Creating and Implementing an Online Donor Portal: One Donor Relations Team's Experience

Fulvio Cativo, University of Maryland

Kathleen Diemer, CFRE

George Mason University

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The Project

➢ Concept initiated in 2006, very few donors were interested at that time

➢ Reconsidered and moved up priority list in late 2011

Timeline

➢ Proposal written and submitted in January 2012

   ➢ History and current status of reports

   ➢ Statistics from 2011 reports

   ➢ Gifts in response to reports

   ➢ Legacy stewardees project

   ➢ Frequently asked for information

   ➢ Considerations for moving to online reports

   ➢ Suggested information for inclusion in online reports

   ➢ Suggested Analytics

Timeline

- ➤ February – May 2012
  - ○ Business Applications unit develops product
- ➤ June – July 2012
  - ○ Business Applications and Donor Relations work to revise text and review site for ease of use
  - ○ Demonstration and review with then Vice President
- ➤ July – August 2012
  - ○ Demonstration to stewardship network
  - ○ Demonstration and review with new Vice President

Timeline

➢ September – October 2012

   ○ Review design and text of rollout postcard

   ○ Confirm mailing lists

   ○ Activation letter drafted and shared with colleagues to test instructions

➢ November 2012

   ○ Postcards mailed (November 2, 2012)

   ○ Activation code letters mailed (November 13, 2012)

   ○ Print reports mailed (November 30, 2012)

Timeline

➢ November 2012 – Present

  ○ Financial and recipient data upload improvements

  ○ New giving site launched to complement Portal

  ○ Projected transition date for all-online reports (in discussion)

Live Demonstration

- ➢ Donor Feedback
  - ○ The Good
  - ○ The Bad
  - ○ And the Comical

By The Numbers

- No outside costs
- Staff involved
  - 3 members of Business Applications unit
  - 2 members of Donor Relations unit
- 792 postcards and activation letters mailed
- 15 donors contacted us immediately with feedback or questions

By The Numbers*

- ➢ 1,583 endowed funds
- ➢ 1,137 contactable stewardees
- ➢ 197 donors have activated their accounts
- ➢ 28 donors have chosen to stop receiving print reports
- ➢ $70,163 raised directly through portal

*All figures as of February 23, 2015

Lessons Learned

➤ You Built It. Now What?
  ➤ Building the system is just the beginning!

  ➤ Enlist partners for success

  ➤ Listen to donor feedback

  ➤ Find champions and allies (IT, senior leadership, development officers)

  ➤ Know your (data) limits and frame message accordingly

    ➤ Add new components and features sustainably

Lessons Learned (Continued)

➢ Where is this project going?

➢ What will it take to get there?
  ➢ Plan for continuous system maintenance

  ➢ Commitment to incremental improvement

  ➢ Factor feedback, capacity to develop long-term strategy

➢ Be mindful of impact on other platforms
  ➢ A rising tide lifts all boats … sometimes capsizes a few

Additional Resources

➢ *The Hub*, October 2013
  J. Kay Coughlin, "E-Stewardship Myths"

➢ *The Hub*, December 2013
  J. Kay Coughlin, "Best E-Practices"

➢ *The Hub*, February 2014
  Julie Bostian, "Applying the Apple Philosophy to Donor Relations, Online reporting: Should you take the plunge?"

Thank you! Got any questions?

➤ Fulvio Cativo,
- Director of Donor Relations and Stewardship
- University of Maryland
  fcativo@umd.edu

➤ Kathleen Diemer, CFRE
- Executive Director of Donor Relations and Advancement Communications
- George Mason University
  kdiemer@gmu.edu