

SEEDING JUSTICE

Revenue-generating membership and fundraising canvasses for community organizing: Lessons from the field

ABOUT THE **CENTER FOR POPULAR DEMOCRACY**



The **Center for Popular Democracy** (CPD) works to create equity, opportunity and a dynamic democracy in partnership with high-impact base-building organizations, organizing alliances, and progressive unions. CPD strengthens our collective capacity to envision and win an innovative pro-worker, pro-immigrant, racial and economic justice agenda.

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Working America
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Introduction

In the fall of 2013, the Center for Popular Democracy and CPD Action (CPD/CPDA) launched the **Sustainability Initiative** in order to explore with our partners across the country various cost-effective membership recruitment models that could contribute to their greater financial resiliency. While foundation funding plays a crucial role in enabling grassroots organizations to achieve their goals, it ebbs and flows and, in most cases, comes with mandates that reflect the priorities of foundation leaders. In the wake of the 2008 financial crisis, many social justice organizations have been forced to rethink their overdependence on foundation funding. Following the Great Recession, the community organizing sector experienced a significant decline in funding from foundations, which had undergone profound and widespread asset losses. The subsequent decrease in funding has set a new—lower—normal for foundation funding of social justice work.¹ Even as American giving in 2014 exceeded the previous high-water mark from 2007, giving to public-society benefit organizations still has not returned to pre-Recession levels.²

Meanwhile, giving from individuals in the United States has risen for the past five years. In 2014, individual Americans gave \$258.5 billion, exceeding the previous high-mark in 2007. Whereas, 15 percent of total giving comes from foundations, 72 percent comes from individuals. While many of these individual donations were very large gifts (greater than \$200 million), giving by non-itemizing individuals, who tend to give smaller amounts, grew by 4.1 percent.³ Yet, most social justice organizations have failed to leverage this revenue stream. Building a diverse funding base with revenue-generating canvass operations and small-donor programs can enable base-building organizations to scale up their work and enjoy a higher degree of institutional stability and independence.

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CPD's Sustainability Initiative aims to help the community organizing sector solve the core challenges of financial sustainability and scale. In the first phase of the initiative, from May 2013 to May 2014, CPD/CPDA partnered with seven membership-based organizing groups around the country to launch revenue-generation experiments based on recruitment canvass operations

and small-donor fundraising programs. During this phase of the initiative, we also interviewed key staff at organizations with successful canvass and small-donor operations to identify best practices and challenges; we created a user-friendly training manual for canvass and small-donor recruitment staff at base-building organizations; and we completed the first phase of our experiments, providing sustained technical assistance and support to our partners.

In this report, we share our learnings so far. The first section fleshes out key findings from our interviews with a range of successful canvass practitioners. The second section presents the findings from our first phase of field experiments. The final section describes the bridge activities we have undertaken to prepare for the second phase of experiments.



KEY FINDINGS

Our interviews pointed to some best practices in the field.

- The most effective canvasses build organizational power by engaging community members to:
 - Identify issues and offer feedback
 - Become new members and develop into leaders
 - Participate in building power through the organizations
 - Raise money
- Successful base-building and fundraising operations require:
 - Talented, engaged canvassing staff
 - Ongoing training
 - Effective data management, targeting and turf management

Our experiments in the field deepened our analysis of best practices for canvasses. We worked to:

- Ensure that field directors are experienced, with strong data management and training skills.
- Integrate canvass training with general organizing operations for best results.
- Include goals for member retention and development in canvass targets.
- Focus on generating “sustaining” members who give regularly and automatically.
- Invest in a long-term strategy for the canvass in order to achieve self-sufficiency.

As we prepare for the second phase of the Sustainability Initiative, we are implementing some of the lessons learned. These efforts include:

- CPD is developing internal infrastructure and a strategic partnership in order to better support partners.
 - Hiring a Director of Sustainability Initiatives to work directly with and develop tools for partner organizations’ canvasses.
 - Partnering with Membership Drive to conduct site visits, analyze canvass operations, provide resources and training, and conduct financial analysis.
 - Creating a comprehensive Canvass Toolkit, including a training manual, canvass needs checklist, recruitment tools, tracking tools and templates for canvass materials.
- CPD has worked with partner organizations to identify key needs for phase 2.
 - Development of data technology infrastructure to cut turf, track contacts, and eliminate pre-debit attrition.
 - Strategies to minimize the rate of member attrition and maximize the value of life-time membership.



3. **No tengo papers y nada en el bagaje**
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Aun así, puedes solicitar un permiso de trabajo temporal para poder trabajar antes de salir del país.
• Si necesitas más información, puedes contactar con el Departamento de Trabajo, al teléfono: 746 746 746
• Si necesitas más información, puedes contactar con el Departamento de Trabajo, al teléfono: 746 746 746

5. **Necesito ayuda financiera**
• Al menos que tengas un plan de contingencia de la ciudad

I. Effective Canvassing Practices from the Field

CPD/CPDA and our partners invested in canvassing-model experiments as a means both to raise member-generated revenue and to deepen organizing relationships. Some organizations have already successfully implemented canvasses that provide a large portion of their total budgets and/or build their membership base. For example:

- The Fund for the Public Interest—the national training center for Public Interest Research Groups (PIRGs)—has a highly developed research and training program on revenue generation through canvassing.
- Maine People’s Alliance has robust membership and fundraising canvasses.
- Working America has a sophisticated electoral canvass model.

In preparation for the Sustainability Initiative, CPD/CPDA reviewed these models and spoke with key staff at 11 organizations with robust and successful canvasses.⁴ These diverse canvasses provided the basis from which **the Sustainability Initiative seeks to advance a canvassing model tooled specifically to the needs and mission of base-building community organizations.**

According to the experience of those we interviewed, the best canvasses build organizational power by engaging community members in four key ways:

1. Identifying issues and getting feedback from the community.

A robust canvass is an opportunity for an organization to speak directly with community members about issues and campaigns the organization is working on. In particular, a canvass can invite the input of people who are not already active with the organization.

2. Recruiting new members and developing leaders.

A canvass is a mechanism to recruit new members to the organization and identify new leaders. Almost all of the organizations we surveyed had a consistent system to rank contacts from opponent to potential leader. New York Communities for Change recruits a large portion of their new members and leaders (including several new canvass staff members) from contacts developed on the canvass itself.

3. Building power.

Canvasses can introduce an organization to thousands of people. Those contacts may come to see the organization as a trusted advocate for their interests, enabling the organization to reach further than it might have before. Where those contacts become members, they build the organization’s power even further. For example, Maine People’s Alliance (MPA) canvass has yielded members in 1 out of every 17 households in Maine.

“The biggest success is that we get to talk to a lot of people,” says MPA Executive Director Jesse Graham. “When running full steam in the summer, we have a one-on-one conversation with over 1000 people a day. We have this paying for itself for the most part, so, at the end of the year, we not only talked to a lot of people and have gotten them to take thousands of actions, but we signed up several thousand new members, and we didn’t spend a lot of money. We also are able to have the canvass support grant-funded and contract-campaign work, so we have a bigger overall staff. The canvass is also very effective in working on elections, which has allowed us to build significant power with elected officials.”

4. Raising money.

Canvasses can generate sustainable, independent income from members and from other supporters. Greenpeace, for instance, raises \$10 million—or half of its total operating budget—each year from its canvass operations. WashCAN raises about 70 percent of its budget through canvassing.

Key Elements of a Successful Base-building and Fundraising Canvass Operation

An effective canvass consistently strengthens an organization's membership and financial base, while providing leadership development opportunities. Canvass operations are challenging to set up because their success requires:

- Talented, engaged canvassing staff
- Ongoing training
- Data management
- Targeting and turf management

Talented, engaged canvassing staff

The success of the canvass depends upon a strong and motivated staff, led by an experienced canvass director.

Canvass Director. A highly qualified canvass director is the anchor of any successful canvass. The canvass director must be a strong manager. He or she must be able to hire promising canvassers, train and support canvassers, provide clear expectations, and manage the administrative and data functions of the canvass. Among the organizations we interviewed, canvass directors most often were internal hires with direct experience canvassing and managing the field. They held stable, full-time positions, and few had been canvass directors at other organizations prior to taking on their current role.

Canvass Staff. While campus recruitment and Craigslist postings play a role in canvasser recruitment, the organizations we interviewed invested in developing pipelines for canvassers within their membership bases and through people who had canvassed for them before. In addition to actual interviews that help assess the candidates' mission alignment, more than half of the organizations had candidates observe or participate in canvassing as part of the selection process.

All of the organizations CPD/CPDA interviewed are breaking from the tradition of paying low wages with no benefits to canvassers. In addition to paying better wages, some organizations also offer health care and paid sick days.

All of the organizations we surveyed reported that this investment made for more successful canvasses, significantly reducing turnover and providing canvassers with a sense that their job is important to the organization. In many organizations, a canvassing job can be the entry point to a career ladder that includes such positions as Field Manager and Trainer, and can continue beyond Canvass Director.

Successful canvasses must provide clear expectations and accountability for canvassers to ensure that the operation is earning back the initial investment and generating ongoing sustainer income. All of the surveyed organizations have weekly quota systems.

Organization	Quota—field canvass	Quota—phone canvass
Maine People’s Alliance	\$100/shift, plus 3 new supporting members	\$150/shift
New York Communities for Change	\$550/week	N/A
Take Action Minnesota	\$100/day; \$120/day in warmer weather	\$135/shift
Working Families Party	\$140/shift	N/A
Washington Community Action Network	\$120/shift	\$175/shift, 7 email addresses, 2 handwritten letters, 10 postcards

While 100 percent of one-time donations are generally counted toward a canvasser’s quota, organizations handle recurring or “sustainer” gifts differently. Most credit canvassers with 8 to 12 months of a sustainer gift towards their quota. For example, a \$10 monthly gift might count as \$100 toward the canvasser’s quota. In the absence of such a policy, canvassers are rewarded more for one-time gifts that may be less valuable to the organization over the long term than securing a sustainer gift.

When canvassers do not meet their quota, progressive corrections are implemented. Initial steps provide additional support to struggling canvassers. After repeated weeks of failing to meet quota, canvassers are fired. On the other hand, canvassers who exceed their quotas are rewarded in most of the surveyed organizations with proportional bonuses.



Ongoing Training

Effective canvasses build in canvasser support through ongoing training programs, which start during the interview process. The training prepares canvassers with a deep view of the issues and with the tools to navigate a range of situations on the doors. With small variations, the surveyed organizations followed the same general training process:

- Interview: Assessing if the candidate believes in the mission of the organization. Providing the candidate the opportunity to see the canvass in action. Evaluating the candidate’s ability to do the work.
- Basic training on the fundamentals: Training canvassers on general presence and body language when canvassing. Introducing the rap. Providing opportunities to practice and get feedback.
- Shadowing current canvassers on the doors.
- Ongoing training: Meeting for briefings before shifts. Practicing the rap and addressing new questions that arise while on the doors.

Organizations sometimes bring in other groups to provide new insights and input in the training process. For organizations just beginning a fundraising canvass, inviting those with deep canvass experience can be very valuable in helping to hone their skills.

The Fund for the Public Interest and Greenpeace both have training centers that provide systematic training.

The Working Families Party has an innovative model for developing canvassers’ leadership. The core of their canvass operation is “the Bus,” a team of 20 to 30 field managers that take turns serving as project directors. By rotating permanent leadership roles rotating, the organization is able to develop more field managers more quickly and less experienced canvassers see more opportunities for growth to develop.

THE RAP.

The rap is a crucial piece of all successful canvass operations. Some bigger canvassing organizations invest thousands of dollars in research to identify the successful elements of their raps. Other organizations rely on field testing and experience. In either case, raps are adjusted for each cycle of canvassing, for each issue, and for effectiveness—if something does not seem to be working, it should be changed.

Although the surveyed organizations agreed on the structure and key tactics for the rap, they varied widely on how canvassers are trained to deliver raps. At one end of the spectrum, WashCAN and Working America use a rap structure with key elements. They train canvassers on the flow of the conversation and brief them before sending them out, but encourage organizers to inflect the rap with their own style or emphasis. At the other end of the spectrum, Take Action Minnesota drills canvassers on the rap so they know it by heart. Canvassers can then focus on other elements, such as body language and tone, while they are on the doors. New York Communities for Change finds a middle ground, using what they call a “Choose Your Own Adventure” rap; the canvasser can decide which issue to focus on based on what they think will have the most traction with the person at the door.

Data Management

From cutting turf to tracking member activity, managing data is important to the success of a canvass.

Turf and Targeting. In our survey of successful canvasses, we identified two distinct approaches to targeting. Some groups cut turf very specifically, while others identify broad geographies for canvassing.

Groups that target turf specifically

- The Working Families Party focuses its canvass on past donors, especially those donors who have lost contact but seem to remain interested in political issues.
- Take Action Minnesota targets its fundraising canvass in areas where support is strongest and people have the financial means to donate.
- Working America changes turf fairly frequently in order to connect as many new people as possible among its higher-income working-class base.

Groups that target turf broadly

- Greenpeace coordinates among canvassing groups to make sure that areas with a lot of foot traffic are covered.
- Washington Community Action Network rotates its canvass sites in order to rest recently visited turf. Sometimes certain turf is targeted based on issue or campaign.
- Maine People's Alliance rotates turf, unless it is working on an issue of particular interest or an election. Within the turf, they knock every door in every town with more than 500 people.
- New York Communities for Change purposefully does *not* cycle or target turf. Instead it goes through each of the neighborhoods with NYCC chapters.

Data Collection on the Doors. While all the organizations we surveyed indicated a desire to invest in hand-held technology for data collection while canvassing, many still use paper to collect information.

- Working America currently handwrites information, and enters it into the database later.
- Wash CAN has walk sheets on which canvassers track each contact and the amount he or she has given. While the organization receives about 70% of donations by check, it has paper forms for credit card gifts and occasionally encourages people to donate online on a household computer during the canvass visit.
- Greenpeace canvassers collect signatures on a signature sheet, and connect potential donors to a contracted call center to process donations.
- NYCC canvassers primarily collect information on paper, which they pass to their data entry team. Some canvassers use Square payment processing; however, the system is not able to process sustainer payments, so is very limited.
- WFP has recently switched to an Android-based handheld data collection and entry system. The investment followed yearly data entry expenditures of \$100,000 or more.

Databases. While almost everyone uses the Voter Activation Network (VAN) for electoral organizing purposes, the organizations we surveyed varied widely in the member databases they used. The table below compares the most commonly used database platforms in terms of functionality, cost, ease of use and technical support provided.

Databases

Platform	Functions of database	Related functionality and tools for digital engagement and payment processing	Level of technical expertise to set up and maintain	Cost	Difficulty of user adoption	Support and developer community	Vendor model
CiviCRM	<ul style="list-style-type: none"> • Cloud-based relational database • Fully customizable 	<ul style="list-style-type: none"> • By default it does not have any other tools built in but these can be added on with developer help 	<ul style="list-style-type: none"> • High • Customization is required and requires technical expertise—does not come ready to use out of the box • Customization requires more resources than other products—it requires not only database design and functionality such as payment processing but also back-end configuration and maintenance on the server 	<ul style="list-style-type: none"> • Low • Open source—free; however, must include costs of consultant to set up 	<ul style="list-style-type: none"> • High • Clunky user interface • Open source means that elements of functionality could be buggy 	<ul style="list-style-type: none"> • Large developer community, • No user support 	<ul style="list-style-type: none"> • Open-source
Google Docs	<ul style="list-style-type: none"> • Cloud-based spreadsheet and webform tool • Not a database—what you can do and track is limited • Data validation is limited, making it difficult to aggregate and analyze data • Spreadsheet has limited rows and columns 	<ul style="list-style-type: none"> • No ability to add on any online campaign functionality such as email blasts or payment processing 	<ul style="list-style-type: none"> • Low 	<ul style="list-style-type: none"> • Low • Free with Google account 	<ul style="list-style-type: none"> • Low • Easy to use and deploy but more difficult to keep standardized and clean data, more difficult to aggregate later 	<ul style="list-style-type: none"> • Continuously being improved by Google • No user support 	<ul style="list-style-type: none"> • Free services provided by Google
Nation Builder	<ul style="list-style-type: none"> • Cloud-based digital organizing toolset • Not a relational database, but tracks contacts primarily • Out-of-the-box ready-to-use tool, limited customizability (customization costs extra) 	<ul style="list-style-type: none"> • Fully featured toolset with email blast tool, website hosting, integration of payment processing, event management, online petitions, and texting (sending texts is a separate cost) • Syncs with Facebook and Twitter 	<ul style="list-style-type: none"> • Low • Still would need developer to design website template 	<ul style="list-style-type: none"> • Low-Medium • Scales with email list size—more expensive with larger list 	<ul style="list-style-type: none"> • Low • Easy to set up and deploy 	<ul style="list-style-type: none"> • Continuously being improved • Highly reviewed user support • Growing developer community 	<ul style="list-style-type: none"> • For-profit business • “Non-partisan” — serves clients of all political affiliations
Powerbase	<ul style="list-style-type: none"> • Cloud-based database built on CiviCRM • Customizable • Built to fit needs of community-based organizations 	<ul style="list-style-type: none"> • Includes email blast tool, event management, and integrates payment processing 	<ul style="list-style-type: none"> • Medium • Basic level of configuration still necessary to conform with organizational needs (custom fields, for example) 	<ul style="list-style-type: none"> • Low-Medium • Subscription service with fee based on total records 	<ul style="list-style-type: none"> • High • Clunky user interface • Open source means that elements of functionality could be buggy 	<ul style="list-style-type: none"> • Support available – though lower capacity than other organizations • Same developer community as CiviCRM 	<ul style="list-style-type: none"> • Built and maintained by non-profit focused on helping community organizations
Salesforce	<ul style="list-style-type: none"> • Cloud-based database • Fully customizable 	<ul style="list-style-type: none"> • Does not include any related communications or campaign functionality • Comes with mobile app that is easy to set up and configure • Large market for applications to add-on. Relatively simple to add on, but costs extra 	<ul style="list-style-type: none"> • Medium • Customization is required – you need to create the objects, fields, and relationships between them (like MS Access, but simpler and cloud-based) • Integration of applications may require a developer 	<ul style="list-style-type: none"> • Medium-High • Subscription service based on number of users • 501c3 organizations have 10 free licenses • Must include costs of adding on application or customizing database 	<ul style="list-style-type: none"> • High • Clunky user interface 	<ul style="list-style-type: none"> • Great user support • Large developer community • Well-maintained back-end—frequent releases and upgrades 	<ul style="list-style-type: none"> • Publicly traded corporation • Industry leader

Payment Processors. A payment processor is a system to manage the submission, authorization, and settlement of payments. The organizations we surveyed emphasized the importance of selecting a credit card processor that is familiar with monthly remittances, uses Visa and Mastercard, allows for account updates, troubleshoots actively, and integrates well with the member databases that groups are using.

Processor	Strengths	Weaknesses	Fee structure
Authorize.net	<ul style="list-style-type: none"> Processes debit card, credit card, and echeck transactions (similar to bank draft, but costs extra to enable) Industry standard Can purchase mobile/tablet credit card swipe POS (point of sale) device that integrates with your account Requires separate merchant account 	Authorize.net will not retry a credit card if it is declined for any reason	<ul style="list-style-type: none"> Setup fee of \$49, monthly gateway fee of \$25, and per transaction fee of 2.9% + \$0.30.—this is the payment gateway plus merchant account
Paypal	<ul style="list-style-type: none"> Paypal processes credit card, debit cards Easy to set up Can request free mobile/tablet credit card swipe POS device that integrates with your account Paypal Payflow customizes the checkout experience but requires monthly subscription 	<ul style="list-style-type: none"> Can't really customize layout and design of payment page – and it will always ask customer to create Paypal account Payment takes customer away from the site to Paypal form Payflow Pro lets you customize payment page 	<ul style="list-style-type: none"> Free account—2.9% plus \$0.30 per transaction For mobile swipe transactions —2.7% per transaction or 3.5% plus \$0.15 for manually entered transactions Payflow Pro is \$25 per month plus \$99 setup fee. Transaction fee is \$0.10 per transaction. Requires a separate merchant account that would have its own fees
FirstData	One group found that FirstData is a better payment processor than Authorize.net largely because FirstData retries declined cards automatically	FirstData will retry declined cards indefinitely, at a cost to the organization, if the transaction is not cancelled	
Litle & Co	One group has found Litle & Co to be adept at dealing with monthly giving and charges are fast		
Salsa		Salsa is designed primarily as an online database, not for field use. One group found that Salsa's coding for recurring billing transactions challenging. Recurring contributions ran as \$1 authorizations and delayed billing the initial charge. The group had to input recurring transactions as one-time donations and convert them on the back-end	

Being thoughtful about the payment processor up-front is especially important, as transferring processors later can be very onerous. Because organizations are not legally allowed to retain credit card numbers internally and processing companies will not often give them to you in bulk, sustainers must be moved and both systems must be kept running for some time.



II. Findings from Experiments with Community Organizing Partners

In the Sustainability Initiative’s Phase I pilots, we worked with some of our strongest base-building partner organizations to broaden their programs to include a fundraising canvass. By applying a more rigorous, “scientific” approach to testing field methods of recruiting recurring dues-paying members or small-donor sustainers, we brought a new level of analysis and transparency to core practices in community organizing. In these pilots, we tested varying conditions and strategies. Because the nature of experiments is that some will fail, we plan for a second phase to help us refine our learning and hypotheses, to position our partners for greater success, and to help create a successful sustainability model for base-building organizations.

	AVERAGE of Total Income per Week	AVERAGE of \$ Raised per Hours Worked	AVERAGE of \$ Raised per Door Knocked	AVERAGE of \$ Raised per Contact	AVERAGE of # of DK to Receive One Donation	AVERAGE of # of DKs to Receive One Contact	AVERAGE of # of Contacts to Receive One Donation
Organization A	\$322.18	\$4.22	\$0.50	\$1.16	35	2	15
Organization B	\$708.27	\$13.88	\$0.72	\$2.02	26	3	9
Organization C	\$210.08	\$1.78	\$0.44	\$1.00	55	2	35
Organization D	\$42.50	\$1.67	\$0.08	\$0.43	111	5	20
Organization E	\$77.80	\$5.23	\$0.62	\$1.99	70	3	24
Organization F	\$2,396.30	\$11.44	\$0.82	\$3.58	397	4	92
Organization G	\$3,116.18	\$15.58	\$2.08	\$6.80	15.53	3	5

Case Studies of Successful Canvass Experiments

Our four most successful experiments were at New York Communities for Change, Action United, Alliance of Californians for Community Empowerment, and Take Action Minnesota. A detailed discussion of three of these canvasses follows.

New York Communities for Change

NYCC aimed both to improve recruitment of new members through a more sustainable membership canvass and to increase its ability to engage new members as active participants in the organization. To accomplish these goals, NYCC:

- Restructured its canvass staff. NYCC shifted its canvass structure from a 12-person canvass team working part time (\$12 hour, 25 to 30 hours a week) to a five to seven person canvass operation working full time (\$15 hour, 40 hours a week).
- Increased training time and scope. NYCC increased training time with their canvass team from 45 minutes per day to 90 minutes per day. The extra time was used to train canvassers on skills and knowledge beyond basic canvass training, including more intensive campaign discussions and broader organizing training.
- Integrated the canvass with neighborhood organizing operations. Canvassers and organizers met daily to discuss local campaigns and canvassers' observations from the field. They also focused on improving the transfer of data collected by the canvassers from the field to the neighborhood organizers.
- Focused on signing up full NYCC members via \$10/month sustainers. Previously, the NYCC membership canvass focused their efforts on signing up "associate members"—one time membership between \$10 and \$60.
- Restructured the rap. Traditionally, an NYCC canvasser would knock on 80 to 100 doors in high density low-income turf and have brief five to six minute conversations on a specific campaign. The rap was revised so that canvassers were having longer, deeper conversations on the doors (12 to 15 minutes) that discussed not just a specific campaign but also the organization as a whole. The canvass conversation also asked contacts more questions about their specific community concerns.

The NYCC canvass operation ran for a total of approximately seven months, during which it achieved the following:

Canvass Shifts Completed	700
Doors Knocked	42,770
Contacts made	12,831
Contacts engaged/educated on major campaigns	6,260
Total full members (\$10/month sustainers)	910
Total associate members (one-time dues <\$120)	1,838
Total membership dues collected	\$87,253

The NYCC canvass was fully sustainable, the only additional costs were management and administrative costs (payroll, transportation). The goal is to eventually cover all the related costs, including management and admin.

Cost of all canvass shifts	\$84,000
Cost of management/administration	\$55,000
Total operational costs	\$144,000
Net Cost	\$56,747

In addition to a successful seven months of engagement and membership recruitment, the canvass also proved to be a successful tool to integrate with NYCC's organizing department and grow its active membership. The canvass was used to turn out new members to several events and neighborhood meetings. A total of 273 new active members joined through the canvass.

NYCC is encouraged by the preliminary numbers of the reorganized canvass operation and intends to further develop and expand the program moving forward.

Action United

Action United focused its sustainability efforts on developing a street canvass operation to build a sustainable small-donor base. The organization defined its goals as:

- Increase the number of sustaining members of ACTION United.
- Reach a total of \$5,000 in automated monthly income from sustaining members.
- Utilize a street, door, and phone canvass team to increase visibility and awareness of Action United's key issues.
- Build and develop a team of highly skilled and professional canvassers.

To accomplish its goals, Action United invested in its last goal first. It hired a canvass director with several years of street canvass experience. The canvass director trained two canvassers to build the program. After several months, the canvass director left the organization, and one of the canvassers trained on the program was able to fill the director position and continue to grow the street operation. The canvass team comprised six to ten canvassers a day and each canvasser worked between three and five days a week. Action United also implemented daily detailed trainings, run by the canvass director, assistant directors, and field managers.

In the course of its canvass experiment, Action United exceeded its goals.

Contacts made	20,000
Contacts who have made one-time donations	3,500
Total full members (\$10/month sustainers)	500
Monthly income from canvass contacts	\$6,700
Total contributions collected by canvasses	\$168,877

The Action United canvass generated revenue to cover the full cost of the canvass shifts and half of the management and administrative costs.

Total operational costs	\$200,200
Net Cost	\$31,323

Take Action Minnesota (TAMN)

TAMN is building a broad membership to win racial and economic equity across Minnesota. Since its founding eight years ago, TAMN has grown in breadth and depth. Its membership has expanded tenfold and now includes people from across the state. Today TAMN has approximately 11,000 individual dues-paying members (counted as c4 donors in the last two years) and 26 institutional members.

Over 15,000 individuals contributed to TAMN between 2011 and 2013, and about 25% of them gave more than once. Research shows that it is easier to get someone to give a second gift than a first gift. As part of the Sustainability Initiative, TAMN set out to improve its membership retention and greatly expand the number of sustainer memberships.

In this pilot, TAMN focused its experiment on identifying the best strategies for retention. TAMN planned to identify key segments of its membership to retain, with a priority on sustainers and people who made one-time gifts over \$200, and develop corresponding treatment programs. This segmenting would take into account how an individual gave (nearly half of gifts from the past three years were collected by the field canvass) in determining his or her treatment and prioritization. As research shows, engaging people in the work increases the likelihood they will give again, so TAMN's retention work would also include testing different strategies to engage its members in its existing organizing work, particularly online. While over 9,000 people acted with TAMN online in 2013, less than 10% of them were members.

TAMN identified four primary goals for the pilot:

- Recruit 1,000 sustaining members
- Collect 6,500 membership contributions in the 2014 calendar year
- Build internal membership infrastructure and capacity
- Develop a clear plan and timeline, based on the work and lessons learned in 2014, to achieve both 20,000 and 50,000 dues-paying members

TAMN had some notable successes with its canvass in 2014. One of its biggest successes was its June Membership Program. Historically, for the month of June, TAMN has a donor who matches all membership contributions dollar for dollar. In 2014, TAMN focused on engaging current members and lapsed members. This allowed its canvass to tailor how it discussed the organization's work with each respective group. These conversations were extremely beneficial when talking to lapsed members: of TAMN's lapsed members, 130 renewed their membership during the month of June.

TAMN also enacted smaller functions to support its canvass around membership retention. Now monthly sustaining members receive a letter one month before their credit card is scheduled to expire. They are asked to update their information to avoid a lapse in their membership. This function helps reduce the number of calls TAMN's phone canvass must make when members do lapse.

TAMN also developed a more sophisticated and personalized thank you program for contributions from the canvass, which included thanking donors within a week of their contribution, and referencing the name of the canvassers and the issues discussed at the doors.

TAMN ended 2014 with 807 sustaining members. Although the organization did not reach its goal of 1000 sustaining members, it exceeded its revenue goal from sustaining members by increasing their monthly level of support. TAMN collected over \$100,000 in sustaining member income, an increase of more than \$25,000 from the previous year.

Below are the numbers highlighting the work of TAMN's canvass program in 2014.

Canvass shifts completed	1,506
New and renewing members through field canvass	3,098
Renewing members through phone canvass	485
Total new and renewing members:	3,583
Dollars raised through field canvass (not including contract income, or future sustainer income)	\$94,600
Dollars raised through phone canvass (not including contract income, or future sustainer income)	\$31,477

TAMN's membership program got closer than in previous years to closing the gap between costs and income. Its income combined new donations from field and phone canvasses, as well as contract income. Together, all of these sources combine to substantially cover the vast majority of the program expenses, although the program hasn't yet reached a break-even point.

Costs of canvassing shifts (\$201.20 per shift)	\$84,000
Door canvassers' fundraising	\$94,600.89
Phone canvassers' fundraising	\$31,477.03
Income from prior years' canvasses (mostly sustainers)	\$48,776.00
Contract income	\$97,886.00
Total income	\$272,739.92
Net Cost	\$30,418.18

Understanding the value of successful canvasses over time

One of the key challenges of building a sustainable dues-collection and small donor program is that it takes time—at least a year, often more—for organizations to break even, and even longer to recover the original investment and start accruing new dollars. The most successful programs account for this challenge and plan ahead, taking the long view.

As part of this initiative, CPD helped organizations project their programs over three and five years. These preliminary projections show that increased investment in data systems, implementation of follow up programs (phone, digital and mail operations), and ongoing training of lead canvass staff, enables organizations to expand their canvass operations, increase the sustainability of these programs, and adapt their canvass models to advance other organizational goals.

From now through 2017, our partners will work to develop models to minimize attrition within their expanding membership and small-donor universes. Partners will do this through their existing organizing framework. For NYCC, this will mean an increased focus on follow up and engagement of members recruited through the canvass by their neighborhood organizers. For Take Action Minnesota and Action United, this will mean an expansion of their phone bank operations, and digital capacity (enhanced engagement via email, SMS messaging, and social media). CPD will also continue to increase investment in training methods and infrastructure (hiring practices, turf management, field materials etc.) to improve canvass performance. We believe that with these models in place, we will be able to continue to grow sustainability operations while still reducing costs. By the end of 2016, we anticipate that all operations will approach total self-sufficiency.

By year 5 (2018), with attrition rates minimized through well-developed engagement and follow-up programs, and we believe the canvass operations will be able to generate enough revenue to be fully self-sufficient as well as subsidize costs of other campaign and community organizing efforts.

New York Communities for Change (NYCC)

Year Three Projections (2016)

Total new sustainer members collected	3,250
Total new sustainer dues collected	110,235
Total new one-time membership dues collected	\$26,000
Revenue from previous two years sustainer sign-ups	\$165,665
Total gross revenue	\$301,900
Total canvass shift cost	\$208,000
Total management/admin costs	121,840
Total costs	\$329,840
Net Cost	\$27,940

Year Five Projections (2018)

Total new monthly sustainer members collected	4,000
Total new sustainer dues collected	\$177,228
Total new one-time membership dues collected	\$50,000
Revenue from previous four years sustainer sign-ups	\$710,100
Total gross revenue	\$937,328
Total canvass shift cost	\$384,000
Total management/admin costs	\$268,800
Total costs	\$652,800
Net Revenue	\$284,528

Action United**Year Three Projections (2016)**

Total new monthly sustaining donors collected	4,875
Total new sustainer dues collected	\$197,634
Total new one-time membership dues collected	\$124,000
Revenue from previous two years sustainer sign-ups	\$210,000
Total gross revenue	\$531,634
Total canvass shift cost	\$458,000
Total management/admin costs	\$100,000
Total costs	\$558,000
Net Costs	\$26,343.48

Year Five Projections (2018)

Total new monthly sustainers collected	6,084
Total new sustainer dues collected	\$244,100
Total new one-time membership dues collected	\$175,000
Revenue from previous four years sustainer sign-ups	\$657,000
Total gross revenue	\$1,076,100
Total canvass shift cost	\$702,000
Total management/admin costs	\$150,000
Total costs	\$852,000
Net Revenue	\$224,100

TakeAction Minnesota (TAMN)

Year Three Projections (2016)

Total new monthly sustainers collected	6,480
Total new sustainer dues collected	\$315,900
Total new one-time membership dues collected	\$175,000
Revenue from previous two years sustainer sign-ups	\$440,000
Total gross revenue	\$970,900
Total canvass shift cost (incl. admin and management)	\$950,040
Net Cost	\$20,860

Year Five Projections (2018)

Total new monthly sustainers collected	9,750
Total new sustainer dues collected	\$428,000
Total new one-time membership dues collected	\$210,000
Revenue from previous four years sustainer sign-ups	\$1,520,000
Total gross revenue	\$2,158,000
Total canvass cost	\$1,452,500
Net Revenue	\$705,500

These preliminary projections are based on past canvass results and our projections of what is feasible with improved performance and implementation of follow-up and engagement programs.

Lessons from Unsuccessful Canvass Experiments

Three of our canvass experiments were not successful and folded within three months. While the results were disappointing, they also provide valuable lessons regarding what steps are absolutely necessary to start new canvass operations.

One common factor of all three unsuccessful experiments was that the field director did not have extensive membership or fundraising canvass experience. In two of the experiments, the canvass projects were managed by community organizers who had some experience in canvassing for membership dues or donations, but no experience in training canvassers on how to raise money and sign up members, or in implementing the operations necessary to run a successful canvass (such as database and dues processing systems, statistical tracking and analysis, etc). In the other the experiment was implemented by an organizer with extensive experience in running GOTV and civic engagement field operations, but no experience in membership or fundraising canvassing.

In all three cases, we attempted to provide training and consultation to the field directors—all spent between two and five weeks working with the New York Communities for Change canvass team.

However, it became clear that far more training time was necessary to develop the necessary fundraising and membership recruitment skills, as well as the systems required to operate a successful canvass.

This suggests that one of the most basic requirements for an organization to develop a successful membership or donor canvass is a field director with at least two years of experience canvassing for membership or donations, as well as experience in managing canvass teams and supervising field operations.

These three organizations also struggled to integrate dues-collection systems into their existing infrastructure. One had a very robust database that took weeks to customize to make sure that the canvass efforts were accurately tracked and connected to the right contacts. The other two had very rudimentary databases and no system for collecting recurring dues.

Importantly, although its canvass-based sustainer program was not successful in this round, one of these three organizations had tremendous success integrating dues-paying membership recruitment into its ongoing organizing work. In 2014, this organization recruited more than 1,700 dues-paying members and changed its membership dues from a lifetime value of \$125 to a sustainer model of \$125 plus yearly dues of \$24. In late 2014, the organization began to enlist current members as sustainers in all of its organizing committees, and membership dues income surpassed \$80,000. At the closing of the year, the organization launched an aggressive membership recruitment program attached to its efforts to support more than 10,000 immigrant New Yorkers who stand to benefit from President Obama's immigration executive action. In the month of December alone, over 250 new dues-paying members joined the organization as part of this effort.

The experience of this organization exemplifies the need to carefully ensure that canvass-based membership and donor programs can be fully integrated into the organization's culture, methodology, and systems. As CPD continues to evolve its Sustainability Initiative, the lessons from this round of experiments will inform our efforts and advance the field's ability to use canvasses to build the power and scale of movement organizations.





III. How We Have Continued this Work and What We are Learning Now

Since the conclusion of Phase I of the Sustainability Initiative, the Center for Popular Democracy and CPD Action have continued to explore with partner organizations opportunities for developing sustainable membership and fundraising field operations. Over the last several months, CPD has taken several measures to ensure the continued growth and success of the Sustainability Initiative:

- **Hired a new Director of Sustainability Initiatives:** In November 2014, CPD hired Greg Basta as the new Director of Sustainability Initiatives. Greg has over 12 years' experience managing fundraising and membership canvass operations—first as a Field Manager with Citizens Campaign for the Environment, then as Statewide Field Director for NY ACORN, and finally as Deputy Director for New York Communities for Change, where he oversaw that organization's successful experiment as part of the Sustainability Initiative. Since joining CPD, Greg has been working with partner organizations to explore growing existing canvass operations and identify potential opportunities for launching new canvass programs with other partner organizations. In addition, he has worked to develop a curriculum and toolset for partner organizations looking to build successful canvass operations.
- **Partnered with Membership Drive:** In 2015, CPD launched a partnership with Membership Drive. Membership Drive was founded by Phil Radford who, in his years as National Field Director of Greenpeace, built a canvass operation that generated over \$20 million in revenue annually. Membership Drive has been working with Greg Basta to conduct site visits, analyze canvass operations, provide resources and training on best practices around maintaining data, conduct financial analysis and projections of canvass performance, and assist in developing materials and tools for partner organizations seeking to develop canvass operations
- **Developed a Comprehensive Canvass Toolkit for Partner Organizations:** Working with Membership Drive and partner organizations currently operating successful canvass operations, CPD has developed a toolkit for partner organizations looking to build membership and fundraising canvasses in 2015. This toolkit includes:

 - **Training Manuals:** CPD has worked with Membership Drive, NYCC, and Take Action Minnesota to develop training manuals both for new field managers/canvass directors as well as new canvassers.
 - **Canvass Needs Checklist:** A basic checklist for partner organization outlining the materials, systems, and logistics that must be in place before hiring staff to build a canvass operation.
 - **Recruitment Tools:** We have created a sample Canvass Director job post, and will work with partner organizations to recruit and interview canvass director candidates
 - **Stat-tracking and Cost Analysis Tools:** CPD has worked with Membership Drive to develop comprehensive monthly tracking forms for canvass operations to more thoroughly track costs, growth, and overall performance. Membership Drive has also provided us with automated spreadsheets to more accurately analyze attrition rates among dues-paying membership and monthly sustainers, and to calculate an organization's "Lifetime Value of Membership", which will allow us to better project canvass performance in the future.

- **Templates for Necessary Canvass Materials:** Stock templates for membership cards, stat-tracking forms, and sample canvass scripts from successful canvass operations.

Through our partnership with Membership Drive and our own work with partner organizations, we've learned more about the components necessary to transform a promising canvass operation into a sustainable, revenue-generating program over a three to five year period. Here are some of the most important findings we've discovered over the last several months.

- **Eliminating pre-debit attrition through investing in new canvass technology:** "Pre-debit attrition" is the term used to describe donations and new memberships where the transaction is declined in the first attempt to process it. This can be the result of insufficient funds in the new donor/member accounts, or, more often, incorrect credit or checking account information collected on the doors. In our analysis of Action United and NYCC's canvass operations, we discovered that both organizations could be losing close to \$10,000 a year in dues and donor revenue due to pre-debit attrition.

However, recent innovations in software and use of tablets in canvass operations could completely eliminate the problem of pre-debit attrition. Several companies that offer software for canvasses that can cut "digital walklists", develop and sign digital petitions and surveys, and process credit/debit transactions (including recurring donors and sustainers) immediately. This would not only eliminate the revenue lost to pre-debit attrition, but would significantly reduce time and resources spent on data entry and cutting turf. CPD is currently in the process of researching and comparing the several companies that offer this software and is working with partner organizations to test the use of tablets in the next few months.

- **Minimizing the Rate of Attrition, Increasing the Lifetime Value of Membership:** Even the most successful canvass operations among our partner organizations have significant room to improve the rate of attrition among their monthly sustainers and thereby increase the Lifetime Value of Membership. Maximizing the Lifetime Value of Membership is the key component to ultimately building a canvass operation that can completely cover its own costs and generate revenue in the coming years. We'll be working with partner organizations to achieve this in two ways over the coming months:
 - **Developing More Sophisticated Data Analysis To Better Project Attrition Rates:** Membership Drive has provided training to CPD to analyze the data collected through our partners' canvass operations so we can better project and account for future attrition rates. This includes demographic and geographic analysis of membership and donor lists, and methods of contact (phone, street and door-to-door) we will utilize these data points to counter attrition rates in the future.
 - **Working with Partners to Develop Better Donor/Member Engagement Programs:** Membership Drive's analysis of the attrition rates of NYCC's membership canvass operation found that, while the organization is canvassing very low-income neighborhoods compared to traditional fundraising canvasses, the rate of attrition for dues-paying members was roughly the same as an average successful fundraising canvass about 78% of monthly sustainers stay active over a 12-month period. This low rate of attrition is due to a system of maintaining regular contact with dues-paying members and keeping them engaged with the organization.

As we move forward in our work with partner organizations, we will help them develop appropriate systems of donor/member engagement. For partners seeking to use canvass operations for fundraising, we will focus on building "donor ladder" programs that will utilize databases, digital tools,

and phone operations to build relationships with donors and increase their level of giving over time. For partners building dues-paying membership field operations, we will take what we've learned from the NYCC model to explore other best practices in keeping members engaged and active within the organization. Building these systems of engagement will not only minimize attrition rates, but will make it easier to re-connect members and donors whose contributions expired or dropped off, and to increase their level of membership or giving.

Conclusion

The Sustainability Initiative was a successful experiment for CPD/CPDA and our partner organizations. Through our interviews with experienced practitioners, as well as our partners' successes and challenges, we have refined a set of best practices that we will be able to build on going forward.

The most effective canvasses build organizational power by engaging community members to provide their insights, to participate in actions, and to contribute financially. In order to build an effective canvass, organizations need experienced, skilled field directors; talented, engaged canvassing staff; high-quality, ongoing trainings that are integrated with the overall organizing program; effective data infrastructure; and a long-term strategy for achieving self-sufficiency.

The challenges of some of the experiments highlighted the need for CPD/CPDA to develop stronger infrastructure to support our partners. Our Director of Sustainability Initiatives and partnership with Membership Drive positions us well to provide the technical assistance, analysis, and tools to help our partner organizations enter the second phase of the Sustainability Initiative better prepared.

Notes

- 1 Atlantic Philanthropies, *Diminishing Dollars: The Impact of the 2008 Financial Crisis on the Field of Social Justice Philanthropies*.
- 2 Giving USA Foundation and the Lilly Family School of Philanthropy at Indiana University, *Annual Report on Philanthropy for the year 2014*. (June 16, 2015).
- 3 Giving USA Foundation and the Lilly Family School of Philanthropy at Indiana University, *Annual Report on Philanthropy for the year 2014*. (June 16, 2015).
- 4 CPD/CPDA surveyed Action United, Alliance of Californians for Community Empowerment, CASA de Maryland, the Fund for the Public Interest, Greenpeace, Maine People's Alliance, New York Communities for Change, Take Action Minnesota, Washington CAN, Working America, and the Working Families Party.



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