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Create a "Why Donate" Page

Discussion: Remember, for every would-be donor who is prepared to consummate the deal online, you have a dozen or more donor-visitors who are researching a potential gift but who will complete the gift via another channel. You must shake off the mistaken belief that you have provided for their needs by posting a PDF of your annual report some-where on your site.

HERE'S A SIMPLE FORMULA FOR ADDRESSING THEIR NEEDS

Create a new web page called "Why Donate" or "Case for Giving" or something equally straightforward
Provide links to this page from your About Us section, from your year-end home page hijack or splash screen, and from your donate form.

Include on this page simple pie charts of where your money comes from and where it goes.

Include a four-star badge from CharityNavigator (if you have four stars).

Include one or two brief endorsements from credible authorities.
(The Dalai Lama would be ideal; Jessica Simpson not so much).

Include any other badges of honor..
Nobel Peace Prize, Worth or Money Magazine pick, etc.

Provide links to your full financials and/or to that PDF of your annual report no one will ever read.
It's good to have the link there just in case.

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Thank Your Donor At Least Three Times

Discussion: Your donor is making a personal, emotional statement with their gifts—they are not buying a new toilet float from plumbingsupplies.com. You have several opportunities to reinforce that act, and help get those endorphins flowing. Use them well!

Use the "finish page" strategically.
The finish page is that screen that comes up once the donation process is complete. That's your first thank you opportunity. This is not the time to put a tax receipt front and center; it's the time for a big hug and an inspiring image.

Review your autoresponder thank you copy.
Is it warm and personal? Does it make your donors feel like they just did a smart and important thing? Does it articulate an ongoing commitment to report back to donors on what you're going to do with their generous donation? *THIS ONE IS IMPORTANT.* Does it specifically address any special cir-cumstances for the gift, such as responding to a match or making an honor donation? If your answer to any of these questions is "no," fixing that is a priority.

Send another thank you email a few days later.
Everyone pretty much knows the autoresponder email goes out automatically. And though on reflec-tion, people would probably assume the same of a second thank you message a few days later, it seems to have a strong bonding effect (test this). This is arguably especially important for new donors.
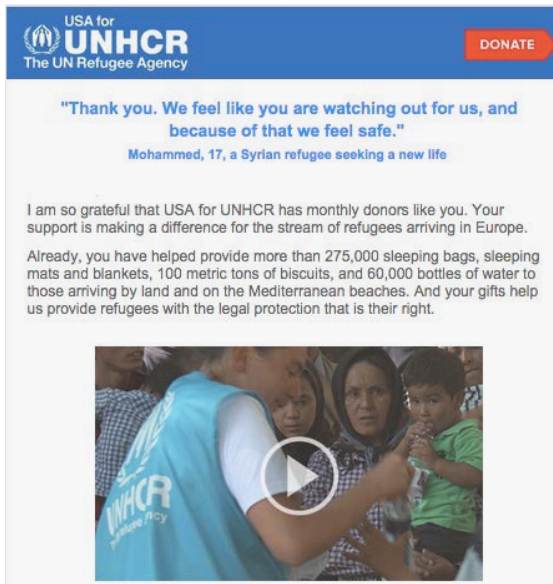
Consider a sincere, handsigned letter or phone call for large gifts.
Did a donor just give you $1,000 (it happens)? A genuine personal thank you is in order, and worth the effort.

Provide a Warm Welcome

Discussion: OK, you've thanked them sufficiently. Now it's time to get the cycle of inspiration off to a strong start.

Plan a follow-up email after every concerted fundraising period.
Before January 15, make a point to send every single online donor an email that reports back how much money your raised, how it will be used, and how you propose to keep donors in the loop going forward. *DO NOT UNDER ANY CIRCUMSTANCES ASK FOR A SECOND GIFT IN THIS EMAIL.*

Send one or two "orientation" emails to new donors.

In addition to that effusive thank-you email you've now sent from your CEO (see point above), send a couple more to help bond your new online donor. Examples include: Links to "greatest hits" content on your website; a brief survey to register donor opinions and preferences; reminders to add the organization's email address to their personal whitelists; and links to recent news coverage. Most donors have a nearly infinite desire to see "their" organization in the news!

Launch a Cultivation Plan

Discussion: Let's review. Our formula for online fundraising success is 2P x 1U = $$$. That means donor passion and inspiration counts twice as much as usability and tactical best practices.

HERE IS OUR RECOMMENDATION:

Once the frantic chaos of year-end fundraising has faded, Re-read Step One, above.

Plan a monthly communication whose principal aim is to re-inspire your donors.

This can be your monthly email newsletter, but it better be good.

Make listening a key element of your donor conversations.

Ask donors what they think as often as you can in your regular communications and on your website. Provide rating and/or comment options in your monthly newsletter. Create regular "sound off" features. Answer incoming donor email as quickly as you can. Consider playing around with a donors' blog or some other "public" forum.

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Measure and Test Throughout the Year

We are reasonably certain that if you follow every step in this whitepaper, you will raise significantly more money online. But many of these strategies need further testing, especially in order to quantify their benefits.

We've flagged good testing ideas to increase your donate page conversion rate throughout this paper. Some of our favorites are summarized here:

Test elements of your donate form.

Throughout the year, change one element on your donate form and keep it live for a few weeks or months, depending on your traffic, to measure if the conversion rate increases (or decreases). There are endless opportunities here; for example, you can:

- add the "hacker safe" icon
- rewrite your intro copy
- change the image on the page
- change the order of your form fields: which performs better personal information first or donation amount first?
- remove that "reset form" button which is next to the "submit" button

Test links from the donate form.

Right now your donation landing page may be bristling with options—give monthly, join, donate, renew, learn about planned giving options, etc. Chances are those pages lead a lot of folks to do nothing, but do you really know?

If you are feeling energetic, other testing ideas for the rest of the year:

Test a one page donate form vs. a multi-step form.

Most organizations use a one page donate form, but as far as we know, that is a convention not recently tested by organizations. Create a well-designed multi-step form and use it for awhile to see if your donations increase.

Year-end fundraising is always a busy time for fundraisers and concerns which don't have immediate ramifications have a tendency to be brushed aside till later. Make sure you have someone on staff that is responsible for compiling metrics for your year-end campaign. It's usually a lot easier to define metrics ahead of time and compile during and immediately after the campaign, than it is to go back in July to see how your efforts performed.

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Avoid Procrastinating Next Year!

Put aside time now, while the pain of procrastination is making you swear to plan better next year, to plan better next year. When January rolls around review what you did the previous year and how it performed. Now it's time to review your budget and make sure your outreach strategy includes both the acquisition of new supporters and retention of your existing supporters by further deepening their affinity for your cause.

Understand what you value.

When reviewing your strategy and budget consider the value of your efforts and how you measure it. Is an email contact simply a way to connect with a potential donor? Or is there also value in engaging your audience in non-fundraising online actions and messages? Are you trying to impact their behavior to improve their health or have less impact on the environment? Or is their value only in their capacity to donate? Be sure to develop your strategy to address the different aspects of commu-nication valued by your organization.

Put your money where the growth is.

Identify your budget for list building and online advertising. If you have money left from this year use it! What are your best sources of support? Organic traffic? Tabling? SEO? Adwords? Paid recruit-ment? What are the costs of each source in terms of staff time and direct expenses? Put your money into what works, but don't be afraid to test some new methods, too.

Planning is the mortal enemy of procrastination.

Map out a plan so that you've recruited most of your new supporters by mid-fall. This will give you time to build a relationship with them. Review your communications plan so each email you send compliments the others and deepens your relationship with your online supporters, educates them about your issues and raises the necessary funds.

SOURCES

This paper was written by Mark Rovner and Sarah Haug of Sea Change Strategies. The guidance laid out here is based on more than 20 years of focus groups with donors, including more recently with online donors; a review of best practices and testing, mostly derived from the commercial sector; a smattering of research conducted by non-profits; and anecdotal experience with more than a dozen current and past fundraising clients.

The illustrations provided are not necessarily our work—we drew from the collective brilliance of the hard-working men and women who toil in the vineyards of non-profit online communi-cations. Our thanks to all of the organizations highlighted.

Special thanks go to to Alia McKee, Director of Sea Change's fundraising unit, who is going to be remembered in fundraising circles for a long time to come.Heather Holdridge, Eric Rardin and Karen Taggart of Care2 contributed advice on online list building, outreach strategy and integrating online fundraising with direct mail and other modes of communicating with supporters.