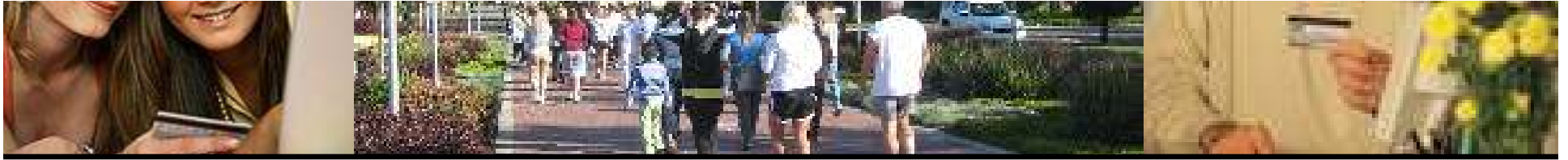




# Online Fundraising: Top 10 Steps to Better ROI on Your Online Campaigns

Cornerstone Group of Companies  
Online Fundraising Services



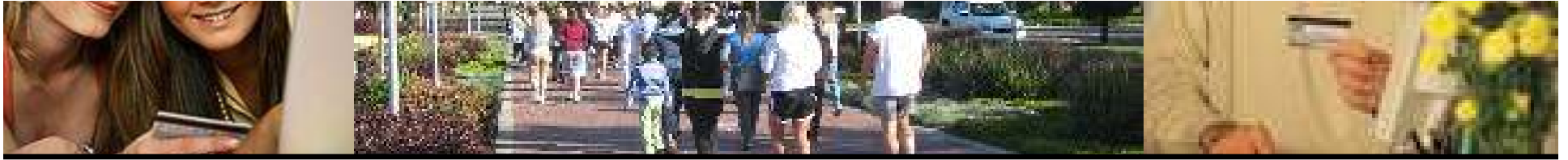
## Why Take Your Campaign Fundraising Online?

- **Support your larger fundraising mandate to build relationships and improve your service with more control, options and convenience for donating**
  - Easy-to-use tools to help your constituents ramp up their fundraising efforts
  - Automated tax receipting, as well as reminder and thank you e-mails
- **Increase your campaign cost-effectiveness:**
  - Reduce administrative and other resource use
  - Decrease data costs associated with your event
- **Increase the geographic reach of your donations**
- **Decrease the risks inherent in event planning by collecting funds in advance**
  - Reduce the effects of bad weather, no-shows and/or other logistical problems
- **Increase your average donation amount, a proven result of online:**
  - In 2006, the Chronicle of Philanthropy reported that organizations saw a median increase in online giving of 50.5% (excluding Tsunami or Katrina-related fundraising)



## Success Drivers and Benefits of Online Fundraising

<b>Key Success Factors</b>	<b>The Benefits</b>
Increase the reach of your peer-to-peer fundraising	Raise more funds outside your immediate event timeline and geography
Improve your donors' experience and pay better respect to their preferences	Develop valuable, long-term donor relationships
Engage easy-to-use tools that are fully supported, serviced and upgraded on a continual, shared basis	Reduce your administrative load and time to market



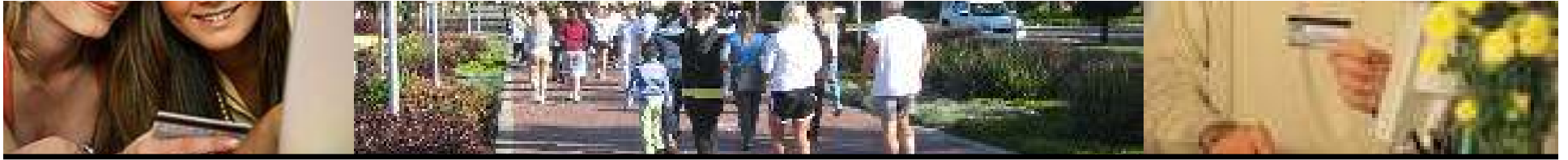
## Online Fundraising: The Lay of the Land

- **E-fundraising is here to stay:** The 80/20 rule means you can't afford not to connect with your donors in multiple channels, including when they are online:
  - 21% of Canadians provide 82% of the value of all donations – Imagine Canada, 2006
- **You need online revenue:** To offset your hard costs and keep your event in the black
  - A recent Charity Navigator study found that only 15% of charities that held special events were equally or more efficient when using special events to fundraise as compared to their regular fundraising activities
- **Success = understanding what online experience your donors are looking for and building the right online solution for them, so....**
- ***Read our Top 10 Steps on how to get there!!***



## Top 10 Steps to Better Online Fundraising ROI

1. Get the online component of your event cost-balance formula right
2. Put in place the right metrics to capture your results
3. Know your constituents online needs and wants
4. Plan your logistics in advance
5. Get smart about how you incentivize peer-to-peer pledging
6. Prioritize your data management goals with your online solution
7. Make certain your online efforts are fully integrated with offline
8. Ensure the online solution is fully secure and privacy compliant
9. Pick an online solution that's tailored to your size
10. Understand and plan for your future growth

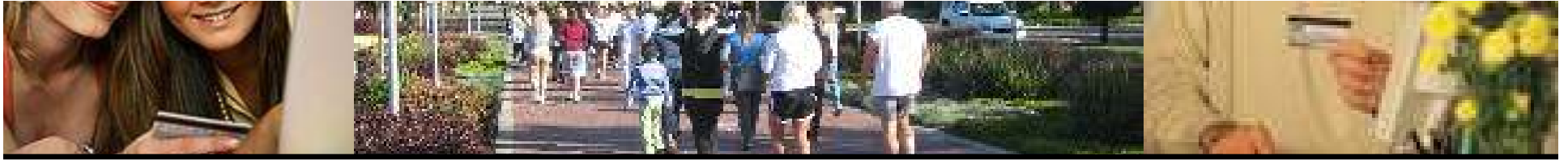


## Step 1: Get Your Online Event Cost-balance Formula Right

# of participants **X** % who fundraise **X** # of people they ask **X** % who give **X** avg. gift / sponsor

**= \$ raised**

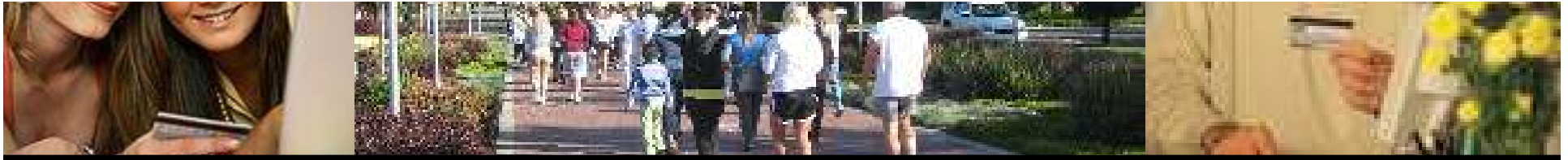
- Start with the formula and determine your break-even point(s)
- Build best-case and worst-case scenarios
- Manage stakeholder expectations
- Take calculated risks



## Step 2: Put in Place the Right Metrics to Capture Results

- Decide up front what you will measure and monitor, and make sure it's strategically meaningful – whether it be % increase in donors, net funds raised after costs, etc.
- Count on monitoring the few important measures of how you are doing on a continuous basis
- Use the flexibility of online tools to share quick summaries of results with your stakeholders
- If something isn't working – change it to influence your results!





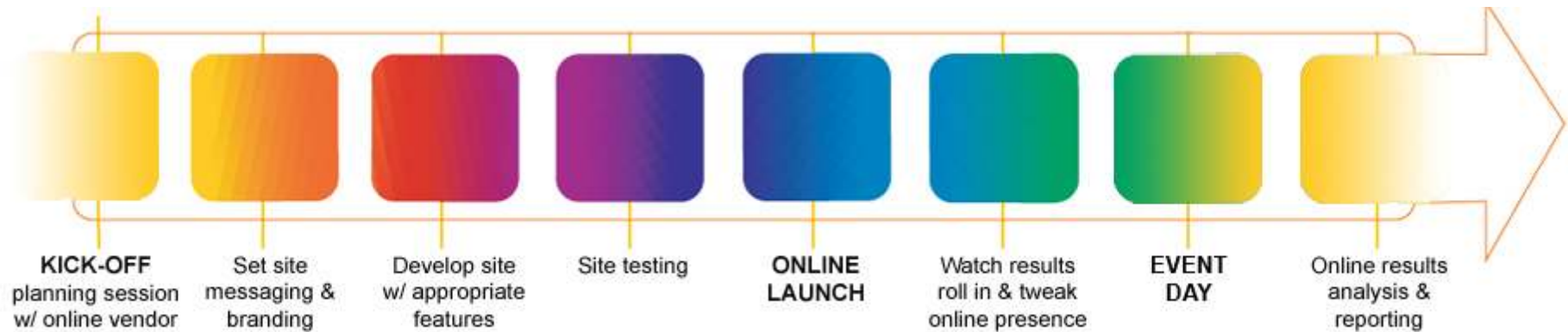
## Step 3: Know Your Constituents Online Needs

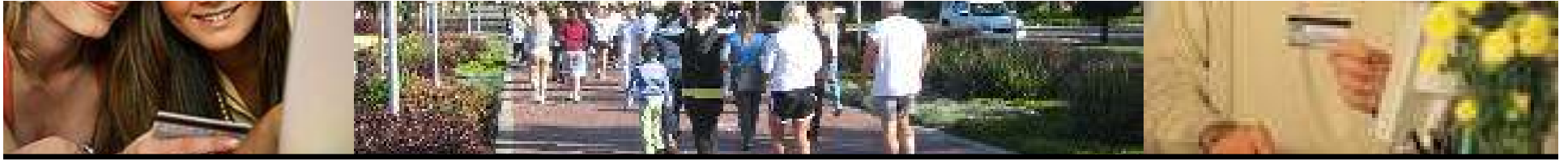
- Make sure you enable the right level of interactivity for your major donor audiences
- Work with your supplier to exploit the full functionality of your system's features
- Don't try to be everything to everyone

Solution Features	Available?
Allow participants to easily register with variable fee structures such as early bird discounts or pledge-to-participate models	✓
Track individual and team fundraising successes using scoreboard or ranking systems to generate a friendly competition	✓
Provide a secure channel to accept and process donations, and issue an immediate e-tax receipt	✓
Empower participants with the ability to customize their personal fundraising page to entice and influence donations from their sponsors	✓
Send automatic email reminders and notifications to participants and donors to keep them engaged throughout the entire event	✓
Bring home the dry cleaning and walk the dog	X (sorry!)



## Step 4: Plan Your Logistics in Advance



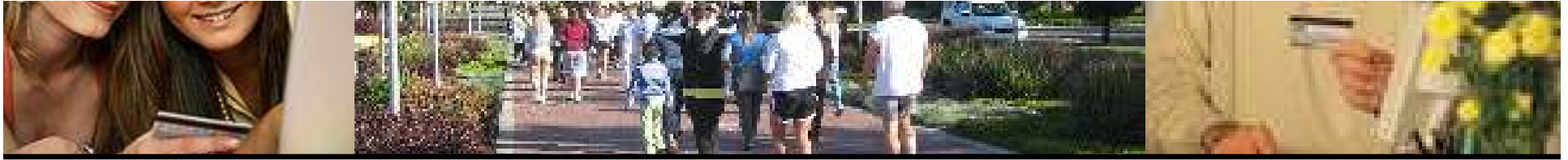


## Step 5: Get Smart About Incentivizing Peer-to-Peer Pledging

- Find ways to promote the idea that online donations can be done anywhere in the world



- Fit incentives to your audience and your budget; for example, 50 \$10 prizes can be more effective than one \$500 prize
- Encourage friendly competition through sharing individual, team or group funds raised via scoreboards/thermometers
- Retire old, tired ideas and innovate for a boost in participant incentive!



## Step 6: Prioritize Your Data Management Goals With Online

- Ensure that online data collection is consistent with offline organizational data standards
- Use the power of online forms to raise the overall value of your donor database
  - Cut down on partial donor/participant information by making important fields mandatory on online forms
  - Don't make required # fields too hefty to avoid drop-offs
- Keep in mind the fields and formats you need for future data use:
  - Set up formats (e.g. Excel Pivot table) that make manipulation for analysis simpler
  - Put permissions in place for contact in another channel

The image shows a screenshot of an online registration form for 'great strides'. The form is divided into two main sections. The top section, titled 'Registration Info', contains fields for name, address, phone, and email. The bottom section, titled 'Provide Your Contact Information', contains fields for first name, last name, business, city, state, postal code, country, phone number, and email address. A large blue arrow points from the top section to the bottom section, indicating a flow or transition.

**Registration Info**

**great strides**  
Helping You Live Your Best

**Monday, May 27, 2007**

**Provide Your Contact Information**

Please provide your contact information and enable a business card provider to set-up your account.

I want to print this form

**Personal Information**

First Name:

Last Name:

Business:

City:

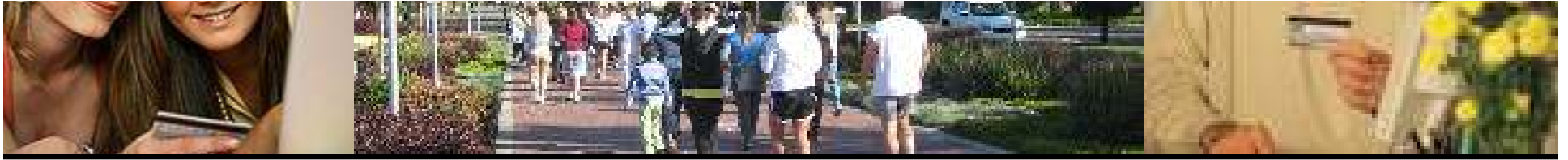
State:

Postal Code:

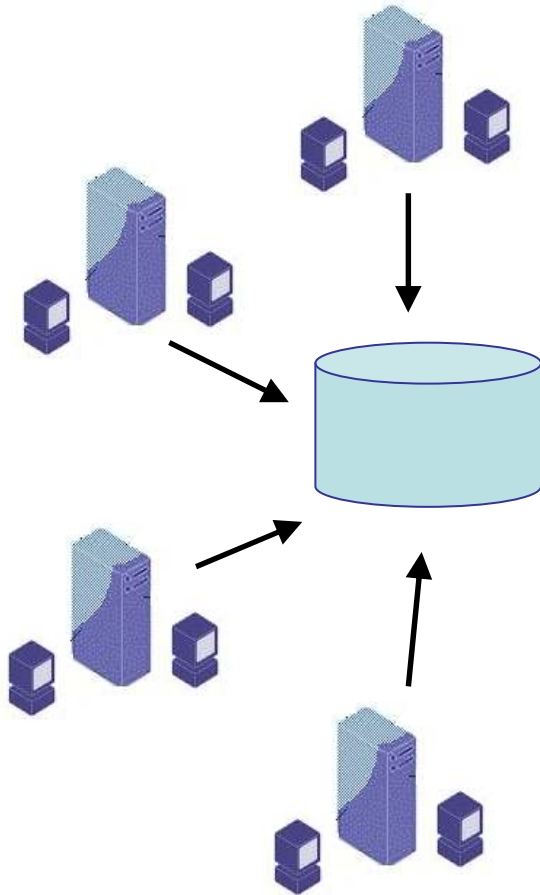
Country:

Phone Number:  Ext:

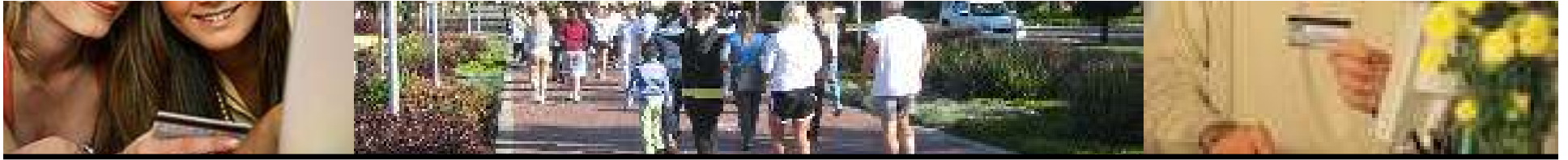
Email Address:



## Step 7: Ensure Online Efforts Are Fully Integrated with Offline



- Build competitive advantage by enabling a 360° view of each donor
- Leverage the consolidated view of your donors and overall fundraising efforts in order to:
  - Track how your various fundraising rates stack up
  - Reframe your success measures and goals online (and in other channels); for example, should the emphasis of your event be on donor acquisition or retention?
  - Refine your donor contact strategy by identifying donor patterns and preferences



## Step 8: Make the Online Solution Secure & Privacy Compliant

- Use this list of questions to determine if your vendor has the experience and has done the due diligence to protect your constituents' personal information:

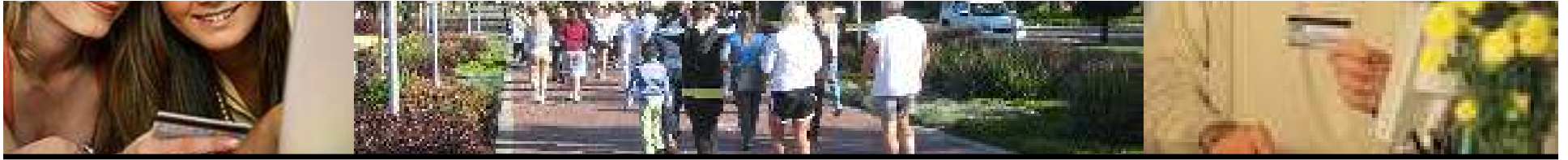
**Are you PCI compliant?** Payment Card Industry (PCI) compliance is a set of security standards that any company that accepts, processes or stores credit card information MUST demonstrate.

**Do you have a secure facility and organizational safeguards to otherwise protect the data you house from security breaches?** Ask for a list of the company's safeguards.

**Have you established a privacy policy based on the principles set out in PIPEDA?** All organizations dealing with personal information need to abide by both federal and provincial privacy laws. Ask the vendor to share what their privacy strategy consists of.

**Do you have dedicated resources to uphold and enforce the policies and practices laid out in your privacy compliance strategy?** Ongoing research and monitoring is needed to comply with the privacy regulatory landscape.

**Do you have expertise in permission-based marketing?** Ask for a summary of the typical permissions structure they advise their Clients to use.



## Step 9: Pick an Online Solution That's Tailored to Your Size

- Use this list of questions as a starting point to evaluate the solutions you are considering, in order to find the right solution for your organization size:

### **What is your solution training program?**

How many hours are included?

Is training provided free of charge?

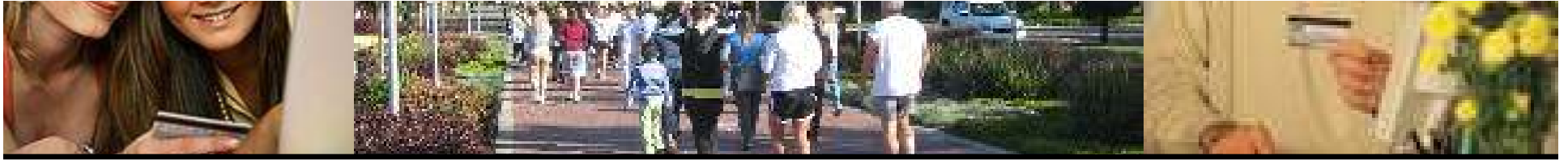
Do you have training facilities at your location?

How many staff would be trained free of charge, and would any new staff be trained?

Do you have an updated training manual?

**How flexible are your modules to accommodate our branding needs easily?** Ask for an interactive demonstration of event site page creation, including inserting logos, etc.

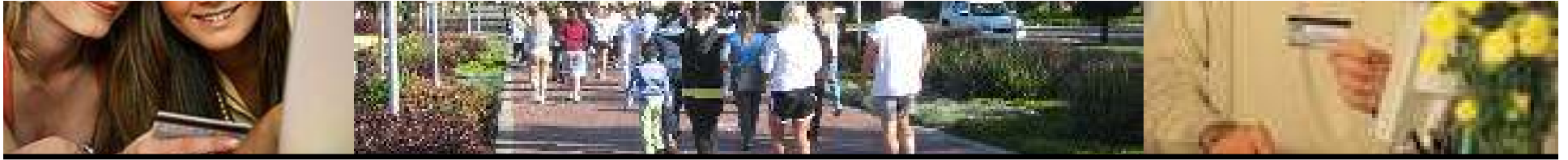
**Will your account service staff consult us on campaign/event planning, and facilitate planning sessions?** Checking that your vendor's staff will provide the support and expertise you need to execute an online event solution will ensure you have help in avoiding online fulfillment issues and other software problems.



## Step 10: Understand and Plan for Future Growth

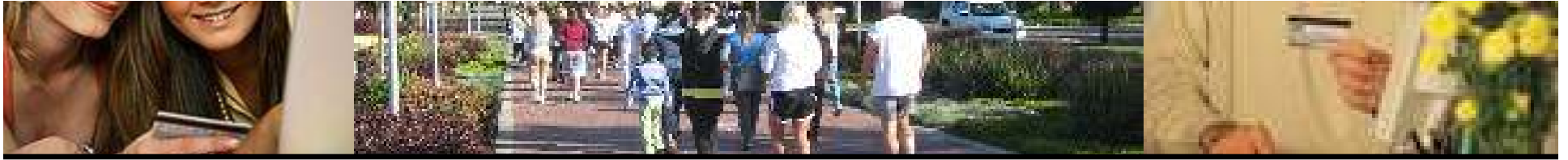
$$\begin{matrix} \# \text{ of} \\ \text{participants} \end{matrix} \times \begin{matrix} \% \text{ who} \\ \text{fundraise} \end{matrix} \times \begin{matrix} \# \text{ of people} \\ \text{they ask} \end{matrix} \times \begin{matrix} \% \text{ who} \\ \text{give} \end{matrix} \times \begin{matrix} \text{avg. gift /} \\ \text{sponsor} \end{matrix}$$

- Focus on the primary growth lever: the percentage of participants who fundraise
- During your post mortem and future planning sessions, refer to this formula to keep your stakeholder team on target:
  - Who and how many participants am I targeting?
  - What action am I asking them to take?
- Remember the rule of thumb of fundraising events: people give to people, not necessarily to a cause, so you need to:
  - Stay current with the needs and desires of your various audiences
  - Tweak your event location and theme to align with those needs



## Once Again.... A Summary of Our Top 10 Steps to Better ROI on Your Online Campaigns

1. Get the online component of your event's cost-balance formula right
2. Put in place the right metrics to capture your results
3. Know your constituents online needs and wants
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**It's never been a better time to take your fundraising efforts online. We would welcome the opportunity to discuss your online fundraising needs further!**

Contact Cornerstone, the leading Canadian provider of fundraising outsource services today!

Karen Webber

Cornerstone Fundraising Services

[kwebber@cstonecanada.com](mailto:kwebber@cstonecanada.com)

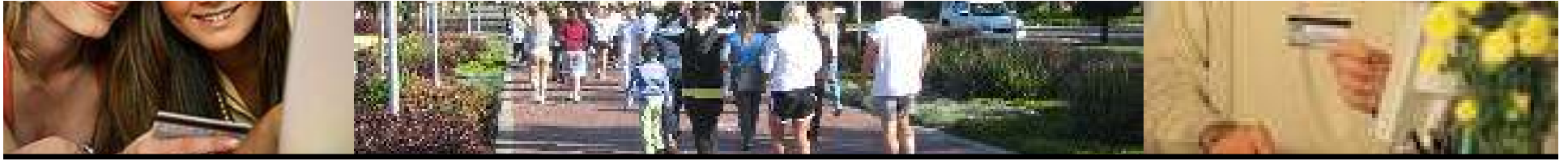
Across Canada: 1-888-755-7780, Ext. 310

In the GTA: 416-932-9555, Ext. 310



**Read on to view some of our Client success stories...!**



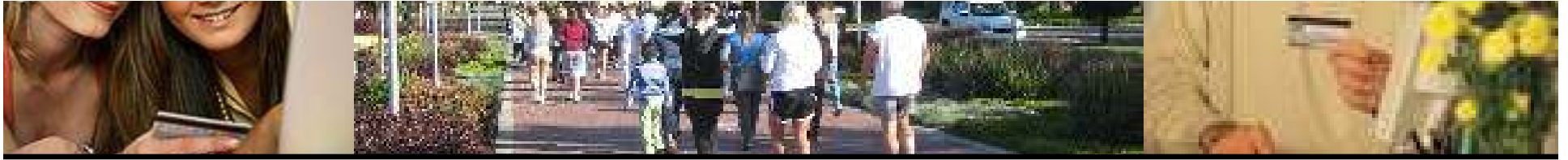


## Client Success Stories – Cornerstone Online Event Solution

“The Canadian Cystic Fibrosis Foundation’s 2007 Great Strides™ walk was an outstanding success. ***In our 3rd year, the campaign exceeded our objectives, raising over \$1 million to fuel the Foundation’s life-saving research and treatment programs.*** A large component of this year’s incredible achievement can be attributed to the implementation of the Cornerstone event module. The turnkey system was user-friendly from both a participant and donor perspective. Automatic tax-receipting and system “snapshot” reports eased event administration. Of course, Cornerstone’s support personnel provided quick turnaround, addressing any questions or concerns from our event team. With all these factors in play, ***our online donations increased by more than 155% over the previous year!*** Results speak volumes and the Foundation is proud [to have] selected the Cornerstone solution as a critical component of the Great Strides™ campaign.”

- Chris Pon, Associate Director of Development,  
Canadian Cystic Fibrosis Foundation





## Client Success Stories – Cornerstone Online Event Solution

“Moving an event to the next level can be a challenging feat given the competitive marketplace, investment of resources and potential risks involved. With this in mind, we approached Cornerstone to help us move our Hike for Hospice event to the next stage in its development. Moving online allowed us to offer the same features as many larger charities and helped us reduce the impact and workload on our backend at the office. They worked with us and other hospices to provide a service that made the best use of the dollars we had to invest and laid a plan to mitigate risks. ***We increased our event revenue by 40% our first year and have received numerous compliments from those that used the online system.*** We are looking forward to our second year in 2008.”

- Graham Hill, Manager, Resource Development,  
The Dorothy Ley Hospice