# ePhilanthropy Strategy: Where Relationship Building, Fundraising, and Technology Meet

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*ePhilanthropy techniques have brought to the nonprofit world an unprecedented opportunity to leverage technology for the benefit of the charity and convenience of the donor.*

Although fundraising and relationship building have always been dynamic endeavors, no change has demanded or received more attention in the past several years than the arrival of *ePhilanthropy,* or the use of the Internet for philanthropic purposes. During this time much has been tried, theorized, and learned. What is certain is that to succeed using the Internet as a fundraising vehicle requires strategy.

In the beginning, some nonprofit professionals thought, hoped, or just fantasized that ePhilanthropy represented quick and easy money for charities. It was unrealistic to ever think that would be the case. However, through careful planning, ePhilanthropy has been shown to add efficiency, reach, options, and success to traditional fundraising and relationship-building efforts.

The book *Fundraising on the Internet: The ePhilanthropyFoundation.org's Guide to Success Online* introduced many tools and options for developing an online presence. This book, *Nonprofit Internet Strategies,* is dedicated to helping take those tools and marry them successfully with offline, traditional fundraising into an Integrated ePhilanthropy Strategy (IePS).

The growth of ePhilanthropy has required even the most seasoned professionals to learn new skills and to reevaluate how they approach nearly every aspect of fundraising. This is not to suggest that ePhilanthropy has taken the place of any traditional fundraising methods—actually, it is the opposite. ePhilanthropy tools add a new dimension of efficiency and require high levels of integration with every *offline* approach to attracting philanthropic support. Although some would relegate ePhilanthropy as

a specialty area to be administered separately, much in the way some offices might have a prospect-research or planned-giving specialist on staff, doing so diminishes the overall effectiveness and denies the opportunity to fully benefit from these tools. This chapter will provide an overview of ePhilanthropy strategy and techniques that non-profits can use to cultivate and steward relationships, communicate and invite advocacy for their cause, and solicit contributions online.

The true strength of ePhilanthropy-based methods lies in their ability to do more than simply functioning as a novel way in which to send messages or raise money. When integrated with off-line efforts, the Internet provides an ideal platform from which to reach, inform, and engage potential donors, many of which may be beyond the reach of normal communication and fundraising channels alone.

Charities seeking success online should approach the Internet as a communication and stewardship tool first and a fundraising tool second. Any seasoned fundraiser will tell you that when you can build and enhance a relationship with a prospective donor, you have a much higher chance of successfully soliciting a gift.

## DEFINING ePHILANTHROPY

ePhilanthropy is a set of efficiency-building Internet-based techniques that can be used to build and enhance relationships with stakeholders interested in the success of a nonprofit organization.

ePhilanthropy is the building and enhancing of relationships with volunteers and supporters of nonprofit organizations using the Internet. It includes the contribution of cash or real property or the purchase of products and services to benefit a nonprofit organization, and the storage of and usage of electronic data and services to support relationship building and fundraising activities.

## CREATING AN INTEGRATED ePHILANTHROPY STRATEGY (IEPS)

ePhilanthropy is not about a quick (or click) hello and a request for money. It's about building and enhancing stronger relationships with supporters. With the steadily increasing market penetration of Internet, wireless, and broadband Internet access, charities have more opportunities than ever to communicate, educate, cultivate, and solicit their supporters.

Five strategies are fundamental to the online success of nonprofit organizations. Taken separately, these strategies may appear too simple. Combining them and integrating them throughout the organization will create a momentum that helps non-profits meet the dual goals of *friend raising* and *fundraising*.

1. Integrate all supporter messages.
2. Give supporters a reason to visit you online.
3. Interact with supporters; don't just send messages.
4. Communicate using multiple methods.
5. Assess and improve performance.

## Integrate All Supporter Messages

In the *always-on* online philanthropy world, the job of the development professional is a lot tougher. Gone are the days when synchronized tone and manner and consistent look and feel were the benchmarks of successfully coordinated campaigns. Today, the coordination of experiences across both online and offline activities requires three steps:

1. Integrate technologies, systems, organizations, and processes to enable your organization to deliver meaningful experiences to deepen supporter relationships. The efficient and effective use of e-mail—while an incredible boon to nonprofits— is best utilized in concert with and integrated into a strategy that includes outreach through traditional methods of print, phone, and face-to-face communication and fundraising.
2. Synchronize information across various communication channels to deliver relevant and consistent experiences at the right time and in the right place.
3. Integrate data from all over your organization to optimize supporter experiences.

In short, if you don't integrate data and activities in new ways, it will be difficult to apply the next four strategies successfully; your efforts are likely to fall short when you treat the Internet as just another communications or donation medium, as opposed to a relationship channel. To be successful, your organization will need to implement organizational and organization process changes to create and manage effective supporter experiences.

## Give Supporters a Reason to Visit You Online

The supporter controls the mouse—and therefore, controls the interaction and the relationship. When the supporter dictates the rules, charities earn loyalty and contributions when they deliver value to those supporters. Many Internet-based strategies fail because they never offer a reason for someone to go online and fail to use all their resources in concert with one another to enhance and deepen relationships with supporters.

To create a sustainable ePhilanthropy strategy, charities must deliver the right experiences to the right supporters. This requires understanding both the supporters' needs and their likelihood of making contributions over a sustained period of time.

To identify value for the supporter, you must assemble data to significantly increase your understanding of your supporters. Why and how do they use the Internet? What online information and opportunities could they use that would open the door to a deeper relationship?

Four online categories usually define value for the supporter:

1. Access to information about the organization's mission and services
2. Increased convenience/saved time in philanthropic transactions (making a donation, volunteering, or advocacy)

3. Ability to expand support to others through use of online tools that aid in supporting the mission (making it possible for family, friends, and colleagues to be informed about your charity directly by your current supporters)
4. Online stewardship and information on accountability

The key is determining what will have the biggest impact on supporters' interest and satisfaction, while increasing value for your organization. As you gather information to gain insights into these topics, you can simultaneously identify the value of supporters and prospective supporters, measured by current and potential contributions. With analysis and prioritization complete, you can deliver the information, experiences, and services that meet supporter needs most effectively and efficiently.

### Interact with Supporters—Don't Just Send Messages

Your supporters *read* newspapers, they *watch* television, but they *use* the Internet. The Internet's value is measured by its ability to give convenient and quick access to what supporters want when they want it, and by what it empowers supporters to do. Although a basic strategy of ePhilanthropy would be to collect e-mail addresses and send out messages to supporters, your strategy should NOT look like an electronic version of a high school public address system, where all communication is blasted out to the entire audience and all communication is one way.

The Internet enables charities to initiate dialogues, invite two-way communication, and enhance relationships. The value of ePhilanthropy is not solely determined by the design of a Web page, but by providing supporters with convenient access to what they want when they want it, and by providing useful tools allowing them to accomplish their interest to support the organization's work and to share their support with their personal and business networks.

A good example is an online service that helps donors reach out to friends, family, and colleagues to solicit funds in support of a race or walk. By focusing on ways to truly interact with your supporters—giving time-starved professionals instant access to easy-to-use tools—your strategy is to develop the charity as a partner geared toward enhancing the ability of supporters to share your message with others. Studies show that by putting such tools in the hands of online supporters, nonprofits will raise much more money from many more contributors than the traditional offline "pass around the pledge form" approach.

### Communicate Using Multiple Methods

Getting information and services into the hands of the right supporters at the right time and in the right place is as important to ePhilanthropy success as creating the message itself. This makes distribution a critical component of ePhilanthropy.

Key to a successful ePhilanthropy strategy is thinking about your online and offline presence as a series of experiences that intersect with your supporters' activities and preferences. Conduct research to understand where and when your organization is of greatest relevance to supporters and prospects. Armed with this supporter insight, your strategy should emphasize a series of services that can be distributed to your sup-

porters as distinct messages across various methods of communication (e-mail, Web site, direct mail, telephone, print, etc).

For example, an organization that traditionally has a gala/auction event would benefit greatly by offering e-invitation options to supporters to aid in selling more tickets; online registration to cut down on staff time updating attendee rosters; and an online auction to expand the number of donors beyond those able to attend the event. By offering these tools and promoting them both online and offline, the organization does not alter its message yet expands its audience and reach.

## Assess and Improve Performance

ePhilanthropy is more than conceiving and implementing innovative strategies that meet the demands of supporters and the objectives of organizations. It is also about continuously measuring and improving results for your supporter and your organization.

When optimizing online services such as content or online donation functionality, the vital measure is the return on supporter time—how well you enable supporters to quickly get the information they want to execute their desired tasks. When reviewing data on Web activities and e-mail donor or advocacy campaigns, it is critical to measure both the immediate actions taken by those receiving the message, as well as their long-term impact on future supporter activity. Therefore, you should track, assess, and act on results across multiple time horizons.

Although it is more difficult to get this information regarding the opening and reading of direct mail or newsletters, what is learned in the online world about your supporter interests and preferences should be used to help enhance the offline services. This sharing of learned experiences will enhance efforts to build an Integrated ePhilanthropy Strategy (IePS).

Be certain you build into every program ways to measure, analyze, and adjust. For example, the data you receive from a single online e-mail campaign will allow you to understand how many received, read, forwarded, and discarded the message, but by looking at longer time horizons, you can learn the long-term effect of such messages on event registration, donations, and Web site traffic. You will be able to plan future campaigns based on an analysis of where and how you acquired the most valuable supporters, rather than on acquisition data that do not factor in links between long-term supporter value and short-term online activity.

Be certain you measure performance on an integrated basis across all media both on- and offline, not in channel silos. True optimization can come only from understanding your supporters' activities across various avenues—offline drive traffic, Web site campaigns, direct mail, e-mail campaigns, newsletters, the content you provide to other Web sites through partnership agreements, telephone outreach, and special events.

After all, ePhilanthropy is less about simple fundraising—that is too easy—and more about creating an always-on interface between your organization and your supporters. You will need to understand and influence technology platforms, and you will want to integrate with systems, databases, and data flows that will enable experiences. Likewise, in building performance-tracking systems you will need to integrate multiple data sources, both online and offline, to ensure a comprehensive, integrated view of your supporters' behavior and their activities with your brand.

### You Can Do It

Marketing today is not about saying hello and making an offer, as it was at the turn of the twentieth century. It's about enabling supporters to never have to say goodbye. Now companies can always be connected, and your interface with supporters can always be on. So, success will hinge on how well connected you are with your supporters. Will you always be on for them? Will you conceive and deliver relevant services to them? Will the services be valuable to both your supporter and your organization? Will your attempts at advertising be embraced as welcomed services or rejected as intrusive annoyances? Will you rigorously optimize the supporters' experience, as well as your marketing budget? Will you integrate your organization, your processes, your channels, and your data in new ways that enable you to take advantage of the Internet's power? Follow the five strategies just described and you will ultimately prevail in the *always-on age*.

## DONORS MUST BE ASKED

Whether the solicitation for support comes via news broadcasts reporting on a tragic event or in the form of an e-mail message from a charity, donors must still be asked for support if organizations expect to receive it. These would-be ePhilanthropists are much more likely to be inspired to contribute based on the mission, the stated need, and the opportunity to give, presented by a charity they have likely already supported offline. But to obtain their support, *they must be asked!*

   Local and national charities that do not offer their supporters the opportunity to communicate and contribute online fail to do so at their peril. Every nonprofit has the opportunity to reach out to more donors and prospects than they could ever afford to using traditional methods of direct mail, telephone or personal visits, but they must cultivate an online relationship before asking for support. This cultivation and solicitation must be part of an integrated fundraising program that includes both online and offline fundraising techniques.

## BACK TO THE FUTURE

This is not the first time that nonprofit organizations and fundraisers have had to adapt to new technologies. Radio, television, newspapers, telephone, fax machine, computers, electronic databases, and direct mail have all affected the way we raise money. Some of the new methods that have evolved are more successful; others have been used with less success.

   Each new advance in technology has created a particular set of challenges for nonprofits and their donors; each has triggered a corresponding set of fundraising norms. For nonprofit organizations, the Internet provides an unprecedented and cost-effective opportunity to build and enhance relationships with supporters, volunteers, clients, and the communities they serve. Connecting with supporters online provides a new means for converting interest in a mission to direct involvement and support.

   In March 2001, Harvard's Professor James Austin wrote,

   *. . . make no mistake; the ePhilanthropy revolution is here to stay, and it will transform charitable giving in as profound a way as technology is changing the*

*commercial world. Charities that have dismissed ePhilanthropy as a fad, or run from it in confusion, will, sooner or later, need to become reconciled to it. If they don't, they risk losing touch with donors and imperiling the vitality of their work.[1]*

In order to harness the power of ePhilanthropy, nonprofit organizations must remember two things:

1. ePhilanthropy should be seen as a set of relationship-building tools first and fundraising tools second.
2. Nonprofit Web sites and use of e-mail for promotional purposes will succeed when integrated into every other form of communication used by the nonprofit (e.g., direct mail, brochures, planned giving, newsletters, telephone, radio, print media).

## SIX CATEGORIES OF SERVICES

The Internet gives donors easy access to numerous philanthropic choices. Increasingly, as the ePhilanthropy revolution builds steam, more and more people have turned to the Web to fulfill their charitable intentions. As ePhilanthropy has emerged, organizations have discovered that one of the keys to success is consistent and deliberate e-mail communication driving traffic to the organization's well-organized and informative Web site.

Years of experience in the offline world have taught fundraisers that attention to detail, privacy, security of information, and honesty in reporting are key components to any successful solicitation of support, whether that support comes in the form of volunteerism, advocacy, or contributions. Through the appropriate use of permission-based e-mail, a nonprofit can provide its donors with increased access to information and more timely details regarding the stewardship and solicitation of their charitable support. Increased access and detailed information help strengthen the relationship and trust between the nonprofit and supporters. To earn this trust, nonprofit organizations will become accustomed to increased levels of scrutiny and demands for evidence that the charity is well managed and provides service consistent with its mission.

Building a Web site is not enough. Success on the Internet requires an integrated strategy that embraces standards for protecting and preserving donor relationships. For-profit vendors have developed a wide array of services to help power nonprofits' Web sites. Many of these services are cataloged on the Nonprofit Matrix at *http://www.nonprofitmatrix.com*. See Exhibit 1.1.

As charities look at various services, they should start by understanding the strategic objectives for their Web site. It is not necessary to have all the bells and whistles before engaging prospects and donors online. It is advisable, instead, to start small and build slowly. Begin with collecting e-mail addresses, communicating via e-mail, and offering the opportunity to give online via an encrypted Web page.

Taking the time to plan ahead can often mean the difference between merely using the Internet and developing a successful ePhilanthropy strategy. The exact mix of strategies and techniques are as varied as the number and types of nonprofits that deploy them.
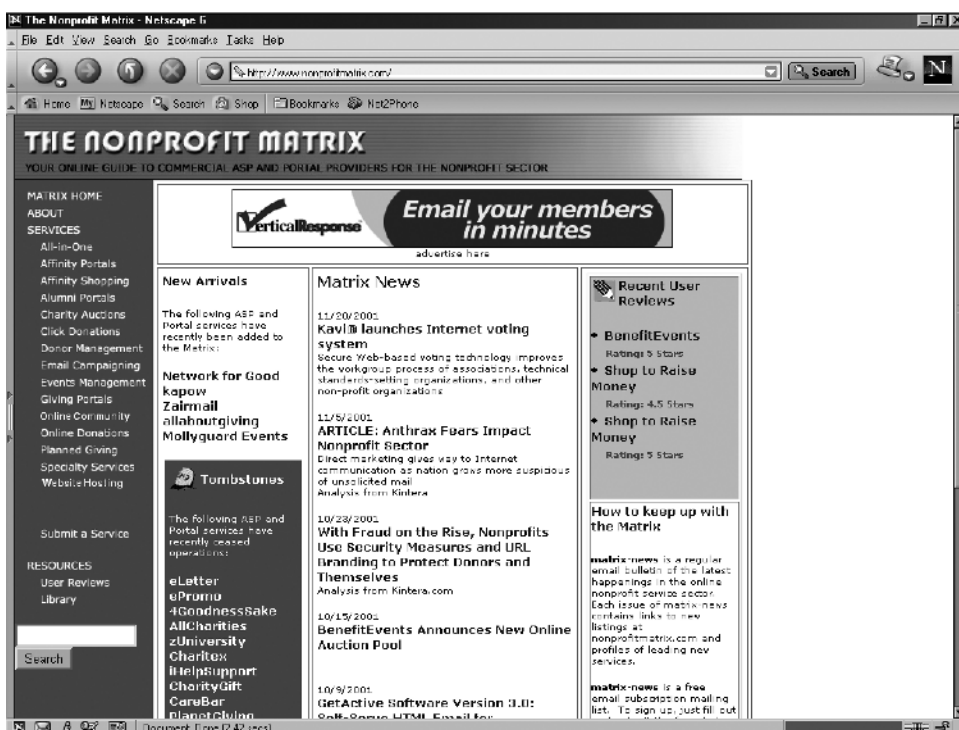
**EXHIBIT 1.1**    Home Page for Nonprofit Matrix

ePhilanthropy techniques fall into six categories:

1. Communication/education and stewardship
2. Online donations and membership
3. Event registrations and management
4. Prospect research
5. Volunteer recruitment and management
6. Relationship building and advocacy

The particular mix of tools and services for each organization will vary widely; organizations should always evaluate options and test assumptions. Incremental improvements and additions of services will help supporters and staff become accustomed to using the new technology and communicating via the Internet. Only by testing can the organization learn which techniques perform the best.

## COMMUNICATION/EDUCATION AND STEWARDSHIP

The first step toward using the Internet to build online donations, expand the volunteer base, and better communicate the organization's mission with a larger audience is to identify who you want to reach, what you want them to do, and what will inspire them to accept the organization's invitation to take action, volunteer, or give.

Use of the Internet as a stand-alone solution is not effective. Although some have predicted that ePhilanthropy will replace many traditional approaches to soliciting support, this will not be the case. Just as television failed to kill radio, yet changed it significantly, so, too, will the Internet change traditional forms of fundraising, not by eliminating them but by changing their utility and increasing their effectiveness.

Just as there are no shortcuts to long-term success offline, there are no shortcuts online. ePhilanthropy methods permit an organization to communicate and engage supporters, not only through a Web site, but directly through e-mail, which can direct attention back to the organization.

As part of an integrated communication and fundraising strategy, ePhilanthropy offers effective and efficient opportunities for nonprofits to communicate with a much wider audience than they might otherwise have the resources to do. Direct mail, telephone, radio, television, personal visits, and other traditional means of communication with supporters all have significant personnel, printing, postage, or other costs associated with them.

The organization's Web site should reflect the mission of the organization; outdated content on a Web site indicates there is nothing new to share. The Web site must be a true resource for information related to the charity's mission and must provide ample opportunities to support and communicate with the charity.

Supporters who begin or maintain an online relationship with an organization have expectations of communication different than their offline counterparts. In most cases, those who communicate via the Internet will expect to receive an automatic electronic response.

## Integration

Promotion of online resources and services through integration with traditional marketing and communication channels significantly increases the effectiveness of overall operations while providing additional options to supporters:

- *Direct mail/ telemarketing.* Every direct mail and telephone appeal should provide the opportunity for supporters to give by mailing in the response form or by making a gift or pledge online. In the case of telemarketing, those who might be at their computer when the call is placed could be directed to an online audio or video message that can enhance the telemarketer's message and could then be prompted to give online.
- *Print material and literature.* Every publication and printed item should include the organization's Web address. This address should appear anywhere the address and/or phone number for the nonprofit would be printed. Large and expensive to produce publications like an annual report can be posted on a Web site as a pdf file (*www.Adobe.com*). Directing donors and supporters to download and print the file not only saves money but also expands the number of people who can access the report.
- *Brand building: promotional opportunities.* Public service announcements (PSAs) and paid advertising and marketing efforts on television, radio, and in print are often some ways organizations share their message with a wider audience.

By directing those hearing or viewing these messages to a Web site, the nonprofit is able to make a more comprehensive appeal for support of their mission.

■ *Press.* Press conferences, television and radio appearances, and public speaking engagements are prime opportunities to promote online resources. Nonprofits should establish an online pressroom, providing in a downloadable format background information, press releases, photos, and other material of interest to the media. This will give the press an opportunity to learn about the organization at any time, day or night.

## Getting the Word Out

The online environment offers several opportunities to communicate with potential supporters. There are several essential aspects to getting the word out online:

■ *E-mail.* This is the most powerful and cost-effective online communication tool available to nonprofit organizations. In accordance with the ePhilanthropy Code of Ethics, it is important that supporters *opt in* to nonprofit e-mail lists. This means that they give permission to receive e-mail from the nonprofit; permission should never be assumed. Even after permission is granted, supporters must be given the option to have their names removed from the e-mail list at any time, known as *opt out.*

■ Several vendors have developed services that make it easy for organizations to use e-mail and the Internet for soliciting donations, outreach, education, and advocacy strategies. The integration of the organization's Web site (content and encrypted online donor forms) and e-mail (pushing the message to supporters), along with direct mail/ telephone and other campaigns, not only provides additional options for donors but also gives them the opportunity to become more informed and engaged donors.

■ *Search engines.* Each has its own criteria for cataloging the resources of the Internet. Yet no single search engine provides reference to more than 16 percent of the Internet. Therefore, it is important to register the organization's Web site with several of the leading search engines (e.g., Google, Yahoo!, Lycos, AltaVista, Hotbot).

■ *"Pass-along" marketing.* Although it is highly unlikely that anyone receiving a direct-mail appeal from a charity will make several copies, address envelopes to their friends and family, and mail copies of the letter urging they also support the organization, it is very likely this activity will take place online. Also known as *viral marketing,* it is a method of asking the recipient of an e-mail to send the message along to other people they know who might be interested. Within a few seconds, the message can be sent along to scores of people on their personal e-mail list. Very important to the success of this method is the fact that the message is now being sent by a friend or family member, thereby increasing the chances of it being read.

■ *Send to a friend.* Those who visit a nonprofit organization's Web site are often looking for expert information related to the mission of that organization. By offering the option to "send-to-a-friend" an article or link to a Web page on the site to a friend, the utility of the Web site's content is further enhanced. Once again, the power of this feature is that the recommendation is coming from a trusted friend or family member.

## ONLINE DONATIONS AND MEMBERSHIP

Most visitors to a Web site go there because they know or care something about an organization or its mission, and they are seeking information. Effective sites offer multiple opportunities for visitors to support the organization through advocacy, volunteerism, or donations, often on each page of the Web site.

William Park, the chief executive of the marketing firm Digital Impact, talking about e-mail marketing in an interview with *The New York Times*, said, "It's the most measurable marketing vehicle of all time."[2] Response rates are more quickly and accurately measured than in other media. This combination of price and response makes e-mail, particularly e-mail newsletters, very attractive to nonprofits.

### Online Donations

The technical details of establishing and owning a secure e-commerce server can be overwhelming; however, with so many vendors and several free services available for processing online gifts in accord with ethical and security standards, it is inadvisable that most nonprofits undertake the creation of a *home-grown* online donation solution. According to the ePhilanthropy Foundation's *Tips for Online Giving*, charities should offer Web sites that use encryption technology to ensure appropriate security for online donations and data transmission. Before entering any information the donor should be able to verify that the page requesting your credit card information is secure (encrypted). The letters https:// (rather than http://) should precede the page's URL, and/or there should be an unbroken key or padlock symbol located in the corner of the Web browser.

### Planned Giving Online

*Planned giving* can often seem complicated to both donors and nonprofits. For donors, education is an important component to learning how they can match their charitable intentions with their estate plans. Nonprofit organizations are faced with the challenge of identifying those who may support their missions with planned gifts—and provide them with the details they need to choose the right planned giving vehicle. For both large and small nonprofits, and for donors and prospects, the Internet is increasingly becoming both a strong marketing tool for planned giving and a great resource for information. The Internet can be an effective vehicle to promote and enhance planned giving efforts, allowing nonprofits to provide detailed information regarding tax-wise giving to more of their donors and prospects.

The Internet provides many opportunities to reach out to colleagues and professionals who share an interest in most any topic of ePhilanthropy. There are several services that allow others to learn from colleagues and share experiences.

### Information

It is relatively easy for most nonprofits to put planned giving information on their Web sites; keeping the site updated and legally accurate is more difficult. Several services provide Internet-ready tools that are regularly updated and kept compliant with changing tax laws. These tools represent a cost-effective way to provide compelling and effective planned giving content.

Many donors are turning to the Internet to investigate for themselves how a planned gift would work, instead of calling an adviser or asking a charity for a planned giving illustration.

To meet the needs of these donors, charities can include online tools such as a gift-planning calculator on their Web sites. This information makes available to donors information and resources that had once been the exclusive purview of accountants, lawyers, and planned-giving professionals. Providing these tools gives another reason for donors to visit the Web site.

### Marketing

Once planned giving information is available on the charity's Web site, it is time to invite donors and prospects to visit. Most board members and staff members hesitate to discuss planned giving with donors and prospects for fear they will be asked questions they can't answer. The Web site provides a valuable tool in reaching out to these donors by providing self-explanatory planned giving pages. Local attorneys, financial planners, and other advisors should be contacted and made aware of the content and services available. These advisors are often asked by their clients if they know of reputable organizations they might support via their will or planned giving vehicle. Advisors not wanting to appear to have a conflict of interest will often offer several options. They are much more likely to advise in favor of organizations they think are prepared and understand the concepts and topics on which they are asked for advice.

### Event Registration and Management

ePhilanthropy special event management makes event registration easier for nonprofits and event attendees. Online services are available to send event invitations, organize volunteer activities, maintain income and expense records, and provide high-quality registration and attendee services. Golf tournaments, walks, and silent and live auctions each have specialized registration and item organization needs. Several online services have been developed to address one or more of these specific requirements.

Surveying the participants from the prior year's event can enhance special event planning. An online survey form can be e-mailed to participants to obtain their feedback. There are several free and fee-based online survey tools available.

## PROSPECT RESEARCH

Although an incredible amount of information about fundraising prospects is available online, it's important to pay close attention to the management and use of information gathered. Whether you subscribe to the Association of Professional Researchers for Advancement (APRA) (*www.aprahome.org*) code of ethics or develop your own privacy policy, it is important to protect sensitive and confidential information.

Some Internet resources regarding online privacy issues include the following:

Online Privacy Alliance:                         *www.privacyalliance.org*
Electronic Frontier Foundation:                  *www.eff.org/privacy.html*
Electronic Privacy Information Center:           *www.epic.org*

## Manual Prospect Research

Although it is estimated that the Internet comprises more than half a trillion Web pages (growing daily), the challenge is to determine what is most likely to support fundraising. Indexed Web sites offer an easier approach to finding helpful databases. These sites have been developed to aid access to information databases and Web sites.

Internet Prospector (www.internet-prospector.org) is the very best customized nonprofit site for doing manual prospect research over the Net (see Exhibit 1.2). The site is set up as a roadmap to resources that have direct bearing on gathering information on prospects. Staffed by a national network of volunteers, this nonprofit site provides a unique service that mines the Internet to report on resources of use to prospect researchers.

## Electronic Screening

The Internet makes it possible for charities of all sizes to obtain helpful information regarding the capacity of their key prospects to make a major gift. There are several free and paid access databases available to nonprofits seeking to identify prospects with wealth. Several companies have developed services that make it possible to match a charity's prospect database to specific information about known persons with private wealth, philanthropists, inside stock traders, private company owners, high-net-worth professionals, as well as corporate and foundation executives and trustees.
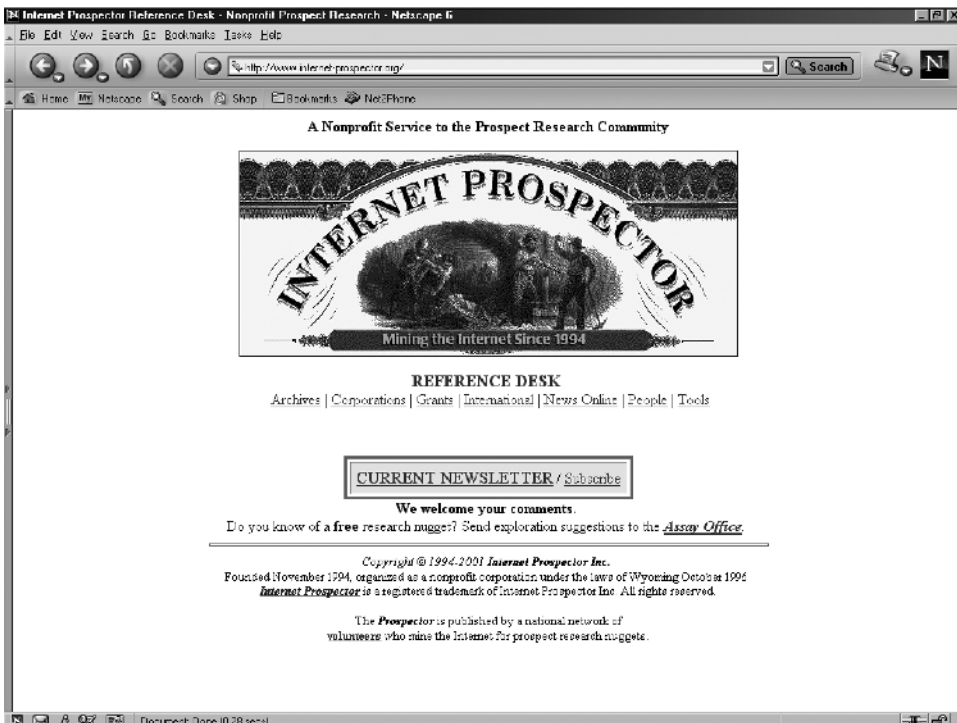


**EXHIBIT 1.2**    Home Page for Internet Prospector

## VOLUNTEER RECRUITMENT AND MANAGEMENT

Volunteers are important to any successful nonprofit program or fundraising endeavor. The Internet provides tools that can enhance relationships and improve communication. Recruiting volunteers online is an excellent way to reach nontraditional volunteers, including populations that might be underrepresented in an organization's volunteer ranks (seniors, ethnic minorities, people with disabilities, etc.).

Several online resources are available that can help with technical assistance, resource sharing, training, and consultation. Organizations interested in posting volunteer opportunities online have several options to obtain help in locating volunteers, tracking them, and managing their activities. One of the largest is SERVEnet (*www.servenet.org*); another is VolunteerMatch (*www.volunteermatch.com*).

### Virtual Volunteer Management

The Internet can be used to increase communication, coordination, education, and collaboration with and among volunteers. The Internet can help volunteers, particularly those that work away from direct supervision, feel more connected to the work and mission of the organization. Here are five examples:

1. E-mail is an easy and free way to communicate with volunteers quickly and provide them opportunities to communicate easily with nonprofit staff.
2. An online *ask a peer* discussion group for your volunteers is an ideal tool to help them collaborate, share what they have learned, and increase teamwork.
3. Regular e-mail updates on important organizational news and volunteer activities can help in volunteer retention.
4. Volunteer manuals, guidelines, statistics, and other information helpful to volunteers can all be posted online, making them available anytime.
5. Online calendars can help volunteers remember important assignments and deadlines.

For an extensive list of free and fee-based services, check out Web Hosting Forum Services at *www.thinkofit.com/webconf/hostsites.htm.*

According to the Virtual Volunteering Project (*www.serviceleader.org/vv*), "virtual volunteering means volunteer tasks completed, in whole or in part, via the Internet." This combines technology with offline volunteer recruitment and management efforts. Organizations can expand their reach by attracting volunteers from new areas and increasing their level of participation.

### Privacy Concerns

When an organization asks donors or members for demographic and personal contact information, it is implicitly asking them to trust that it will not misuse the information they provide. Organizations must address privacy concerns. Information will not be given and donations will not be made online if they don't trust that their information will be used responsibly.

To increase the likelihood that the trust supporters have for the charity will be transferred to the online environment, charities should do the following:

- Publish their privacy policy on the Web site and at other places where such data is requested or required.
- Review and strengthen internal security and use of confidential data.
- Ensure that supporters can control the information collected about them, including removing their name from lists for future online communication and/or solicitation.
- Respond promptly to complaints and all forms of electronic communication.
- Consider seeking certification from one of the well-known privacy trust marks such as trustee or BBB Online.

### Shopping and Bidding

Shopping sites, auction sites, and others can give supporters an opportunity to show their support by encouraging them to shop or bid to benefit the charity of their choice. Few of these options have raised significant revenue for charities. The appropriate allocation of staff time would place an emphasis on improving the Web site, developing an effective e-mail communication program, and integrating these efforts into traditional forms of fundraising. Even though such services have failed to generate quick and easy money for nonprofits, it is appropriate to use these services as additional options on a charity's Web site, only when the items being sold or the auction event is somehow tied to the mission of the organization.

## RELATIONSHIP BUILDING AND ADVOCACY

For some organizations the promotion of their mission through e-mailing an elected official, signing an electronic petition, receiving electronic *action alerts,* or forwarding e-mail messages to friends, co-workers, and family serves an important role in building and enhancing online relationships.

An online advocacy campaign can serve as a successful way to rally support and an excellent way to build an e-mail database. Making effective use of the organization's Web site and e-mail database requires careful planning. The messages in the action alerts should match those of print media and the Web site. It is important to identify specific goals for online advocacy.

Follow-up to these prospects or donors through traditional direct mail or other methods should refer to the initial e-mail contact. An example might be: "Last month you joined with 75,000 other dedicated Americans who are joining the fight for tougher drunk driving laws. Today, we are writing to ask for your help."

To support the details of this effort, several online services have been developed.

Because their initial contact was on the occasion of an advocacy campaign, it is important to provide appropriate follow-up. Charities might consider proposing additional advocacy activities, an invitation to volunteer, or suggestion to make a charitable gift to support going efforts related to the initial advocacy request. The purpose is to turn potential donors acquired during an online activism campaign into donors.

## CONCLUSION

ePhilanthropy techniques have brought to the nonprofit world an unprecedented opportunity to leverage technology for the benefit of the charity and convenience of the

donor. In every organization, time and resources are spent on recruiting and retaining charitable support. This support is based on relationships built and missions fulfilled. Hundreds of options exist to develop solutions for each of the six categories of ePhilanthropy outlined in this chapter. Use of the Internet enhances these efforts by providing efficient and effective communication tools tied to robust secure online services. These services empower donors to utilize information and support charitable causes anytime and anywhere.

## ABOUT THE AUTHOR

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## ENDNOTES

1. Kellogg Foundation Report on e-Philanthropy (2001).
2. "Charities Turn to Email Experts," *New York Times* (August 21, 2000).