Making every dollar count

Industry veterans weigh in on best practices and ideas to improve donor efficiencies

BY AMY BOSTOCK

With Canadian charitable organizations fighting for every donor dollar, how they process these donations has become every bit as important as how they procure them. From an operations standpoint, these organizations are facing a number of challenges when it comes to both donations processing and donor outreach.

This DM roundtable, sponsored by CDS Global, brought together senior level fundraising professionals who shared their insights on best practices around donor outreach and donations processing - specifically speed of donations processing and turnaround times on acknowledgements (and the effect this has on donations), how nonprofits can effectively incorporate and use both online and offline data when shaping donor communications and how centralization of core back-end processes can improve operational agility and response times.

So what keeps fundraisers up at night?

According to Mary Lynne Stewart from March of Dimes Canada, it's getting a lot done with little.

"Operationally, it's how do you run your ship lean? How do you keep your cost to raise a dollar lean? How do you give your ROI the impact that it needs? It's all of those things, because peoples' expectations are huge when it comes to what you're doing, operationally."

For Ericka Tovey of the Canadian Diabetes Association, the challenge of being a large organization comes down to donations processing.

"We have several branch offices across the country," she says, "and I think one of our biggest challenges is the speediness of getting the donations into our system, to be able to effectively receipt. This has always been a challenge for CDA."

Daniella Sretenovic from March of Dimes Canada says that budget restraints are what keep her up at night.

"That's the reason why we cannot invest in the operational resources that we need to help the turnaround time improve. When it comes to donation processing, because we use a third-party supplier, we are dependent on what they do and how they're fast in processing donations that come in at the door. The expectation of donors is quite different now than it was a couple of years ago and the generation of donors is very different. We have donors that are 75 years old and they have a certain expectation about turnaround time and what they expect to see right after they make their donation. Then, we also have the younger generation of donors that will just go online and automatically receive the receipt and expect a different type of communication. So, I think that generational gap also needs to be addressed. I think the budget restraints that every charity faces, in terms of how much money to invest in having the operation up to speed with all this new technology, mobile devices, trying to figure out how to integrate everything together, is the biggest challenge for March of Dimes. And, the staff that is still there, and that was there 10 years ago, needs to be trained, brought up to speed, so it's all about money."

"At Alzheimer's Canada, we have 150 different separately registered charities that work together in a federation. And, each one of them has their own database," says John Andresen. "Within my office, I have at least seven databases that I have to work with, and that is really the time-consuming challenge. It's the elephant that's too big to eat right now, that we're actually just starting to get into a process of looking at a new CRM. It's going to be a major difficulty for us, a challenge for us, to be able to be competitive, and really grow as far as we need to grow, with that in the way."

According to Andresen, at Alzheimer's Canada they don't face the same challenge of getting donations in or donations out. The challenge, he says, resides more in the outreach, "because I can't really get to all of those other sources of information, and get out to people, in an effective way. So, I don't really know what's happening in 150 different communities in Canada. I do a nationwide program, but my nationwide program sits on top of other local programs. That's the biggest challenge that we have."

Steve Merker of the Princess Margaret Cancer Foundation cites donor and volunteer fatigue as one of his organizations biggest challenges.

"Our Ride to Conquer Cancer, for example, has a lot of triple type A's, who are early adopters. So, they do the ride, or play in our road hockey event, or do our walk. And, they do it for a couple of years, and then ask,

in the mail, because they like it. There's nothing else like the mail to tell your story. But it's expensive – not to create the mailing piece, it's a penny to print a pretty package. But then you have to spend 50 plus cents to get it to them, and then another 75 cents to get their gift back, and then another 75 cents to thank them. You can't ignore the 60-plus, because they're the ones who are now not afraid to give some of their wealth away to make a difference, versus the young people who will give you what they can, but they've got to save it; they don't know how long they're going to be working. And, it hasn't been such a big challenge, because, in the past, there used to be better programs available for charities. And, I find it ridiculously offensive that Canada Post cries about how they're failing, when if they just gave some support to a charitable sector, we could get more stuff in the mail, and save our donors money."

Operation Smile Canada is not the only organization feeling the postal crunch. At March of Dimes Canada, Sretenovic says the cost of mail campaigns has cut into their ROI as well.

"Postage-paid stamps cost over 99 cents now. So, if you're running an acquisition program and you're sending out hundreds of thousands of pieces, you'll probably get at least 5% back. So, just the cost of return mail is excruciating. I don't know why this has never been addressed properly, not been successful, but we're now competing with Royal Bank, the big financial institutions that have a lot of money. They're paying the same rates as charities are."

'okay, what's the next new big thing? I want to go try something else', and so how do we keep them engaged? That's a challenge for us and we have to be creative and innovative in order to keep our strategic brains humming at that high."

Cutting through the clutter is another problem Merker and his team face.

"To go back just in the bike riding space, for example, we caught the wave at the right time. We built our program around the excitement for road biking fundraising. And, now, there are so many very similar events out there so it's getting more and more cluttered. I'm almost thinking there's a renaissance in direct mail. Because, years ago, everyone said direct mail is dead, it's going. And, it still might, but it hasn't died as quickly as a lot of people thought. We send out emails upon emails upon emails, and people just delete. It gets below the fold in five minutes, and you've lost them. But, when you send something in the mail nowadays, I think people are more willing to pay attention to that kind of thing."

Some other challenges that all of our participants agreed on are acquisition of new donors, processing tax receipts and managing the expectations of your donors.

But for Patricia Vidov of Operation Smile Canada, the thing that causes her the most worry is escalating postal costs and decreasing service levels of the mail.

"Because we're a very direct-response-heavy organization, our donors are primarily 60- 70-plus, they don't always want an email. They either don't have a computer or they don't want to do business using their email. They want to be communicated to by letter. They want to be reached out to. So, there's not only the cost of the thank you (which is important), there's the cost of getting their gift back and the time involved. We work with CDS Global for our caging and some of our inbound telephone and outreach and it's not CDS Global's processing times and being able to quickly send the thank you that slows us down, it's Canada Post getting us the gift in the first place."

It's not uncommon, says Vidov, whose office is in Markham, ON, to receive donations mailed from Toronto, ON (a 30-minute drive from Markham) two to three weeks later than the date of postmark.

"Then the donor says 'I mailed that at the beginning of September', and they don't understand that we just received it two to three weeks later. And there's no alternative for us when it comes to mailing. Then to raise the postage price 23 cents in a year, that eats in to your bottom line. Over half of my fundraising budget is postage, in terms of mail going out and mail coming back, the cost to thank them, in the way they want to be thanked. So, really, that's my biggest challenge."

It's also difficult, says Vidov, to explain to donors why organizations have such high fundraising costs.

"We're making almost half of our money through cultivating our donors

The waiting game

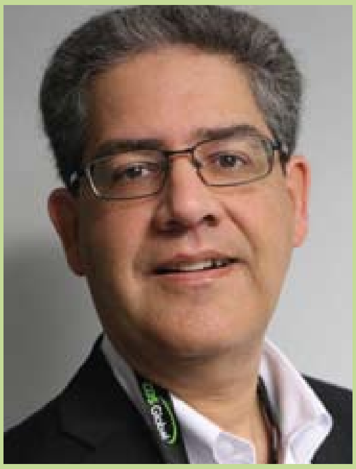
So from a donations processing and donor acknowledgement standpoint, how does the turnaround time impact the donation levels coming in? If it takes organizations a long time to process and say thank you, will donors take their dollars elsewhere?

According to Stewart, this is a valid concern for charitable organizations.

"Especially if they're younger donors. They expect a seamless process – 'I've donated online, now where's my e-receipt?'."

"Certainly, if trust is broken, they will think twice," says Sretenovic. "So, if you're not doing the best job of acknowledging donations on time, it will definitely affect if they're going to give again, or if they're going to increase or decrease their donation. But, we never had a tool to

John Andresen, Alzheimer Society of Canada
John Andresen is the Director of Annual Giving at Alzheimer's Canada. He is responsible for the nationwide direct marketing and annual giving activities (telemarketing, mail, online, integrated programs).



Patrick Durbano, CDS Global
Patrick Durbano is the Director of Business Development for CDS Global. His role is business development, focused primarily on the non-profit and utilities areas.

Steve Merker, Princess Margaret Cancer Foundation
Steve Merker is the Vice President, Business Development at The Princess Margaret Cancer Foundation. He helped create The Ride to Conquer Cancer and Road Hockey to Conquer Cancer as well as other corporate engagement programs at Princess Margaret.

Chris Simpson, CDS Global
Chris Simpson is the Vice President and General Manger of CDS Global Canada. She is responsible for both the Markham and Montreal divisions of the company and has spent 32 years in the media space in Canada.

Daniella Sretenovic, March of Dimes Canada
Daniella Sretenovic is the Associate Director of Individual Gifts at March of Dimes Canada, one of the biggest charities in Canada for people with physical disabilities. She has spent the last 13 years working on annual giving programs.

Mary Lynne Stewart, March of Dimes Canada
Mary Lynne Stewart is the National Director of Fund Development and Communications for March of Dimes, responsible for running a $6 million program. She's been a fundraiser for 32 years.

measure that, so I don't know if that's something that's really tangible to measure. But, I'm quite sure that, for myself, if you don't give me my receipt, or you spell my name wrong or you don't send it to me, I won't give to you – I'm just going to go and give it to somebody that's more worthwhile and does a better job. So, I'm quite sure there is an impact, but I don't have the report, or stats, to confirm that."

Ericka Tovey and her team at CDA recently launched a new CRM system and have had some delays with receipting due to a blackout period where gifts had to be manually tracked outside of their database before the new system launched.

"And, then we've had some challenges getting some of those gifts in from all the various branches. Our Donor Relations team have been handling many calls this summer from donors that have made their gifts and asking about their tax receipts, and I think it is really important that you train your team to be able to address it. What will be interesting is when we're back up to being in a full-production mode again, what these delays are going to do for our long-term retention of our donors. We're taking measures now to address the delay in the tax receipt mailings. From a donor services perspective, we endeavour to respond to calls and emails within one business day. We make sure at least we're getting back to our donors in a timely manner. I think that does help to mitigate donor frustration in these types of situations."

Patrick Durbano brings a different view to the table. As Director of Business Development for CDS Global, Durbano has a lot of insight into donation processing from an execution standpoint.

"Obviously we have the tools in place to do (donations processing) at any frequency. We can do it the same hour; we can do it the same day; we could do it once a week. It ends up really being what the needs are of the charity and how you want to either improve, or at least stay the same...you certainly don't want to get worse. But, we're finding that it ends up being a balance between cost of getting those executed, and desired turnaround time. We can certainly execute on a daily basis, but that comes with a cost. Typically, though, everything goes out on a weekly basis, and we're finding most charities are happy with that, because that's often an improvement over what they've had before.

"As an extension of that, there ends up being a lot of cost savings in running an annual program, because we can start employing savings on postage. So, when we do the annual tax receipt program, all that mail goes out as Incentive First Class, because volume is high enough that you can get the density rates, and that saves you additional postage money. As well, is you're printing all of the stock in bulk. We do it all on continuous forms, so we're getting two images per pass on the stuff. So, from an annual standpoint, you're saving a ton of money. The weekly correspondence files basically say thank you for your gift, and your tax receipt will be coming. So, you do get that immediate thank you, within a few days of having that gift received, and you're setting an expectation that the tax receipt comes once we've ensured it's all in the bank, it's been processed properly. And, we're actually going to save you money by sending you that tax receipt at the same time, when you're about to do your taxes. So, there are really good pros and cons to that kind of a process, and that's where we're saving some postage money."

The power of omni-channel fundraising

The proliferation of channels available has opened up a whole new world of donor outreach possibilities. But how can fundraisers use both offline (mail and telemarketing) and online (social, email) channels in tandem to communicate more effectively with their donors without negatively impacting operational efficiency?

"We use mostly mail, and mail is making more money than ever for us right now, so it's definitely not dead," says Andresen. "I've also really ramped up the amount of telemarketing that we do in the last couple of years and we do a variety of online, social media types of activities. The model I've always used was use mail or email to continue behaviour and use phone to change behaviour. And, so that's why we've been really focusing on changing our donors to monthly donors, and we've had a real push on that for the last couple of years. Instead of going and trying to find acquisition lists, we've gone back into our lapsed files and tried to reactivate donors, and that's been more effective, actually, than acquisition for us. So, these are the kinds of things we do, and it's my job to integrate all of those requests."

"We do a lot of everything, a lot of mail, a lot of emails," says Sretenovic. "We actually have a donor thank you program with volunteers and any time there is a donation coming through the system, they will pick up the phone and try to call donors and thank them. But you need to be cognisant of what the peoples' expectations are when you phone them. The first and the most important thing is if you don't have the type of relationship that they know who you are then there's this instant barrier because they think you're asking them to make another donation. So, my pitch is always 'it's Daniella from March of Dimes. I'm just calling to thank you. We've received your gift, thank you so much'.

What channel you use, says Sretenovic, depends what type of donors you're engaging.

"We send out surveys and we try to get their stories, engage them more, so there's this really personal touch. We've grown so much, from being Ontario-based to national, that that's a challenge, doing everything with everybody in different channels. So, we're just creating the calendar, that is updated weekly, with the different things that are done online, offline, in person, on the phone, and it's a big jungle."

"Like everybody else, we leverage every fundraising channel," says Tovey. "Five years ago, when I first started at CDA, the direct marketing program was only direct mail, there were no other channels used. So, in my tenure thus far, I've introduced telemarketing, mainly for monthly gift conversion. We've also introduced direct dialogue as a channel for monthly acquisition, in addition to our grassroots, volunteer driven door-to-door campaigns that take place across the country.

"Online integration is something that has been a bit of a challenge for us. We are seeing, year over year, great increases of the number of online donors. Most of them are giving through either general donations or through our events. Our challenge with online donors is retention. Our second-gift rate with our direct mail is about 30%. With online, it's less than 4%. And, we know that we're seeing a lot more traffic on our website. We're looking to leverage the online channel to engage donors and take them on a personal journey with our organization, using the digital space as a focus for stewardship. Direct mail is certainly one of our largest acquisition channels; at least it's our most viable. We haven't seen the bubble burst yet, so we're just trying to ride the wave as much as we possibly can."

The key to channel integration, says Stewart, is finding your organization's niche and staying within it. So what niches have our panellists found?

"We do DRTV for acquisition, which I didn't hear a lot of people doing," says Vidov. "We're still in that space, but it's in the long form space, so we run half-hour and one-hour paid programming, and it's working quite well for us. It's returning a lot of donors; and they're giving us a second gift. We're not stewarding them through the TV necessarily, we're bringing them in and we're stewarding them through the mail."

Don't ignore the mail, warns Vidov who sees online not necessarily as a strategy anymore, but another channel.

"It's a convenience. It's, 'okay, right now, I can do this online, because it's midnight and I know I'm not going to get a human on the phone', or 'I don't feel like writing out a cheque'. It's just a way for them to transact with your organization. We've actually had really good success getting a second gift from a web donor by mailing them and tweaking the message. We do a lot of segmentation, so we don't just mail the same people the same thing all the time. We go through the pool; we look at when their last gift was. We do 14 cultivation mailings to the house file a year, which is a little more than one a month. And of course we can customize mail preferences to the donor's wishes."

How does this proliferation of channels now impact the way companies like CDS Global are handling their side of the business for their clients?

"From our standpoint, we have to be able to accept donations in all of those different channels, and then pool those together to present it back to the client," says Durbano. "You have to have a central database, certainly from a response standpoint. You have to be able to manage an online giver and an offline giver, somebody who phones the call centre, and pull them all together. So, internally, we've got one central database of your donor file, which will be accessible over the web, in the mailroom, or in the call centre. We've worked with Blackbaud to create import systems that will go right into their system. We've worked with some people at Salesforce.com to get data into their system. So, it's all about working the middle man, which is what we really are, and working both sides of the street. We have to get the data in here quickly, fast, efficient, run your business rules, and everyone has separate business rules, we have to run them as if we are actually working for that charity. And then we have to present that data back as efficiently as possible, so that you can do the next step, whether it's stewardship, whether it's sending out a thank you, that your tax receipt will be there in a week or it will be there at the end of the year. Or, it's an instant tax receipt, or there's a tax receipt with a monthly recurring gift upgrade opportunity. We work outbound and inbound telemarketing the same way. To save postage money, we are putting in systems that, if somebody is giving us an email address, we'll respond with an e-tax receipt. It doesn't cost much anymore, no printing or postage, which can save you up to $1.00 or more on sending out that thank you, or that tax receipt. So, we're trying to use efficiencies in technology to basically pass those savings onto the charity, to get faster response to the donor to help your stewardship dollars go further."

"One of the things that we have not had to come to grips with, fortunately, and as we move into a diversification space, is the timeliness of mail processing and acknowledgements," adds Chris Simpson. "The terminologies are a little bit different, but our organization has always been driven by service level agreements, stuff in, stuff out the door, they want the money in the bank. At the end of the day, I look at some of what you do as a business functionality, as well as a cause, and the passion that goes behind that. So, your operations, at the backend, have to be considered exactly the way as any other business, because that's what you do every day. So, that's one of the things that we have not had to tailor. As an organization, we've had to build out solutions, because the world is changing. There's always going to be a balance, and I think a silo, of how you speak to your donors and how you react to the business condition. So, with the breadth of our organization, we've been very fortunate to work for a company that's out there building solutions as we speak today, to support the things that you need to get done. Because there are less of us and there's more work, and that's the way we look at it."

Telemarketing: an oldie but a goodie

John Andresen has done a lot of telemarketing in his years as a fundraiser, having worked either as a consultant or in the charity with about 30 different charities.

"I've done tons and tons of telemarketing both in-house and externally. Where I am now, my team is me and two people, so there's no way that we could operate an internal call centre, so I hired out. And, I measure it in the same way that I measure any other program. I know how many donors I put into that, I know how many donors I get out of that. I calculate cost per donor; cost to raise a dollar, gross return, net return, whatever it happens to be. It's not quite as simple as sending somebody a letter and getting a letter back, and then marking it off that way. What I find nowadays is that I have to look, really, at the end of the line on an individual basis, because they might have got a number of different communications and they may have responded back in any of a number of different channels. So, at the end of the year, I want to see that whatever I've spent on that individual has returned more money rather than less, and that could come from a combination of anything So, sometimes it's not a direct line, and how we measure it, sometimes you have to really look at the bottom line. I've been doing this for 20-some years now, and once we introduced the online environment especially, and once web came into the picture, everything blew apart. Nothing was simple to measure anymore. You really had to measure it altogether."

"To John's point, you really do have to look at the full picture," says Tovey, "because one program might help support another program, or they work in tandem.

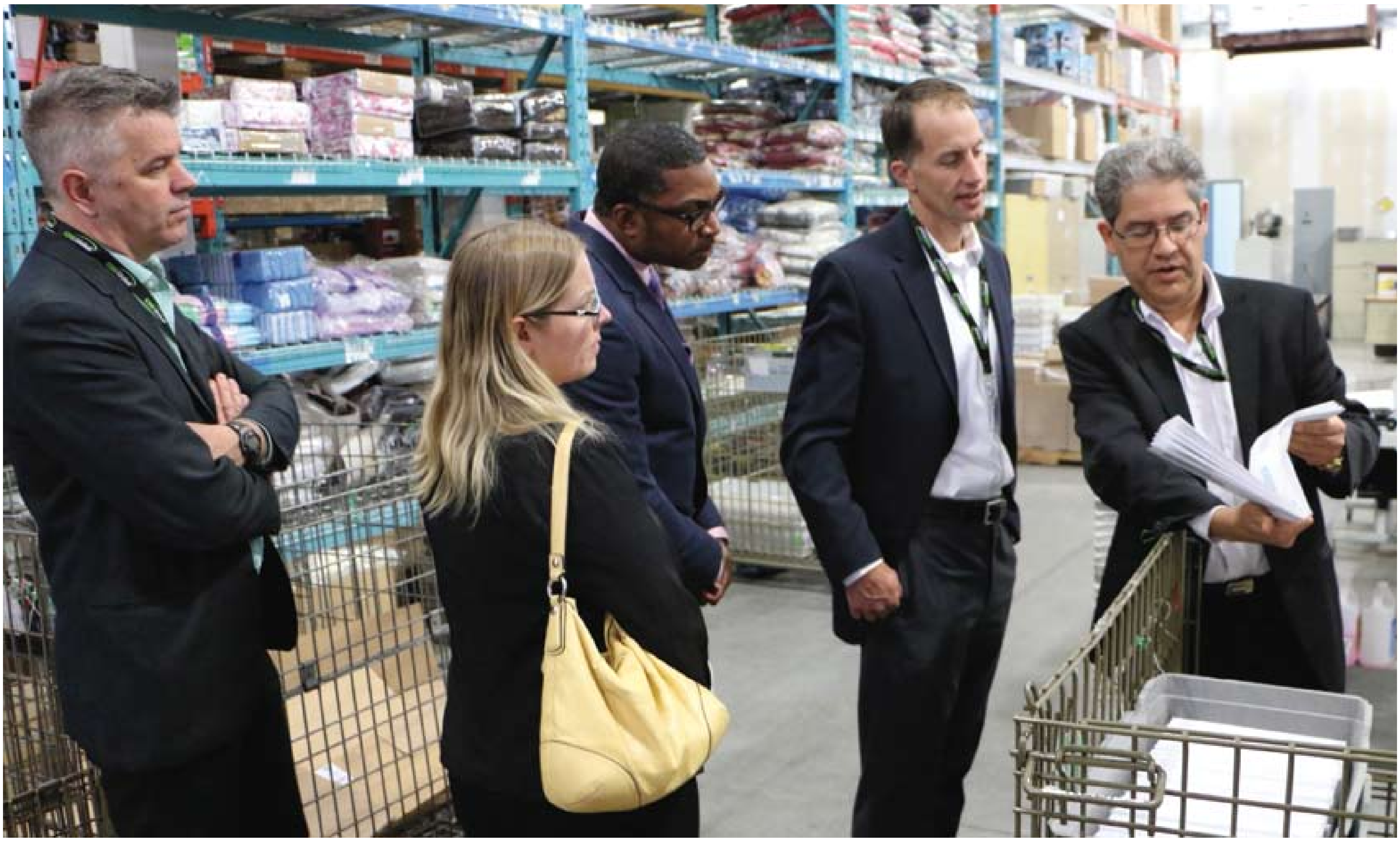
"I do have an internal Donor Services team. My team does some outbound calling for things like tax receipt returns, or undeliverable mail that we want to try to get back to the donor or NSF donations. Our telemarketing agency runs our monthly conversion programs to our donor base. The one area that we've actually tested outsourcing this year is the monthly donor declines. This process is in place for donors who give monthly and then for whatever reason, their credit card or cheque didn't go through. We tested a whole variety of different channels to retrieve these donations, but what we found most successful was being able to reach donors by phone as soon as possible after the donation was missed. We've actually seen four times

Ericka Tovey, Canadian Diabetes Association

Ericka Tovey is the Director of Donor Marketing and Relations at the Canadian Diabetes Association. She manages the mass individual giving programs including direct marketing, membership and tribute programs. She also oversees the donor services area of the organization.

Patricia Vidov, Operation Smile Canada

Patricia Vidov is the Director of Operations for Operation Smile Canada, which is a relatively new charity in Canada (launched in 2011). She helped grow the business from $2.5 million in the first year to $6.6 million by the end of June 30, 2014. She is responsible for the day to day management of the organization which includes the oversight of the financial, legal, direct TV, direct mail, and digital channels and related strategies.



our investment in one year in this area, which has been really fantastic. Overall, we use a variety of both internal and external services; I think it depends on cost and your return. We also measure all of our incoming/outgoing call statistics through different phone lines on a regular basis to help us continually improve our overall donor experience."

Getting social

March of Dimes Canada has a dedicated resource for social media fundraising efforts.

"Our department is a combination of marketing, communications and fund development, and we actually have a social media specialist," says Stewart. "It used to be done out of the corner of the desk of our public relations person but now that there's a dedicated resource, our president and our COO that we report directly to is really noticing the growth."

She cites the recent Ice Bucket Challenge as evidence of what social media can do for fundraising.

"Who's ever going to top that baby? It blew everything out of the water. So, I think social media is a really good channel. I think it needs to be integrated, and that's what we try to do, but it's another chance to tell your story."

"The ALS Ice Bucket Challenge and the no-makeup selfie in the U.K., they wouldn't have happened if it wasn't for social media," says Merker. "Those are examples of success in social media integrated into fundraising. But, we spend a lot of energy and resources in developing our social media area at Princess Margaret and we've actually downsized it in the last little while. Everyone was, six, seven years ago, we've got to be in that space, it's the next frontier, let's get there. So, we hired up, we staffed up, and we did all kinds of stuff with Facebook and Twitter and Instagram, and we're active, we've very active. But, it's more of a place you need to be, it's a brand building, it's marketing. But, unless you're going to have an Ice Bucket Challenge kind of thing, it's more of a support vehicle. You need to be there, and it supports all of the other programs that you're doing. But, I think 10 years from now, who knows where it's going to go? Everything might revolve around social media, so you need to be always thinking of, and being in, that space. But, I don't think social media has paid off anywhere near what people thought it was going to be yet. But, like I said, we use it to activate donors, whether that's through one of our strategic brands or trying to get people to move into that space and just try to steward them and educate them and engage with them in another way, so we're very active."

"We're a volunteer-based medical charity, so everyone blogs," says Vidov. "They're in the field doing surgeries, they're blogging about it. And, what Operation Smile globally does really well for us, and shares the content with us on our website and through social media, is on-the-ground field stories, which is like gold to our fundraising efforts. And, so it's a way for us to engage, but not necessarily a donation channel. We do have a good digital strategy, where we're doing ads on Facebook and retargeting, and

Direct mail is NOT dead!

Years ago, everyone said direct mail was dying. "And it still might," says Steve Merker, Vice President, Business Development at The Princess Margaret Cancer Foundation. "But it hasn't died as quickly as a lot of people thought.

"For example, we did a program with one of our sponsors and we offered a special discount. We sent it out via email and a handful of people went into the store and took advantage of the discount, so the sponsor wasn't very happy. The next year, we did the same discount, the same program, but we sent it out in the mail and created $150,000 of new sales for the sponsor - because it got in the mail, they had something in their hands, a little coupon. It's just that simple. So, you spend a little bit of money, but it really led to a big gain."

that's working quite well on returning the 2:1 and the 3:1 on our investment on digital, but it's not money coming through necessarily Facebook. It's sending people to our online space, finding more donors. And, I think that the blogs from the volunteers, the blogs from the students who go on missions and the donor stories – that's like gold, because it can make a potential donor feel like they're really connected to what we do."

"One thing that social media has done really well for our organization is that it opens up that two-way dialogue," says Tovey. So, rather than pushing information out at people, you're actually hearing, from your social media networks, how your mission and your work affects them. So, for example, if we're talking about one of our advocacy efforts, or children in school living with diabetes, and we post that on our Facebook page, we have people that are actually engaging and talking about it. And I think, for us as fundraisers, that's really valuable, in that you're opening up the communication doors to having your supporters have that conversation with you. Then, you understand more about what's important to them; so rather than just pushing information out, you're getting valuable feedback as well."

Data collection and best practices

With all these new channels come many new streams of data, making it easy for the importance of offline data to be lost in the shuffle. So what best practices do our panellists have in their organization for collecting, integrating and using their offline data and how have those best practices helped them become more efficient while increasing donation levels?

"Like every charity, we take our privacy and our compliance very seriously," says Tovey. "When we're working with third-party vendors, we obviously have to ensure that everything is PCI compliant to protect our donor's information.

"Privacy isn't only important on the secure collection of gifts, but on solicitation as well. We communicate to our donors about our privacy policy as best we can, and we let them know, in the very beginning how we will use their information. We also work to ensure that anyone who directly deals with our donors knows how to effectively handle donors' communication preferences and do not solicit requests."

With many organizations working off multiple databases, how do they ensure that all of those are kept within compliancy, along with the cleansing of those files regularly?

"It's a challenge, for sure," says Andresen. "One of the ways that we deal with it at Alzheimer's is that, even though we have multiple databases, at some point, they all get uploaded to one. So, that helps us with keeping the database clean. We do have a number of databases, because we have an advocacy function and we have the online function and etcetera. Each and every one of the companies that we deal with has the proper accreditation for compliance and that sort of thing. So, it's laborious, but the data is very, very well protected, and we only transfer data in the proper ways. And, there's a lot of concern and attention to that. Our challenge, because we have so many different offices, is really, because CASL has put the fear of god in everyone again, in the way that privacy did, back in 2003. And, I'm happy to say that we've been very proactive around that. We've built a working group around that, we've engaged legal professionals to help us get all of our privacy statements and practices together, so that we're really standardized in every Alzheimer's office there is. So, I think you do what you can. It's a massive, massive problem, and really, it's about training, it's about standards, it's about processes that aren't really that complicated, actually. Once you get down to it, you just have to make sure that everybody knows."

More on privacy & compliance

When it comes to privacy, donor expectations have changed over the years, so charitable organizations have had to change as well.

"I think, bottom line, you have to make sure that you give people the opt-out. It can't just be buried at the end of an e-invite or newsletter – you have to make sure that it's very clear where people can unsubscribe. And, you have to make sure that your website, and all your social media platforms, are updated with the proper privacy options for people, because they have to be there, because people know about this now. As a fundraiser, all this stuff is out there, so you have to be able to respond to it. So, I think it's just that you have to be up to date on what's going on in the marketplace, and you have to make sure that you communicate that to your donors."

"Another challenge is how do you keep that paper trail safe and protected, aside from locking it in a cabinet, and how long do you keep those files for? Because, sometimes people would like proof they really made that donation a year after, when they do their taxes," says Sretenovic. "They want to know that they really sent you that donation with their signature on it. So, if you destroy the document, paper document, or if you white it out, what is your way of keeping track, and how long do you keep it? Because, for our volunteer door-to-door campaign, we actually give out the tax receipts at the door and, by the same token, we have peoples' name and credit card information. So, that's something that we keep as a backup, but then, if we destroy that, we don't have any way of finding out how to send a copy of that tax receipt."

"I've worked in the past with clients who have done the door-to-door campaigns, and you get the little receipt books," says Durbano. "And, then you've got millions of little pieces of paper around, and how do you manage? Yes, you've got 47 or more different divisions, each running its own campaign, how do you manage all that paper? This is the benefit of what we've been doing for 40 years in the subscription management and circulation business, is everything that comes in here is scanned, digitized and archived. Once they're images, the paper can be destroyed. Then, you've got secure logins to actually go look at that archived paper anytime you need to and, if you want, you can retrieve it, print it, create a PDF and email it to somebody. So, all of those tools exist outside the non-profit environment which are now coming to the forefront because you need the same level of privacy, but still need access to the original data, in a secure, locked-down, who-looked-at-it, what-time-did-they-look-at-it, what-did-they-do-with-it environment. So, when you do have the auditors come in here, and they're saying, okay, you outsourced this, so now you need your PCI Compliance and a 5970 or a 3416, or whatever the number is this year, you are able to satisfy them. Now it's all at your fingertips." ✓