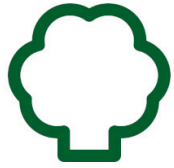


# ***Integrating Social Media For a Fundraising Boost***





# **Broccoli**

good for you.



**Brock Warner CFRE (He/Him)**

*I've been fundraising for more than a decade, and loving every bit of it. From answering calls and processing donations at 11:45pm on New Year's Eve to film shoots and planning sessions on Hollywood film lots – I've worn a lot of hats.*



**Holly H. Paulin CFRE (She/Her)**

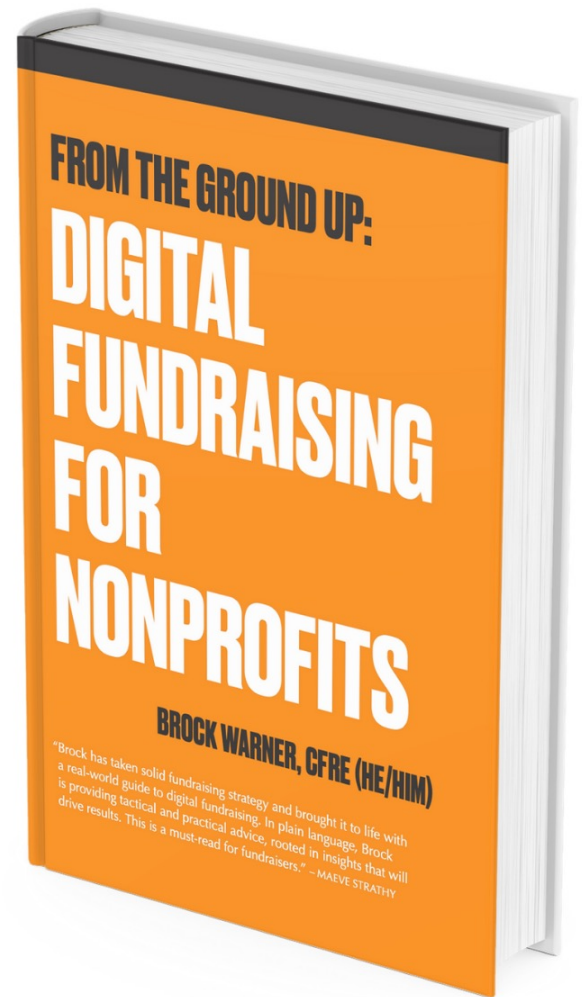
*A fundraiser for my entire career, and I've done some pretty cool things: managed a student calling program, closed an 8-figure gift, created successful direct response appeals, run a national event, migrated a new database, analyzed about a million spreadsheets...*

**An Amazon Bestseller since Sept. 2020, available in digital, paperback, hardcover and audiobook.**

"...tactical and practical advice, rooted in insights that will drive results. A must-read for fundraisers."  
- MAEVE STRATHY

"...an easy to digest essential overview of the digital tools that can complement age-old best practice in fundraising and help you raise more!"  
- SARAH WILLEY CFRE, MA

"...avoid beginner's mistakes and be launching your own winning campaigns in no time"  
- DENNY YOUNG MA



20 **Refresher: Digital Fundraising Building Blocks**

20 **Social Media for Fundraising**

- 3 Avoidable Mistakes
- 2 Investment Strategies

20 **Q+A // Discussion**

+ Extras!

Over 100 Free/Cheap Online Tools

5 Questions to Ask Your Digital Person

Homework

Search Engine Optimization Cheat Sheet

Avoid that SPAM filter!

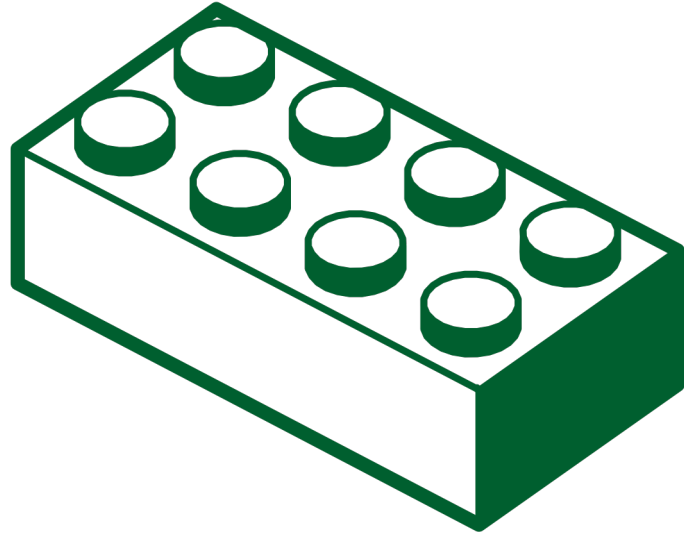
Email Marketing Tip Sheet

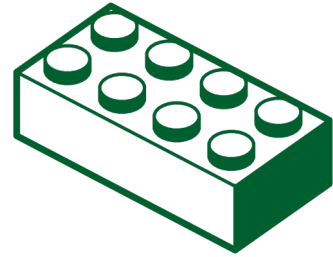
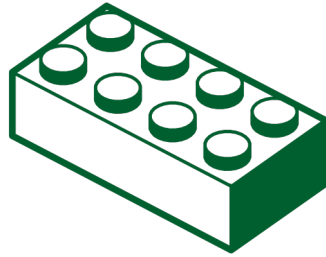
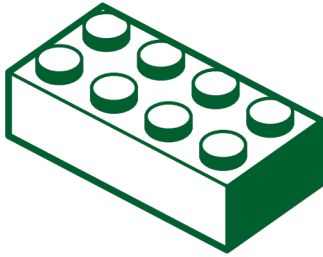
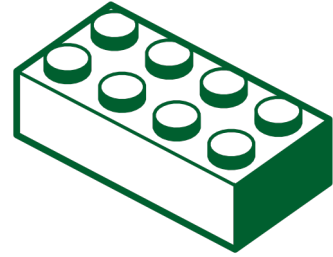
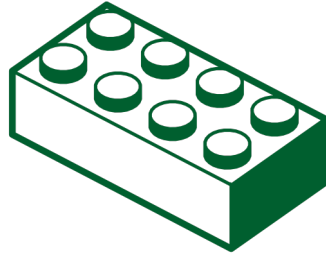
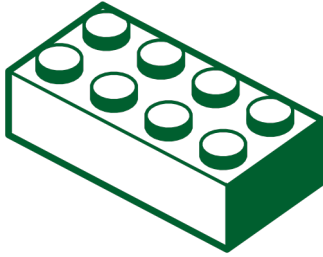
Storytelling for Fundraising



# ***Building Blocks***





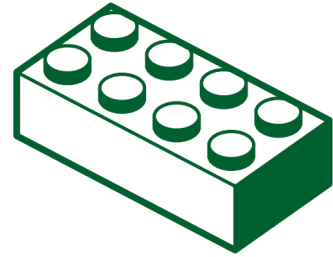
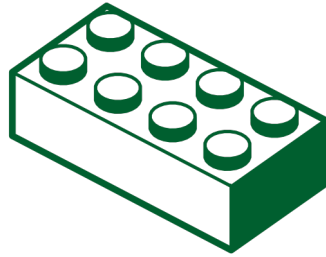
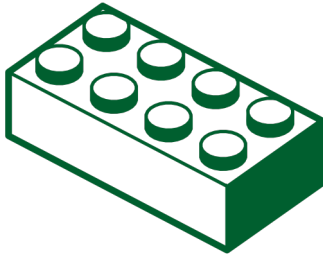
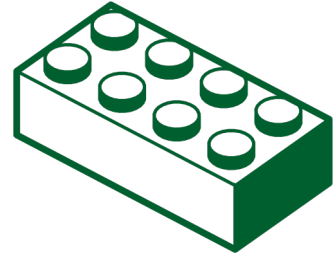
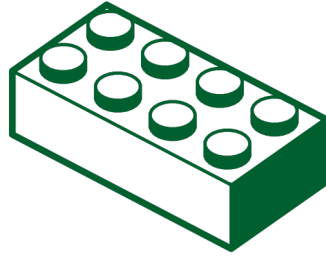
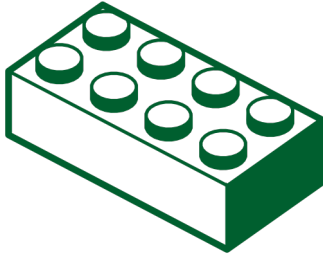


# 915,103,765

Bergfinnur Durhuus and Søren Eilers "On the entropy of LEGO" [arxiv.org/pdf/math/0504039.pdf](https://arxiv.org/pdf/math/0504039.pdf)







# ***Digital Fundraising Building Blocks***



## Email

This “push” channel is effective because of the control you have to determine the timing and content, as well the options to customize, personalize, and segment.

**Primary Purpose:** to directly solicit individuals, and thank them.

## Social

This channel is most effective for community-building, discussion, and organizing. As a fundraising tool, it will most often raise the majority of donations by directing people to your website or donation form, via a great post, advertisement or video.

**Primary Purpose:** near real-time communication with your community.



## Search

Every search engine, fundamentally, allows people to search for content related to, or specifically for your charity. There are a wide variety of factors that increase or decrease the likelihood of your website appearing at the top of a search engine's results.

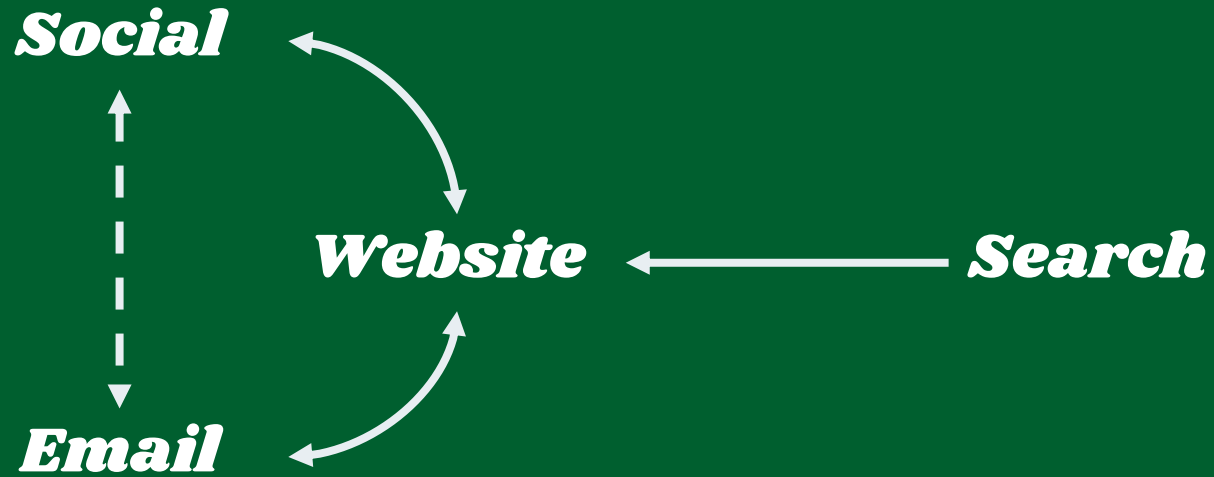
**Primary Purpose:** to help you be found when people search for you.

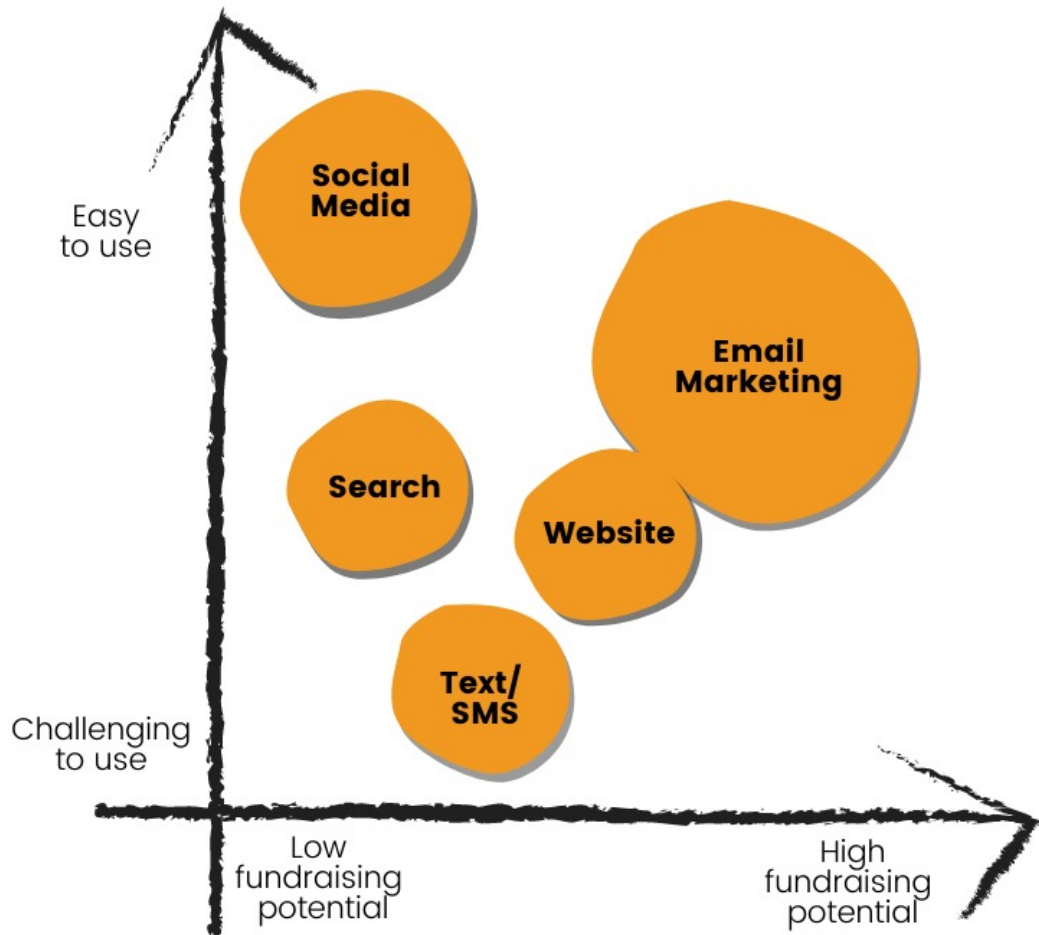
## Website

This channel is effective because, if designed properly, it makes a compelling case for charitable support, demonstrates accountability and trustworthiness, and promotes ways for visitors to help. It should also make it easy for new visitors to subscribe to your email list, which will give you the ability to continue communicating with them.

**Primary Purpose:** to process your donations efficiently.







## Website for Capture

Prominent Donate Button

Simple Signup Form

Integrate with Email Tool

Link out to Social Media

## Email for Conversion

Subscriber Welcome Series

Donor Welcome Series

Consistent Schedule

Ability to A/B Test

## Social for Community

Share Personal Stories


Curate Relevant Content

Promote Email Signups

Test Live/Interactive Tools



# Website for Capture

CANADA **AMNESTY INTERNATIONAL** 

NEWS EVENTS BLOG RESEARCH STORE


**OUR WORK GET INVOLVED DONATE ABOUT US**

## BELIEVE IN THE POWER OF US TOGETHER

Make a donation to support human rights.

**DONATE NOW**

NEXT **GREAT READS AND RIGHTS**



**SIGN UP** **DONATE NOW** **ACT NOW** **ACT LOCALLY**

Join the global movement for human rights.

YOUR EMAIL ADDRESS >

Support human rights with every dollar.

**DONATE NOW** **DONATE MONTHLY**

Your voice can make a difference!

**SIGN OUR MOST URGENT PETITIONS**

**MAKE A DIFFERENCE**

**CLICK HERE!**



# Website for Capture

[Bernie](#)

[Vote](#)

[Meet Bernie](#)

[Issues](#)

[Get Involved](#)

[Store](#)

[En Español](#)

[More](#) ▾

[Donate](#)

## Not me. *Us.*

Bernie is counting on all of us to continue fighting for our progressive agenda. There is only one way we will transform this country – and that is together.

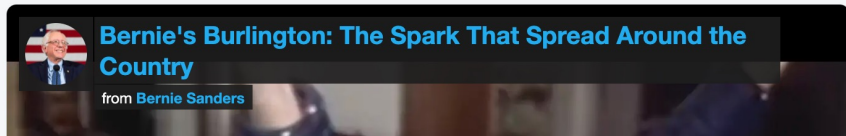
**Add your name to tell Bernie you're in.**

**Add Your Name!**

By providing my phone number, I consent to receive periodic text message alerts from Bernie Sanders and his affiliated campaigns, including Friends of Bernie Sanders. Friends of Bernie Sanders will never charge for these updates, but carrier message & data rates may apply. Text STOP to 67760 to stop receiving messages. Text HELP to 67760 for more information. [Terms & Conditions](#)




**ABOUT**




# Email for Conversion

No Images? [Click here](#)



**Canadian Red Cross**




Thanks to technology, collaboration from around the world, and data crunching, answers are coming more quickly – and that means we're able to save more lives and help more people in need.

This year, the American Red Cross and the International Federation of Red Cross and Red Crescent Societies announced [a new innovation in the field](#): a collaboration with Facebook around Disaster Maps that uses aggregated Facebook data to show where communities are located after a disaster, where they are moving, and where they are checking in as 'safe.'

**HOW DATA CAN SAVE LIVES**

This collection of data — combined with other information — might be able to help the Red Cross better target relief supplies to the families and communities most in need during the critical days after large-scale disasters.

[f](#) [t](#) [i](#) [View in browser](#)





FRANKLIN D. ROOSEVELT  
FOUR FREEDOMS PARK

*Welcome.*

Thank you for signing up for the Four Freedoms Park Conservancy's e-newsletter! Expect monthly newsletters with Park news, upcoming events, and stories of FDR's legacy. We also send emails with exclusive invitations and special opportunities so you won't miss a thing.

---

HERE'S 5 MORE WAYS TO CONNECT TO FOUR FREEDOMS PARK



# Social for Community

**act** @ACToronto

Guess who's back?

Big Gay Book Club is returning via Zoom on Monday, September 28 from 7:30 – 9 pm. We will be reading "The Skin We're In" by @DesmondCole.

Please email Michael at mburch@actoronto.org to register. Only the first 20 respondents will be accepted.

#ACToronto



5:37 PM · Sep 1, 2020

Copy link to Tweet

**timesupnow** @timesupnow 623K followers [View Profile](#)

## SHOW YOUR SUPPORT

Share with Friends  
Follow Girls Leadership

Learn More  
[girlsleadership.org/readytolead](https://girlsleadership.org/readytolead)

# #ReadyToLead

## GIRLS LEADERSHIP


[View More on Instagram](#)

5,969 likes  
timesupnow

@GirlsLeadership just released a new report that reveals the complex, nuanced, and intersectional story of the leadership development of girls of color. Check out this groundbreaking research about the leadership of Black and Latinx girls in #ReadytoLead by @charlottej\_phd, with foreword by @monique.w.morris.

**Canadian Red Cross** @redcrosscanada · Apr 24


Meet Janis, a Red Cross volunteer who helps people in B.C. transition from hospital to home through the Health Equipment Loan Program. Read about her volunteer experience: [bit.ly/3veUKeR](https://bit.ly/3veUKeR) #NVW2021 #VolunteersBringChange



4 likes  
15 hearts

**Kids Help Phone** @KidsHelpPhone · Apr 22

Happy #EarthDay! Sometime today and give back by participating in cleanup activities in your community. For more information, visit: [earthday.org](https://earthday.org)



9 likes  
26 hearts

# Just Getting Started?

Articulate your channel strategies at a high-level first, then get more granular.

A tool that can help: an OGSM Model

Objectives

Goals

Strategies

Measures



# Sample OGSM Framework

Objective	Goal(s)	Strategy	Measure(s)
<p><u>Words:</u></p> <p><i>What will success look like?</i></p>	<p><u>Numbers:</u></p> <p><i>What quantitative targets would this require you to reach?</i></p>	<p><u>Words:</u></p> <p><i>What actions must you take to get there?</i></p>	<p><u>Numbers:</u></p> <p><i>What will you measure, and how?</i></p>



# Sample OGSM Framework

Objective	Goal(s)	Strategy	Measure(s)
<i>We will cultivate and grow our email marketing list in order to expand our network of supporters and meet annual fundraising targets.</i>	<i>25% growth in email subscribers quarterly, until 2023.</i> <i>25% of Annual Giving Revenue from eAppeals by 2023.</i>	<i>Utilize and optimize a drip email strategy for new subscriber conversions.</i> <i>Deliver eAppeals consistently, with high degree of personalization</i>	<i>% growth in net email subscribers quarterly.</i> <i>% change in Annual Giving Revenue from eAppeals</i>



***Social***



**Avoidable Mistake #1:  
Over-valuing Vanity Metrics.**







*Start with These.*

## Conversion Metrics

Conversion Rate  
Cost per Conversion  
Form Completions  
Advertising ROI  
Lifetime Value  
+ more



*Optimize with These.*

## Vanity Metrics

Impressions  
Likes and Followers  
Shares  
Comments  
Open rates  
Views  
Traffic  
Time on Site  
Bounce Rate  
+ more



# **Avoidable Mistake #2: Betting on a Single Design.**



**Trying to guess what creative (images, taglines, colours, etc.) will work is near-impossible.**

**SOLUTION:** Create multiple variations on a creative theme, and empower your advertising platform to optimize based on data over a 4-6 week period with an automated daily budget.

Like it or not, this is what a "data-driven" strategy looks like!



"DROP" IN ANY TIME

**GIVE BLOOD  
TODAY**

SAVE A LIFE.

"DROP" IN ANY TIME

**GIVE BLOOD  
TODAY**

SAVE A LIFE.

**GIVE  
BLOOD  
TODAY**



"DROP" IN ANY TIME

**GIVE BLOOD  
TODAY**

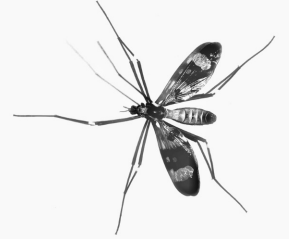
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SAVE A LIFE.

**GIVE  
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TODAY**

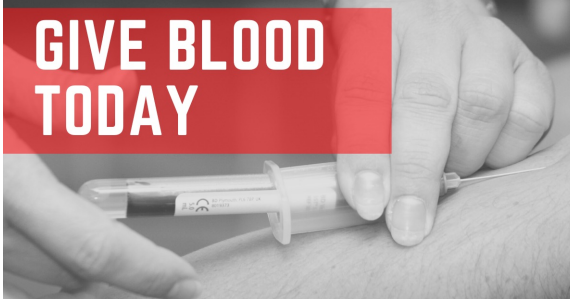


"DROP" IN ANY TIME

**GIVE BLOOD  
TODAY**

SAVE A LIFE.

**GIVE BLOOD  
TODAY**



**don't  
just take,  
give.**

# **Avoidable Mistake #3: Targeting the Wrong People.**





Reactivation, Conversion

## Behaviour-Based Targeting

Serving advertisements to people that know you or are actively looking for you.

### Examples:

Current Donors, or Email List  
Recent Website Visitors  
Searched for Your Charity



Acquisition

## Profile-Based Targeting

Serving advertisements to people that don't know you but might be interested.

### Examples:

Live Near Your Programs  
Follow Similar Charities  
Friends of your Fans



# **Organic (un-paid) Strategies:**

- 1. Persistence**
- 2. Hit or Miss**





Contributing to your RRSP

## Persistence

Growth through consistency.

### Ideal for:

Twitter, Facebook,  
Instagram, YouTube

### Benefit:

Provides compounding returns  
over time.



Lottery Tickets

## Hit or Miss

Hoping to achieve virality.

### Ideal for:

Reddit, TikTok,  
Snapchat

### Benefit:

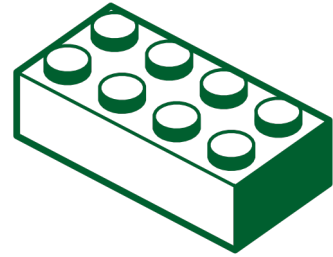
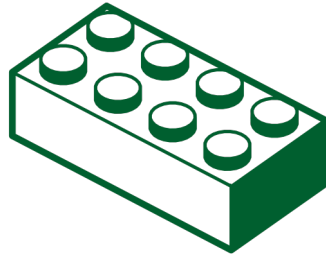
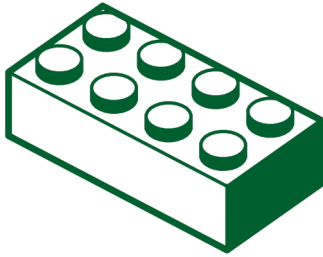
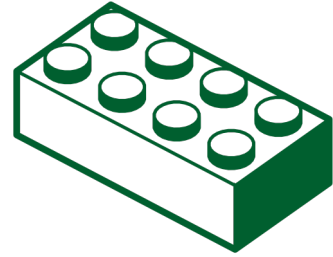
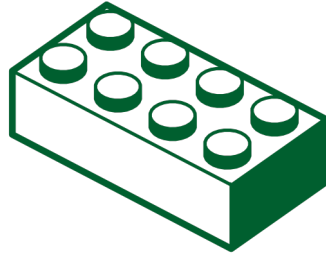
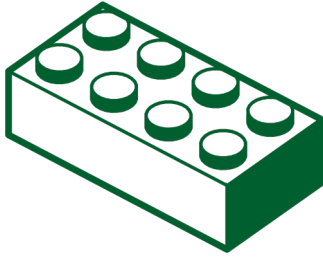
Low risk, high reward.





# ***Final thoughts***





**The digital world is constantly evolving. You don't have to be an expert - but learn enough to be dangerous.**

**SHIP OF THESEUS:** a famous ship sailed by the Theseus in a great battle was kept in a harbor as a museum piece, and as the years went by some of the wooden parts began to rot and were replaced by new ones; then, after a century or so, every part had been replaced. The question then is whether the "restored" ship is still the same object as the original.

**If you disconnect from the digital world for too long, it's possible that tools, platforms and tactics have changed dramatically without you noticing.**



# *Discussion // Q+A*

brock@teambroccoli.org

647-456-7374 (cell)

LinkedIn: [linkedin.com/in/brockwarner](https://www.linkedin.com/in/brockwarner)

Book: ["From the Ground Up: Digital Fundraising for Nonprofits"](#)



***Extras!***



# Freebies

Over 100 Free/Cheap tools: [brockwarner.ca/useful](https://brockwarner.ca/useful) sorted by category

Sample Chapter of From the Ground Up: Digital Fundraising for Nonprofits  
[brockwarner.ca/sample](https://brockwarner.ca/sample)

[CanadaHelps 2021 Giving Report](#)



# Five Questions to Ask Your Digital Person

1. Is our donation processing tool connected to our Google Analytics account?
2. Have we enabled cross-domain tracking between our website and our processing platform?
3. Do we have advanced eCommerce in Google Analytics on, so that we know the value of completed donations?
4. Do we have audiences configured in Google Analytics in place, and growing?
5. Have we "linked" all of our Google Platforms? (Analytics, Adwords, Search Console, YouTube, etc.)



# Homework:

- Investigate whether your website is effectively capturing email signups
- Investigate if you are cross-promoting on social to acquire new email signups
- Investigate if your email marketing platform is integrated with your donor database and/or online donation processing tool.
- Draft your high-level plan in the form of an OGSM Model
- Organize your story inventory. Many charities have well organized filing systems for photos and logos, but not for stories.
- Create a schedule and set a goal for story-gathering. Could be one new story per month, highlighting a healthy cross-section of your programming.
- Challenge yourself to adapt a story from long-form to short-form (ie. Direct mail to a Tweet) without losing the story circle.
- Embed an email signup form prominently on your website. Test it!
- Set up your first automated “new subscriber” welcome series in your email marketing tool.
- Create a 12-month email marketing Calendar that includes at least one eNewsletter per month, seasonal appeals, a Giving Tuesday appeal, and a year-end reminder.
- Investigate/confirm if your donation platform is connected to Google Analytics, so that you have conversion metrics to work with.
- Add social media themes into your content calendar. E.g. volunteer week, “\_\_\_\_\_ month”, etc.
- Plan if/how you will deal with negative comments, and generally moderate your community as you grow.





# Search Engine Optimization (SEO)

1. Ensure your h1, h2, h3 and p tags are in use and properly structured.
2. Improve your page load speed by:
  - Use [compressor.io](https://compressor.io) to compress images
  - Use JPGs instead of PNGs for the smaller file sizes
  - Avoid the use of "elements" like galleries and sliders
  - Cut out the use of animations (unless essential)
3. Populate image alt. text with keyword related description.
4. Use [ubersuggest.com](https://ubersuggest.com) for competitor SEO research.
5. Verify site ownership on Google Search Console.
6. Use [technicalseo.com/tools](https://technicalseo.com/tools) for a variety of free tools.



## Avoid SPAM filters with these tips:

1. It should be clear what organization is sending the message.
2. Contact information of the sending org. should be included
3. An unsubscribe link should be easy to find, and easy to use.
4. Any images should have a reasonable file size (under 500KB).
5. Avoid special characters (!!!, !?) and ALL CAPS in subject lines.
6. Include descriptive alt text for any images.
7. Text should be compelling, but brief. Link away to a website if necessary.
8. Run a test with [www.mail-tester.com](http://www.mail-tester.com) (free!)

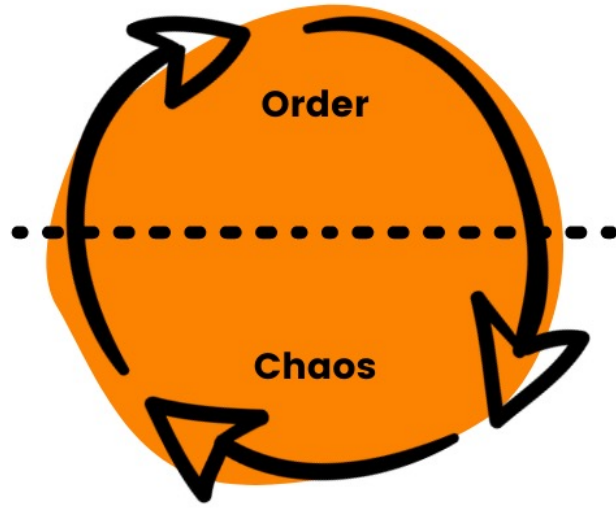


***Storytelling***

# Story Circles

1. A character is in a zone of comfort
2. But they want something
3. They enter an unfamiliar situation
4. Adapt to it
5. Get what they wanted
6. Pay a heavy price for it
7. Then return to their familiar situation
8. Having changed







1. Hafsa remembers a peaceful childhood in Uganda
2. She was attending school, dreaming of being a doctor.
3. Rebel groups killed her parents, but she escaped.
4. In a Kenyan refugee camp, Charity A was able to help.
5. With the help of a scholarship, Hafsa is attending school.
6. She couldn't save her parents' lives or bring them back.
7. But she plans to return to her village, and to rebuild.
8. Bright minds like Hafsa are Uganda's future.





1. Hafsa remembers a peaceful childhood in Uganda  
Your childhood memories are precious, and important.
2. She was attending school, dreaming of being a doctor.  
What did you want to be when you grew up?
3. Rebel groups killed her parents, but she escaped.  
Life gets busy, and complicated though, doesn't it?
4. In a Kenyan refugee camp, Charity A was able to help.  
When times got tough, did you have a guardian angel?
5. With the help of a scholarship, Hafsa is attending school.  
Did the kindness and love of others get you through?
6. She couldn't save her parents' lives or bring them back.  
The struggles made you who you are, didn't they?
7. But she plans to return to her village, and to rebuild.  
You may have grown up, but that child is still inside.
8. Bright minds like Hafsa are Uganda's future.  
While children dream, adults can take action.



## **By being aware of storytelling patterns, like story circles, we can use them to our advantage.**

Using a tool like the story circle may feel formulaic, or cliché.

But to your donors, it is far more likely to feel familiar.

In fundraising, familiar is your friend, because when you tap into your donor's habits and routines, you have far less heavy lifting to do.





***Email***



# Email Marketing Building Blocks

## List Growth

Prominence on Website

Email + Database Linking

Cross-Promote on Social

Incentivize Signup

## Content Calendar

Monthly eNewsletter

Seasonal Appeals

One "Special" Appeal

Giving Tuesday + Year End

## Automation

What you can expect...

Join us on \_\_\_\_\_ too!

Take this short survey

A Conversion Ask



**Email  
Signup**



**New Subscriber  
Welcome Series**

**Online  
Donation**

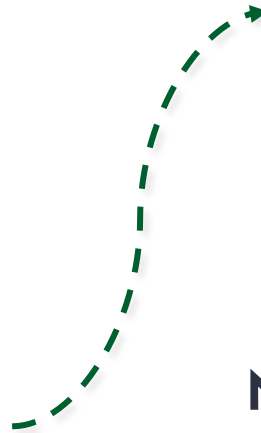
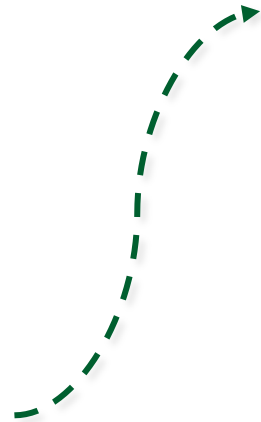


**New Donor  
Welcome Series**

**Monthly  
Donation**



**New Monthly  
Welcome Series**



**Content  
Calendar**



**When planning an email campaign, there are six questions to ask at the outset. The answers inform your strategy for this specific ask.**

1. Who is your audience?
2. What are you asking them to do?
3. Where do they take action?
4. When are you asking them to do it by?
5. Why are you asking them?
6. What data or intelligence makes you confident this is the right direction?

