Digital Fundraising Playbook Series:

Choosing Technology to Support Animal Welfare Nonprofits and Nonprofit Allies of Municipal Shelters

Introduction

In the municipal digital space, animal shelters must often use whatever technology is provided by the municipality or at least the division of the municipality to which they report. Since those supervisory divisions range in nature from fire and police to public health and recreation, these systems can be diverse, large, and built to accomplish municipal tasks that 501(c)(3) organizations do not need to address.

Even if your organization is a municipal shelter, you can still be supported by nonprofit allies: 501(c)(3) support groups dedicated to increasing community engagement and funding for the shelter. The content of this playbook, which is focused on choosing nonprofit technology, can still benefit you and your agency.

In the nonprofit digital space, there are many kinds of technology choices to make: who is going to send out your marketing emails, who is hosting your website, who will provide safe and secure donation forms, and how that money gets into your bank account. To start, determine the scope of your technology needs. For example:

- We need an email platform to send marketing, fundraising and engagement emails.

- We need a nonprofit database/platform (also called a CRM, which stands for constituent relationship management) to track supporters, collect donations, sign up volunteers and/or do online advocacy work.

- We need a web host to create and host our organization's website.

There are dozens of sites dedicated to helping you answer these types of questions (see the resources section at the end of this playbook). Below is general guidance on two of the most frequent choices that organizations must make: email technology and website platforms.

Program Choices: Sending Emails

Stand-alone email marketing tools vs. CRM platforms with their own email tools

There are two types of email solutions to consider in order to send marketing, fundraising and engagement emails to your supporters: (1) stand-alone email marketing tools and (2) CRM platforms (often called donor databases).

Stand-alone email marketing tools: Simple stand-alone email marketing tools, like MailChimp, MyEmma and Constant Contact, allow you to collect emails and basic contact information, organize them into lists and send emails to those lists (or segments of those lists). The vast majority of these email platforms have templates you can use out of the box, and/or have drag and drop and drop functionality that lets you build an email that reflects your organization's visual identity.

Basic emails can probably be created by a tech-savvy, nonprofit organization's committee member, but the tasks are best suited to a semi-dedicated digital staff member or skilled volunteer. This person queues up the emails, selects the audiences and hits the "send" button.

If you're not digitally experienced, pressing the send button can be vaguely terrifying because once you hit send, you can't get the emails back. But you can test and learn! If you're new to this task, set up small tests with a handful of inner-circle supporters (like other members of your leadership team) and expand your list of recipients as your skills grow.

Stand-alone email marketing tools are better for organizations that only need to send emails (rather than manage significant donor information and relationships). If you think you might also need fundraising or advocacy functionality, look at nonprofit CRM platforms instead.

Best Friends and many Best Friends Network partners use MailChimp for some grassroots, advocacy and volunteer emails. These are the types of emails we send without a digital specialist team member involved. MailChimp, MyEmma, Contant Contact and other mainstream platforms have much the same functionality, so you can generally choose from among these stand-alone email platforms based on personal preferences.

CRM platforms with email marketing tools: There are also more complicated email marketing tools that are part of larger nonprofit CRM platforms like EveryAction, Engaging Networks and Blackbaud's Luminate. These larger CRM platforms allow you to do all the things the stand-alone email marketing tools can do, but you can buy (if needed) expanded functionality to host donation forms, organize online/offline events, conduct online advocacy campaigns, engage volunteers and do a host of other supporter engagement activities.

The true advantages of CRM platforms are:

- The views they give into the other aspects of your relationship with your supporters (e.g., you'll be able to tell which adopters are also donors or volunteers)

- The assistance they provide with marketing automation (i.e., the process of automatically triggering a series of emails when a supporter takes a certain action)

- Increased integration (and ease) of reporting

Your outreach is integrated, and integrated outreach helps you build a more authentic relationship with your donor as a multi-faceted person. For example:

- If your email, donations and advocacy are on the same platform, you can customize your next email appeal based on what a supporter donated last time.

- You could put an advocacy ask on the thank-you page of your donation form or a donation form on the thank-you page of your advocacy form.

Reporting is similarly improved by having everything in one place. You can track how you're doing on each channel and how much better supporters perform when they're involved on multiple channels. You can create really powerful segments in your supporter data.

Best Friends uses [Luminate](#) (from Blackbaud) for most of our supporter emails and for all the emails that involve donations. This sort of 360-degree integration can be really powerful if you have the right digital staff resources in place to support it.

In past lives, Best Friends staff members have worked with the [EveryAction](#) CRM, and that might be an easier path into a sophisticated CRM for most organizations. EveryAction also nicely handles offline fundraising and philanthropy.

As with stand-alone email tools, a tech-savvy committee member might be able to build and send an email on one of these platforms, but the tasks are best suited to an experienced staff member who is at least semi-dedicated to digital tasks. If you're a one- or two-person shop, you may be better served by a stand-alone program like MailChimp. (You can still integrate this with a basic donor database like [Little Green Light](#).) And consider making your next hire someone who is tech-savvy. Hiring a digital team member may feel challenging, but it's a smart investment for the digital world your organization now inhabits, and the investment will produce a great return over time.

A note on email deliverability: As you're thinking about which email platform to choose, know that there are some very real things you need to do to make sure your emails make it into your supporters' in-boxes. Check out our email deliverability [playbook](#) for more information.

Program Choices: Accepting Donations

This section is about technology that your donors never see but that impacts their experience. Payment processors and gateways are the plumbing beneath your email (and website) that donors aren't aware of. They handle what donors don't see (e.g., the split second between pressing the submit button and having the thank-you page pop up). They also handle getting the money into your organization's bank account.

What scenario best describes your needs?

Scenario 1: We're just beginning. We're not locked into anything, and we like the idea of expanded functionality offered by a CRM.

Consider a CRM with a built-in payment processor. Each of the CRM platforms described above collaborates with a payment processor with whom they'll likely ask you to create an account and/or sign a contract.

How does this collaboration work? The donation platform/CRM provides all the secure transaction infrastructure (including the donation forms and reporting you can use to reconcile the transactions with your bank account) and then sends your donations through their preferred payment processor and into your bank account.

It's a bad idea to try and force these platforms to use a payment processor that they don't want to use. The reason for that is you get reduced functionality and will encounter more problems with your forms and transactions than if you used the processor they recommend.

Before selecting a CRM with a built-in processor, talk with your own bookkeeper or accounting department. While it can be challenging to persuade an accounting department to adopt a new (or second) payment processor, you'll find it even more challenging to deal with problems created by a payment processor that your CRM platform doesn't really support.

Scenario 2: We've already got a stand-alone email marketing platform in place. We've chosen not to use a CRM, but we do need to add the ability to accept donations.

Consider one of the handful of platforms that exist solely to accept donations and other payments. While Best Friends does not endorse any specific platforms, we do try to share our experience. Best Friends is currently experimenting with Fundraise Up for some donations, and we've used Tiltify to help supporters raise money (via birthdays, walks, marathons, etc.) on our behalf. Even a full-on CRM like EveryAction can be easy to set up if you're just rolling out the donation forms.

You may already be familiar with a platform called Network for Good. It's very basic and most of the work is done for you, but the platform does the work in exchange for a percentage off the top of each donation you receive. It's your choice as to whether that trade-off is right for your group.

These products are simple to set up, and they have infrastructure to support you if you have questions. We encourage you to do your own research and find the best fit for your organization.

Scenario 3: We're just looking for a payment processor.

Here are two of the payment processors most familiar to nonprofits:

- Stripe: A lot of nonprofits use Stripe for donations. They may also accept payments on-site at events by using Stripe's mobile apps. This solution is fairly DIY (do-it-yourself) unless you pair it with one of the donation platforms mentioned at the top of this section. If you want to pair, start by contacting your preferred donation platforms and asking what payment processors integrate well with their platforms.

- PayPal: PayPal is probably the first payment platform you ever encountered. It still exists and it still works, but the digital industry considers it a little dated. It's not particularly dangerous from a scamming perspective, but it's probably not a first-choice solution for most organizations, since the giving experience for donors is not great.

There are several smaller ways to accept payment — Apple Pay, Samsung Pay, Amazon — but for a growing organization, it's best to choose a payment processor that already supports the organization rather than try to set up something new all by yourself.

Reconciling transactions: critical no matter what your choice is

Once most organizations set up donations and payments, they have someone (finance lead, accountant or bookkeeper) review donations received every month and ensure that the data that is coming into the donation forms matches what is ending up in the bank account.

In this process, someone on the finance team will determine how much money from your donations went to things like credit card fees and processing charges, and how much went into your operational support (or other fundraising budget centers).

While it's always best to focus on raising unrestricted funds (donations that can be used where you decide they are most needed), this reconciliation process will also be where you identify anything raised for a restricted purpose (governed by legal requirements and critical for accounting and auditing purposes).

Program Choices: Choosing Website Platforms

In general, there are three types of solutions available to nonprofits: cloud platforms, Wordpress platforms and Drupal platforms. Generally, municipal shelters will be required to use whatever the municipality's website is built on, but there may be opportunities to partner with a 501(c)(3) "Friends of" support group for greater flexibility, relationship building and community engagement.

Cloud platforms

There are pre-existing "cloud" platforms that have good-looking web design templates already baked in. These platforms, notably Wix, Squarespace and Weebly, don't have a lot of flexibility, but they're designed to help people who don't have a lot of experience (or resources) create a website that looks good enough.

With these platforms, you do the design from pre-existing templates, and there are many pre-existing functions you can turn on if you need them. Need a donation form? Wix has one you can turn on. Want a photo gallery? Same. You're not going to have a lot of options on how to make them look and work, but sometimes you just need the basics. The Best Friends Roadhouse and Mercantile website is built on one of these platforms, and while we had a designer polish some details, it was largely done by a non-designer with less than a week's worth of work.

Wordpress platforms

Wordpress is the choice of many organizations that need a bit more control over their website and are willing to pay someone with some web development experience to do more custom work. Wordpress began as a platform for blogs, but it has now morphed into a full-featured content management system. You can either choose from existing templates or work with a designer or developer to produce a custom product.

There are many features you can use, and plug-ins to add, not unlike one of the cloud platforms discussed above. You will probably need a developer to help you set up your first photo gallery, but once that one is up and running, you may be able to do a second or third one without significant assistance.

Five to ten years ago, Wordpress was the easiest solution in the market. It hasn't gotten any more complicated, but the arrival of the cloud platforms has given organizations a truly easy option. If you're choosing between cloud platforms and Wordpress, keep in mind that you really need a web developer to use Wordpress effectively. Lots of companies say they host Wordpress, but unless your web developer gives you a compelling reason to choose otherwise, it's probably best to forgo the hosts and just use wordpress.com.

Drupal platforms

Drupal is a powerful framework for nonprofit digital presences, and Best Friends loves and uses it. But if you're reading this playbook because you're just beginning your digital journey, Drupal is probably not the best choice for you.

Drupal is a heavy lift for small (and smaller-than-small) organizations. It will be expensive to maintain because you need a very, very good web developer to keep the platform humming. Best Friends is a large organization with an entire team of digital experts, so unless you're in a similar situation, you'll want to avoid Drupal. Don't let

someone who is simply a Drupal fan persuade you to use it unless you're certain it's right for your organization's needs.

Conclusion

While it's tempting to default quickly to what others recommend, successful nonprofit technology choices begin with a thoughtful consideration of what you really need to communicate with your current and potential supporters. Evaluate those needs in at least two areas (email communication and website platforms) and also determine if you need email alone or if a true donor database (CRM) is what you need.

Think about the back-end (after the gift) needs like payment processors as well as the front-end (getting the gift) needs for templates, creative flexibility and list segmentation. Then launch your conversations with trusted others about their choices, using the filter of how similar their needs are to yours (or how different).

Work with your colleagues who handle the organization's finance and technology issues to make sure that your solutions are solutions that work for the whole team. Consider your bandwidth and whether you can maintain what you initially build. Determine how much support vendors are willing to provide.

Then make your choices boldly and with commitment, knowing that no solution will be perfect and that you will need to make changes as your organization grows. Build a community of support with peer shelters and expand your resources through engagement with professional organizations like NTEN (see below). Technology can be one of your most powerful tools for lifesaving, but like any tool, it is only as effective as the people who wield it.

Resources

- Techsoup offers significant discounts on hardware and software, as well as a host of how-to resources, blogs and webinars.
- This resource helps build out the game plan for choosing technology.
- Additional information on choosing nonprofit technology can be found here and in this EveryAction blog.
- Salesforce, one of the country's largest CRM vendors, offers this CRM beginner's guide.
- Nonprofit Technology Enterprise Network (NTEN) is the largest professional group for nonprofit employees whose activities are technology-driven. Find articles on choosing technology, plus national conference and membership information at NTEN.

In our digital playbooks, Best Friends is not endorsing any specific product, platform, or company. We share our knowledge of (and experience with) digital tools, and we strongly encourage every organization to research, test, and choose tools based on the organization's specific needs.