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Building Meaningful Engagement — Your Future Depends on It

Three Nonprofit Organizations Share Their Stories

Summary

Nonprofits depend on personal connections. Whether making individual appeals to fund raise and enlist volunteers or engaging in face-to-face interactions with the communities they serve, those personal connections are everything. Previously, nonprofits attempted to forge these all-important personal connections via direct mail, brochures, phone calls, and door-to-door solicitations with the goal of moving past one-off engagements to fostering long-term relationships with donors and volunteers.

Today, the goals are similar but the tactics are—by necessity—radically changed. The dawn of social media, the popularity of mobile devices and apps, and the emergence of other technologies such as online collaboration tools are forcing nonprofits to think differently about how they engage with and provide services to their constituents.

Social technologies are driving radical changes in a new, emerging generation of nonprofit organizations, helping them communicate, collaborate, and innovate in ways that advance their core missions. We can learn from nonprofits about the importance of these social technologies and how they help place the success of their missions in the hands of their supporters. Read on to find out how three nonprofits, Groundwork Operations, Hopeworks 'N Camden, and Polaris Project, use social technologies to listen, engage, and communicate with people in a meaningful way.

Beth Kanter: "Don't Treat Your Social Media Contacts Like an ATM"

Beth Kanter is the author of *Beth's Blog: How Nonprofits Can Use Social Media,* one of the longest running and most popular blogs for nonprofits on the Web. Kanter says that the first thing nonprofits have to realize about social media versus other communications channels— for example, advertising or direct mail—is that it's a two-way street. You want to *engage* constituents, which means that you eventually want to get something back from them—a response of some kind.

"Social media has to lead somewhere," says Kanter. "And although you may well want to eventually raise money, don't treat your social media contacts like an ATM. Don't just demand money."

Instead, says Kanter, engagement is a progression: from building awareness to building a relationship. "Keep in mind that there are different stages of engagement, and be sensitive to what stage your contacts are in," she says.

For example, a first goal with a social media contact might simply be getting a "like" on Facebook, or a tweet on Twitter. A second goal might be collecting that contact's email address. Eventually, you may want that person to be a donor, but then you might want to nurture them even beyond that stage—to be a champion of your cause, and solicit donors on your behalf.

"It's important to think about your strategy as you move people through these various stages of engagement," she says.

Indeed, one of the biggest pitfalls Kanter sees for nonprofits is a lack of consistency and follow-through. "Beginners at social media don't have an editorial calendar, and they don't measure results—they simply post when they have time," she says. So the intern might post for a couple of weeks, then get distracted by other duties.

"You have to keep feeding the beast," says Kanter. "Otherwise, it's worse than doing nothing."

Beth Kanter

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Hopeworks 'N Camden: 'We Manage Our Dreams with Salesforce'

Rev. Jeff Putthoff is the executive director of Hopeworks 'N Camden, a Camden, New Jersey–based nonprofit that trains at-risk inner-city youths in leading technologies. A Jesuit priest, Putthoff has lived and worked in Camden for almost a decade. He points to the success Hopeworks has experienced in the past 13 years: nearly 1,000 youths from the target population that have been trained by Hopeworks and moved on to get jobs, pass their General Educational Development tests, and attend college.

Putthoff says that the scale of this success has a lot to do with the technology tools now available to nonprofits.

Rev. Jeff Putthoff

Prior to three years ago, everything was done manually. The trainees were given physical cards to document the technology training classes they had taken. Putthoff would then enter the data into a Microsoft Excel spreadsheet. But it was easy for the physical cards to get lost, and keeping the spreadsheet up to date was time consuming and Putthoff would often fall behind in his record keeping. Putthoff also lacked an adequate system for tracking grants, donors, and volunteers. "We had information everywhere, and we never knew where to find anything, much less make use of the information we had," said Putthoff. "Today, we manage our dreams with Salesforce."

The No. 1 benefit of Salesforce: It helps Hopeworks engage more meaningfully with its constituents. "We collect data on our trainees, volunteers, and donors, and we can use it to good effect," he said. "Salesforce is not just a digital file cabinet. I can segment my volunteers and donors and send personalized emails that say, 'In the last month you gave us X amount of time. We want to thank you.' And then we try to push them to the next level of engagement."

The key about using Salesforce is that every piece of information can be "actionable," said Putthoff. "For our quarterly fund-raising campaigns, we write the scripts, notify our volunteers of whom to call, and enter the amounts pledged, all from one Salesforce dashboard," he said.

The team at Hopeworks also depends heavily on Salesforce Chatter™ to share information and collaborate. "Every single day, everyone here uses Chatter," said Putthoff. "We use Chatter to talk about opportunities for our kids. We use it in private conversations, as a way of sharing information, and we use it to bring in outside mentors. When we have to share information or collaborate, Chatter is involved. We've found it an invaluable way to engage people in our mission."

Social and Collaboration Technologies Keep People Engaged

- As of December, 2012, 67 percent of all Internet users in the United States regularly engaged with others via a social media site such as Twitter, Pinterest, or Facebook (see Figure 1).[1]
- A full 40 percent of cell phone owners use a social networking site on their phone.[2]
- Seventy-five percent of businesses say that collaboration tools were either "very important" or "somewhat important" in the past year.[3]

Social Networking Site Use by Age Group, 2005-2012
% of internet users in each age group who use social networking sites
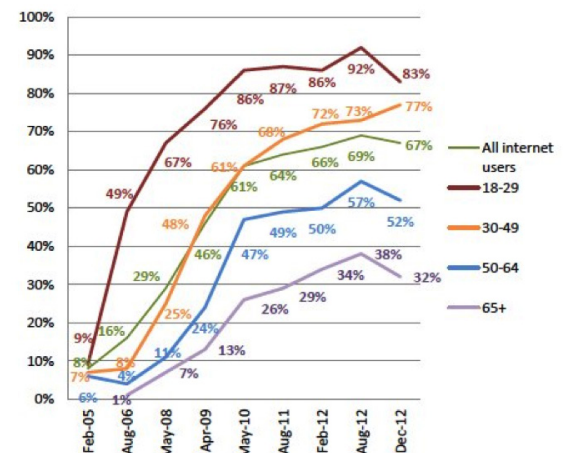
Source: Pew Research Center's Internet & American Life Project surveys, 2005-2012

1. Pew Research Center's Internet and American Life Project survey 2012.
2. Ibid.
3. MIT Sloan Management Review and Deloitte, May 2012.

Putthoff recently used Chatter to organize a citywide campaign to reduce the murder rate in Camden. "As a way of sharing information and bringing people into the conversation, it worked very well—we actually succeeded in our campaign—the murder rate dropped here in town," he said.

There are some challenges to using social technologies in the mission, he admitted.

"Chatter is ultimately a cultural change. It's about understanding data, and defining opportunities, and grasping the importance of transparency and power structures," he said. "It's a new kind of stream, much different from email, and learning how to use it can take some time."

37 percent of nonprofits spend six hours or more on social media every week.[4]

Facebook and Twitter were also useful in the murder-reduction campaign. Father Jeff created a Facebook page that made Hopeworks the "go-to people" for knowing what was happening in the city. Here, too, engagement was a top goal. "We used Twitter as a way to thank volunteers and people who donated to our cause," he said. "Anytime we can engage with people who touch us, we do."

Putthoff feels that he is just scratching the surface as to what technologies like social and customer relationship management (CRM) technologies can do for his group. "Culturally, as an organization, we need to understand that we have relationships with each of our volunteers, our donors, our trainees, and those relationships need to be managed with care," he said. "Salesforce and Chatter are helping us do that."

Groundwork Opportunities: 'We Couldn't Fulfill Our Mission Without Salesforce'

"Too much of the advertising and messaging from developing world charities comes from communities of despair—showing poverty, hunger, sick and dying children and women," said Bart Skorupa, executive director of Groundwork Opportunities (GO), a nonprofit charity that invests in groundbreaking ideas in education, healthcare, and the environment. "But there are truly amazing leaders doing amazing things out there. We want to highlight the positive things they are accomplishing."

Bart Skorupa

GO's mission is to find those leaders and entrepreneurs in neglected communities around the world and give them the support to grow. It accomplishes this by matching leaders and entrepreneurs with fund-raisers—called champions—who pledge to raise money for a particular cause. For example, one such community leader is building sand-based water filtering systems; another is sponsoring the Homeless National Cup in India that gives poor and homeless boys and girls the chance to compete in soccer matches. GO provides such leaders with the start-up capital and guidance needed to turn their vision for a better world into a reality that will scale across multiple countries.

GO started four years ago with just $2,000 and two projects that it wanted to fund. One of these projects was a model development farm in Uganda founded by a man who was teaching the local community to grow food more easily and sustainably. A champion of the farm, Sarah, traveled from England to visit the farm and view the progress that was being made with her funds.

4. "Nonprofits Investing More Time, Money in Social Media," Vertical Response Marketing Blog, 2012.

"Sarah came home excited about an idea to build a biogas plant out of pig waste on the farm," said Skorupa. "She started fund-raising, but we didn't have our own fund-raising platform back then, so Sarah used a crowd-funding solution to raise $12,000 for her cause."

The average nonprofit Facebook and Twitter communities grew by 30 percent and 81 percent, respectively in 2012.[5]

But the problem with using any of the crowd-funding platforms currently available is that they take between 8 percent and 15 percent of the proceeds. "So suddenly we owed $850 for the privilege of using the platform," said Skorupa. "We thought at that point, how hard would it be to build our own crowd-funding platform?"

Skorupa realized that the campaign feature in Salesforce CRM was exactly what he needed—all he had to do was to build a data bridge from Salesforce to GO's website. "Suddenly we had our own crowdsourcing platform," he said. "It saved us a lot of money, and best of all, we had full access to a whole bunch of data about our donors. The data we would get from the other crowdsourcing platforms was not to our satisfaction."

Today, when potential donors log on to the GO website, they can choose a project, enter the amount they wish to donate, and type in their credit card information. The payment system then automatically populates Salesforce. "So unless someone writes us a check, we don't enter anything manually," said Skorupa.

Currently there are about 47active champions on the site, and on average they receive donations from 30 people over the course of funding their projects. "The great thing about Salesforce is its ability to scale," said Skorupa. "We could have 3,000 champions, and Salesforce could easily handle all the number crunching."

Skorupa's goal in 2013: to get 500 champions in his system raising money "for all sorts of amazing things."

Skorupa also uses Facebook and Twitter to spread good news about his projects. "Mostly, we don't like pity and sad stories. We're using social media to show success—how we are training women to sew in Uganda, or how we are building a water filter plant in Cambodia. Our overall messaging is, stop the pity and be a champion."

By the end of 2012, 98 percent of nonprofits had a presence on Facebook, 74 percent had active Twitter accounts, and 66 percent had YouTube channels.[6]

GO simply wouldn't be viable without the new social technologies, said Skorupa. "A lot of the champions have video, and they are telling the stories virtually and sharing their stories through Facebook and Twitter, reaching hundreds of new people with each new champion," he said. "We'd need to be much bigger, and we'd need money for postage and to sponsor events to make this concept work without the new technologies."

Skorupa points to a champion who put on an online concert and streamed it on the GO website using Google Hangouts. She raised $2,300 to build a clean water well in Cambodia with that single event. "If she'd just had a local concert, she might have raised $300 or $500. But doing it worldwide, she even had people donating money from around the world," said Skorupa.

All this would be impossible to do 10 years ago. "We're quite small, yet we're able to have a really big impact because of these technologies," said Skorupa.

5. Ibid.
6. "Nonprofit Social Network Benchmark Report," 2012.

In September, he rented out space in a downtown San Francisco café for an event called Give 100. "Our concept was simple: We had 100 days left in the year for 100 champions to give 100 percent," he said. GO sold tickets on Eventbrite and more than 80 people showed up. "We kept track of all the contacts on Eventbrite—the Eventbrite integration with Salesforce is awesome—and were able to track the costs of the event on Salesforce," said Skorupa. "Managing the information about the event was effortless."

News is rapidly spreading about GO. "We raised more money in December than in the past four years combined," Skorupa said. "I haven't slept much since December 1. It's gotten to the point where it's a little out of control, but in a good way. People are signing up to be champions, and we are confident we can support them, given the technology tools we have today."

Polaris Project: 'We Truly Understand the Value of Information'

Human trafficking is a very real and very serious problem—not just in the developing world, as most people might think, but even in the United States. Polaris Project runs the National Human Trafficking Resource Center, a toll-free hotline (888-373-7888) that also accepts texts (BeFree) from people who are victims of human trafficking, who are serving human trafficking survivors, or who have tips on possible human trafficking cases.

> By using technologies such as Facebook and Twitter, nonprofits can reduce costs by as much as 80 percent over direct mail, telephone calls, or other traditional ways of getting people involved with a mission.[7]

Key to the success of the Polaris Project mission: the ability to engage people through information. "We truly understand the value of information," said Brad Myles, executive director and chief executive of Polaris Project.

"Human trafficking is a hidden crime, and the people who are affected are often at the margins of society," said Myles. "There's a lot of interest in this issue, and a lot of political will to do something about it, but it's such a clandestine crime that people don't have good data at their fingertips about the scope of the problem."

When policymakers are considering legislation, they ask for data, said Myles. When the White House is considering new policies, it asks for data. The police, the social workers, potential donors, and volunteers immediately focus on the data. Thanks to its use of the Salesforce platform, Polaris Project has become the go-to organization for this all-important data.

"Because we run the national hotline, we have a tremendous amount of very valuable data flowing through our doors every day," said Myles. "We had to make sure we were being good stewards of that information. Salesforce enables us to do that."

Brad Myles

When a call for help or a tip about a potential case comes into Polaris Project, it is assigned a unique record in Salesforce. That record is then added to and tracked as the case progresses. In recognition that "hotlines don't have to be stuck in the last century," said Myles, the Polaris Project hotline team accepts communication not just by telephone but by text, email, and web forms. All of this is channeled into Salesforce, with the texting functionality powered by Chatter. When Polaris Project refers a hotline call to other service providers or to law enforcement, these referrals are tracked in Salesforce. The hotline also receives requests

7. Ibid.

for reference documents and training materials. "A hospital might call in and ask us for training materials on human trafficking for healthcare workers," said Myles. "We track a library of thousands of documents through Salesforce and share contact packs with whoever requests them."

Then, of course, there are the statistics. The media, government leaders, law enforcement, and legislators at the local, state, and national levels frequently call for statistics to educate, inform, or persuade. All that is done through Salesforce as well.

Polaris Project has been so successful that it now fields more than 2,000 calls a month—that's approximately 70 per day. And the hotline team has grown by a factor of 10 over the past five years to manage that. Originally, there were just three people staffing the hotline. Now there are 32. Myles has managed this growth using Chatter. "You can imagine the knowledge transfer challenge when you grow so quickly," said Myles. "We had to make sure that everyone on the staff—who work in shifts—understand the case histories of people who have called in for help." This is done through the Chatter functionality of Salesforce.

But use of Salesforce isn't just limited to the hotline. Since Polaris Project started using Salesforce seven years ago, it has gradually adopted it to run virtually every aspect of its business. "Salesforce has been a game changer for us. I could give you dozens of examples," said Myles. "It's how we track our partners in social service organizations across the country. It's how we power our policy work. It's how we track different bills going through various legislative bodies. You name it, we use Salesforce for it."

Polaris Project has been so successful that the U.S. State Department has awarded it a grant to identify and map all the human trafficking hotlines in the world. "The data systems of these hotlines are ripe for improvement and innovation," said Myles. "They're still using hard-copy data forms and storing those forms in three-ring binders." Polaris Project is working with a team of engineers within Salesforce to make its instance of the Salesforce platform exportable to other trafficking hotlines. "We are planning to export it this summer to a group in Southeast Asia, and after that envision replicating it for dozens of other hotlines around the world," he said.

Using Social Technologies Pays Off

- Nonprofits that solicit funds through social channels can get as much as 45 percent more money.[8]
- Fifty-eight percent of nonprofits reported an increase in donations from online fund-raising over direct mail.[9]
- People who join an organization online give an average of $62, compared to just $32 given by those who join by mail.[10]
- For nonprofits, the value of a single Facebook "Like" is $161.30 over 12 months. That number increases to $214.81 when combined with other social media channels.[11]

8. Ibid.
9. "The Nonprofit Fundraising Survey," Nonprofit Research Collaboration, 2010.
10. Helen Flannery and Rob Harris, "2011 donorCentrics Internet and Multichannel Giving Benchmarking Report," 2011.
11. Ibid.

Conclusion

Social technologies have enormous potential to help nonprofits engage donors, volunteers, and other constituents on a completely different level than they were able to before. Here are some tips on how best to do this:

- **Create "light" ways to engage.** Give potential constituents an easy way to become introduced to your organization without making a huge upfront commitment of time or money For example, start by asking them to "Like" you on Facebook. Prompt them to "Share" a post with their friends. From there, you can request small amounts of time or money—and then gradually increase the "ask" to deepen their engagement. Make sure to collect sufficient data on all people you come in contact with, no matter what level of engagement they've committed to.

- **Think in terms of lifetime value.** Once you find the people who are interested in your cause, find innovative ways to engage them for the long term. For example, invite them to engage in leadership committees or to train the next generation of volunteers. Think about all the possibilities in the relationship—not just in terms of fund-raising, but in other ways you can accelerate your mission. For example, you may have a potentially interested person who can only donate small amounts of money annually but who is willing to commit to an increasing number of volunteer hours or to elevated positions of responsibility.

- **Show results instantly.** Today's volunteers and donors want to see what has been accomplished with their actions or funds right away. With the right technology tools, you'll have the data and should be able to display it in real time. For example, show how a particular volunteer effort has pushed a mission closer to achieving its goals by posting photos on Facebook, or how a particular donation contributes to the overall dollars raised by showing a bar chart that is updated in real time.

- **Combine traditional storytelling with social technologies.** Nonprofits have always used storytelling to tug at the heartstrings of potential supporters. Now with the added elements of video and social networking and mobile technologies, storytelling can be more effective than ever. YouTube videos that focus on the stories of individuals helped by a mission can be very dramatic, for example. Or Facebook pages dedicated to the impact your mission is having on a community's members, with individuals posting their own stories, can be equally riveting.

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