Transformational Fundraising Campaigns – Ideation Workshop

LUMINATE ONLINE®/ TEAMRAISER® TRACK

blackbaud®
DEVELOPERS' CONFERENCE
June 15–17, 2021

MARK BECKER

Session Host: Heather McLean

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As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users

Hello! I'm Mark Becker

HOMETOWN: CHICAGO
CURRENT RESIDENCE: CELEBRATION, FLORIDA

BLACKBAUD PARTNER FOR 13 YEARS

@cathexispartner

Cathexis PARTNERS

We help nonprofits
use technology to raise funds
and engage supporters
effectively and affordably.

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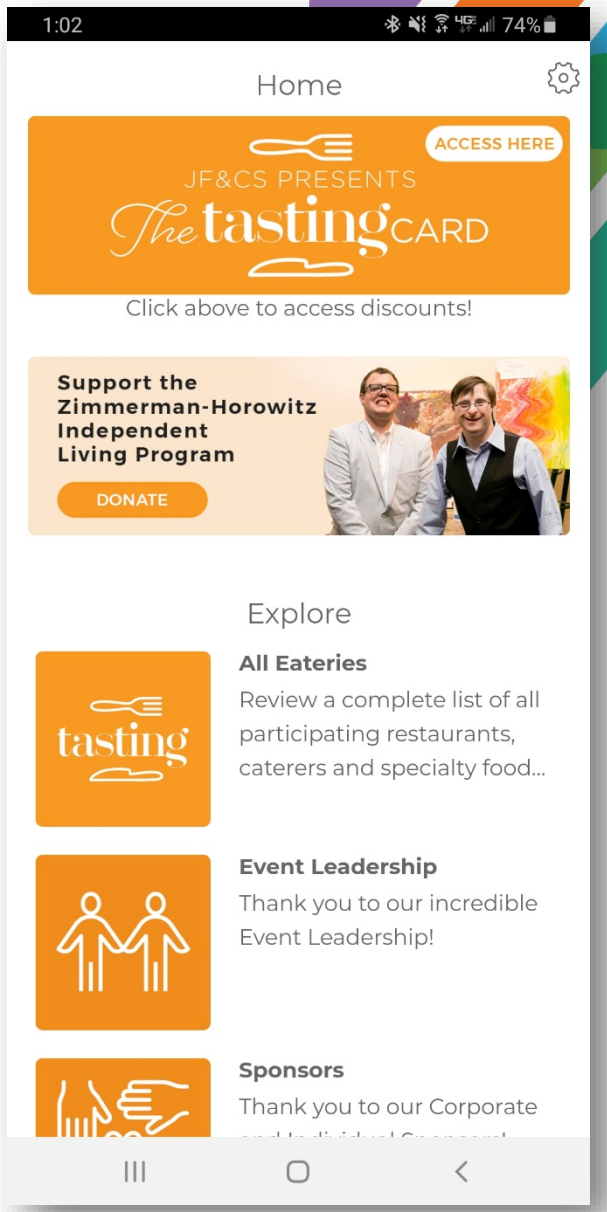
The tasting CARD 2021

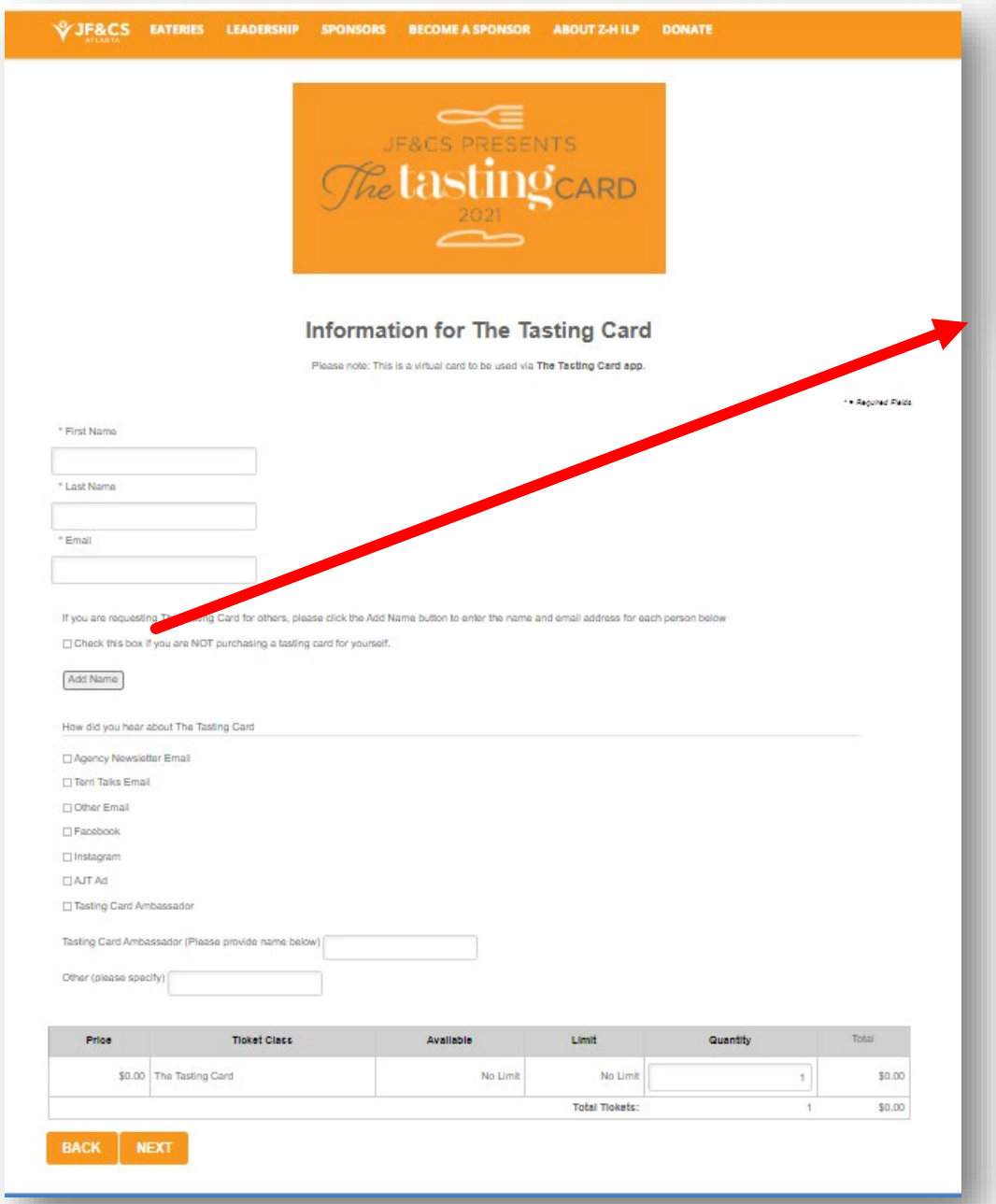
Purchase your virtual card today at thetasting.org!

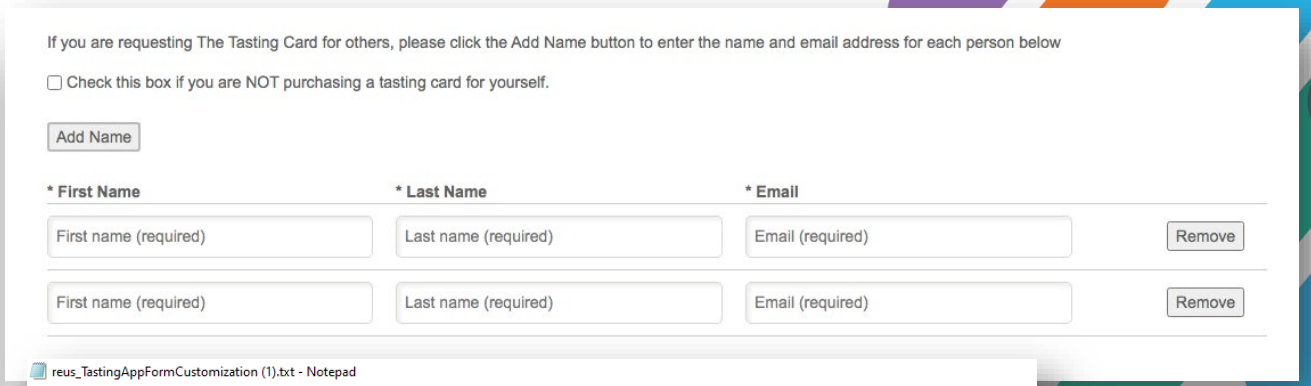
Enjoy 20% off* at 40 amazing restaurants, caterers and specialty food providers with 48 locations around Metro Atlanta by using The Tasting Card from May 10-24!

All proceeds support the Zimmerman-Horowitz Independent Living Program (Z-H ILP), a highly-individualized, nonsectarian, person-centered supportive living program that enables people with disabilities to live as independently as possible.



https://buildfire.com/ - App





reus_TastingAppFormCustomization (1).txt - Notepad

File Edit Format View Help

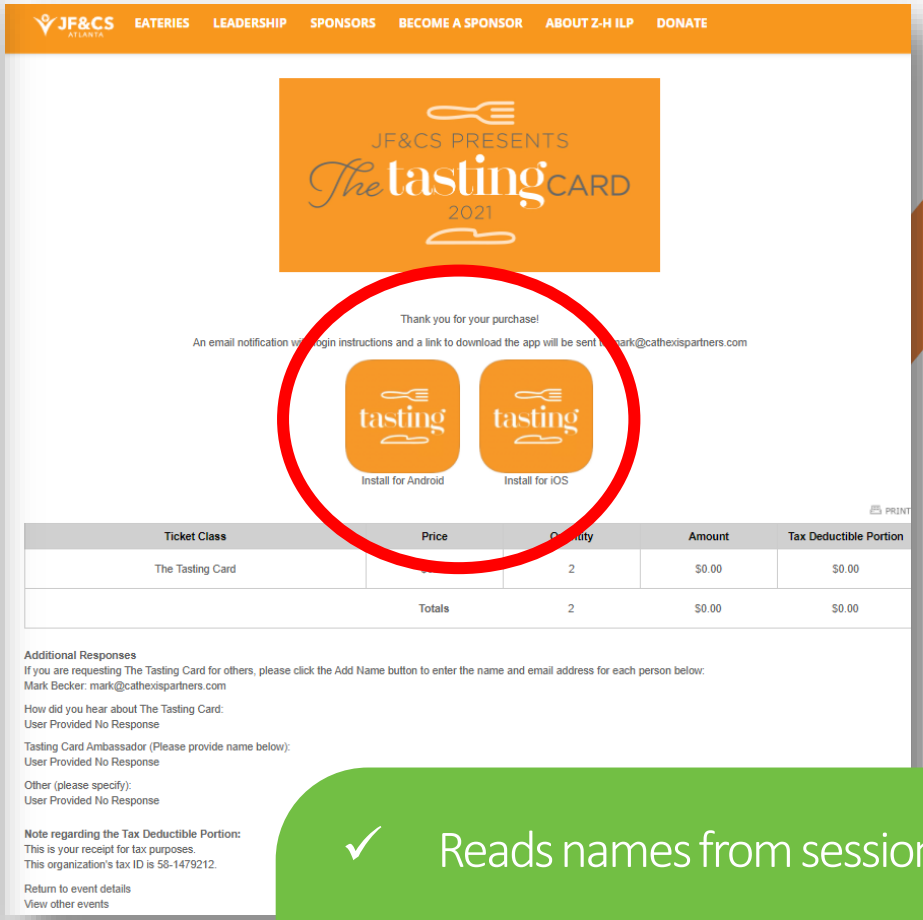
```
function updateNamesAndQuantity() {

  var textarea_input = "";
  var donorFirstName = $j("#first_name").val();
  var donorLastName = $j("#last_name").val();
  var donorEmail = $j("#primary_email").val();

  if ( document.location.href.indexOf("view=Tickets") > 0 ) {
    var opt_out_self = $j("#opt_out_input").is(":checked");
    var quantity = opt_out_self ? 0 : 1;
    var name_list = opt_out_self ? [] : [ donorFirstName + ',' + donorLastName ];
    var email_list = opt_out_self ? [] : [ donorEmail ];

    $j("#name_table tr:has(input)").each(function() {

      var fname = $j(this).find('input.first_name');
      var lname = $j(this).find('input.last_name');
      var email = $j(this).find('input.email');

      if ( fname.val() != "" ) fname.parent().removeClass('error');
      if ( lname.val() != "" ) lname.parent().removeClass('error');
      if ( email.val() != "" ) email.parent().removeClass('error');

      textarea_input += (fname.val() + ' ' + lname.val() + ': ' + email.val() + '\n');
      name_list.push(fname.val() + ',' + lname.val());
      email_list.push(email.val());

      quantity++;

    });

    if ( $j("#name_table tr:has(input)").length == 0 )
      $j("#name_table").hide();

    $j(textarea).html(textarea_input);
    $j("#tix_quantity0").val(quantity).change();

    // update session vars
    var session_endpoint = "https://secure3.convio.net/jfcs/site/SPageNavigator/reus_TastingAppRegisterProcess";
    $.get(session_endpoint, {
      s_primary_email: donorEmail,
      s_purchaser_name: donorFirstName + " " + donorLastName,
      s_name_list: encodeURIComponent(name_list.join(';')),
      s_email_list: encodeURIComponent(email_list.join(';'))
    });
  }
 }

});

</script>
```

- ✓ Add additional questions to event registration
- ✓ Appends to hidden text area
- ✓ Form validation
- ✓ Adds names to session variable

reus_TastingAppThankYouCallout (1).txt - Notepad

File Edit Format View Help

```
<style>#app_download, #iOS_link, #Android_link, #Desktop_link { display: none; }</style>

<div id="app_download">
  <div id="iOS_link" align="center">
    <a href="https://apps.apple.com/us/app/the-tasting-card/id1561643094" target="_blank">
      <img alt='Get it on the App Store' src="../images/content/pagebuilder/TastingAppIcon.png" height="150" border="0" />
      Install for iOS
    </a>
  </div>
  <div id="Android_link" align="center">
    <a href='https://play.google.com/store/apps/details?id=com.he042919267f.www&pcampaignid=pcampaignidMKT-Other-global-all-co-prtnr-py-PartBadge-Mar2515-1'>
      <img alt='Get it on Google Play' src='../images/content/pagebuilder/TastingAppIcon.png' height="150" border="0" />
      Install for Android
    </a>
  </div>
  <div id="Desktop_link" align="center">
    <table border="0" cellspacing="10" align="center">
      <tr>
        <td align="center">
          <a href='https://play.google.com/store/apps/details?id=com.he042919267f.www&pcampaignid=pcampaignidMKT-Other-global-all-co-prtnr-py-PartBadge-Mar2515-1'>
            <img alt='Get it on Google Play' src='../images/content/pagebuilder/TastingAppIcon.png' height="150" border="0" /><br />
            Install for Android</a>
        </td>
        <td width="25"> </td>
        <td align="center">
          <a href="https://apps.apple.com/us/app/the-tasting-card/id1561643094" target="_blank">
            <img alt='Get it on the App Store' src="../images/content/pagebuilder/TastingAppIcon.png" height="150" border="0" /><br />
            Install for iOS</a>
        </td>
      </tr>
    </table>
  </div>
</div>

<script src="https://code.jquery.com/jquery-3.6.0.min.js"></script>
<script>
var endpoint = "https://hooks.zapier.com/hooks/catch/9713841/ojiuag8/";
var name_list = "[[S80:name_list]]";
var email_list = "[[S80:email_list]]";
var name_rows = [], email_rows = [];

var index = 0;

jQuery.noConflict();
jQuery(document).ready(function($j) {

  if ( name_list != "" && name_list.indexOf("undefined") == -1 ) {
    name_rows = decodeURIComponent(name_list).split(";");
    email_rows = decodeURIComponent(email_list).split(";");

        for ( var i in name_rows ) {
      var name_data = name_rows[i];
      var email = email_rows[i].trim();
      var name_fields = name_data.split(",");
      var fname = name_fields[0];
      var lname = name_fields[1];

      if ( fname != "" && lname != "" && email != "" ) {
        $j.post(endpoint, {
          firstname: fname,
          lastname: lname,
          email: email
        }, function(result) {
              if ( ++index == email_rows.length ) {
                    var url = "https://secure3.convio.net/jfcs/site/SPageNavigator/AddTastingCardGiftRecipients.html?" +
                          "name_list=[[S80:name_list]]&" +
                                "email_list=[[S80:email_list]]&" +
                                "primary_email=[[S80:primary_email]]&" +
                                "purchaser_name=[[S80:purchaser_name]]&" +
                                "index=0";
                    $j("body").append("<iframe style='display: none;' src='"+url+"' />");
              }
        });
      }
    }

    var device = getMobileOperatingSystem();
    $j("#" + device + "_link, #app_download").show();

  }

});

function getMobileOperatingSystem() {
  var userAgent = navigator.userAgent || navigator.vendor || window.opera;

  if( userAgent.match( /iPad/i ) || userAgent.match( /iPhone/i ) || userAgent.match( /iPod/i ) )
  {
    return 'iOS';
  }
  else if( userAgent.match( /Android/i ) )
  {

    return 'Android';
  }
  else
  {
    return 'Desktop';
  }
}

</script>
```



- ✓ Reads names from session variables
- ✓ Post to Zapier webhook url
- ✓ Detects device and shows app store link
- ✓ Submit additional names to Survey via hidden iframe which sends AR with link to app

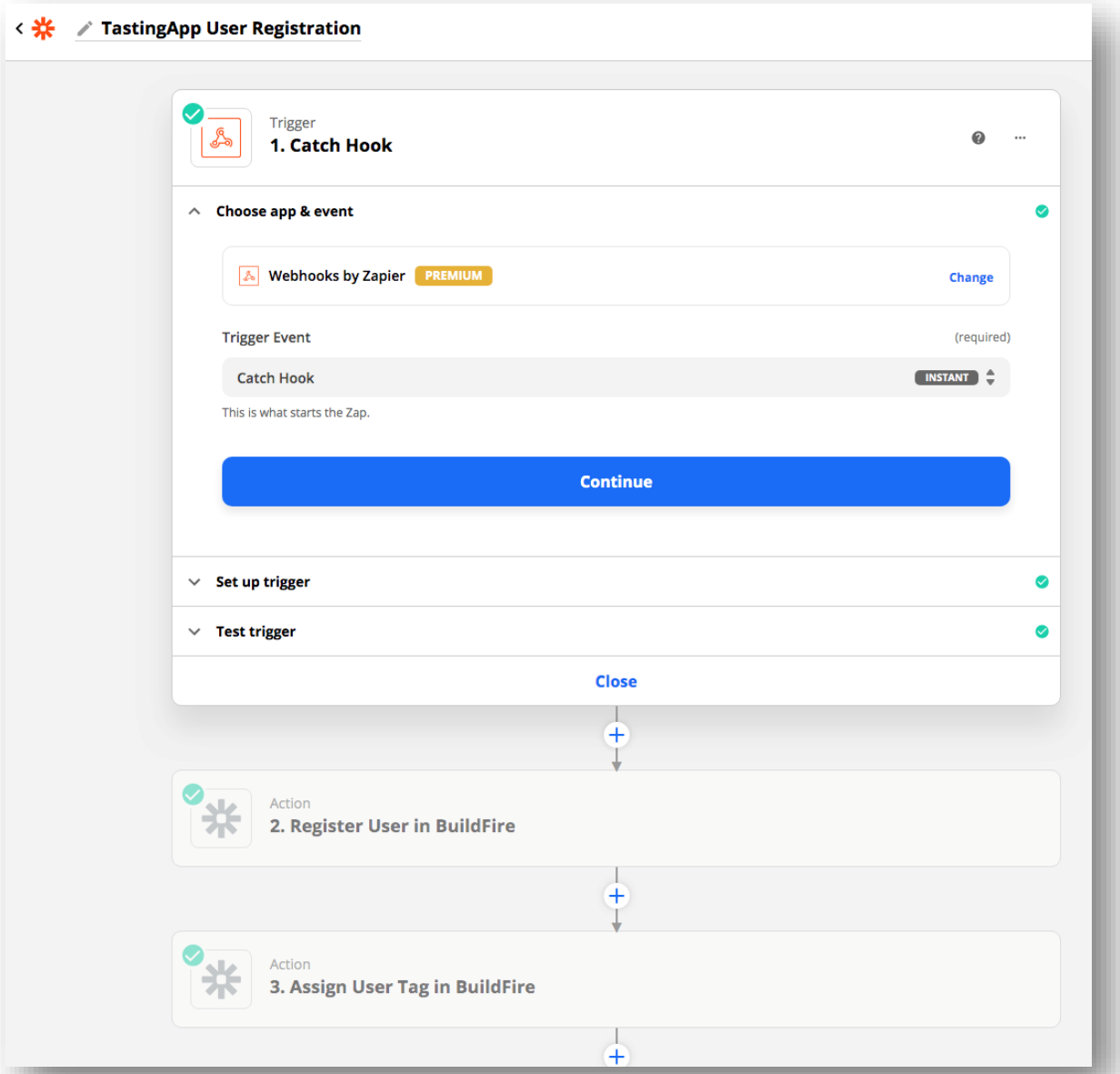
reus_TastingCardSurveySubmitter (1) - Notepad

File Edit Format View Help

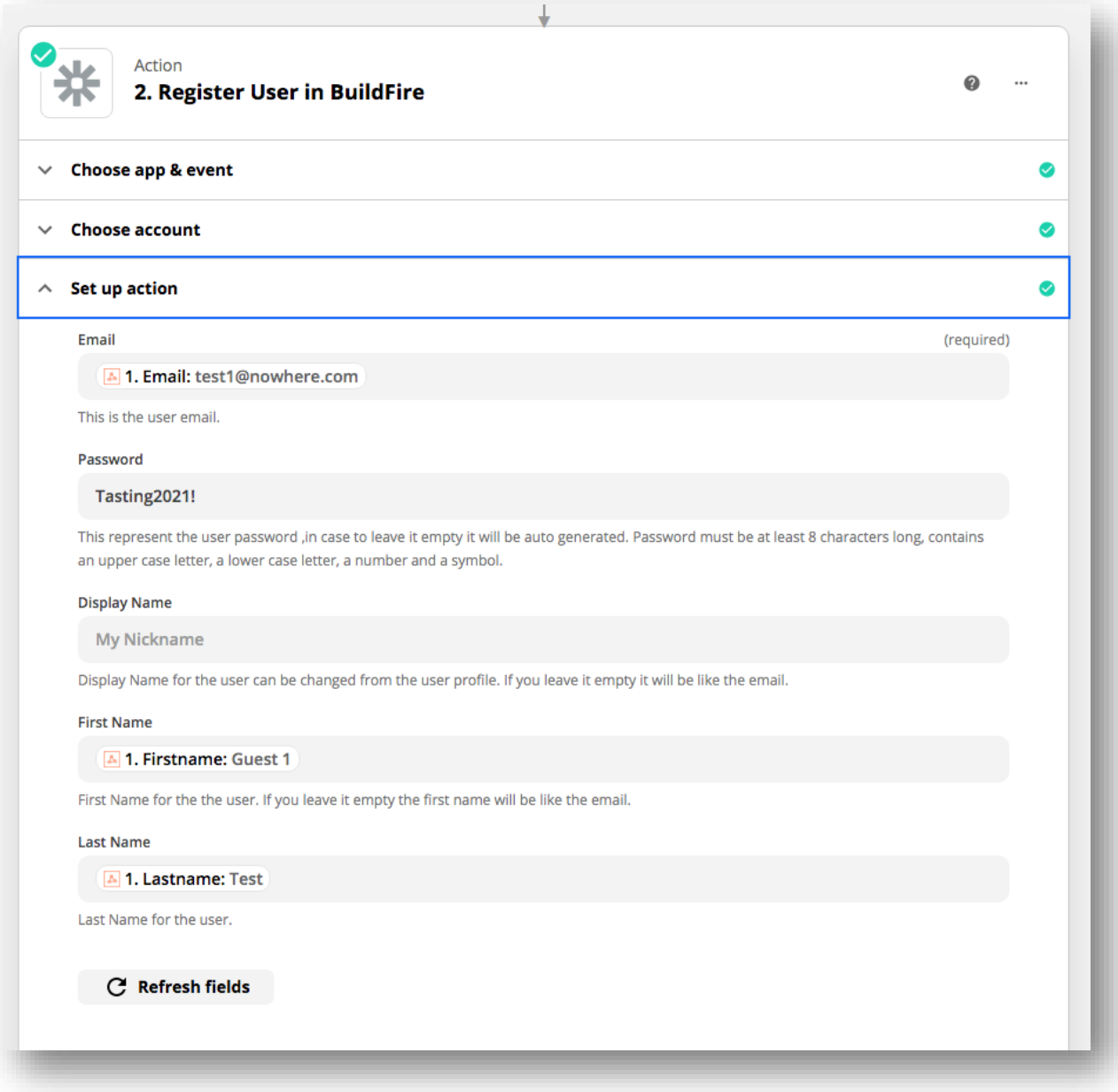
```
<script src="https://code.jquery.com/jquery-3.6.0.min.js"></script>
<script>

var endpoint = "https://secure3.convio.net/jfcs/site/CRSurveyAPI";

var name_rows = [], email_rows = [];
var name_list = "[[S334:name_list]]";
var email_list = "[[S334:email_list]]";
var primary_email = "[[S334:primary_email]]";
var purchaser_name = "[[S334:purchaser_name]]";
var auth = "[[S86:true]]";
var i = parseInt("[[S334:index]]");

jQuery.noConflict();
jQuery(document).ready(function($j) {

	if ( name_list != "" && name_list.indexOf("undefined") == -1 ) {
		name_rows = decodeURIComponent(name_list).split(";");
		email_rows = decodeURIComponent(email_list).split(";");
		console.log(email_rows);
		var name_data = name_rows[i];
		var name_fields = name_data.split(",");

		var fname = name_fields[0];
		var lname = name_fields[1];
		var email = email_rows[i].trim();

		if ( email != primary_email && fname != "" && lname != "" && email != "" ) {

			$j.post( endpoint, {
				api_key: "wDB09SQODRpVIOvX",
				v: "1.0",
				auth: auth,
				method: "submitSurvey",
				survey_id: "2021",
				cons_first_name: fname,
				cons_last_name: lname,
				cons_email: email,
				source: "Tasting Card Gift Recipient",
				question_1763: purchaser_name
			}, function(response) {
				console.log(response);
				$j.get("https://secure3.convio.net/jfcs/site/CRConsAPI", {
					api_key: "wDB09SQODRpVIOvX",
					v: "1.0",
					method: "logout"
				}, function(response) {
					if ( i + 1 < email_rows.length ) {
						var url = "https://secure3.convio.net/jfcs/site/SPageNavigator/AddTastingCardGiftRecipients.html?" +
							"name_list=" + encodeURIComponent(name_list) +
							"&email_list=" + encodeURIComponent(email_list) +
							"&primary_email=" + encodeURIComponent(primary_email) +
							"&purchaser_name=" + encodeURIComponent(purchaser_name) +
							"&index=" + (i+1);
						console.log("nexturl", url);
						location.href = url;
					}
				});
			});

		}

	}

});

</script>
```

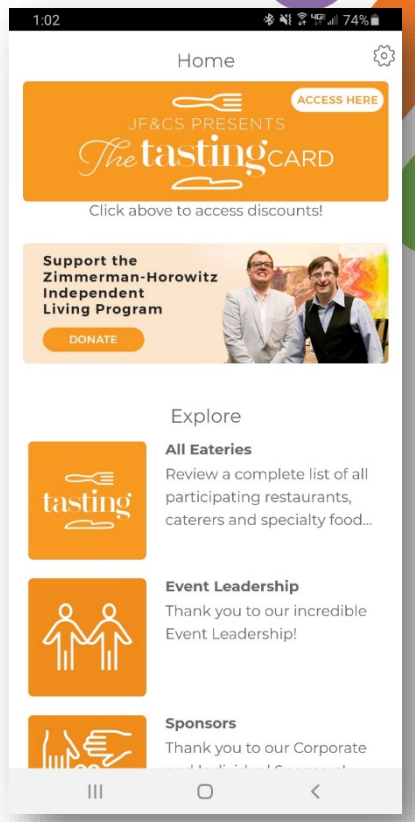
- ✓ Grabs Nth name/email in the list
- ✓ Posts data to the Survey API
- ✓ Logs out
- ✓ Refreshes itself in order to process the next name

* used this approach vs Survey API posts directly since Zapier callouts originate from a new IP address every time so whitelisting would have been difficult

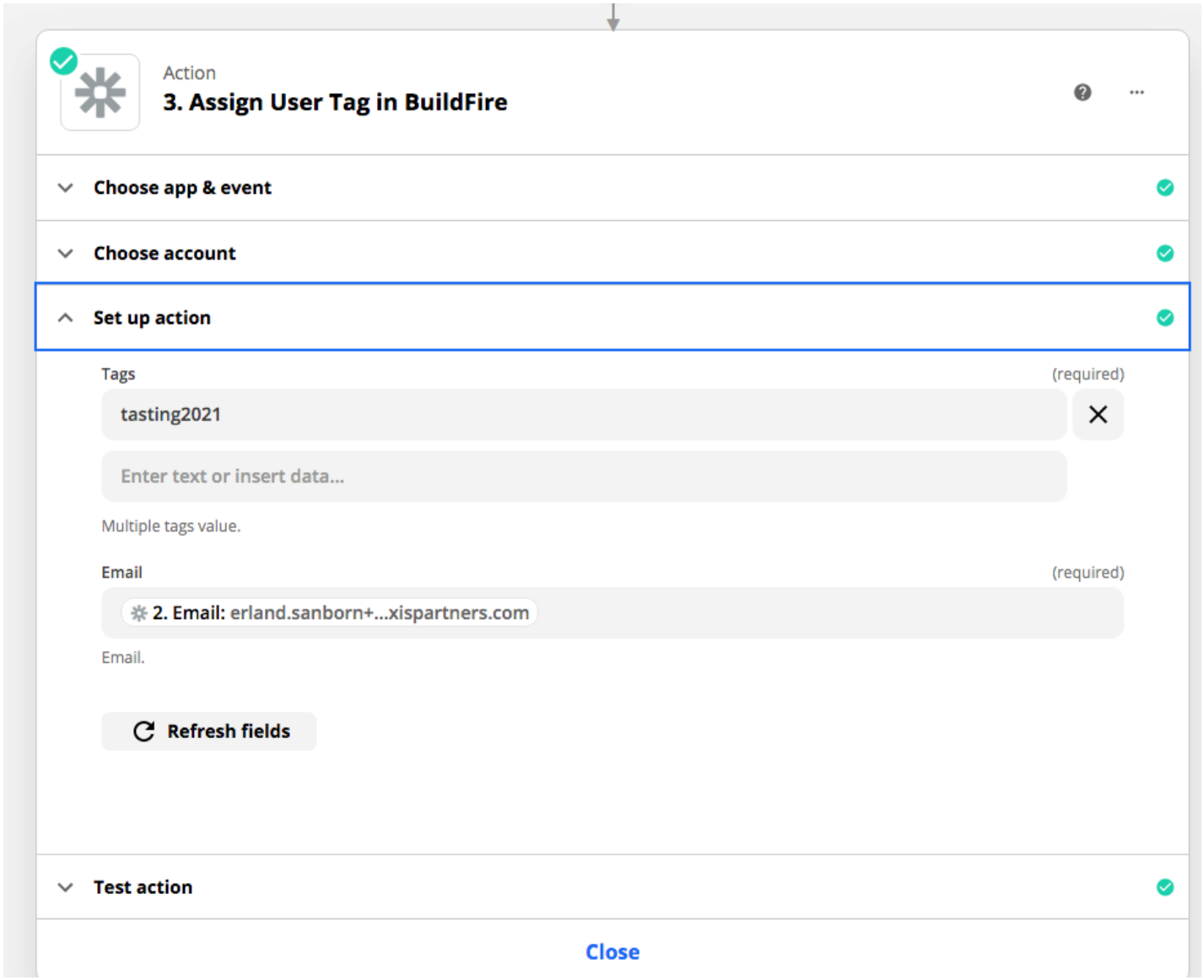


Uses Zapier to catch the webhook from the ticket purchase thank you page





Creates / updates user in the BuildFire app



Tag / flag user account as authorized to receive discounts

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The tasting CARD

2021

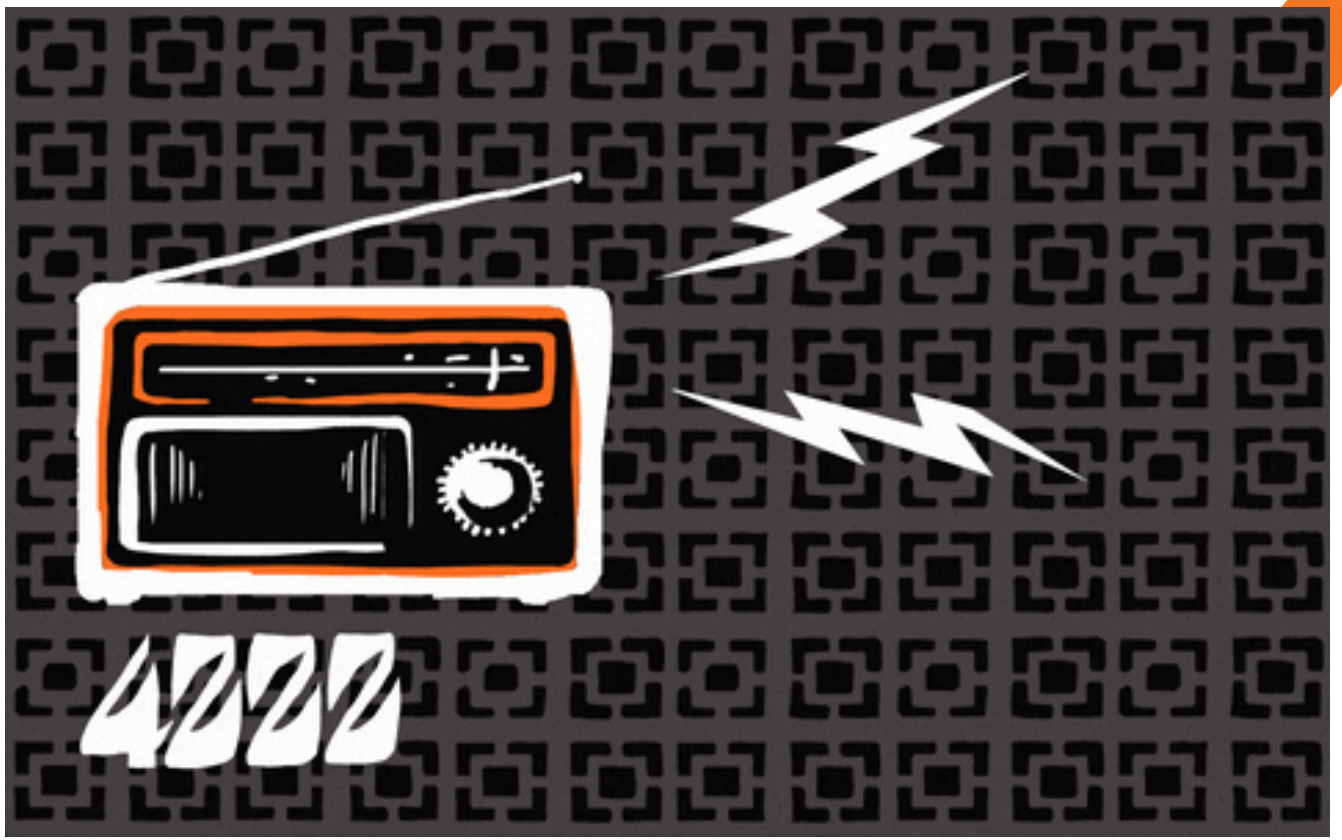
Thank You Donors & Restaurants!

The Tasting was a HUGE Success!

The clients of the nonsectarian Zimmerman-Horowitz Independent Living Program want to give a big THANK YOU to all who supported this year's Tasting Card!

< 15 hours
developer time

Radiothon
- Wanted true real time donation reporting



```
<form id="gform" method="POST" class="pure-form pure-form-stacked" action="https://script.google.com/macros/s/AKfycbwevGxetm2ApNv5x20WUiNaMGAIeKaiajfbHoSDb34eYCZDg-bm/exec" style="display: none;"
  <!-- change the form action to your script url -->

  <fieldset class="pure-group">
    <label type="text" for="donor_first">Donor First Name: </label>
    <input id="name" name="donor_first" placeholder="donor_first" value="[[S120:dc:donorFirstName]]" />
  </fieldset>

  <fieldset class="pure-group">
    <label for="donor_last">Donor Last Name: </label>
    <input type="text" id="message" name="donor_last"
    placeholder="donor_last" value="[[S120:dc:donorLastName]]" />
  </fieldset>

  <fieldset class="pure-group">
    <label for="joint_first">Joint First Name: </label>
    <input type="text" id="message" name="joint_first"
    placeholder="joint_first" value="[[S120:dc:jointDonorFirstName]]" />
  </fieldset>

  <fieldset class="pure-group">
    <label for="joint_last">Joint Last Name: </label>
    <input type="text" id="message" name="joint_last"
    placeholder="joint_last" value="[[S120:dc:jointDonorLastName]]" />
  </fieldset>

  <fieldset class="pure-group">
    <label for="city">City: </label>
    <input type="text" id="message" name="city"
    placeholder="city" value="[[S120:dc:donorCity]]" />
  </fieldset>

[[?xtruexTRUExyesxYESxYesx::x[[S120:dc:custom:custom_boolean1]]x::
  <fieldset class="pure-group">
    <label for="read_on_air">Read On-Air: </label>
    <input type="text" id="message" name="read_on_air"
    placeholder="read_on_air" value="YES" />
  </fieldset>
::
  <fieldset class="pure-group">
    <label for="read_on_air">Read On-Air: </label>
    <input type="text" id="message" name="read_on_air"
    placeholder="read_on_air" value="NO" />
  </fieldset>
]]
```

Once a donation is made and the Thank You page is reached, information about the donation is processed and sent to a custom Google Sheet.

A custom macro in Google Sheets then adds this to a transaction log in Google Sheets and the dashboard is updated in real-time.

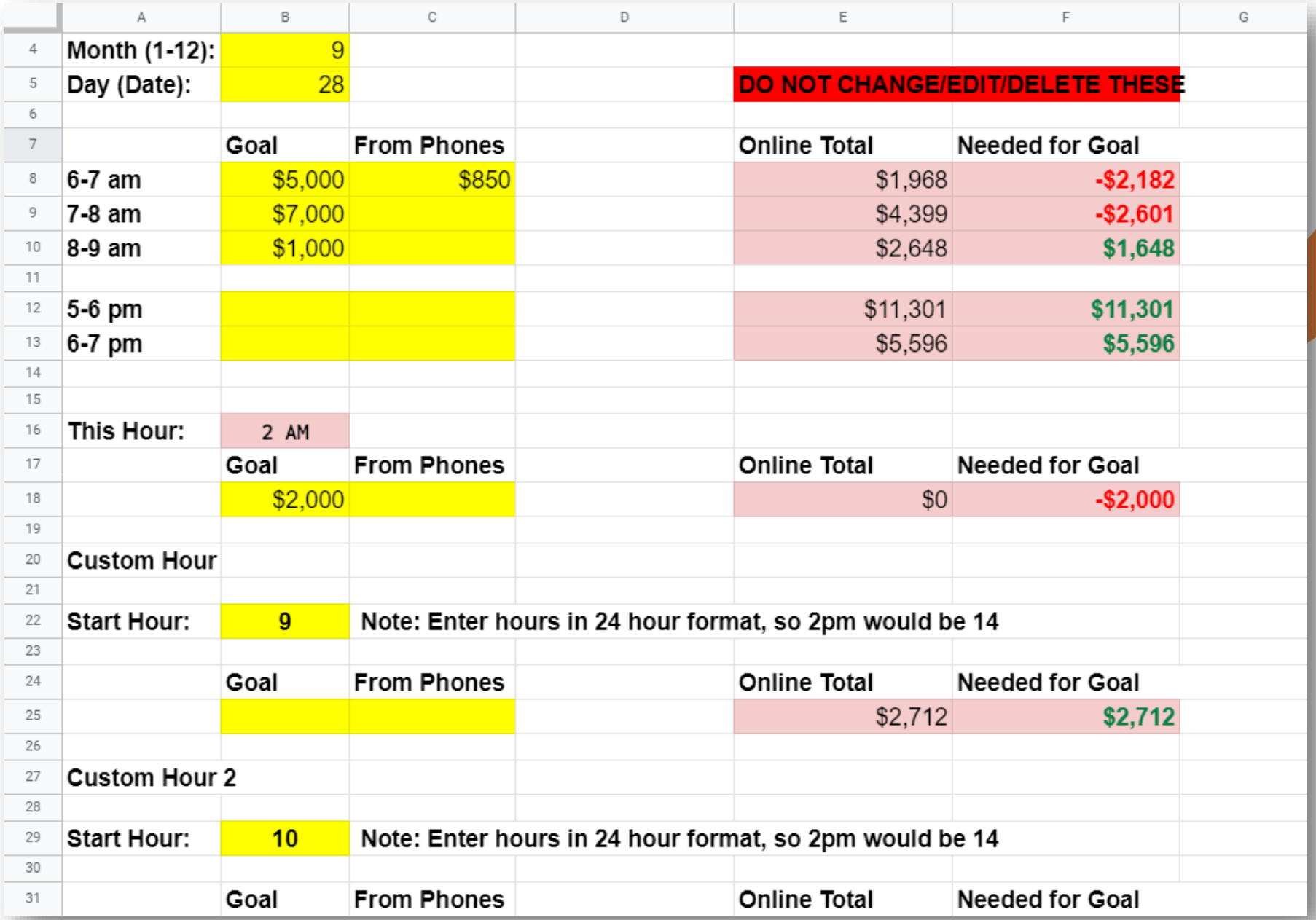
We're capturing:

- Donor's First/Last name
- Joint donor's First/Last name if applicable
- Whether or not the donor wanted their name to be read on the air

Code also captures one time vs sustaining.
If a sustaining gift, that dollar amount is multiplied by 12 to determine the anticipated annual amount and that is passed along to the Google Sheet instead of the regular donation amount.

*We, of course, don't recommend sending sensitive donor data.
Just what is needed to make the dashboard useful.

	A	B	C	D	E	F
1	Timestamp	donor_first	donor_last	joint_first	joint_last	city
2	9/25/18 6:29:48AM	Cornelia	[illegible]			[illegible]
3	9/25/18 6:30:29AM	april	[illegible]			[illegible]
4	9/25/18 6:50:04AM	Scott	[illegible]			[illegible]
5	9/25/18 6:50:19AM	Roger	[illegible]	Gorgia	[illegible]	[illegible]
6	9/25/18 6:57:23AM	kelly	[illegible]			[illegible]
7	9/25/18 6:57:43AM	Russell	[illegible]			[illegible]
8	9/25/18 7:12:19AM	Paul	[illegible]			[illegible]
9	9/25/18 7:14:20AM	Rosalie	[illegible]			[illegible]
10	9/25/18 7:28:30AM	Ana	[illegible]	Kevin	[illegible]	[illegible]
11	9/25/18 7:34:58AM	Austin	[illegible]	Bobbi	[illegible]	[illegible]
12	9/25/18 7:36:30AM	Lindsay	[illegible]	Joe	[illegible]	[illegible]
13	9/25/18 7:39:32AM	Julie	[illegible]	Michael	[illegible]	[illegible]
14	9/25/18 7:49:45AM	Nicole	[illegible]			[illegible]
15	9/25/18 8:05:57AM	Dixie	[illegible]			[illegible]
16	9/25/18 8:10:09AM	Howard	[illegible]	Sydney and Ellie	[illegible]	[illegible]
17	9/25/18 8:12:36AM	Patty	[illegible]	Thomas	[illegible]	[illegible]
18	9/25/18 8:16:13AM	Jan	[illegible]			[illegible]



	A	B	C	D	E	F	G
4	Month (1-12):	9					
5	Day (Date):	28			DO NOT CHANGE/EDIT/DELETE THESE		
6							
7		Goal	From Phones		Online Total	Needed for Goal	
8	6-7 am	$5,000	$850		$1,968	-$2,182	
9	7-8 am	$7,000			$4,399	-$2,601	
10	8-9 am	$1,000			$2,648	$1,648	
11							
12	5-6 pm				$11,301	$11,301	
13	6-7 pm				$5,596	$5,596	
14							
15							
16	This Hour:	2 AM					
17		Goal	From Phones		Online Total	Needed for Goal	
18		$2,000			$0	-$2,000	
19							
20	Custom Hour						
21							
22	Start Hour:	9	Note: Enter hours in 24 hour format, so 2pm would be 14				
23							
24		Goal	From Phones		Online Total	Needed for Goal	
25					$2,712	$2,712	
26							
27	Custom Hour 2						
28							
29	Start Hour:	10	Note: Enter hours in 24 hour format, so 2pm would be 14				
30							
31		Goal	From Phones		Online Total	Needed for Goal	

< 8 hours
developer time

Donation form / shopping

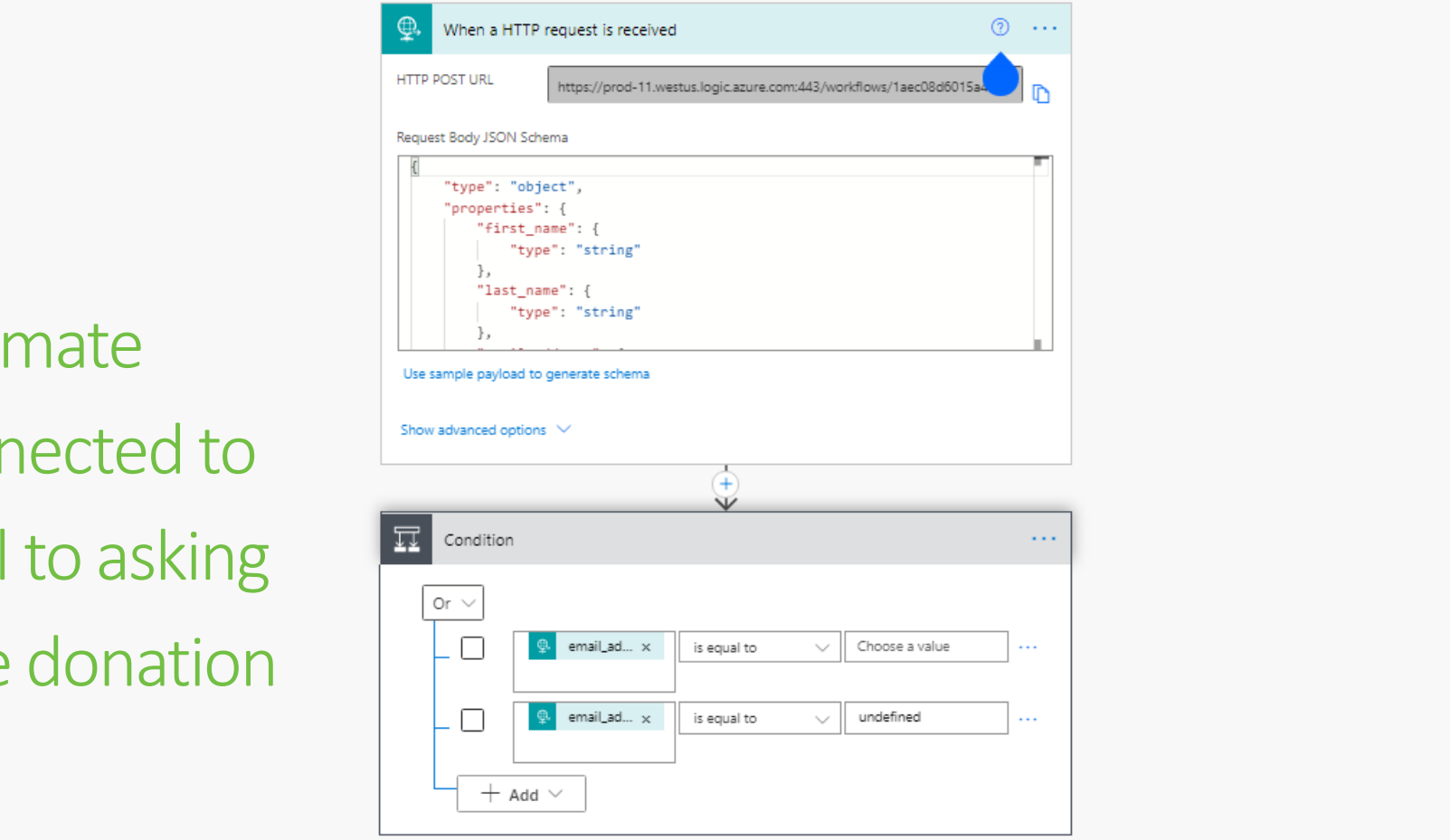
cart abandonment

follow up via

Microsoft Power Automate

1. Captures:
   - ✓ First name
   - ✓ Last name
   - ✓ Email address
2. Passes to Power Automate
3. Power Automate connected to Gmail, sends an email to asking them to complete the donation

< 8 hours developer time



#bbdevdays

Thank you!