

**Case Study:  
Step Up for the Gorge  
Matching Gift Campaign for  
Friends of the Columbia Gorge**



**I) Summary**

In 2010, Friends of the Columbia Gorge launched its first matching gift campaign which it called “Step Up for the Gorge.” The campaign ran from August 1<sup>st</sup> through December 31<sup>st</sup> and matched only new contributions and contributions above and beyond individuals’ 2009 giving levels. The campaign was branded with a memorable name and logo and personal, printed and online communications reinforced the simple message of the campaign and the opportunity to leverage a contribution. Board members and volunteers became “step up” fundraisers bringing new individuals to the organization, and several long-time small donors made significant leaps in their year-end contributions. The campaign also severely taxed the organization’s online donation technology and exposed weaknesses in its online fundraising.

With an initial goal of raising \$50,000 in new and upgraded funds that would be matched dollar for dollar by a matching donor, the campaign expected to raise \$100,000 total. Exceeding expectations, it raised \$157,674 in new and upgraded gifts and \$125,000 in matching donor gifts for a grand total of \$282,674.

<b>New and Upgraded Gifts</b>		
	<b>2009</b>	<b>2010</b>
<b>Aug thru Dec.</b>	<b>\$32,531</b>	<b>\$157,674</b>

**II) Inception**

**A) Early conversations**

In February 2009, Executive Director Kevin Gorman was approached by a relatively new donor to the organization suggesting that the organization should conduct a matching gift campaign and that the donor would consider serving as the matching donor. The donor was intrigued with the concept of using matching campaigns to energize and motivate donors. Because the donor wished to remain anonymous, for the purposes of this case study, the donor is referred to as Janet Match.

Early discussions with Janet focused on determining how a matching campaign could best serve the organization. Three objectives came out of those discussions:

1. **The campaign would fund operations:** Staff determined that focusing the campaign around supporting the annual operating costs was the most important priority for the organization. As such, the campaign would need to effectively articulate compelling reasons to support the operations of the organization versus special projects.

2. **The campaign would raise “new” funds:** Staff expressed concern that in some matching campaigns, contributions matched were contributions that would have come to the organization regardless of the match. With this campaign, staff wanted to test the benefit of the match by focusing on “new” money, meaning new-member gifts or upgraded contributions from existing members. This objective proved to be a challenging one to monitor and report (requiring new code to be written for our member database program), but the effort paid off in the final results. The emphasis on new and upgraded gifts was codified in the naming of the campaign to “Step Up for the Gorge.”
3. **The campaign would reach beyond the base:** Just as important as raising new money was bringing in new members. Members serve as “the voice” of the organization by writing letters, testifying at public hearings and meeting with elected officials. A strong, broad membership is critical to the financial health as well as the conservation goals of the organization. It was important that all membership levels participate.

## **B) Creation of the Plan**

In July 2009, the first draft of the matching campaign plan was created. It was the first of several iterations which honed the focus and strategies of the campaign. The initial order of business was settling on the match itself. Early drafts of the campaign plan suggested three-to-one and two-to-one matches, but Janet provided a study revealing campaigns with three-to-one and two-to-one matches did no more to motivate donors than one-to-one matches. Focusing on a one-to-one matching gift campaign, the message was greatly simplified for the audience, as well as staff and volunteers charged with carrying out the campaign plan. This tactic exemplified the value of the close collaboration enjoyed between staff and Janet as the campaign plan was fleshed out.

One month after the first draft was written, Friends development director of 12 years left the organization to pursue other interests. The executive director and Janet agreed to put the drafting of the campaign plan on hold during the hiring process and to refocus once the new development director was in place. In October 2009, Friends hired Sandy Wright as the new development director. Within a month, Sandy was adding her input to the plan. A most significant aspect that Sandy brought to the plan was adding a volunteer component and creating a volunteer committee that would help engage staff, board and other volunteers in motivating others to “step up.”

The campaign plan continued to evolve as Janet and staff challenged assumptions made in the plan. Early iterations of the plan had the campaign running during Friends’ spring hiking season (March through June). A spring campaign would allow for a large number of face-to-face contacts during the hiking season between potential givers and Friends’ staff and volunteers. Tying into the hiking season also served the “step up” concept, as the campaign’s

logo portrayed a hiking boot stepping up. However, staff determined that fall through the end of the year was historically the time when most people give, especially our major donors. So, the campaign was revised to start in the fall.

The length of the campaign was another consideration. Janet favored a shorter campaign of one to two months, suspecting that a shorter campaign would create more urgency and a longer campaign would languish and get stale. Staff felt a longer campaign would allow for branding and building momentum. In the end, it was decided the campaign would run from August through December. August 1st was the chosen start date. The campaign would be pre-launched at our annual picnic (in late July) and promoted in the organization's fall newsletter that would reach mailboxes in mid-August.

The campaign was constructed to achieve three critical objectives:

- Inspire members to give at higher levels;
- Increase the number of members at the Conservator level (\$1,000) and above; and
- Increase new members.

Because the goal of the campaign was to **increase giving** rather than just spur members to give (possibly at the same giving level), it was agreed to match:

1. 100% of new gifts and
2. 100% of the portion of a gift that was greater than what was given in 2009. For example, if a member gave \$100 in 2009 and was inspired to give \$250 in 2010 then \$150 would be matched (\$150 in new money, \$150 in donor match) for a total of \$300 toward achieving the campaign goal.

Finally, to set an appropriate fundraising goal for the campaign, Janet and staff discussed the amount that Janet was willing to donate and the amount staff believed could be raised (see *Final Financial Report*). Janet offered one study that suggested matching gift campaigns could increase giving per solicitation by approximately 19%. Janet and staff agreed on a fundraising goal of \$50,000. Further, Janet offered that if the campaign reached its goal prior to the deadline, she would provide up to an additional \$25,000 in matching funds. Janet suspected that the additional funds could provide a boost to the campaign, motivating additional donors in the final days and weeks. Janet, the Friends' executive director and development director, all agreed that the potential additional matching funds would not be shared with other staff, board or volunteers until such time as they might actually be used. When the announcement was made later in the campaign, it

A 2006 study shows that the presence of a matching gift can increase revenues by 19% per solicitation. Friends' 2010 special appeal contributions during the Step Up Campaign totaled \$20,152, a 19% increase over 2009.



generated newfound excitement among the board and volunteers.

These pieces in place, the Step Up for the Gorge Campaign was set to raise \$50,000 in new money with a \$50,000 match. Further, the potential of increasing that to \$75,000 in new money with \$75,000 in matching funds existed.

### III) Implementation

#### A) Pre-launch

In early conversations, staff and Janet agreed on a name for the campaign: *Step Up for the Gorge*. The name evoked hiking in the Gorge but also asked supporters to increase their giving and commitment to the Gorge. Staff contracted with an artist to design a logo (right) that could be used for print and electronic communications.



Preceding the launch of the campaign, staff utilized a database consultant to create reports to measure the results of the campaign. The criteria for these reports were complex. For example, gifts made prior to August 1 would not qualify for the match, but would serve to determine if the donor was indeed upgrading their giving level. After several efforts, a report was created that could provide the correct amount of “Step Up” contributions for any given period.

Volunteer and board participation efforts also occurred prior to the launch. It was hoped that recruitment of fundraising volunteers would not only help this campaign, but also lay the groundwork for future, possibly larger endeavors. In May, staff recruited volunteers for a *Step Up for the Gorge* steering committee (see *Committee Description*), consisting of four board members, one long-time volunteer and three volunteers new to the organization. In June, the committee convened with the goal of inspiring others to get involved in the campaign. The committee helped develop ways to involve more volunteers and planned kick-off events in Portland and Hood River.

At the advice of a steering committee member, a campaign messaging document was created that helped staff and volunteers speak consistently about the campaign. This document made all subsequent written communications easier to produce (see *Messaging Document*). A campaign communications plan was also created that helped staff and volunteers plan and budget for communication activities (see *Communications Campaign Calendar*).

Friends’ annual Summer Picnic was held July 25, just days before the launch of the *Step Up for the Gorge* Campaign. More than 250 of Friends’ most ardent supporters attended the event. While merchandise is typically sold at the picnic, this year’s event



instead offered the new *Step Up for the Gorge* T-shirts (right). Supporters could get the T-shirt only by making a special pledge to “Be One, Bring One”, meaning: be someone who makes a “step up” gift and bring someone along to make a “step up gift.” The incentive of the T-shirt with a pledge resulted in early pledges from 55 people. (see *Pledge Form*).

## B) The Launch- August

### STEP UP FOR THE GORGE



On August 1, the *Step Up for the Gorge* Campaign was posted on the organization’s website. In addition to the *Step Up for the Gorge* logo, an animated graphic (left) of a mountain climber who climbed up the mountain as the campaign progressed was created.

In mid-August, Friends’ newsletter landed in members’ mailboxes with an inserted campaign brochure (see *Newsletter Insert*). The brochure asked supporters to “Be one, bring one” by sending in their Step Up gift and then tearing off the back page of the brochure and passing it along to a friend. Members were offered a free *Step Up for the Gorge* T-shirt for participating. Over the course of the campaign, 41 people sent in the brochure. The campaign launch was also announced in the organization’s August electronic newsletter.

During the course of the campaign, supporters whose memberships were expiring received a renewal request letter that included a message about the *Step Up for the Gorge* campaign (see *Renewal Letter*). The letters personalized individuals’ 2009 giving amounts and asked for an increased gift. Each gift was acknowledged with a thank you letter that recognized if the gift was a Step Up gift. Renewal letters went out in August, October and December.

Two *Step Up for the Gorge* campaign kick-off events were held in August, one at a private home in Portland and the other at a board member’s home in Hood River. Friends’ entire membership was invited using an email invitation that encouraged them to attend the kick-off and learn about the campaign and ways they could get involved. In total, 48 people attended the events.

At the kick-off events, staff and steering committee members worked to inspire, explaining how the campaign would help achieve conservation goals, as well as the effort to stop a proposed Gorge casino. Guests were provided ways to reach out to family and friends regarding the campaign. This included specific instructions or templates for the following activities:

- Do-it-yourself Group Hike;
- Bring-a-Friend Hike;
- Do-it-yourself Winery Tour;
- Do-it-yourself Fruit Loop Tour;

- House Party;
- *Be One, Bring One!* Outreach Brochure; and
- Social Media outreach.

Each of the above templates were enclosed in a packet containing instructions on how to invite guests and make a pitch for the *Step Up for the Gorge* campaign. Steering committee members participated in presenting the templates. In some cases, guide books or maps were given away as incentives. Thirty people signed up for an outreach template.

On August 19, a former board member and a current staff member co-hosted a house party in Hood River. The event gathered nearly 50 attendees in the home of the former board member and raised approximately \$7,000. As the most successful house party fundraiser in the organization's history, the party gave the campaign instant energy.

In August, the *Step Up the Gorge* Campaign raised \$14,490 in funds that qualified for the matching gift.

### **C) Broadening - September**

Friends looked to broaden communications and build momentum in September, using the monthly electronic newsletter, Facebook, and Twitter to update supporters. During the course of the campaign, the organization's monthly electronic newsletter prompted supporters to "step up" and included a link to the organization's donation webpage and to the *Step Up for the Gorge* webpage. Friends also posted twice on its Facebook page and twice on Twitter.

Volunteer fundraisers were asked to use a social media site called First Giving to solicit gifts from friends and family. The site allowed volunteers to create their own personalized fundraising webpage utilizing the banner and logo of Friends of the Columbia Gorge. Volunteers could send links to their friends and family by email, Facebook or other social media. Six sites were set up and approximately \$1,300 in qualifying donations were received.

A steering committee member led the way on social media and created a personal blog about gorge issues and opportunities. She emailed volunteers who had signed up to help with social media, asking them to use Facebook, Twitter and First Giving to spread the word about the campaign.

One of campaign's goals was to convert hikers to members. An "Ambassador Training" session was held for those volunteers who lead Friends' hikes to assist them in understanding how they could help spread the word when leading hikes. During the fall hiking season, 62 non-members attended hikes and ten were converted to members. (See Lessons Learned)

An unexpected opportunity to broadcast the campaign came when Friends received an invitation from REI to be the beneficiary of the Radical Reels Film Festival. During the film festival's intermission, 400 attendees heard about the work of Friends of the Columbia Gorge

and the opportunity to double their impact through matching funds pledged to the Step Up for the Gorge campaign. The event resulted in generating only one new member, but the organization benefited from the public relations and more than \$2,400 in event proceeds.

Volunteers and board members also put their own ideas into action. One steering committee member made contact with a green burial service that gave \$5,000 to Friends and set up a giving opportunity for their customers. A board member taught a cake decorating class and donated proceeds to Friends. In addition to generating new members, the cake class was featured in a newspaper circular that was sent to every home in Hood River. The class description included Friends of the Columbia Gorge's mission.

In September, the *Step Up for the Gorge* Campaign raised \$18,660 in funds qualifying for the match, thus \$33,150 cumulatively for the first two months of the campaign.

#### **D) Going Deeper - October**

In October, the campaign turned its focus to major donors. Any donor who had given \$250 or more in the previous year was mailed an invitation to join the Conservator Society (those who give \$1,000 or more annually) and attend a special gathering. The invitation explained the matching gift opportunity. Board members called many of the invited major donors and asked them to *Step Up for the Gorge* and attend the Conservator party. Seventy-seven people attended the Conservator Party on November 1, where staff announced that the \$50,000 goal for the campaign had been reached and that the matching donor was now adding another \$25,000 matching challenge.

Typically, the organization mails four special appeal letters a year (March, June, Oct and December) regarding a special gift to support a key conservation effort. In October, members received a special appeal letter highlighting the threat of the Gorge casino and the last-minute efforts to approve the casino in the final days of the Kulongoski administration. Further highlighted was the opportunity to leverage gifts through the *Step Up for the Gorge* Campaign. Mailed to 1,847 households, the letter received a response rate of 8.55%. A similar mailing in 2009 had a 6.66% response rate.

The steering committee's October efforts focused on making approximately 100 follow-up phone calls to the people who had pledged to support the campaign in August and September, encouraging them to continue (or start) their efforts.

In October, the *Step Up for the Gorge* Campaign raised \$27,656 in funds qualifying for the match, and thus \$60,806 cumulatively for the first three months of the campaign.

#### **E) An Extra Boost - November**

Throughout the campaign, staff provided Janet Match with reports on campaign activities and results. When the organization reached the \$50,000 goal in late October, Janet added another \$25,000 to boost to the campaign. As Janet had predicted, the announcement brought

a new level of excitement to the campaign. The new goal was announced at the Conservator Party, and also in the organization's Fall 2010 print newsletter, October electronic newsletter and on the website.

Friends' print newsletter (see *Fall 2010 Newsletter*) featured not only the successful *Step Up for the Gorge* campaign, but also the story of individual donors making large donations and conservation purchases to save the land across from the iconic Vista House. This story, in combination with the *Step Up for the Gorge* Campaign, seemed to produce a tipping point. The extraordinary examples of members' financial resources being put to use on the ground moved long-time supporters to view Friends in a different light. While typically a few members move up to the \$1,000 Conservator level in a given year, as a result of the campaign, Friends had 31 new Conservators. One of those individuals was a longtime member who had consistently given about \$50 a year. In 2010, she retired and began going on Friends' hikes, including two with different staff members. With the campaign, she had increased her annual gift to \$1,000 and attended the Conservator Event. Hearing about the conservation buyers' efforts at the event, she approached staff about becoming a conservation buyer. Staff is now working with her to secure a \$300,000 conservation purchase.



**Major Donors  
Step Up!**

*Upgrades, \$1,000+ contributors*

<b>Projected:</b>	<b>\$27,854</b>
<b>Actual:</b>	<b>\$69,781</b>

In November, the *Step Up for the Gorge* Campaign raised \$25,151 in funds qualifying for the match, now \$85,957 cumulatively for the first four months of the campaign.

#### **F) Big Surprises – December**

As the final days of November approached, it was clear that the organization would meet the \$75,000 goal by month's end. Staff and board were excited to see such a high level of success. However, without matching funds for the month of December, Friends would have to call an end to the campaign during the organization's historically biggest fundraising month. Staff began talking with major donors about the power of the campaign and asked for support to keep it going through December. The organization then received a phone call from long-time donors in Richland, WA. The donors had read the newsletter and were inspired by the stories of land conservation and the *Step Up for the Gorge* campaign. Though they were typically \$50 per year members and had no personal connection to the organization's staff or board, they wanted to make a significant gift. After discussing several gift options, the development director explained the situation regarding the lack of matching funds to continue the campaign. The couple considered the various opportunities and chose to support the *Step for the Gorge* Campaign with a \$25,000 matching pledge to leverage even more support for the Gorge. A second major donor also pledged \$25,000 to the campaign. Now

\$50,000 in matching funds were available to continue the campaign through the end of the year.

The final month of the campaign incorporated a communication blitz to members and potential members. Renewal letters were mailed. A special appeal letter focusing on Gorge land acquisition was mailed to 2,447 households, and achieved a response rate of 6.53% compared to 6.13% for a similar mailing in 2009.

A personalized letter was sent to those who had donated gifts of stock in the past. A new-member prospect letter was mailed to nearly 8,000 lapsed members and prospective members asking them to join now and take advantage of the opportunity to double their impact. And, in a new strategy, staff sent three email appeals to supporters and prospects in the final days of December.

On December 30, the organization reached its revised campaign goal of \$125,000 in Step Up gifts. Supporters continued giving until midnight on New Year’s Eve via the website, exceeding the revised goal by over \$34,000 and recording the largest number of online gifts in December in the organization’s history.

In December, the *Step Up for the Gorge* Campaign raised \$71,717 in funds qualifying for the match. The final results for the *Step Up for the Gorge* Campaign were \$157,674 raised and \$125,000 matched – a total of \$282,674 in new support!

**IV) Financials (see Final Financial Report enclosed)**

**With (2010) and without (2009) the Step Up Campaign**

	Aug. - Dec. 2009			Aug. - Dec. 2010			% \$ Increase from 2009
	# of Gifts	Total Giving	Avg. Gift Size	# of Gifts	Total Giving	Avg. Gift Size	
New Members	401	\$25,554	\$64	519	\$40,313	\$78	58%
Renewals	991	\$75,045	\$76	982	\$84,240	\$86	12%
Conservators	67	\$121,921	\$1,820	84	\$166,386	\$1,981	36%
<b>Total</b>	<b>1,459</b>	<b>\$222,520</b>	<b>\$153</b>	<b>1,585</b>	<b>\$290,939</b>	<b>\$184</b>	<b>31%</b>

**V) Campaign Outcomes, Strategies and Goals (Projected vs. Actual):**

**A) Proposed Outcomes and Results:**

- ✓ **Goal:** Raise up to \$100,000 (or up to \$150,000 with the Kicker Match);  
**Actual:** Raised \$282,674
- ✓ **Goal:** Broaden and deepen member support;  
**Actual:** Added 519 new members (broadened), 1101 donors increased giving (deepened)
- ✓ **Goal:** Increase the Annual Fund and decrease the amount drawn from reserves;

- Actual:** Increased annual fund and, despite significant unexpected legal costs, decreased the projected draw from reserves by \$50,000 through 12/31/10
- ✓ **Goal:** Develop board fundraising;
 

**Actual:** Board interacted with 115 donors who contributed \$46,848 in increased funding
  - ✓ **Goal:** Develop capacity for a larger campaign in 2012
 

**Actual:** The organization grew in its ability to engage volunteers, communicate via new media and motivate new and existing donors

**B) Proposed Strategies with Projected\* and Actual Outcomes:**

*\*many projected goals based on numbers in “Best Case Scenario” spreadsheet enclosed*

- ✓ *Personalized Membership Renewal letters:* Friends of the Columbia Gorge sent a personalized renewal letter explaining the match opportunity, giving the member’s 2009 giving level and requesting renewal at a higher-giving level.
 

**Goal:** \$18,335 in step-up increases

**Actual:** \$17,396 in step-up increases
- ✓ *Conversion of Hikers to Members:* Friends led approximately 20 hikes in fall 2010, attracting over 400 members and non-members. Hike leaders were encouraged to promote *Step Up for the Gorge* during their hikes. In addition, hikers who were not members received an email and direct mail to encourage membership.
 

**Goal:** 40 new members and \$2,000 in step-up increases

**Actual:** 10 new members and \$740 in step-up increases. Reporting limitations did not allow accurate determination of the total number of conversions and the amount of donations (See *Lessons Learned*)
- ✓ *Board Involvement:* Board members were engaged in all aspects of the campaign: recruiting new members, encouraging members to renew at higher levels and thanking members for their gift. Of the 315 donors assigned to board members for cultivation, 115 contributed gifts that qualified for the match.
 

**Goal:** 100% board participation and \$5,000 in step-up increases

**Actual:** 100% board participation and \$46,848 in step-up increases attributable to board members’ efforts
- ✓ *Electronic media:* Friends’ website, Facebook, YouTube, Twitter, email alerts, and e-newsletter to reach new supporters and re-engage existing members. The Friends’ email distribution list includes 4,500 names of which only 25% are dues-paying members.

**Goal:** 100 new members and \$4,000 in step-up increases

**Actual:** 179 new members and approximately \$10,545 in step-up increases

- ✓ *New Member Direct Mail Appeal:* Friends sent a direct mail appeal to 8,657 potential new members. These were names accumulated internally via our website and events.

**Goal:** 150 new members and \$6,000 in step-up increases

**Actual:** 330 new members and \$18,896 in step-up increases

- ✓ *Special Appeals:* Two special appeal letters were sent to existing members. These highlighted Friends' conservation efforts and encouraged members to give beyond their typical gift to take advantage of the match.

**Goal:** \$3,857 in step-up increases

**Actual:** \$16,096 in step-up increases

- ✓ *Special Events:* The organization planned to host a land trust tour and a Conservator Party for our major donors (those who give \$1,000 or more annually) and major donor prospects. A land trust tour was not held as it conflicted with the two August kick-off events.

**Goal:** 5 new conservators

**Actual:** 33 new Conservators (note: conservators were inspired by strategies beyond the special event.)

*Friends projected in its "Best Case Scenario" that 25% of the contributions made during the Step Up Campaign would qualify for the match. Instead, 47% qualified for the match.*



## VI) Lessons Learned

### A) Successes

As this was the first matching gift campaign for Friends of the Columbia Gorge, there were no benchmarks to judge the success of the campaign other than pre-campaign financial projections. However, based on the financial success of the campaign and member feedback during and after the campaign, some of the lessons learned from the effort are:

**Branding is critical:** Staff believe a large part of the success of the campaign came from developing a recognizable name and logo for the effort. In personal contact with contributors to the campaign, many specifically mentioned it as the "Step Up" campaign versus the "matching gift campaign." The logo with the hiking boot in the Gorge reinforced the simple name. The branding was memorable, and served in reinforcing the main tenet of the campaign: that contributions would only be matched if they were a "step up" from previous activities or non-activities.

**Time to build campaign:** By kicking off the campaign in late July at Friends' Summer Picnic, the organization had four months to educate and inspire individuals about the Step Up for the Gorge Campaign. This allowed five public events (summer picnic, three Step Up events and our major donor event), two print newsletter issues in which the executive director and development pages focused on the campaign, two special appeal mailings, three personalized renewal mailings and numerous social media announcements on the campaign. Comparing with six matching gift campaigns from other non-profits that staff members were exposed to in the final days of 2010, the lengthier campaign seems to have paid off for Friends.

**Engaging board and volunteers:** The development director transition led the campaign to adopt a more "volunteer centric" campaign including the creation of a steering committee that focused on getting other volunteers to assist in securing Step Up gifts. Friends' board members were also more engaged in fundraising than ever before. The compelling campaign, simple message and easy-to-use fundraising templates contributed to increased board-member participation.

**Old timers become new blood:** The campaign moved long-time members who have made modest donations for over a decade to "step up" to extraordinary levels. Two shining examples are mentioned on pages seven and eight.

**New members think big:** Friends of the Columbia Gorge has never seen more new members join at the Conservator level (\$1,000 or higher) than during the Step Up Campaign. In all, 84 people contributed at the Conservator level during the campaign, while in the same time period a year ago, 67 people contributed at that level. There were 33 new Conservators during the campaign compared to 19 new Conservators in the same period last year. This success can also be attributed in part to personal connections: one board member convinced a friend to join at \$5,000 while a Step Up committee member secured a \$5,000 new corporate gift. The campaign inspired these individuals to reach out to their connections.

## **B) Setbacks**

In a campaign with such an impressive final result, there were no significant setbacks. There were, however, examples where communications did not resonant, systems did not support the influx of donations, and intentions and projections did not live up to initial expectations.

**Social Media:** The organization pushed its social media efforts further than it ever had, but that push did not result in consistent results. The First Giving fundraising website was not especially effective, except for one board member who used it successfully to generate new out-of-state members.

Future strategies might also include developing individuals to serve as "champion spokespeople" via their Facebook and Twitter accounts. Using video clips of the Gorge in the

social media efforts was also discussed early in the campaign, but staff and volunteers lacked the experience or infrastructure to make that happen.

**Online Donations:** While the organization had its largest level of December online donations in its history, the final days of December taxed the system. A few people wrote to the organization complaining that they had given up on trying to make online gifts because they continued to get kicked off the site. It is likely there are others who gave up and never contacted the organization. The experience has led Friends to research improved online giving technology with the goal of replacing our current system in 2011.

**Communications in the final month:** Friends received strong feedback from one board member that as the matching goal continued to increase (from \$50,000 to \$75,000 to \$125,000), the resulting communications explaining these changes were confusing and possibly made the organization's efforts appear disjointed. The board member suggested that it might make sense to explain to members upfront the possibility that the campaign goal could move as it progressed, however, that would potentially diminish the enthusiasm and urgency we found with the surprise additions of matching funds. Staff needs to examine this issue prior to launching another matching gift campaign.

**Volunteer Support:** The organization reached new heights of volunteer fundraising involvement during the campaign, but it was that large influx of new volunteer interest which revealed the lack of infrastructure to support all those volunteers. Staff effectively engaged the steering committee and board members, but these volunteers would have benefited from better and timelier reports on the donors they were cultivating. The organization's second tier of volunteers was left unsupported and the organization was not able to ascertain if these volunteers conducted the outreach intended. As a result, the organization is researching database systems that have the capacity to support volunteer fundraisers with on-line reports.

**Hiking new members:** Staff overestimated the number of non-member hikers who would convert to new members during the campaign. Of the 64 non-member hikers who participated in our fall hikes, 10 became members (a nearly 16% return). But the campaign's goal was 40 new members and was based on erroneous data from the previous year. The organization also learned they could not track hikers who converted to members in order to attend a "members only" hike. These types of conversions were only recorded as on-line donations.

**Tracking results:** In creating the outcomes of the campaign, some proved very difficult to track. For example, in our revenue forecast, certain financial returns were projected based on communication tools such as face-to-face meetings. In this case, the meetings were to reach individuals, yet the gifts from those individuals were typically received through other means, such as online giving and response to mailings. This caused some deviance in the reporting of our results.

## VII) Reflections and Future Actions

- A) Survey those who participated in the Step Up Campaign:** One board member suggested that Friends conduct a survey of those who participated in the campaign, asking them what they thought of the program, how they would improve it, and what motivated them to “step up.” Friends’ staff will consider creating a survey in Spring 2011 using a simple online survey tool such as Survey Monkey.
- B) Untapped potential within existing membership:** The *Step Up for the Gorge* Campaign demonstrated the vast untapped potential of our membership. In several cases, longtime members who had given at the same level for over a decade increased their giving tenfold. Our challenge in the future is to continue to inspire individuals who are committed but are giving far below their potential. As demonstrated in the campaign, compelling issues, simple incentives and working to establish personal connections with those individuals are key.
- C) Maintaining the upgraded giving levels:** One of the challenges of 2011 will be ensuring that those who stepped up remain at that their higher giving level in 2011. Friends is already working on strategies to ensure upgraded giving levels are sustained. For example, during the campaign, renewal notices to members listed the amount of money they gave in the prior year. This was the first time the organization personalized the letters in this way and the organization is considering continuing the practice.
- With contributors who gave beyond the conservator level (\$1,000), Friends is planning a sit-down dinner in an elegant Portland home. Contributors will be provided a presentation on an exciting conservation/recreation project in conjunction with the 25<sup>th</sup> anniversary of the Columbia River Gorge National Scenic Area and will be asked to pledge an annual giving level of \$5,000.
- D) Frequency of future Step Up campaigns:** Part of the success of the campaign is that it was a new, fresh idea. While it is tempting to hold an annual matching gift campaign, it is likely that the enthusiasm for such a campaign would wane in a short period. Friends is very interested in determining appropriate time periods between such campaigns and appropriate themes to wrap such a campaign around. Friends will undertake a strategic planning process in the summer of 2011. The future of Step up for the Gorge will be a significant topic to address.

### ***Enclosures:***

*Final Financial Report*

*Step Up Committee Description*

*Messaging Document*

*Communications Campaign Calendar*

*Pledge Form*

*Newsletter Insert*

*Renewal Letter*

*Fall 2010 Newsletter*