

Digital Fundraising
Donor Engagement & Cultivation Guide

July 2015

#### Introduction

Donors are the lifeblood of your PBS station!

We think that makes YOU a very special person. Why? Because you are reading this Guide, we're guessing you are probably responsible for finding new people in your service area to watch your programming, come to local events and – yes – donate to support your station.

Let's face it. If not for people like you who help raise money for public television, civilization as we know it, would cease to exist. Just think:

Without *This Old House*, great old houses would crumble to dust – and be replaced with yet another cookie cutter McMansion (plus no one outside of the '01234' zip code would understand a Boston accent).

Without *Masterpiece Theater*, no one would know to change their alarm settings for the impending Monday morning, causing mass unemployment due to firings.

Without **Downton Abbey**, those who didn't lose their jobs would be forced to actually discuss work around the water cooler, rather than Monday morning quarterbacking around plot twists and turns.

Seriously, without you, our world would suffer from a loss of the unique role that public television plays in providing news, cultural offerings and quality educational programs to all. So, we're here to help you save civilization by providing you with great prospects for your Digital Engagement program. In addition, this Donor Engagement and Cultivation Guide gives you proven tools and techniques to welcome those new constituents to your online community, educate them about the impact your station has on their lives and in their community and engage them to support your work.

PBS conducts a number of programs that inspire people to sign up to receive information from their local station, from eNewsletter signups on our website, to social media surveys and quizzes, to partnerships with National companies.

#### How to Use this Guide

In this Guide, you'll learn how to:

- Build Your Email List through Search
   Engine Optimization (SEO), Search
   Engine Marketing (SEM) and other proven
   techniques
- <u>Evaluate Your Website</u> of for how well it helps you acquire, cultivate and engage donors
- Access High Quality Prospects through PBS digital properties, e.g. OTT, PBS.org, etc.
- Benchmark your digital performance against other stations, gaining valuable intelligence on the best places to spend your time and make the case for investment
- Effectively Use Email to welcome new constituents and bond them to your station
- <u>Seamlessly Integrate</u> those new constituents into your annual fundraising program

You will also be able to:

- Quickly Download Names ② from the Prospect Portal into your own station database
- Learn more from your peers about great ideas you can utilize for your own program
- Easily access email <u>Welcome Message</u>
   <u>Templates</u> to customize for your own program
- Peruse Our FAQs 🗗



#### **Public Television Benchmark**

How do you build warm prospects?

Across small and large stations, the total email file size grew 11% in 2014 over 2013.

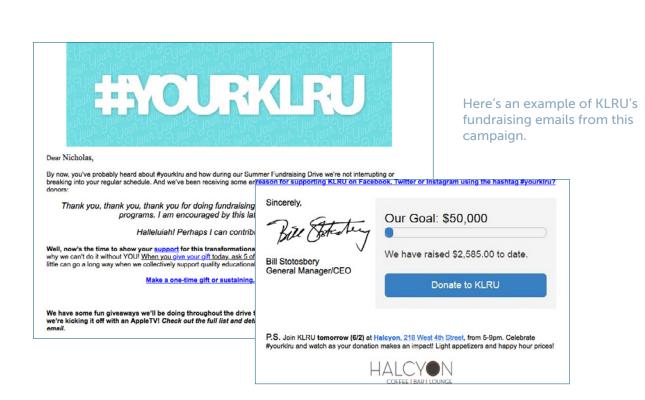
Larger stations have more than a 4-to-1 advantage of number of total emails on file compared to their smaller station counterparts, in part due to more aggressive acquisition campaigns.

**Download the Public Television Benchmarks (5)** 

# Station Success Stories: KLRU Cancels June On-Air Pledge Drive for Online Campaign and Raises \$92k

KLRU launched an unprecedented Summer Fundraising campaign this past June by embarking on a 5-day online giving drive, instead of the traditional 10 day on-air pledge drive. This meant not interrupting the regular schedule and breaking into favorite shows to ask for support. KLRU used special peer-to-peer fundraising tools and leveraged social, #yourklru, to engage audiences. A KRLU supporter summed it up the best, "Thank you, thank you, thank you for doing fundraising without interrupting our regular favorite programs. I am encouraged by this latest move on your part. Halleluiah! Perhaps I can contribute more this year!"

Read More on KLRU's Blog €



Growing Your Email List

#### Growing Your Email List with SEO, SEM and Sharing

The best place to start building your email list is on your own website. While not every station will have budgets for Banner Ads, Retargeting or other Search Engine Marketing (SEM) programs, there are still ways easy ways to ensure that your site is being found by good prospects:

- Promote your URL at offline events:

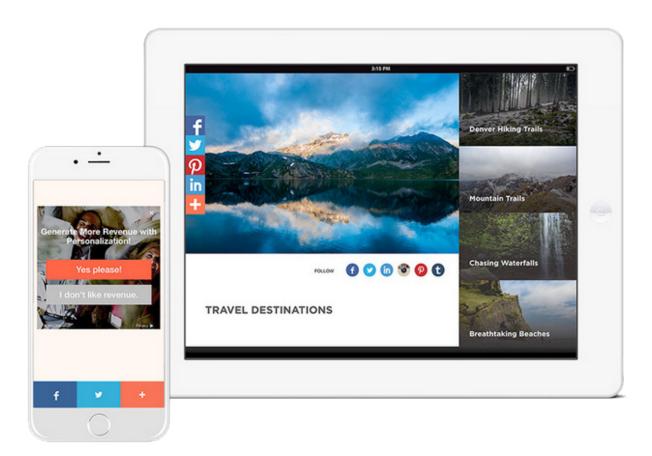
   a simple signup sheet at Community
   events, or a fishbowl where people can
   deposit their business card is a great way
   to collect email addresses. Add them to
   your database within 48 hours to take
   advantage of the excitement your event
   generated
- Make sure that your URL is visible on all your offline materials, especially the bottom third of on-air promotion
- Ensure that you can be found through "Organic Search"
   Check out these easy tips •

- After you have maximized SEM, consider 'Paid Search.' Paid Search moves your message to the top of search results.
   Check out <u>Google Grants</u> of for non profit for "free" paid Search
- Develop relationships with local bloggers to write about your events or review and promote your local programming
- Invite web visitors and email readers to share your content with others using web sharing tools, <u>Gigya</u> •
- Consider Facebook Marketing Facebook Ads, Sponsored Posts or their newest tool, "Signup" <u>Call to Action Button</u> • in the header navigation





Some marketing and fundraising platforms have built in sharing tools to make it easier for donors to promote your station.



Tools like 'Add This' allow you to make it easy to encourage others to share your content.

#### Making Your Website Donor Friendly

You've invested a lot in your website. But how well is it serving your engagement and fundraising goals? Take a good long look at your website and make sure that you are balancing your programming information with "donor-centric" information and activities.

What do we mean by making your website donor-friendly? It's pretty simple – take a look at your website and answer these questions:

- How easy is it for a current or potential donor to find a clear description of my station's goals and objectives?
- How easy is it for them to find information on how donations are used?
- How easy is it for them to find stories about the impact of support in their local community?
- How easy is it for them to find a way to donate or sign up to receive emails?

- Once a donor finds a way to donate, how many clicks does it take for them to complete their online donation?
- How easy is it for them to find a way to contact us – and not just via an email 'form,' but via phone or snail mail?
- How easy is it for a donor to update their mailing information and change what emails they are receiving?

#### Is Your Website Donor Friendly?

WETA's Mission Page does a great job of explaining their mission and making it easy to donate and sign up. Check out this site and some other great examples:

**WETA Mission Page ②** 

**WNET Privacy Policy** •

**WGBH Contact Page** •

**CET Email Signup ⑤** 

Sign Up for WETA Highlights

Enter email address

SUBMIT

Already subscribed? Log in now --

**KLRN Support Page Video and Info** 

# Station Success Stories: KLRN Reinvents Their Online Giving Experience

KLRN knows a lot about their supporters, but was unsure why three out of four prospective donors abandoned their donation form. Following a series of A/B tests on their donation funnel, KLRN launched a specialized Program and Thank-You Gift App. The multi-faceted application, with no home page, used filters to surface various pages for different giving purposes. Over a three week period, pledge and other donations through website forms increased 20% compared to the same period last year (despite slight overall decrease in donations). The donation funnel also converted at 32% compared to 26% last year.

#### **Learn more ②**





## The PBS Audience:

Demographics of Email Names Available through Lead Sourced Names

#### What's in a Name?

#### **Great Prospects are Waiting to Hear from You!**

While we'd all love for EVERYONE to support Public Television, we know that certain members of our community are more likely to support your station than others. To that end, "localization" across platforms is designed to connect your audience to the programs – and station – they love (and sign up to receive emails from you!)



PBS viewers value how your station's educational programming allows them to easily experience Sesame Street and other great kids' shows with their children.

When a viewer creates an account through the COVE player, they are able to manage videos in their Watchlist, keep track of their favorite shows, and watch PBS in high definition. The forced localization on certain platforms also allows for PBS to collect email prospects and share it with your station for donor cultivation. For example, over-the-top (OTT) invites people who sign up to stream content through devices such as ROKU, Apple TV and Xbox to opt-in and receive emails from their local station. This ensures that you are reaching people who love your content and actually want to hear from you.

Since PBS started to collect prospective donor information on behalf of stations, 3.5MM names have been provided for stations to download, cultivate, and engage locally.

The individuals who have shared their email through the OTT program have chosen your station as their PBS provider and have opted in to receive communications from you. This means they will see your local brand on any communications they receive from PBS and they can't wait to hear from you!

But what else do we know about these folks? Actually, quite a lot. Through a recent analysis of the 1.2MM names, PBS has learned they are:

- Younger than many potential donor lists, with 21% in the coveted 31-40 year old age range. Here is your opportunity to build a strong ties with these constituents while they are still developing relationships with nonprofits they would like to support
- More likely to be working Moms of preschool and grade school children, who appreciate your educational programming
- They love the performing arts, world news and politics and gourmet cooking. Wait, there's a show for that, isn't there?
- Finally, these folks have higher than average amount of disposal income, which they are likely to spend on home improvement, consumer electronics AND on supporting good causes like yours
- Want to know more? Please contact
   pbsi\_stationservices@pbs.org •



PBS viewers LOVE the Performing Arts. We know they will love you too!

# Station Success Stories: PBS Digital Properties are Source of New Donors for KQED

PBS Digital and Development Services partnered with local stations to leverage the millions of unique visitors to PBS.org for station financial sustainability last December. The goal was to drive a higher number of prospective donors to station donation forms through holiday-themed banners on COVE video portals and a targeted lightbox on PBS.org. KQED found that donations from PBS during the campaign amounted to approximately 10% of all "generic non-pledge online giving" for the month of December and that PBS.org can be a source of new acquisition for stations while KQED.org tends to work more effectively as a driver of additional and return gift. Learn more  $\Theta$ 

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## Making the Case:

Using Benchmark Data to Make the Case for Growing your Program

#### **Investing in Digital**

#### Using Benchmark Data to Make the Case

In the early, heady days of digital marketing, we lived in a "If you build it, they will come" world. Organizations put up a website and constituents came – and donated – in droves.

Annual double digit increases in revenue were commonplace, often with no dedicated staff or investment.

Those days are gone, and – as in direct mail and other acquisition programs – continued revenue growth depends on a strong name acquisition program combined with a smart cultivation and engagement strategy. Yet some organizations are still clinging to those 'good old days' and assuming that they don't need to invest in acquiring new email addresses.

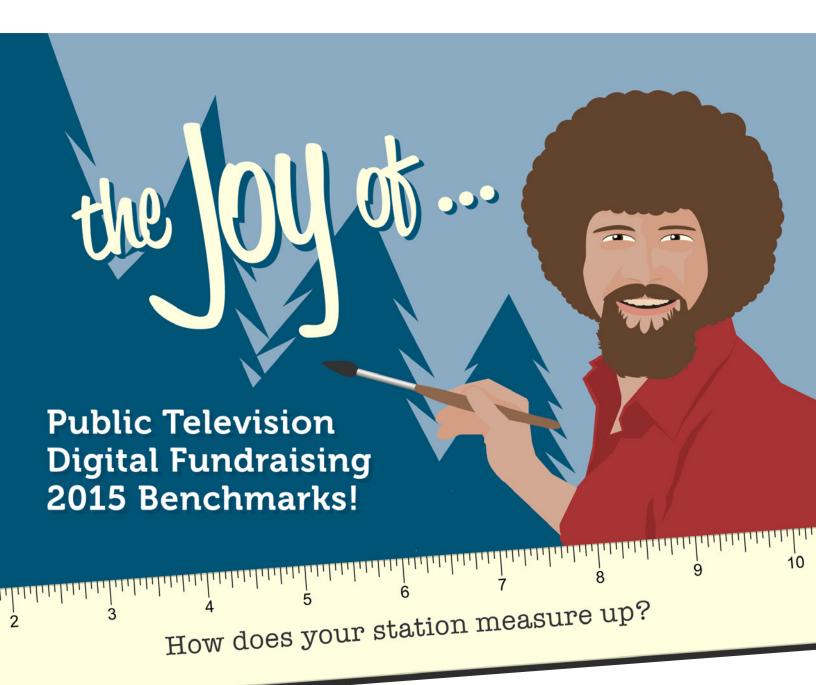
They good news is that – thanks to PBS digital properties' name acquisition efforts – you can add good quality email addresses to your database easily at no cost. But we won't insult your intelligence and say that it won't require work – and maybe some investment – to capitalize on this great opportunity.

So how do you convince the powers that be to make digital fundraising more of a priority at your station? To paraphrase a non-PBS show, "show them the money" by sharing benchmarks – directional guidance – from other PBS stations to prove how an investment of staff time and resources, can really pay off.

PBS partnered with Blackbaud to look at the state of digital marketing and fundraising for a segment of our station community. Data from 25 stations who have used **Luminate Online**Marketing of for a minimum of three years was analyzed. Albeit a small number of stations, these 25 stations represent the largest number of stations on a single CRM platform. The data represents more than \$16 million in total online revenue, 330k in total number of gifts, 3.4 million usable emails, and 180 million total emails sent.

The resulting report is a great resource to check your own progress in digital marketing and fundraising – and brag to your bosses where you are excelling and be inspired to try new things to increase your performance in areas where other stations are seeing growth.

See all the numbers by downloading the full benchmark report 🗗



### Meet Your Newest Constituents:

Downloading OTT and other Lead Sourced Names from PBS and integrating them into your engagement and fundraising efforts

## Ready, Set, Go!

V	Use your <b>PBS Acquisition Checklist</b> to make sure you are ready to welcome your newest supporters.
	Make sure you've got access to the Prospect Portal! If no one in your organization has login credentials for the Prospect Portal, or you're not sure who that is, email pbsi_stationservices@pbs.org ♥ to request access.  Already registered? Access the Prospect Portal today ♥
	Decide how you are going to keep track of these new names. Prospect Portal generates emails through a variety of sources. Each email comes with a Lead Source – Most Recent field, which lets you know how the name came into the system. There is a spreadsheet on the Prospect Portal that details what each Lead Source refers to and what, if any, communications they are receiving from PBS.  Lead Source codes can help you customize communications, reminding OTT subscribers about your video on demand or promoting children's events to parents. Even if you're not prepared to segment your communications just yet, plan for it now!
	Identify existing supporters on your new names and treat them accordingly. Few things annoy a donor more than not being recognized by an organization they support. Run a "merge/purge" using the email address field to identify duplicates and exclude them from your Welcome Series.  Keep in mind that this is not a foolproof method for identifying supporters, since people use multiple email addresses. Consider eyeballing the data to look for big donors' names and be prepared to respond quickly to people who let you know they are already members.
	Be ready to welcome your new constituents. New email addresses have a limited half-life. The longer you wait to welcome them and given them opportunities to engage with you, the less responsive they will be to your fundraising requests.  Not to worry, Check out our sample 3-notice Welcome Series • in this Guide, and then download our templates, customize them for your station and get started.

# Station Success Stories: EIGHT, Arizona PBS Uses Multichannel Marketing to Exceed Revenue Goal

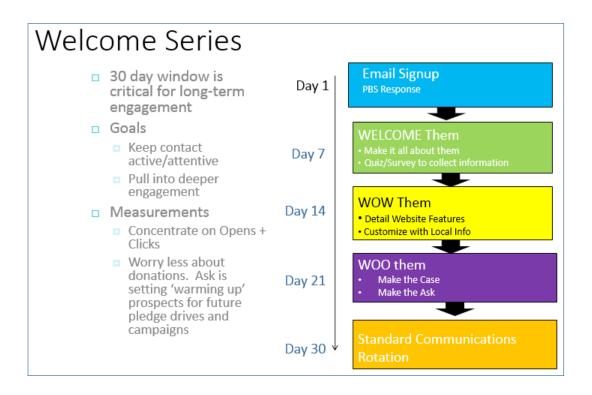
EIGHT, Arizona PBS took the Newman's Own Foundation grant, and split it up into two fully integrated matching gift campaigns — a \$50,000 New Member Match and a \$50,000 Hometown Sustainer Challenge starting in August. They used all available channels for this campaign, and because it was a limited time offer, could create buzz around it. By end of campaign, EIGHT, Arizona PBS increased gifts by 18% over March last year and revenue by 37%.



#### **Welcoming Your New Constituents**

A Welcome Series is a group of emails sent to a new constituent immediately after they are added to your station's email housefile. If your CRM and email system support "Trigger Campaigns" you can set up a Welcome Series to run automatically. Since one of the keys to engagement is to QUICKLY contact new names, an automatic Welcome Series (rather than having to do a manual send and keep track of who is due to get what message) will help you minimize administrative time and allow you to concentrate on other ways to engage these new constituents.

If your email system does not support trigger-based communications, consider a recurring schedule (preferably weekly) of manual email sends to welcome new supporters to your online community. This will help to transition your supporters into your station's regular email schedule. Don't forget to exclude existing supporters from those receiving Welcome Series messaging. These constituents can stay in their current messaging track. Here is a suggested cadence and strategy for your station's Welcome Series:



Next we'll show you a sample Welcome Series, customized for a particular station. If you like what you see, **download our customizable templates** • and make them your own.

#### Sender Address: Your standard institutional address **Subject Line: Welcome to KLRU**

Make sure you have your Station Call Letters in the "From" line.

Keep your Subject Lines short and direct. (Remember, lots of the folks will be reading these on their phone!)

#### Welcome Email #1



Personalize the salutation.

Dear [First Name/Friend],

Reference how you got their name.

Thank you for downloading the PBS channel on your Roku. Now, in addition to awardwinning national programs, you also have access to special local programming from KLRU – YOUR public television station showcasing community events, educational initiatives and the diverse culture and interests in Austin and across Central Texas.

#### Your inbox just got an upgrade...

We are thrilled to officially welcome you as the newest member of the KLRU online community. Look for your weekly email program guide soon, which will keep you in the know on upcoming programs and community events.

#### Let us get to know you better...

Everyone loves KLRU for their own special reason. In order to provide you more of what you love, we created the PBS Personality Quiz. Your answers to this fast, fun, online quiz will help customize your online experience, so take five minutes and tell us a little more about you.

The KLRU Team

P.S. When you signed up for PBS channel on Roku, you indicated your interest in receiving emails from PBS. We know that our weekly email Program guide and other information will add value to your viewing experience, but if you need to change your email preferences << Insert your process for unsubscribing or changing email info here,>>

Depending on how quickly you send these out, they may already be receiving co-branded eNews, so adjust copy accordingly to reference great local info they will be receiving.

People love to share information about themselves. Take advantage of this great PBS Quiz. There is easy code in the downloadable template to make it easy to put on your website.

Emails can come from an individual or the entire "team."

an email. Use it to remind people that they asked to hear from you and offer them an 'out' if they've changed

P.S. is one of the most read parts of

their mind.

Footer information and Social Sharing buttons



Put meaningful info in your footer (including web address, snail mail and phone contact information, links to email preferences). Don't hesitate to put a Donate link as well. People need to be educated that donating is a great way to be part of your community.

## Sender Address: Your standard institutional address Subject Line: Inside - Special benefits for PBS Insiders

#### Welcome Email #2



[First Name/friend] - Thanks for joining KLRU through your Roku!

Now that you are a member of our online community, you are a PBS Insider. When you visit our website <u>KLRU.org</u> you will be able to:

- · Program schedules and sneak peeks at upcoming national and local shows
- · News about fun events and performances happening in your neighborhood
- · Interactive quizzes and games, and a special
- Taping announcements to be part of our studio audience for your favorite local programs like, Overheard with Evan Smith and Civic Summit

In addition, you can sign in with your email, Facebook or Google+, create a Watchlist, keep track of your favorite shows and watch PBS in high-definition. It's a great way to enjoy on-demand viewing of documentaries and shows that already make us your go-to channel on your Roku.

From the latest hit series to many full-length episodes, we offer thousands of shows for you to enjoy whenever and wherever works for you. Check it out!

Happy watching and reading!

The KLRU Team

Footer information and Social Sharing buttons



## Sender Address: Your standard institutional address Subject Line: Dolores, help us bring the world to central Texas

Personalizing subject line with 1st name increases open rate. (Note: Don't over use this tactic!)

#### Welcome Email #3



[First Name/friend] – We hope you're enjoying your favorite PBS shows on your Roku and finding great stories and news at KLRU.org.

Each week, KLRU reaches more than 500,000 people and delivers more than 35,000 hours of programming. It's only because of our donors and supporters that, PBS and KLRU are able to provide the national and local programming that educates, entertains and inspires adults and children in the Greater Austin area and beyond.

Help support your favorite programs by <u>making a generous online donation today</u>. Your support allows KLRU to bring PBS favorites to Central Texas – and so much more.

[DONATE BUTTON]

Thank you for your consideration.

The KLRU Team

P.S. KLRU is community-supported: 85% of our annual funding comes from individual donors, foundation and corporations. Please join your neighbors in supporting KLRU today with your <u>online donation today</u>.

Don't be afraid to be direct. Clearly ask for a donation in the text and with a graphic 'call out' button.

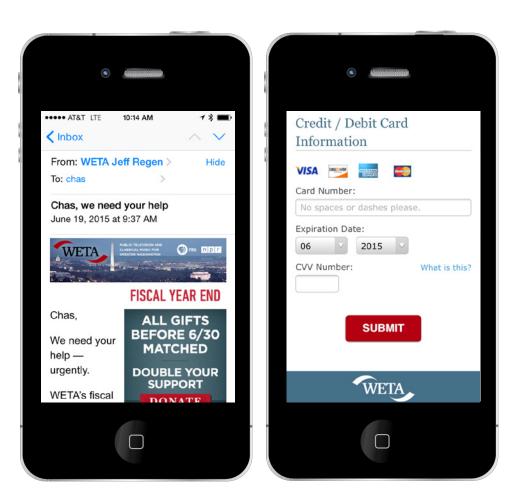
Most people are unaware of how much donor support makes a difference. Use the PS to let them know using your statistics.

Footer information and Social Sharing buttons



#### A Few Other Things to Keep in Mind about Welcome Series:

- Keep the copy general enough to work for different Lead Sources, but if your email program allows, make customizations to remind people how they joined your list.
- Resist the urge to tell new constituents everything about your station. Concentrate on a few
  key points and one strong engagement action that will make them want to come back for
  more.
- Exclude people from other promotions (except for eNewsletters going from PBS). And yes, that includes Pledge Drive fundraising emails. Remember, you are in this relationship for the long haul!
- Invest in making your Welcome Series -- and as many of your emails and donation forms as possible -- mobile friendly or even "responsive." Mobile readership of emails is approaching 50% for nonprofits, so try not to make your readers work too hard to read your messages. Look at one of your emails on your phone and if you don't like what you see, check out below how WETA created a "responsive" email and donation form template to make their emails more accessible for all their supporters.

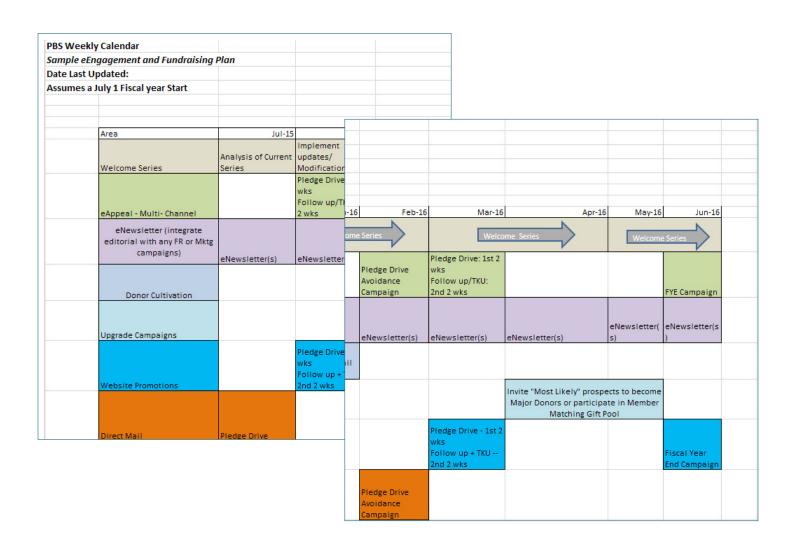


# Integrating Your New Constituents into Your Program

After you have welcomed people to your station, it's time to start integrating them into your ongoing communications. We've created a starter **Engagement and Fundraising Monthly Plan** on Excel that you can download and customize.

#### A few thoughts about integrating names:

- It's best to download OTT and other names weekly, but if you can't make sure you do
  downloads before major Pledge Drives allowing ample time to welcome constituents before
  fundraising begins.
- Make your plan Multi-Channel, including Website Marketing, Social Media and Direct Mail to reinforce that all your efforts are providing consistent messaging to constituents.
- Social Media should support your fundraising but not dominate it. This channel works best for engagement rather than fundraising.



# FAQ

# Donor Engagement & Cultivation Guide Frequently Asked Questions

#### **Questions about Prospect Portal Names**

#### How do I get email addresses that are associated with my station?

The email addresses are loaded into a secure station cloud-based portal (Prospect Portal). Email <a href="mailto:pbsi\_stationservices@pbs.org">pbsi\_stationservices@pbs.org</a> to request login credentials.

#### How are email addresses Generated?

Prosper has been generating emails through a variety of sources, including over-the-top (OTT) systems like Roku, Apply TV, and Xbox, newsletter sign ups and quizzes. Each email comes with a Lead Source – Most Recent field, which specifies how the contact came into our system. There is a spreadsheet on the Prospect Portal that details what each Lead Source refers to and what, if any, communications they are receiving from PBS

#### What do we know about the emails/names?

The individuals who have shared their email have chosen your station as their PBS provider and opted-in to receive communication from their local station. This means they will see your local brand on any communications they receive from PBS. By surveying these constituents and tracking what content they click on in emails and on your website, you can gain a better understanding of the individual's engagement with programs, content and newsletter preferences.

#### What communications do individuals receive?

The excel spreadsheet in the Prospect Portal details the communications that the contacts have received based on their Lead Source. All of these communications include your station branding. If you would like a sample of any of these communications, you can request them from pbsi\_stationservices@pbs.org.

#### How can I tell if these email addresses are from current members/donors?

The quickest way is to run a "merge/purge" using the email address field to identify duplicates and exclude them from your Welcome Series. Keep in mind that this is not a foolproof method for identifying supporters, since people use multiple email addresses. Consider eyeballing the data to look for big donors' names and be prepared to respond quickly to people who let you know they are already members.

#### How soon can I include these names in email fundraising?

Constituents should not be included in ongoing fundraising until they have been properly welcomed through a Welcome Series or some other orientation. It's a good idea to track these names (and all your new names) by their Lead Source Codes and evaluate how well they do in fundraising. That way you can focus your energies on the sources that are most productive for your station.

#### What if I don't have an email service provider?

Contact <a href="mailto:pbsi\_stationservices@pbs.org">pbsi\_stationservices@pbs.org</a>.

#### Questions about Fundraising

#### When is the best time to ask for money via an email campaign?

Most nonprofits do 3-4 fundraising campaigns per year. Your first priority should be to use email to support your overall on-air pledge campaigns. In addition to those campaigns consider the following:

- Year End Campaign: December 30th and 31st: While you may have just completed a
  December Campaign, invite all prospects, donors, and members to make a special taxdeductible gift, as these are the single largest days of giving in the year.
- Fiscal Year End Campaign: While not as compelling as a Calendar Year End Campaign, you may be able to make a compelling case at fiscal year-end, especially if you have Matching Grant that will help donors gifts go twice as far.
- An Ask in Association with a "Tax Receipt": A tax receipt is a powerful cultivation and fundraising tool. For some organizations, a simple ask added on to the bottom of a direct mail and/or email receipt has become their most successful fundraising campaign.

- Cancel a Pledge Week Campaign: Several stations have had success with an email campaign
  that sets a specific fundraising goal. If that goal is reached, the station can cancel part or all
  of a Pledge week.
- A 'program specific' appeal: If you do feel you need another campaign, consider an appeal about a very specific project where you can show impact in the community.

#### How should I thank email donors?

Donors should be thanked immediately. Most website tools allow you to pre-enter thank you copy for both a "landing page" on your website and a thank you email that is sent immediately after a gift is made. Take the time to rewrite the "canned" copy provided in web tools to a message that is specific to your mission and to the appeal that generated the gift. And take the time to vary the copy that donors see on the landing page and in the thank you emails. For example on the landing page, ask donors to share that they donated on social media.

#### Can I ask for gifts in my eNewsletter?

You need to strike a very careful balance between content delivery and fundraising in your eNewsletter. It is completely appropriate to include a DONATE button in your email stationery. It is also appropriate to include a story or an ad during pledge campaigns and at fiscal/calendar year end.

#### Does email have a role to play with planned giving?

Absolutely! In fact, results from the inaugural Estate Planning Awareness Campaign found email generated the highest number of requests for information about planned giving. Remember these two good practices when planning your email campaign: 1. Don't leave folks out, send email to all records on file and 2. Use a standalone messaging template, to not dilute the ask. Lastly, consider a planned giving promotion spot in all of your eNewsletters to ensure maximum reach.



Visit **MyPBS.org/Development ②** for more information.