



Staffing for Success

Digital Fundraising in the Era of PBS Passport

MAY 2019

Research & Report by CAUSE CRAFT CONSULTING
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Executive Summary

PBS stations are moving unevenly into the digital fundraising future. The 2016 [Tale of Two Systems](#) report illustrated this growing divide among stations. The 2017 [Passport: Navigating a Sea Change in Fundraising study](#) charted how Passport has disrupted stations' approaches to engaging a new class of donors and viewers. Today, more than half of stations (56%) perceive Passport as a significant digital fundraising asset but another 44% have not yet experienced real results from Passport.

How can stations close the gap to successfully engage a new class of members as we approach 2020? This study analyzed 72 PBS stations to understand how different station profiles are building their internal capacity for digital fundraising success by modernizing their staffing models, workflows, and practices. Key findings include:

A Shared Definition of "Digital Fundraising" is Necessary to Achieve Collective Impact

Is digital fundraising separate from pledge? Does it include Passport? Or is it just the work done by someone with "digital fundraising" in their job title? The system needs a common definitional starting point, both within and between stations, in order to share strategies, align around goals, and understand the potential.

Member Stations Utilize a Range of Staffing Models to Meet Varying Objectives

Stations fall into four profiles for staffing digital fundraising, each with distinct advantages and risks. Understanding your station's current model can help to both implement critical success factors and determine if another model might work better for carrying out the work.

Passport has had Significant Impact on Staffing & Workflows

Forty-three percent of stations report that Passport has **increased collaboration** and exposed organizational silos. Stations that are seeing success with Passport have **reallocated time and money** and pursued new and **different digital hires**. At those stations, Passport has also brought increased staff and leadership buy-in for digital fundraising, including new executive champions.

Established Digital Fundraisers Further Multichannel Promotion, but Also Risk Isolation

Stations that have invested in one or more dedicated digital fundraising staff have been more effective at understanding

"Digital fundraising" refers to the integration of digital practices into fundraising, marketing, and member cultivation strategy, including:

- 1 a set of engagement platforms (eg web, email, social);
- 2 tools (CRMs, online forms); and
- 3 practices (rapid optimization, testing).

The four staffing profiles for digital fundraising include:

- 1 "All Hands on Deck"
- 2 Membership-Driven with Distributed Responsibility
- 3 Dedicated Digital Fundraisers
- 4 Shared Responsibility

"Passport has us thinking much more about how to leverage data and tailor content and services to meet consumer expectations. We are currently researching the possibility of outsourcing general membership so that we can focus on member experience, engaging specific donors, and increasing major gifts."

multichannel member behavior, setting goals, and running successful non-pledge campaigns. However, this also risks turning “digital fundraising” into “whatever thing our digital fundraising person does,” rather than a program and methodology that’s well understood by everyone at the station.

Digital Fundraising “Better” Practices Seed Innovation & Growth

Regardless of market, size, and overall operating budget, stations seeing the greatest digital fundraising success tend to implement the following six “better” practices.

- 1 Make Passport a full station initiative.
- 2 Don’t let digital fundraising become a silo.
- 3 Establish an ongoing Passport working group.
- 4 Institute a multichannel content and campaigns calendar.
- 5 Invest in training all relevant staff.
- 6 Hire a digital fundraising generalist (or specialist) when budget allows.

Disjointed Fundraising Technology Limits Success Across System

Stations are significantly hampered in their digital fundraising potential by inflexible, resource-intensive member-engagement software. Individual solutions sometimes work locally but struggle to scale for emerging requirements and to integrate with other solutions. Until the state of technology improves for the system as a whole, stations won’t be able to make the best use of staff time and expertise, nor offer the most engaging member experience.

Building a Culture of Learning is Critical to Digital Fundraising Success

When it comes to Passport, the strongest determinant of digital fundraising success is how well a station’s culture allows for taking calculated risks, embracing experimentation, and learning from failures. Station leadership, including middle management, will play a significant role in leading the way in this critical culture change.

“From an overarching perspective, our leadership respects and acknowledges the importance of my job. Practically speaking, there’s not a whole lot of interest from station leadership in what it takes to actually do effective digital fundraising or the impact on other priorities for us to take this on full-scale.”

“For Passport, we have provided cross-training to all staff that need a deep view, as well as an overall orientation to our entire staff. It’s part of our new employee orientation, and we set up each employee with their own Passport account so that they can be familiar with the service.”

“This debate always comes up: Should all stations be on the same thing? Should there be a national system or not? Every route has its advantages and disadvantages, but right now, we’re all at a disadvantage.”

“As a system, we’re well behind our peers in other sectors in collecting and using information about our audiences. We have to commit to understanding them better – without knowing exactly what the end game is or how our programs might evolve or change.”

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Introduction

For the past two decades, we (your humble researchers and strategists at Cause Craft Consulting) have had the privilege of helping nonprofit organizations come into their own in the digital age. We've also watched from the sidelines as for-profit media organizations have pioneered new, digital-first content approaches, while big businesses have set ever-higher expectations for personalized customer experience.

At the same time, we've watched those organizations whose missions lie at the crossroads of content delivery and community engagement struggle to modernize not just their content services but their entire approach to member fundraising and engagement.

PBS stations exist at this very crossroads. The PBS system now faces the charge of pursuing a new class of donors and members, in service of long-term station sustainability. With the advent of Passport, donor behavior has become inextricably linked to viewer expectations for rich, engaging content and meaningful experiences. Donors and members desire from their PBS station the same level of member experience they're accustomed to receiving from those for-profit media and corporate entities.

Behind the scenes at stations, this is requiring a (sometimes exhausting) openness to new ways of thinking and working. It necessitates constant exploration of new **digital strategies** and **technologies**, not to mention actively steering **station cultures** to become more dynamic and nimble.

With Passport now offering both significant new revenue opportunities and workload challenges, we believe that stations need to focus on the **staff** and **processes** that are critical to achieving fundraising growth. As one participant in this study put it,

“ As a system, we're still staffed for the past and not the future. We are not yet prepared, and we don't have the resources to do all of this new fundraising work on our own.”

The Research

So we set out to explore how digital fundraising work gets done at stations: who does it, how these roles are changing, and which success factors must be present for station staff to succeed in growing their membership, with particular attention to how Passport has affected both workflow and staffing needs. We sought to understand how PBS stations are staffing for digital fundraising success: what's already working well; how stations are struggling to get the capacity they need to conduct digital fundraising and Passport activities; and ways that staffing models might evolve over the next 3-5 years.

Our research process covered 45% of the PBS system, with careful attention to achieving balanced perspectives across station size (from very small to very large), licensee types, and region (from urban to frontier, including border stations). We collected station staffing artifacts such as organization charts and workflow diagrams; surveyed 72 stations via GMs, the marketing, development, and digital advisory councils, the Passport Station User Group, and the Passport Point of Contact group; and conducted in-depth interviews with staff at 20 stations, including fundraisers, marketers, content and education staff, digital directors, and station leadership.

Here's what we found.

Toward a Common Definition of Digital Fundraising

When you ask stations about their approach to digital fundraising, a consistent theme emerges: It can be difficult to talk about digital fundraising because stations and the system as a whole lack a consistent, shared definition of the term.

Is digital fundraising separate from pledge? Does it include Passport? Is it simply any revenue that comes through the website, social media, email or digital ads? What about online gifts associated with direct mail campaigns? Or are we really talking about the work done by someone with “digital fundraising” in their job title (for those stations that are fortunate to have a dedicated person or team)?

While each station must necessarily determine their own audience targets, business rules, and strategy, having a common definition can provide a shared starting point for learning and idea-swapping across the system. It can also support efforts to advance digital fundraising strategy within a station.

We propose the following common definition as a place to begin talking about digital fundraising:

Digital fundraising refers to the integration of digital practices into fundraising, marketing, and member cultivation strategy, including:

- a set of **engagement platforms** (such as the web, email, social media, and online ads);
- **tools** (such as CRMs, online donation forms, and email software); and
- **best practices** (data-driven analysis, testing, and rapid optimization).

Much like digital-first content delivery, digital fundraising is an approach and a function, rather than an activity performed by one person alone - even individuals with “digital fundraising” in their title. It’s necessarily a component of pledge and a complement to direct mail campaigns - even when gifts made online aren’t sourced to digital. Digital fundraising’s current success is intimately tied to Passport - the system’s best example of how digital content, marketing and fundraising can be combined into a single offering. And digital fundraising rarely stands alone independent of other channels: Its success is interdependent with the performance of other giving methods and platforms.

Above all, digital fundraising offers a new set of approaches for gathering data, rapid campaign optimization, marketing automation, and tailoring communications to members’ needs and interests. Digital fundraising is not a strategy in itself, but an agile, learning-based approach to refining member engagement strategy according to a station’s unique audiences.

“Digital fundraising is not something that anybody has really figured out yet.”

“We possibly could change our approach to staffing, but the definition of ‘digital’ is not clear and the same across our station.”

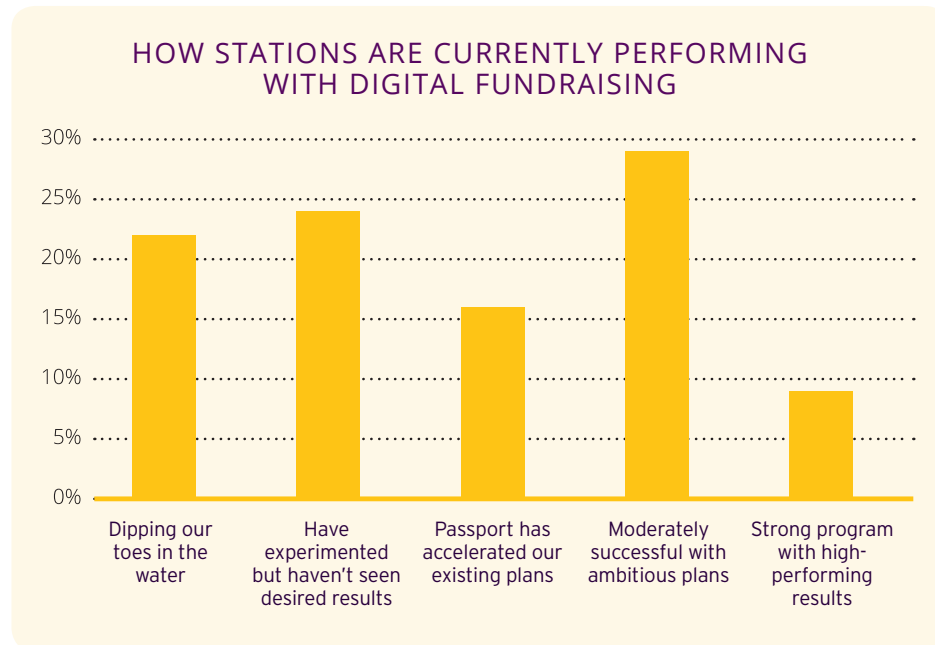
“It has been such a struggle to define what ‘digital strategy’ means to us. It’s not a one-size-fits-all, because of how unique our audience is. Any definition ultimately has to be multi-dimensional per channel and per market segment.”

Current Staffing Models & Emergent Trends

Overview

When it comes to digital fundraising, 40% of stations report that they are already seeing significant success, with 54% citing Passport as an accelerator for their digital fundraising results.

However, almost half of stations self-report that they're still in the early days of digital fundraising, either just getting started or not yet seeing desired results.



Who is Doing the Digital Fundraising Work Today?

While a small fraction of stations fully outsource their digital fundraising, most stations either conduct these activities in-house or utilize a mix of in-house staff and outside vendors.

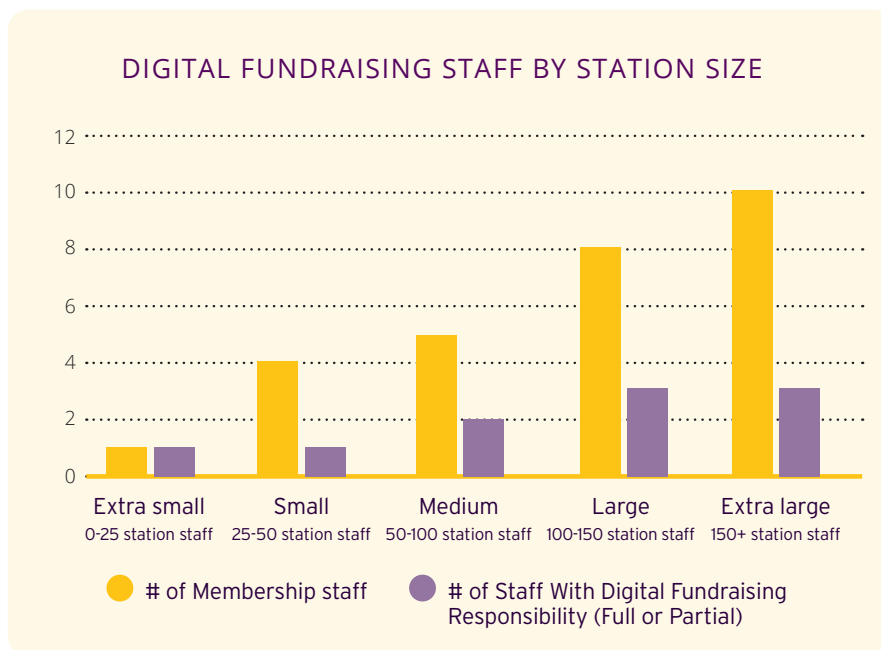
Partially Outsourced

Stations that partially outsource their digital fundraising most commonly seek outside assistance for:

- 1 **Digital components** tied to direct mail campaigns
- 2 **Recurring member-lifecycle emails** (e.g. renewals and lapses)
- 3 **Digital ads** (e.g. Google AdWords and social advertising)
- 4 **Regularly recurring campaigns** (such as #GivingTuesday and End of Year)

In-House Staff

Predictably, the number of in-house station staff with full or partial responsibility for digital fundraising is closely correlated to a station's overall size and the size of its Membership department. The smallest stations reliably either concentrate digital fundraising and Passport work within a single Membership person or distribute the function across all station staff. Mid-size stations are most likely to have several point people responsible for digital fundraising - in addition to their other roles - with a broader informal team of supporting players helping to accomplish the work.



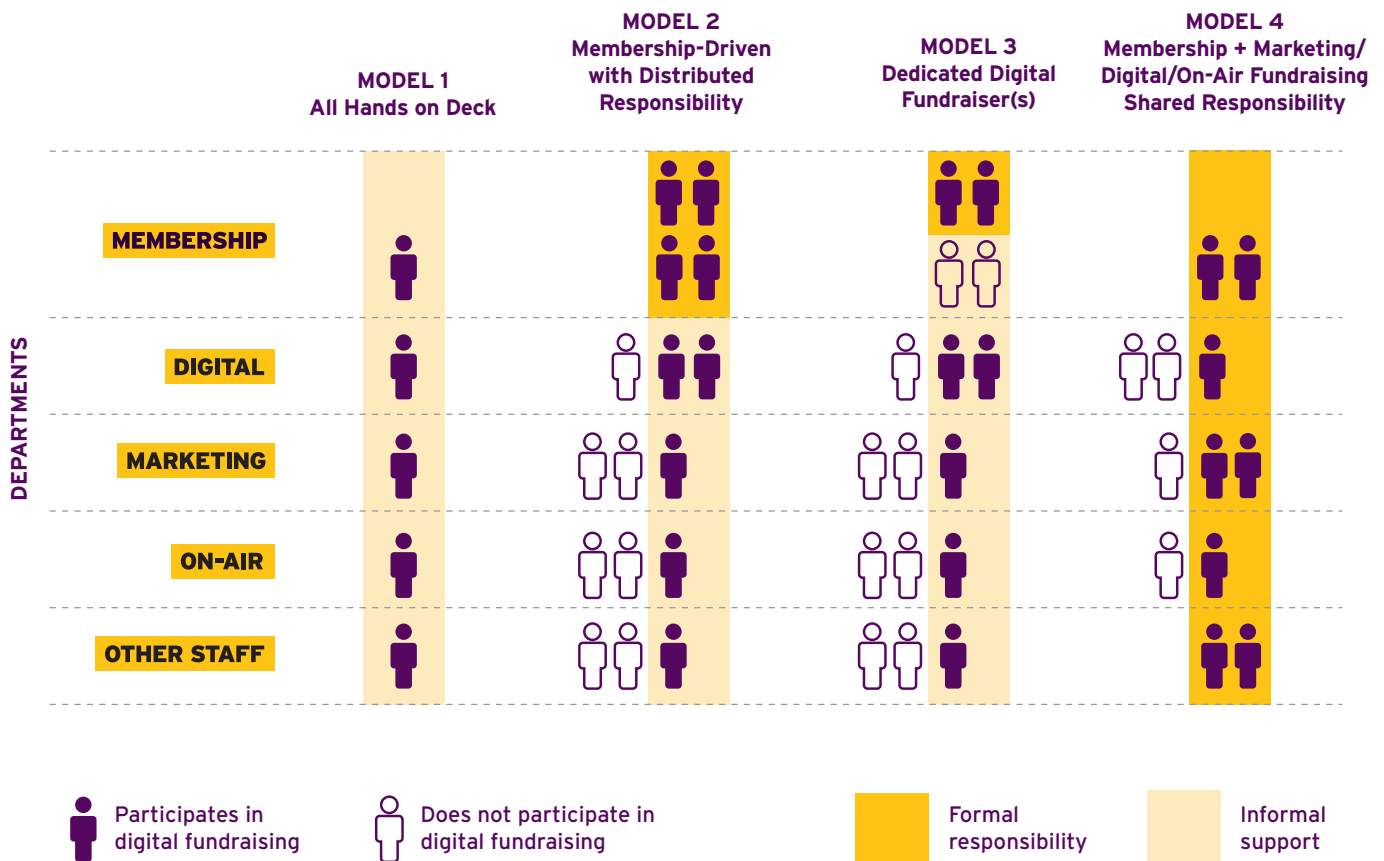
Staffing Models for Digital Fundraising & Passport

While a station's size does have some relationship to its staffing model, we found stations across the size spectrum that validate the old "if you've seen one PBS station" maxim. For example, while the largest stations are likeliest to have a dedicated digital fundraising person or team, we did find examples of small stations that have invested in a dedicated, full-time digital fundraiser or a crossover digital content+fundraising hire.

More importantly, we found no stations in which digital fundraising is truly a one-person, insulated function, particularly when it comes to Passport. Even when the work isn't well-coordinated or station politics intervene, digital fundraising is never executed without a variety of skillsets and expertise being applied.

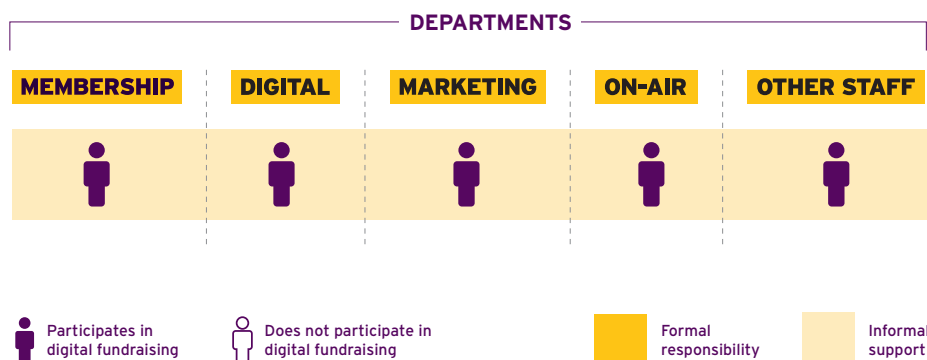
Most stations use one of four primary staffing models to manage and execute their digital fundraising activities.

"Who does digital fundraising does not have a simple answer. Our on-air pledge producer is writing copy for emails. My data guy is doing queries to get the right data where it needs to be. My customer service folks are taking phone calls on how to deal with Passport. Our content people are putting content in Passport. Different areas will have newsletters that are coming out as part of their overall content plan."



MODEL #1

All Hands On Deck



The most common approach to digital fundraising work at smaller and some mid-sized stations remains “all hands on deck,” especially since the advent of Passport. While individuals own specific tasks, everyone must be cross-trained and able to serve as a backstop to their colleagues, with Passport as necessarily a full-station initiative. We talked to stations in which GMs regularly answer Passport support calls, and others in which the one-person development team builds all e-renewals and newsletters — the only digital campaigning for which there’s currently staff time.

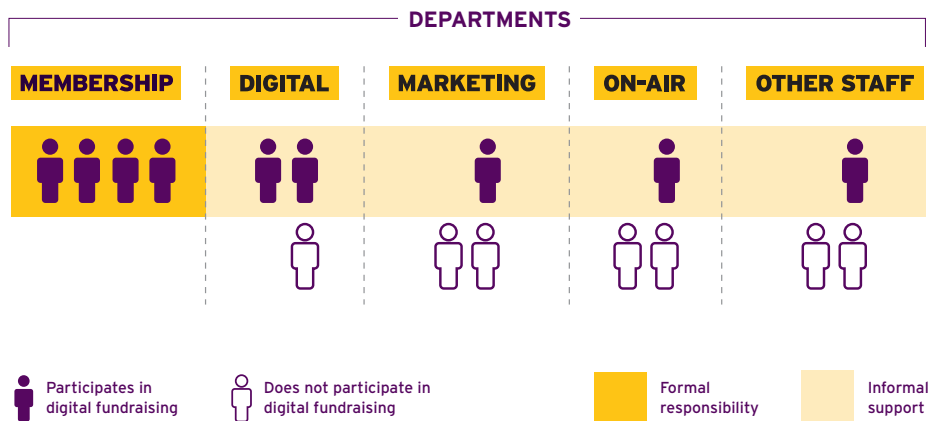
“ My job description as a digital fundraiser is fluid at best. All of us juggle so many things with so much overlap that it can get hard to identify where one department ends and another begins. I’m thankful to be at a station where we work together super collaboratively and don’t have silos. It’s a necessity of smaller stations.”

+ **PROS**
Inherently integrated approach; little need for cross-training; few silos

? **SUCCESS FACTORS**
Role differentiation & specialization necessary to deepen expertise; still requires investment and staff time to grow skills

MODEL #2

Membership-Driven with Distributed Responsibility



The model we observed most frequently across all station sizes and types is “distributed responsibility” for digital fundraising, with Membership ultimately responsible for fundraising performance. Most of the digital fundraising work, including member data management and outbound campaigns, is driven by a Direct Response person or team within Membership, with additional collaboration between other teams that support Passport. The Direct Response function serves as a hub for digital-fundraising activities, both owning much of the work and coordinating contributions from other teams.

“ Digital is an integrated part of our whole membership program. We aren’t a station that has one person running our direct mail, one person running on-air pledge, one running digital. Those are all under a single person, who can help the help they need facilitating each of these programs. The fact that it’s all under the Membership Director helps bring consistency between them.”



PROS

Each team/person contributes their expertise; can enable multichannel approaches to member cultivation

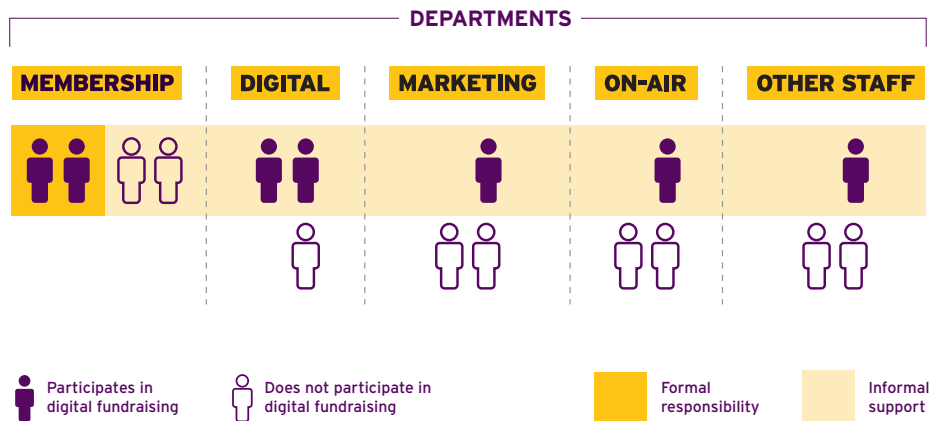


SUCCESS FACTORS

Requires strong collaboration & clear lines of responsibility; Membership must be empowered to solicit & direct work from other groups; digital fundraising expertise must be cultivated in Membership

MODEL #3

Dedicated Digital Fundraiser(s)



The opposite of the “all hands on deck” model is for digital fundraising to be concentrated in one or more staff who are charged with digital fundraising outcomes. This function typically lives in Membership, though we found examples of digital fundraisers reporting in to Marketing and Digital leadership.

What’s important to note in this model is that even in stations with 2+ dedicated digital fundraisers, much of the implementation work - from Passport promotion to campaign buildout - still necessarily relies on other internal teams or outside vendors and contractors. You’ll find more on the dedicated-digital-fundraiser model in the section “What Happens When There’s a Dedicated Digital Fundraiser (or Three).”

“ We believe that digital fundraising and Passport-like initiatives are the future of basic and mid-level membership, so we made some hard decisions in order to be able to dedicate staff accordingly.”



PROS

Dedicated, centralized digital fundraising expertise and platform ownership; strong way to quickly build a mature online fundraising program; increased ability to measure results & attribute ROI by platform

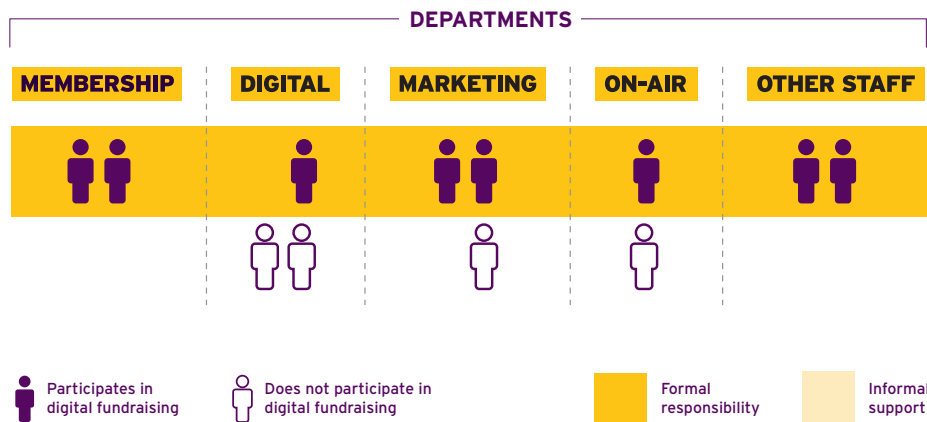


SUCCESS FACTORS

Must allow other staff to benefit from learning digital skills; needs to ensure that digital fundraising does not become a silo or “black box”

MODEL #4

Membership + Marketing/ Digital/On-Air Fundraising Shared Responsibility



Finally, some stations have committed to joint ownership of digital fundraising between Membership and another team, most commonly either Marketing or Digital, although On-Air Fundraising is an occasional co-pilot. This hybrid model must involve clear division of labor, close collaboration, and each team bringing its distinct approaches and expertise to shared processes and workflows. We have observed this model working effectively in stations with minimal politics, established inter-team accountability, and a degree of autonomy for staff to establish collaborative mechanisms in order to make the work happen.

“ Our digital fundraising scheme is more of a traditional marketing and sales relationship. Our prospects, many of them start in Marketing, eventually they move on to us in Development as they become more qualified prospects. There’s also ownership by our IT department, which is the crew that works on the website.”



PROS

Shared leadership & decision-making; distributed ability to learn new skills; promotes a full-member-lifecycle, multichannel orientation



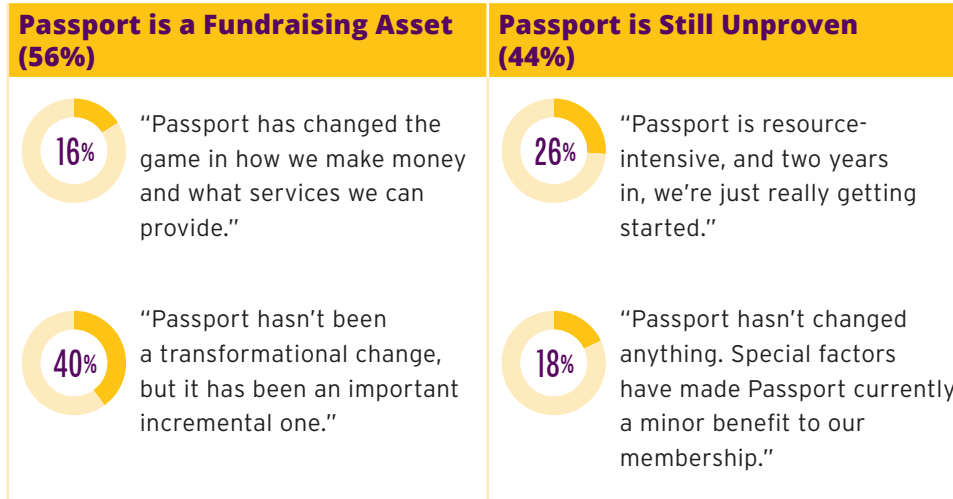
SUCCESS FACTORS

Requires negotiating clear lines of responsibility & roles; Collaborators must be comfortable with an emergent approach & lack of a single leader; very difficult to achieve in a siloed organization

Staffing in the Era of Passport

Passport's Impact on Stations

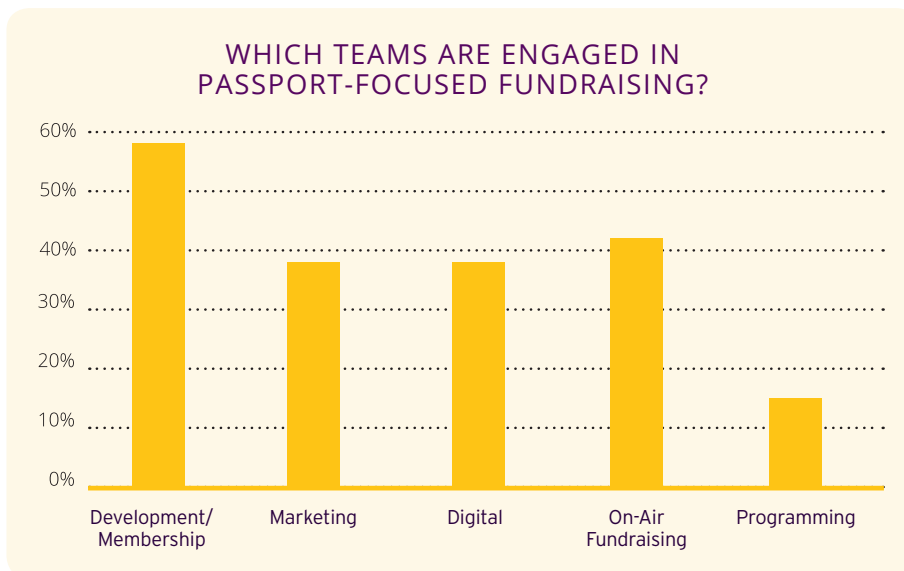
We asked station staff what level of impact Passport has had on their stations to date. Their assessments fall into four categories:



Who Owns Passport?

At 70% of stations, Development teams own Passport responsibilities tied to revenue outcomes. On-Air Fundraising (10%), Marketing (8%), Digital (7%), and Programming (4%) are also occasional internal owners of Passport as a revenue-generating program.

However, in only 27% of stations does Development/Membership run Passport without any involvement from other departments. Most stations (73%) report that Passport is either a multi-team initiative or considered a station-wide commitment.



How Passport Has Impacted Staffing and Workflows

1. Increased Collaboration & Exposed Silos

43% of stations reported that Passport has either significantly increased staff collaboration between teams or revealed the need for increased collaboration, although it hasn't yet been put into practice. Notably, even stations that reported no formal changes in staffing as a result of Passport have still experienced increased collaboration. For example, a number of stations have instituted Passport working groups or task forces that formalize workflows, information-sharing, and decision-making among key staff that touch Passport inside of the station.

In addition, Passport has blurred the lines between traditional content and fundraising functions, requiring crossover channel expertise, technology skills, and audience knowledge to be transferred between teams.

Station staff were 2.5 times more likely to say that collaboration has increased in the era of Passport (56%) than were GMs and CEOs (23%), whose predominant opinion was that collaboration was already strong before Passport and hasn't changed since.

“Passport has actively brought together our fundraising, web and marketing teams to work together towards an ultimate goal: Passport sign up and utilization. It has helped us to streamline conversation internally with colleagues and externally with members (and potential members). I think there is still work to be done, but we have certainly taken a big step in the right direction.”

“Passport has given us lots of opportunities for new conversation and collaboration, though it can still be hard to get everyone pulling together.”

“I think Passport has helped bring marketing/digital and our fundraising foundation back together as a united front.”

2. Reallocation of Existing Time & Resources

Many stations reported that Passport has forced them to shift workflows and clarify responsibilities, from requiring a more intensive customer support model to reconsidering elements of their member engagement model. This has included the need to cross-train a broader group of staff to provide backup for Passport (from promotion to support); an increase in using analytics for measurement, optimization and member targeting; and for some, the opportunity to create new, non-pledge campaigns between drives, focused on a Passport-specific ask.

“Passport has us thinking much more about how to leverage data and tailor content and services to meet consumer expectations. We are currently researching the possibility of outsourcing general membership so that we can focus on member experience, engaging specific donors, and increasing major gifts.”

“As a result of Passport, our Membership department has changed the way we allocate our time and goals for each staff member.”

3. New & Different Digital Hires

In the early days of digital, stations sought general expertise in emerging channels and practices. Now the scope of digital roles and associated hiring profile has begun to change. As a rule, most stations separate digital content from digital fundraising as distinct functions, but staff in both roles are expected to play a part in the website, social media, emails, and advertising. They are also required to have strong fluency with data, analytics, and back-end technology. A number of full-time digital fundraisers are self-taught station staff (primarily fundraisers) who organically took over their current responsibilities and learned on the job, eventually moving from generalist to more specialized roles such as digital fundraising strategy and analysis

“**Passport is a chunk of lots of people's jobs. It's a major focus for our one (soon to be two) dedicated digital fundraisers. We're adding the second digital staffer in large part because of Passport.**”

“We've learned that we can't continue to try to do it all. We need to take some calculated risks and invest in letting go of positions that can't take us into the future in order to fund the work needed to serve audience and member expectations when it comes to providing content AND in fundraising.”

4. Increased Buy-in and Attention to Digital Fundraising

When Passport is seen as an asset, station leadership are more likely to prioritize digital fundraising for the station as a whole. While this evokes the proverbial chicken-and-egg question, what matters is that leadership buy-in strongly correlates to both a) staff buy-in and b) a willingness to work together across functions to accomplish integrated digital and multi-platform campaigns.

One universal critical-success factor is having Passport champions — both at a leadership level and on the ground — who can demonstrate the value of Passport in the member lifecycle. Such champions also serve to promote ways of integrating Passport as an offering across programs, from pledge to renewals to educational events to other programming.

“**Since I've been our first digital fundraiser, there's a new acknowledgement and buy-in that things have to shift in terms of how we fundraise. Station leadership understand it when I say that I need a new donation form as a dependency for effective online fundraising.**”

“I'd say we get more engagement from digital and leadership because of Passport.”

“Passport really does require a whole team effort. That's what we should learn. Everyone has to buy in for this to work.”

What Happens When There's a Dedicated Digital Fundraiser (or Three)?

The hiring of a digital fundraiser can bring a new level of awareness and focus to a station's member cultivation efforts.

Stations that have at least one dedicated digital fundraiser on staff seem to have consistently achieved a few significant leaps forward:

- 1 Member Behavior** They're better able to harness their data to construct a picture of member behavior across platforms and channels, including how new members are acquired, converted, and retained.
- 2 Definition & Goals** The presence of a digital fundraiser also strongly correlates to a station having a consistent, shared definition of what digital fundraising means to the station. With this clarity comes refined business rules, meaning that stations are better able to track and attribute gifts and to establish membership and revenue goals around their digital channels.
- 3 Non-pledge Campaigns** The hiring of a digital fundraiser is often the catalyst that allows a station to begin running membership campaigns between pledge drives, focusing on specific opportunities like Passport activation, #GivingTuesday, End of Year, and digital campaigns leading up to pledge (which ultimately lengthen a drive but introduce new audience engagement opportunities).

However, the risk for digital fundraisers in emergent roles is that the station's definition of digital fundraising can easily become a black box. As one station leader said, "I don't really know what digital fundraising is. I guess it's whatever thing our digital fundraiser is working on."

In order to scale up this function, any digital fundraising hire will necessarily need additional support - whether it's an outside fundraising firm to help with strategy or implementation, a junior-level generalist to coordinate multiple campaign pieces, or a student or intern to build and send emails.

Unsurprisingly, however, the most critical partner for digital fundraisers seems to be station leadership: GMs, VPs of Development, and other executives who are willing to champion the cause of emerging approaches and who can help bring digital-engagement ideas and insights to the rest of the station.

"This is how I became our dedicated digital fundraiser: A few years ago, someone at the station said, 'We don't really have a year-end campaign. Do you think we could run one?' I said yes. Now that I'm in the role, my charge is to move us from being more passive and opportunistic with digital fundraising to being more concerted and proactive."

"Digital fundraising is the wild west right now. I'm just making up half this job as I go along. This isn't the time to say, *there's only one thing that digital fundraising can mean.*"

"I have a lot of autonomy, but no one knows what I do on a day-to-day basis. It's scary, overwhelming, and new."

"Our GM comes to me with so many crucial digital conversations. She regularly asks, 'How can we support you? What do you need to do your job?'"

A Note to Stations for Whom Passport Isn't Yet a Big Opportunity

Perhaps you're at a border station that can't advertise Passport broadly because it's not available to all members. Perhaps you're in a frontier state where the vast majority of your audience doesn't have access to digital platforms (or even, potentially, an email address). Or maybe your audience is less savvy in digital environments, rendering your Passport activation rate low and making direct mail still the best-performing method for member engagement.

We realize that many of the recommendations in this report might not be a direct fit for your station's current situation. We also firmly believe that digital fundraising, and this new class of donor, can't be the only way forward for station sustainability. Even the best digital programs only work if they're executed in an integrated, hand-in-hand fashion with traditional channels and platforms that still work well for many markets and demographics.

Although your time horizon will be different from other stations, the future of digital fundraising will eventually arrive, along with changing audience demographics and an increasing comfort with streaming. For these stations, we see the biggest opportunity with digital fundraising to be choosing the approaches and practices that will set your station up for that future. For example, even if your digital donation rate is low, your station can see value from practices like automating email communications (freeing up valuable staff time), thoughtfully segmenting your audience and targeting based on behavior (using digital tech to create a member-responsive experience), and focusing digital promotions and asks on those members most likely to respond to those channels. When the digital fundraising future fully arrives for your market, you'll be ready to meet its demands.

Recommendations: Staffing for Success

1 OWNERSHIP

Make Passport a Full-Station Initiative.

While we didn't encounter any station in which Passport is truly a one-person effort, the standard in most stations is still "firewalling" Passport to a very small team: a customer service person, a Membership team "owner," and Digital or Marketing for promotion.

The stations that have seen the most success with Passport share one feature: They have made Passport a full-station initiative, similar to the way that stations have historically organized around pledge. They've invested time and energy in cross-training staff and looked for ways that Passport intersects with each person's job (from underwriting to programming to community education). Station leadership regularly expect to see Passport performance metrics, like new member acquisition via Passport and overall activation rates. And rather than treating Passport as a special new offering with an uncertain future, the station has integrated Passport as an integral piece of all its communications and events.

A note here for stations with the All Hands On Deck model of digital fundraising: Congratulations! As it's likely that Passport is already a full-station initiative for you, our recommendation in your case is different: Focus instead on how your station might better clarify lines of responsibility, ownership, and accountability when it comes to Passport. If possible, identify where additional support could better allow staff to each tackle their individual roles - rather than everyone having to do a little bit of everything, from Passport to the kitchen sink.

"For Passport, we have provided cross-training to all staff that need a deep view of Passport, as well as an overall orientation on Passport to our entire staff. It is part of our new employee orientation. And we set up each employee with their own Passport account so that they can be familiar with the service."

"We're still struggling for Passport to be a station initiative and not just a development effort. We've made strides in getting investment from the Marketing team and are slowly getting other departments to buy in as well."

2 TRAINING & ACCOUNTABILITY

Don't Let Digital Fundraising Become a Silo.

Even in stations with a dedicated digital fundraiser, the most effective digital fundraising programs are both heavily supported by and able to significantly influence other parts of the station.

In practice, this means that even digital campaigns get planned within a broader multichannel framework, so that audience rather than platform is the starting point for campaign strategy. This is the key to offering your members an integrated experience of a unified station - rather than allowing internal station functions to show through to members and prospects via disjointed, uncoordinated campaigns. This is also the key to aligning internal resources to ensure that campaigns get the appropriate staff support from multiple teams/roles.

"Whenever we approach our digital campaigns from a multichannel perspective, which is now most of the time, we do get support from the marketing team - which is our ideal way of working, not doing digital fundraising alone."

Avoiding a digital fundraising silo means that digital can do what it does best: offer a broader impact on the station than a single campaign outcome, through feeding back analytics and insights about how different audiences respond to certain tactics and messages. This approach also allows digital campaigns to become a testing ground for long-term questions about a station's membership, e.g. audience behaviors and preferences tied to demographic segments.

3 PROCESS

Establish a Passport Working Group.

To scale up their in-house digital fundraising capacity, what most stations need is a combination of inter-team accountability and a clearer division of labor when it comes to Passport activities.

Several stations have established cross-functional Passport working groups, committees, or task forces, spearheaded by a single person who coordinates Passport efforts (typically from the Membership team). The group meets weekly or biweekly to tackle everything from recurring, tactical support issues to Passport-specific campaign planning to brainstorming new ideas for increasing activation rates. Often the team puts infrastructure in place to support daily collaboration between meetings, such as a shared email alias, project management tool, or chat channel. An executive champion or liaison can also be appointed to make sure that station leadership is aware of the group's plans, needs, and challenges.

While we strongly recommend an ongoing working group, one alternative is to start with a time-delimited, project- or campaign-based task force. This can be an excellent way to test the cross-functional waters and pilot new Passport approaches, particularly amidst political station cultures.

“ Passport isn't my full-time job; I'm pulled in 10 other directions. If we had a digital fundraiser, they could serve as a project manager to bring the right people together to explore, 'how can we do more with Passport?'”

“If I could, I'd have my own little digital retreat for all staff at our tiny station. I'd help everyone understand who our audience is on different channels like social, what their needs are, what needs aren't being met and how we can fill those needs. I do that in snapshots now, but I don't ever have the full attention of my staff. That would be a dream come true.”

“When Ken Burns' Vietnam was coming up as a fully binge-able opportunity, our digital fundraising manager put together a team of marketing, audience services, and development to run a full cross-functional promotional effort. That structure helped us collaborate by planning together.”

4

PROCESS

Develop a Multichannel Content & Campaigns Calendar.

Many of the stations that reported increased collaboration as a result of Passport share a common practice: They have implemented a station-wide content and campaigns calendar that allows for a single view of all communications planned for each audience group. While stations are using a variety of apps to achieve this (e.g. Google Calendars, Kapost, Hubspot, Basecamp), the biggest success factor is buy-in from across the station: getting everyone using the calendar, with a tie-in to programming, community education and events, and any other opportunities to reach members and prospects.

While the calendar itself is just a tool, stations report that the process of using one necessarily opens up conversations about dependencies, opportunities to align related efforts across teams, and strategic questions about how best to present an integrated, single-station face to each audience group. When implemented thoughtfully, the calendar can become a go-to resource for tackling campaign planning, evaluating competing priorities, and for individuals to manage their day-to-day tasks. In a few instances, shared station-wide calendars have even helped to break through long-held cultural divides between teams.

“We’ve put in place a joint calendar, with everything coming out of Membership, the On Air team, and Digital Media, so that you can see every communication that’s coming up, with attachments. It’s really easy to find information. Then we work with our digital media team to say, for example, Victoria is the Passport priority for us for x amount of time. While we in Membership are the owners and primary drivers, we’ve got to work in lockstep with our internal partners to make sure that we have a commonality of messaging through all the places we are talking to prospects and members.”

5

PEOPLE

If You Can Invest In One Thing, Train Your Staff.

One consistent theme across all stations was that there’s rarely enough time for staff to focus on developing the skills that would lead them to try new digital fundraising approaches (which, of course, applies to other skill areas as well). Particularly at small stations, staff reported that even when there’s free training available, they can’t step away from day-to-day pressures long enough to prioritize these opportunities.

We recommend conducting a quick Digital Fundraising Staff Skills Assessment, which will allow you to see a) what coverage the station has and where there are currently skills gaps and b) individual staff strengths and weak areas. No individual can be evenly expert in all digital skills, but this assessment can help prioritize types of training and development investments for the station and for individuals.

Prioritizing training is one of the most important parts of creating a culture of learning at a station. Digital platforms and tactics change so quickly that staff have difficulty keeping pace, much less staying on the forefront. They can only do it if station leadership supports them through training and evaluation. If a station can make one investment in its digital fundraising, focus on training.

“We need to train existing staff how to better do digital fundraising effectively now and then add staff capacity when ROI allows.”

“Sometimes at a small station, you feel like a hamster having to just churn things out, without time to grow or get advice or change the way you work.”

“You have to be nimble, willing to share, and expect marketing and fundraising to work hand in glove. Have staff, both marketing and fundraising, go to industry conferences and make time for learning.”

6

PEOPLE

If You Can Invest in Two Things, Hire a Digital Fundraising Generalist (or Specialist).

Once you've got training covered for existing staff, your next investment would be either 1) hiring a dedicated digital fundraising generalist or 2) expanding your in-house digital fundraising capacity through a specialist.

If this will be your only digital fundraising hire for the foreseeable future, focus on finding someone with experience and aptitude. Several stations reported recruiting experienced fundraisers with general digital aptitude and a willingness to learn and lead (rather than experienced digital leaders who would be expected to learn fundraising practices). University licensees often hired digital-skilled students for part-time work, especially running social media, web and email campaigns, content production, and data analysis.

Stations hiring a specialist reported that their highest-need specialty skills for digital fundraising were:

- **Analytics** and **testing**
- Front-end and back-end **development**
- **Channel-** and **tactic-specific** expertise, such as email and ad campaigns

"Although I'm Gen Y and feel like I 'get digital,' I didn't grow up with these channels and technologies in my everyday life. I'm fully self taught. I had to dig in, learn our tools, research, and get on email lists to be able to really learn what I needed to."

"When I hire a digital fundraiser, I'll pursue someone who has worked in a fundraising program already and who has digital aptitude, even if their direct digital skills are limited to start. They must want to learn and be completely okay with ambiguity."

Dependencies for Staffing Success

In the course of this study, two themes emerged repeatedly as significantly impacting stations' abilities to successfully staff the digital fundraising function. Even with a mature staffing model for digital fundraising, a station's **technology** and its **culture**, particularly the tone set by leadership, can still make or break its digital fundraising success.

Technology

Almost universally, public television stations are struggling with their member-engagement technology.

We heard that technology is a nightmare for many stations because systems have proliferated and are poorly integrated. Station staff wind up compensating for ineffective tech, performing time-intensive, manual data manipulation and transfer. The absence of customizable software that is adaptable to public-media fundraising practices has bred hacked-together, sub-standard work-arounds. And the lengthy, expensive processes involved in systems migrations have created a barrier to change. Fundraisers report feeling trapped in vendor lock-in, unable to access better digital fundraising, CRM, and marketing automation software.

Station staff maintain the dream of a single, 360-degree view of their prospects and members, and they know they'd like to pursue marketing automation, do more with the prospect lists that PBS provides, and provide a seamless Passport member experience. We believe that until the state of member-engagement tech improves for the system as a whole, stations won't be able to make the best use of staff time and capabilities, nor to offer the best possible member experience.

“ There's so much that I'd love to have automated. For example, if the system worked together like it should, when you activate your membership benefit, an automated email would go out to you saying, 'I noticed you just activated. Here's how to download the app, some recommendations for shows, cool stuff you need to know, and who to email if you have any questions.' There's just no way to do anything like that right now.”

Leadership & Culture

In our survey, GMs rated their stations as 64% effective in allocating funds for digital fundraising. This includes stations that have made significant investments to increase their digital fundraising potential as well as stations that have done little, but feel that a more substantial investment hasn't yet been warranted.

However, even more than funding, we found the strongest determinants of a station's digital fundraising effectiveness, particularly when it comes to Passport, are:

- 1 the level of **leadership support** consistently demonstrated; and
- 2 a station's culture related to **experimentation and risk-taking**.

“It's a big dream of ours to burn our donor management software to the ground and start over. I have yet to meet a single station that loves their CRM. If we could find or build something, that would be the best technological advancement we could ever ask for.”

“This debate always comes up: Should all stations be on the same thing? Should there be a national system or not? Every route has its advantages and disadvantages, but right now, we're all at a disadvantage.”

“We feel stuck with our suboptimal technology. We're making it work, but it's all very manual and time consuming. Timing-wise, it takes so long to make things happen, and changing our technology up is a 2-3 year process.”

“I think digital fundraising is a great opportunity, but really needs buy-in from management, station-wide strategy, a commitment and investment of staff resources, and cross-team leadership.”

We observed that across the size spectrum and licensee types, those stations that had both executive champions for digital fundraising and those that strongly supported experimentation and learning have experienced the most digital fundraising success (and in many cases, the most success with Passport, too).

“Even more than offline, how does a team be flexible with the channel mechanisms and tools that one has in the digital space? To be successful, you have to have the mindset of a) not fearing change, and b) being able to live in the gray while you’re coming to understand the shifting tides.”

When it came to experimentation, we observed three profiles of station cultures:

1 Embracing Experimentation With Calculated Risks

These stations use their existing audience knowledge to formulate questions, create campaigns, test, optimize in real-time, report broadly to the station on what they learn, and incorporate those learnings into their next efforts. Leadership support is high for strategic, relatively autonomous experimentation, as is tolerance for failure. Leaders want to know what’s happening with digital fundraising and encourage the sharing of learnings (whether successes or failures) across the station.

“There’s a critical level of trust in our station culture. We try hard not to micromanage people and let them own things. At the same time, I do feel strongly that not one person fails here. There’s the sense that it’s a collective failure, so we can all learn together from that.”

2 No Risk Without Showing Me the Money

These stations are conditionally supportive of experimentation, but struggle when it comes to shouldering the level of risk involved. Station staff have to find a way to fund their own risks; run extensive internal campaigns to get all levels of management on board; or pre-demonstrate the ROI of a campaign — all sizable feats that can prove prohibitive to rapid experimentation.

3 Letting Other Stations Try It First

These stations are the most risk-averse, preferring to wait until a tactic has been proven by other parts of the system before incorporating it as a “best practice.” While this is a valid approach, these stations are leaving a significant opportunity on the table to better understand their unique audiences — both loyal members and what the new donor class looks like within their market.

“If your manager tells you, ‘if you don’t make money on this, we’re in big trouble,’ you’re not going to take any risks. If we don’t try new things, we’re never going to discover new things. We’ll never advance as a system. And if we don’t advance, we’re dead.”

“From an overarching perspective, our leadership respects and acknowledges the importance of digital fundraising. Practically speaking, there’s not a whole lot of interest from station leadership in what it takes to actually do that or the impact on priorities for our Membership team to take this on full-scale.”

“We have a great culture. I am very calculated in my risks, but willing to try new things. If I’m going to take that risk, let me see what we could possibly lose out on and what could we possible gain.”

“Our culture has been, ‘Yes, you can do that, *but* how much money are we really going to make off of it?’ Or, ‘We can do that, but you have to go find a grant to support you.’ Or just plain, ‘how are you going to fund that?’ The world has been my oyster, but I always need to find the funding to try anything new, which is a major roadblock for experimentation.”

The Future: When Digital Becomes a Part of Everything

From a programming perspective, we believe that stations have already embraced the digital-first future. In conducting the research for this staffing study, we observed that the digital-first shift is also well underway on the fundraising side.

However, internal organizational change - roles, skills, workflows, culture - is often much slower to take root than programmatic change. In order for stations to move evenly into the future of digital fundraising, we believe that what's needed now is a sharp focus on building stations' overall digital fundraising capacity.

There are two hallmarks of stations that lean in to the digital future:

1 They acknowledge that everything is, at some level, digital.

These stations no longer carve the world into "digital" and "non-digital." Instead, these stations take a longer view. While they might be building a digital team and digital-specific fundraising functions now, their aspiration is ultimately digital maturity: for all staff to gain fluency with digital methods and practices as one key part of the way that they do their jobs.

Although the pace of digital change won't slow, what stations are doing now is putting into place the building blocks — the infrastructure — for a future in which each new channel and approach won't require quite so much effort. Instead, stations are increasing their ability to run multi-platform campaigns and meet their members with personalized messaging in the places that those members already spend time. This is the key to attracting, engaging, and building long-term relationships with the new class of donors.

2 They use digital to learn and to lead.

We've emphasized this point throughout, but it's worth calling out again: Digital platforms, including Passport, are offering stations an unprecedented level of data-driven insight. The stations that have seen the most digital fundraising success have incorporated what digital does best at the heart of their strategy and culture: They have used the data to build a strong picture of how supporters behave; responded in real-time to supporter needs and interests; fed learnings and ideas back to the station at large; and used what they learned along the way to deliver long-term, repeat value to members. Digital has been a means to an end: reaching new donors in a way that builds a lasting, sustainable base of support, at a pace and scale that station staff can sustain, too.

“As a system, we're well behind our peers in other sectors in collecting and understanding information about our audience, which will ultimately help us to tell our story better. The tools are in place, and the opportunities are there. We just have to evolve what we know about fundraising to the new digital space, and we have to commit to understanding our audience better – without necessarily knowing exactly what the end game is or how our programs might evolve or change.”

“All fundraising and all station functions now live in the digital realm. We keep customer records digitally; we take pledges digitally; we enter them manually into a digital system. We are no longer living in an analogue world - either in content or in fundraising.”

“Digital requires an integrated approach. Digital needs as much love and care as your direct mail program, as your pledge drive and on-air fundraising. We also know that we must have a healthy, diversified membership fundraising program so that we're not over-reliant on one set of channels or approaches.”

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About

Cause Craft Consulting

For 20+ years, Misty McLaughlin and Alice Hendricks have helped nonprofit organizations rise to the challenge of engaging their audiences in a rapidly-changing world. Our purpose is to support the social sector with the **craft** of sustaining effective **causes**, building its capacity to effectively deliver nonprofit programming to the outside world.

We focus on all the elements of building organizational capacity — strategy, staffing, process, technology, and culture — to help stations and other cause-based organizations increase their effectiveness with development, marketing, communications, and digital. We are high-integrity partners for change who love our clients' causes as much as they do.

Find out more at www.causecraftconsulting.com.

Misty McLaughlin (Researcher & Strategist)

Equal parts organizational strategist, nonprofit coach, and digital expert, Misty supports cause-based organizations and stations through critical times of change. Her personal mission is to help organizations effectively project their cause into the world.

As co-founder and principal of Cause Craft Consulting, Misty assesses opportunities for organizations to grow, creates strategic and tactical roadmaps to get there, and supports the process of implementing the necessary change. She also holds a part-time appointment as VP of Consulting with Jackson River, a technology company that helps nonprofits shift to digital-first ways of thinking and working. Her deep love of the social sector began 20 years ago, working on the inside of early nonprofit digital teams as a content manager and engagement strategist.

Have a question about this study?

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