Consulting Report
Prepared for Partnership for the Arts and Humanities
By Team CPAC Consultants

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Table of Contents

Executive Summary

The Partnership for the Arts and Humanities was founded in 1998 as a non-profit cultural arts organization whose mission is to raise funds for arts and culture programs and promote cultural arts and humanities in Canton Township. Currently, employees in the Partnership input data manually into the spreadsheet, such as donor information, which makes it difficult for them to update and retrieve the data, and therefore, get back to stakeholders. In order to address the challenges experienced by our client, Team CPAC consultants conducted four interviews to better understand their workflow and processes, as well as observe and question how they track stakeholder information and engage with the community. Based on observations and interviews, we analyzed the data to produce the following high-level conclusions:

1. Miscommunication and lack of job clarity exist in the organization, and both of these factors are interdependent.
2. The current donor management software is significantly underutilized.
3. The Partnership is using an excessive number of platforms than truly needs. Some platforms may have duplicated functionalities
4. Data are scattered among different software systems, and a lack of synchronization may result in repetitive tasks.
5. Subscribers and donors are not categorized by the event type, which may lead to an inadequate level of engagement.
6. There is a lack of incentives for donations on social media platforms.

Based on the findings above, we additionally made recommendations on how the partnership could be improved:

1. Develop well-defined organizational and personal communication protocols, and outline the primary and secondary responsibilities of each employee.
2. Make full use of the user support offered by the software provider.
3. Consolidate the tech stack and streamline software.
4. Utilize the integration function on the current software or switch to a platform that provides better integration of the software if time and budget allow.
5. Divide donors and subscribers into three main groups based on their interests in events: veterans, arts, and holiday events, and send notifications only to the targeted audience.
6. Integrate the fundraising process on social media platforms to incentivize donations.

Introduction & Background

Partnerships for the Arts & Humanities

The Organization was founded in 1998, in Canton Michigan, When the local government of Canton Township started this organization, their goal was to help raise funds for the community to assist in the development of local arts. The purpose of this organization is to encourage the development of humanities and arts and to serve different groups of people: local residents, tourists, artists, and veterans. They have spent a great deal of time building different programs to provide a platform for all the arts organizations that perform in Canton. As the first art-related organization in Canton Town, it has raised enough funds to help different art organizations in just 6 years[1].

Projects

Since its establishment, the partnership has invested a lot of time and effort in building different projects with the goal of creating a better living environment for Canton. The organization is currently operating three projects: Village Theater, Veterans Memorial Garden, and Village Arts Factory. Every holiday season the organization holds different events to provide a lot of social activities for the residents of Canton, and they can also use these events to raise more funds to help artists and veterans with mobility issues.

Their main project, Village Arts Factory was established in Cherry Hill in 2012. The entire factory is housed in a workshop space that includes an art gallery and various types of retail outlets. The Factory organizes art exhibitions, conducts art sales, and provides different classes and activities for all ages. Like the Village Theater, they host events for the residents every specific holiday. The Factory also provides opportunities for a large number of artists by inviting tattoo artists, photographers, and a variety of visual artists to showcase their talents. The operation of the entire factory has made significant contributions to the organization and the community.

[1] The Village Arts Factory | Canton, MI | Learn About Us. (n.d.)Retrieved December 6, 2022, from https://villageartsfactory.com.

Methodological Review

Through three months of research, we have been able to provide targeted answers to our clients at different stages of the process. Our consulting and research process with our clients can be divided into the following steps: background research, problem assessment, plan analysis, and development of recommendations. We gathered data mainly from analyzing four interviews conducted with employees in the Partnership. These analyses led us to formulate design ideas and recommendations aimed at bettering data management and facilitating daily office operations for the Partnership.

Background Research

During the background research phase, our team conducted the first interview to gain a general understanding of the organization's operations, challenges, and opportunities. Afterward, each team member wrote a 2000-word report on a different aspect of the client organization or problem, including client background, non-profit sector analysis, digital file management, fundraising and donor management, and social media management.

Problem Assessment

Before interviews, we developed different interview protocols according to the job responsibilities of each interviewee and target specific questions to obtain the response we need. With the exception of the first interview, where we had the entire team present, we arranged for at least two team members to be present for each interview, one as the interviewer and the other as the note-taker, and we made a request for an audio or video recording so that we could provide the most comprehensive information for the next phase of analysis. After each interview, we organized an internal interpretation session in the shortest possible time to evaluate the information gleaned from the interview. During each meeting, we discussed the main points of the interview together, with replays and recorded notes we circled key concepts and wrote short comments. By measuring and connecting each interviewee's responses, we can pinpoint the problem and begin to develop a solution.

Plan Analysis

After interview interpretation sessions, we created affinity diagrams to help us in the next step of results analysis. The affinity diagram was used to summarize and categorize the large number of complex questions that existed so that we could obtain a more holistic picture of the most critical information, as well as the unexamined and overlooked questions. Specifically, we wrote interviewee statements on sticky notes and grouped the notes based on their relationship to each other. After collecting and organizing all the problems, we used all the existing evidence and everyone's ideas to formulate a plan to solve all the problems.

Recommendations Development

After a series of surveys, evaluations, and analyses, we conducted brainstorming and collected the opinions and ideas of each member, creative ideas from different perspectives to break through the existing limitations of customers, and finally compiled them to create our recommendations for the client.

Findings & Recommendations

Miscommunication & Lack of job clarity

During our interviews with the employees and volunteers at the partnership, we discovered a repeated pattern of miscommunication being prevalent among them, and a general lack of job clarity regarding their and other people's roles at the organization. It is important to note that these two issues are cyclical: since there is miscommunication among the employees, there is a lack of job clarity, and vice versa. We looked at this issue on both levels and came up with recommendations that can potentially help break this vicious cycle.

Miscommunication

At any organization or workplace, it is pivotal to have clear communication between employees and workers. Poor communication can lead to a lot of issues that can hamper productivity in any workplace. Through various findings, we concluded that the partnership is facing communication difficulties due to members having varying employment statuses and work hours.

***Finding*:** Members of the organization work in a mixture of in-person and remote, and part-time and full-time which sometimes causes communication issues.

***Evidence*:** We found that the partnership employees and volunteers work in a mixture of in-person and remote. One of the interviewees mentioned:

"...the staff are very distributed in terms of physical locations"

The correlation between different work locations and miscommunication was highlighted by another interviewee, who stated:

" it would be much more convenient if all of them (the employees and volunteers) work on-site"

Similarly, the partnership has multiple volunteers and employees, particularly the board members, who are working part-time.

"I attend board meetings via zoom since most of the board members are working remotely"

These varying work statuses can result in miscommunication, particularly in the absence of a well-defined protocol. A study [2] concluded that digital communication is a major problem with remote work, hence what the partnership is currently facing is not an issue unique to them, and can be resolved.

Recommendations**:** This issue can easily be resolved by well-defined organizational and personal communication protocols. This proposal is also backed up by the study cited earlier. The partnership needs to have regularly scheduled meetings at all hierarchical levels, from the board of directors to the daily staff. For example, the daily staff meets once every week and the board of directors meets bi-weekly. This will keep everyone up to date with the current status of work at the partnership. As for personal communication protocols, those working part-time and/or remotely should have specific hours of the week dedicated to the partnership's work. They should inform their colleagues about their work hours in advance so that their colleagues can contact them without any issues and wait for a response.

Finding**:** Those working in person report great communication, and those working remotely feel there is a major communication gap.

Evidence**:** Some of the interviewees work together at the partnership's office on a daily basis, and they expressed their satisfaction with the current communication system since it did not hamper their daily workflow. They felt that the coordination among them was seamless and that they were able to work together without any hiccups. One of them told us:

"...I don't think there is a communication gap because there are only three people in-person who need to communicate regularly"

However, one employee who was working remotely felt that they were facing a major gap. They stated:

"...there are communication gaps all the time."

[2] Aziz, A. (2021). Remote work: New normal communication challenges. European Proceedings of Social and Behavioural Sciences. https://doi.org/10.15405/epsbs.2021.06.02.1

This only reaffirms our earlier finding: Those working in person find it difficult to communicate with those working in person, and vice versa.

Recommendations**:** Just like the earlier issue, a well-defined communication protocol can resolve this issue easily. Adding to that, it is also important for those working remotely to identify their preferred communication mode. The people are the partnership use too many modes of communication right now, e.g email, SMS, calls, etc, and those working remotely need to not only confirm their availability hours but also how they would want to be contacted. This would help bridge the communication gap by a lot.

Finding**:** While the financial data is being managed well, there is a need to improve the communication regarding the financial information and the two bank accounts being used

Evidence**:** While talking to one of the interviewees, we came across an incident where the communication regarding the two different banks being used by the partnership was unclear. Once, this confusion even resulted in a check being deposited to the wrong account.

Evidence**:** One of the interviewees noted:

"...I am a little confused about the use of two different bank accounts. Once a check was put in the wrong account, and we had to manually correct the issue"

Recommendations**:** The use of two different bank accounts needs to be clarified, and the bookkeeper needs to be informed of each of their use. It is also important to inform the bookkeeper regarding the exact bank account when a transaction is requested.

Lack of Job Clarity

Another key issue that we uncovered during our research was that the employees and volunteers at the organization have a lack of job clarity regarding their own and other members' roles. This is leading to issues:

a. A few of the members have to do a lot of the work
b. Poor job transitions and handovers when someone new joins

Finding**:** There is a lack of hands-on involvement from the board members and clarity regarding their role, which causes confusion that trickles down to the lower-level management.

Evidence**:** While it is understandable that most of the board members are working on a part-time basis, and have other professional commitments, it is quite evident from the interviews that there needs to be increased involvement from them and clarity on what are their roles and responsibilities. One of the interviewees noted:

"Since board members work part-time and remotely so they sometimes are not responsive to my emails"

Another one stated:

"..some board members are out of touch and they don't read their emails or attend meetings….There are only a few members on the board who do everything"

This clearly shows that the lack of involvement and ownership from the board is affecting the lower-level management. This can lead to many issues in the longer run, in terms of planning, organization, and accountability.

Recommendations**:** All the board members must have clear responsibilities and roles, and they must be communicated to the lower-level management so that they know who they have to refer to in what situations. Giving each board member a specific stream of the organization to overlook, e.g fundraising, events, donor communications, etc, can make the organization's workflow a lot better.

Finding**:** The employees and volunteers at the organization are not sure about their job roles, despite working there for a while now.

Evidence**:** With an NGO the size of the partnership, it is expected that the employees and volunteers will take up different roles, and sometimes do beyond what is expected of them and their job role. But, having no job roles at all can be a problem as the organization continues to grow. Even right now, it can cause issues for the organization in its workflow. An employee mentioned:

"employees in the NGO do not have defined job descriptions"

Another employee specifically referenced an event where another employee was unaware of the said person's duties. They said:

"[Other Interviewee] sometimes asks me to do stuff beyond my responsibility because [Other Interviewee] does not know about my exact duties."

This clearly shows that the lack of clarity regarding duties is causing issues, that can be exacerbated in the future.

Recommendations**:** Since the organization is not very strong right now in terms of numbers, employees and volunteers have to go above and beyond every now and then. Having them restricted to a very specific job role can cause issues for now. As a workaround, it would be helpful to have primary responsibilities outlined for all the workers, possibly along with secondary responsibilities. So now, instead of everyone doing anything and everything, all the workers have a primary set of responsibilities that they will conduct day by day, and a secondary set of responsibilities, with which they can help whenever called upon. This preserves the flexibility that is needed right now and introduces a structure into the job roles as well.

Finding**:** The job transition between employees at the organization is not very efficient, leading to incoming employees facing issues.

Evidence**:** Whenever a new employee or worker comes into the organization, it is important to have mechanisms in place that can help them settle in. The partnership is currently lacking these mechanisms, which were highlighted by the fact that some of their employees are new hires who joined the organization very recently in the post-COVID era. They told us how they had to figure things out on their own and how the previous employees did not leave something in place that could have helped them transition into the job better. One of them stated:

"when planning an event, I need to dig into the notes handwritten by previous staff regarding event planning, and the information is not comprehensive so I need to start over the whole planning process"

It was further noted:

"the employee before me used donor perfect but since that employee left, no one is specifically responsible for it."

This shows how there is very little work put into making the organization ready for new hires.

Recommendation**:** Since the partnership aims to grow in the upcoming years, it is important that they make themselves ready for new hires. The current employees must use an approach where the person who replaces, or comes in to work with, them does not have a steep learning curve. For example, having concise documents that hold descriptive information, instead of handwritten notes can be a much better approach. Having a small "Bootcamp" period where a new hire or volunteer spends a week or two getting training regarding the working of the organization with regards to their role will be of great benefit.

Software Underutilization & Excessive Platforms

In our interviews with the organization's employees and the board members, we discovered that the Partnership uses numerous applications and platforms. However, none of the platforms speak to each other, and at least one paid software is underutilized. While the three problems can have corresponding unique solutions, they are closely interconnected: Disconnectivity of platforms reflects that the organization does not use the current tools (especially the paid donor management software) at its full capacity, which partially leads to using more separate platforms. The three problems all impede the organization's productivity.

Software Underutilization

Finding: The current donor management software is significantly underutilized. This may result from employees' lack of knowledge about what the current tool is capable of and that staff is not explicitly required and trained to use the tool they have purchased.

Evidence: Through interviews, we found that the Partnership is paying a considerable amount to subscribe to a plan on DonorPerfect. However, the DonorPerfect is not efficiently used. The information of the donors, event participants, or other stakeholders is either manually managed in spreadsheets or not tracked at all. Interviewees mentioned:

"We are paying $1200 to DonorPerfect per year."
"We don't utilize DonorPerfect much yet."
"We do not track (the donor's contact)."

It is clear employees lack knowledge of what DonorPerfect is capable of. Interviewees stated:

"People don't know how to use software(DonorPerfect) efficiently... don't understand all the aspects of it."
"...because no one understands its capacity... (The current staff) did not have sufficient time to understand DonorPrefect once normal office resumed after the pandemic".

The disconnectivity of platforms also reveals the lack of understanding of DonorPerfect's capacity. Interviewees expressed their hope of connecting DonorPerfect with other platforms, while we found DonorPerfect website does indicate some capabilities for integrating with other platforms. According to one interviewee, since the previous staff who used DonorPerfect have left, no one is specifically responsible for the software. An interviewee claims that people are not using DonorPerfect because they have not been trained, so they do not know how to use it.

Linking up all evidence supports the earlier finding: A lack of job role clarification regarding the software aspects and no corresponding training contributed to employees' poor understanding of the software's capabilities, leading to software underutilization.

Recommendation 1 (Short-term): Fully utilize the user support offered by software providers to maximize the current tool. Taking DonorPerfect as an example, its provider offered multiple types of support, from customized onboarding to on-demand training webinar series. We encourage potential users of DonorPerfect in the Partnership to first connect with their onboarding team specialists to customize the DonorPerfect system, activate essential functions, and set up a customized training schedule. The specialist can also recommend the most helpful training webinars based on the Partnership's particular needs and the current subscribed plan. Signing up for a training series may take some time, but this will significantly benefit the organization's working efficiency in the long run.

Recommendation 2 (Long-term): Set up software documentation for the current software and whenever purchasing new software in the future.
The purpose of documentation is to standardize various aspects of the interactions between the organization and the technology tool. It helps ensure the purchased tool's adoption, durative, and consistent utilization. We encourage the management-level person in the Partnership to take it seriously and initiate the software documentation project - focusing on but not limited to DonorPerfect, MailChimp, and QuickBooks.
Specifically, the documentation should cover the following aspects:

1. The objectives and goals of the software implementation
2. All expected use cases, with the recorded demo if possible
3. Who or which job role in the organization is expected to use it
4. Where to seek help when encountering technical issues

Excessive Number of Platforms

Finding: The Partnership is using an excessive number of platforms than what it truly needs. Some platforms may have duplicated functionalities.

Evidence: In the project proposal, the Partnership stated they currently use more than 30 tech programs and/or applications to run daily operations and provide a list of tools in use. While there is no definite and universally optimal number of software platforms, we believe the Partnership is using too many, given its organization size and businesses.

Though we cannot be experts in all software platforms that the Partnership listed in the proposal, we believe there are at least several platforms subject to overlapping functionalities. Below are some example platforms you might consider in the same functional group and want to focus on only one.

Online forms: Formstack vs. DonorPerfect (integrated forms)
Fundraising: OneCause vs. DonorPerfect
Payment: PayPal vs. Square
Cloud: Apple Cloud vs. Key Cloud

Recommendation: Streamline software and conduct tech stack consolidation. Running multiple technologies for daily operations can leave staff spending more time dealing with tools than on actual work[3]. Another concern is that leaving records on separate platforms leaves the organization at risk of data insecurity. We encourage the Partnership to streamline the software by following some steps for reference:

1. List all the platforms and associated costs. The idea is to ensure the organization keeps track of the software it uses. We suggest doing this with a spreadsheet for categorization and calculation.
2. Mark all the obsolete or underutilized tools. Think of the last time and the frequency the organization touches each software.
3. Identify the use cases of each software application.
4. Identify the duplicate functions. If some tools are identical or similar in your use cases, group them and give each group a color.
5. Determine which tools to abandon. In each color group, keep only one platform for continuing use. Prioritize those with multiple functions in your use case, e.g., DonorPerfect supports constituents' data management, fundraising, and online forms.
6. Consolidate platforms. Migrate or download the important data in the abandoned platforms of your choice and delete the accounts.
7. Re-evaluate the software you keep. Evaluate the remaining software and consider downgrading or upgrading the subscription plan based on your needs to ensure quality operation after streamlining and consolidation.

Lack of Integration

Based on the interviews with the employees of the partnership, we discovered that donors, subscribers, volunteers, and tenants' data are scattered among different software systems, and a lack of synchronization may result in repetitive tasks. The current system to collect and store vendors', participants', and donors' information is time-consuming and inefficient. Currently, most of the data information is manually recorded in spreadsheets, which makes it very difficult to retrieve information as more data becomes available. Even though manually tracking data may

[3] Castagno, M. (2021, June 23). Too many tools are bad for productivity – here's what you can do. Beezy. Retrieved December 4, 2022, from https://www.beezy.net/blog/too-many-tools

work for now, it will become inconvenient in the long run when the organization receives frequent donations.

Finding: All the software is stand-alone, with no means to transfer data between each other. Employees have to fetch and update information in different software manually.

Evidence: There is a lack of synchronization between DonorPerfect and other software. And Interviewees emphasized the hope of having different platforms connected. Interviewees stated:

"...more convenient to have a database connected with the forms volunteers filled."
"There should be a way to synchronize DonorPerfect and bank accounts."
"... wants a software like a donor perfect or database or a spreadsheet to store and fetch the information of vendors"
"...it would be easier to track participant's information automatically"

Recommendation (If budget & time are limited): DonorPerfect has some levels of integrations that can address part of this issue. Based on our preliminary research, every plan of DonorPerfect has integrated online forms. Instead of using other online form builders, the Partnership can let donors, event participants, tenants, volunteers, etc., fill in, so their information can be automatically tracked via DonorPerfect[4]. Besides, the upgraded plan also includes integration with Quickbooks, which can satisfy the Partnership's need of integrating financials. Also, we found an external tool - Apiant that can connect DonorPerfect with Mailchimp. After the connection, once there is a new donation identified in DonorPerfect, MailChimp can automatically add the donor to the mailing list[5]. And there is a 10-min training video that can help.

Recommendation (If budget & time are adequate): Switch to the platform with better integrations of software. We found a new CRM (Customer relationship management) software - Neon One, which can integrate with Mailchimp, Quickbooks, Eventbrite, and 50 other software providers[6]. That can manage the donors, members, email, events, fundraising, volunteers, and grants all in one easy-to-use platform. It is even more economical than current software.

[4] Home. Fundraising Software for NonProfit Donor Management by DonorPerfect. (2022, November 30). Retrieved December 7, 2022, from https://www.donorperfect.com/
[5] Connect donorperfect to mailchimp with Apiant.com @donorperfect @mailchimp. With APIANT. (n.d.). Retrieved December 7, 2022, from https://apiant.com/connect/DonorPerfect-to-MailChimp
[6] Best software for nonprofits. Neon One. (2022, November 3). Retrieved December 7, 2022, from https://neonone.com/

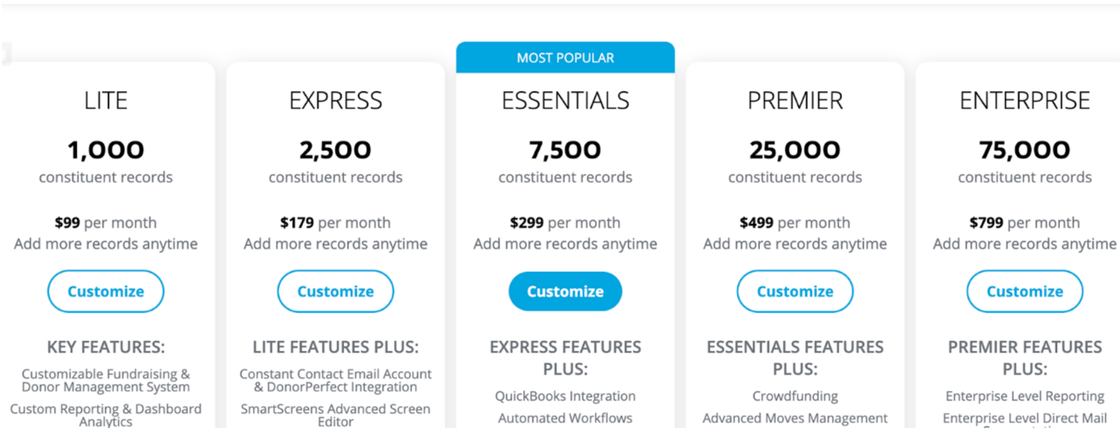

Figure 1: Monthly cost of DonorPerfect's different plans

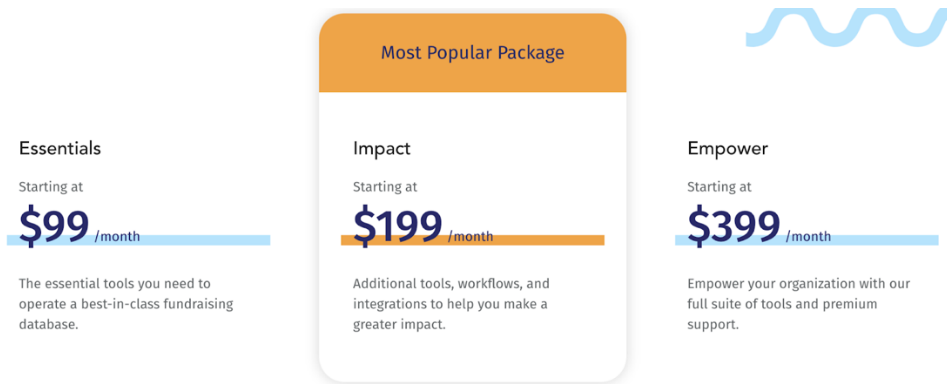

Figure 2: Monthly cost of Neon One's different plans

Community & Donor Engagement

During our interviews with the employees of the partnership, we discovered that they are doing very well in engaging the local community while having some difficulty recruiting donors after shutting down for almost three years during the pandemic. As a non-profit organization, having a wide array of supporters is vital for operation. Thus we expect the partnership to be more invested in maintaining relationships with current donors and building relationships with potential donors i.e. event participants and social media platform subscribers.

Sponsors categorization

People have varying interests when it comes to events, so categorizing stakeholders and tailoring content to targeted audiences is necessary to increase local community engagement and attract donations.

Finding: Subscribers are not categorized by the event type in Mailchimp, which leads to an inadequate level of engagement.

Evidence: In Mailchimp, subscribers are categorized into four categories: Donor society, Business Card Mailing List, Website subscribers, and Agent Orange Awareness subscribers. Aside from Agent Orange, subscribers in the other three categories are **not** categorized according to the type of event. Noticeably, there is a significant gap in engagement between Agent Orange Awareness and the other three categories. There is about a 70% open rate and 23% click rate in the Agent Orange Awareness group, which is significantly higher than the around 30% open rate and 2 ~ 4% click rate in the other three categories. The partnership member expressed their concern:

> *"I am not sure if Mailchimp is hitting the audience as we are supposed to…"*

We also found that the Newsletter Signup interface on the partnership website does not include a categorization function.

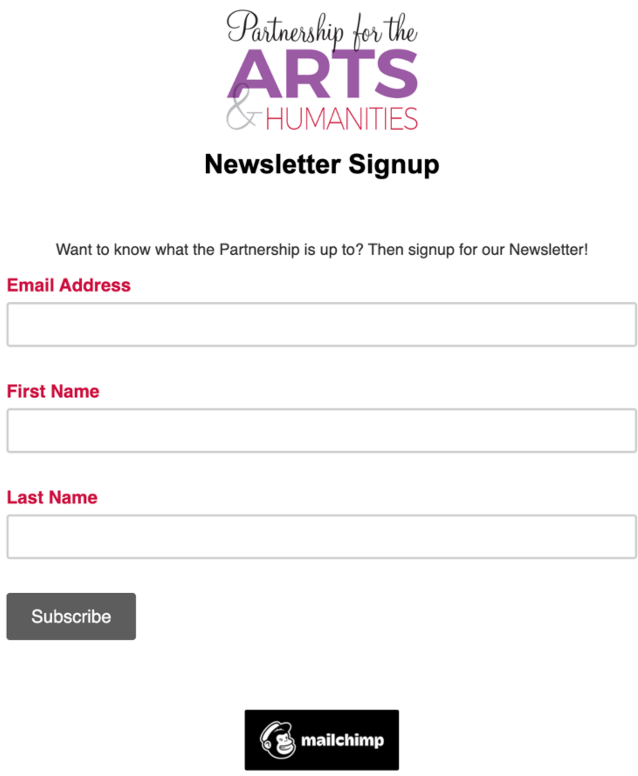

Figure 3: Subscription page on the partnership website

Recommendation: Accordingly, we recommend dividing subscribers into three main groups based on their interests in events: veterans, arts, and holiday events. When subscribing to monthly newsletters and event notifications, people will be able to select the type of event they are interested in, and multiple choices are permitted if they are interested in more than one type of event. When we have different categories of subscribers, we will send event notifications only to the targeted audience.

Finding: Opinions vary regarding how donors and event participants should be categorized.

Evidence: Some interviewees believe that two categories of donors will be enough: veterans and others:

"Sponsors do have a lot of crossovers, for example, people who sponsor the golf also sponsor the fall festival … and I do not think sending event information to all the people at once will make donors feel they are spamming, because we don't have many events and don't send emails frequently"

On the other hand, some interviewees think it would be more effective to separate art types into fine categories including pottery, tattooing, photography, etc considering some people are only interested in a certain type of art. It is not necessary to spam people with the information they are not interested in.

Recommendation: As there are very few employees responsible for reaching out to donors and subscribers, too many categorizations will increase management's workload. Also, as discussed in the interviews, it is very likely that people who attend golf outings will also be interested in holiday events. Thus, we agree that too many categorizations can be burdensome and may not be necessary. Our recommendation is to ask people who subscribe online, attend events, or make donations to fill out a form that asks them which event they are interested in and classifies them into only three categories: veterans, arts, and holiday events.

Donor engagement

Finding: There is a lack of incentives for donations on social media platforms.

Evidence: On the donation page of the website, the partnership shows potential donors how their donation can make a difference by stating:

Your gift plays a crucial part in helping to develop the arts and humanities in the Western Wayne and Eastern Washtenaw counties. Your support helps the 2022 Annual Appeal… (other programs)

However, the partnership has not integrated their fundraising progress on any of their social media platforms to incentivize donors by showing them how their donations can help this non-profit organization reach its fundraising goal.

Recommendations: Our recommendation is for the partnership to visualize the fundraising process on their website and to communicate where they stand in meeting their semi-annual or annual fundraising goal on a regular basis via social media. Also, we suggest that the partnership include a more quantified impact that donations can make on their projects.

A good example of encouraging donations on the website is [Water.org](https://water.org/). Wate.org is a non-profit organization that provides innovative solutions that break down financial barriers between people living in poverty and safe water and sanitation[7].

They have a prominent "donate" button on their home page (Figure 4), and under the button, they explain how the donation can make a difference: "Give $5 a month and change a life with safe water every month of the year." On their donation page, they highlight the impact of monthly donations (Figure 5). Also, they provide contact information for monthly donors who may wish to cancel their donations. Further, they provide a brief history of their fundraising and a hyperlink to more detailed information. According to research, a detailed description of the organization, including its mission, history, and programs, providing logos, and visual cues will help the organization build a relationship of trust with viewers, thus encouraging them to donate[8].

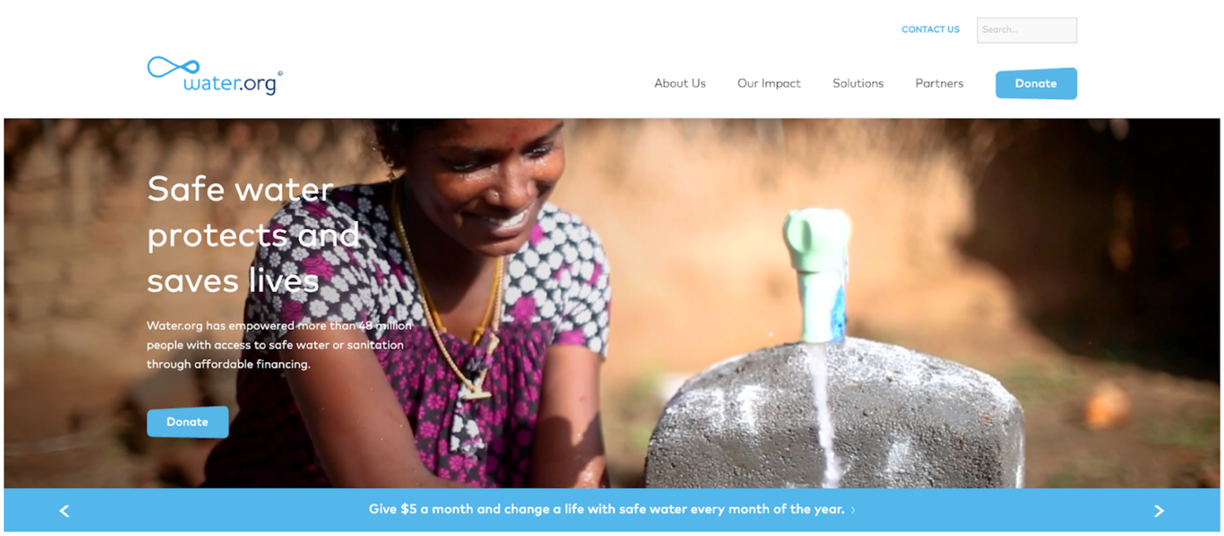

Figure 4: The head of water.org home page

[7] Water charity for safe water & sanitation. Water.org. (n.d.). Retrieved December 7, 2022, from https://water.org/
[8] Waters, R. D., Burnett, E., Lamm, A., & Lucas, J. (2009). Engaging stakeholders through social networking: How nonprofit organizations are using Facebook. Public Relations Review, 35(2), 102–106. https://doi.org/10.1016/j.pubrev.2009.01.006

Figure 5: Impact of the donation section on water.org monthly-giving page

Conclusion

While there are evident issues in the partnership's daily workflow, it would be unfair to say that these issues do not have any remedies or will take a lot of time to fix. Most of the problems that are with regard to communication and day-to-day work can be resolved without making major logistical changes, and by implementing some protocols in place that can help the employees and volunteers at the partnership perform their duties better. Other issues may require more complicated solutions, but are not as grave. Things like software integration and utilization, event planning, and donor engagement, are very interrelated and can be resolved in parallel. For example, if the partnership is able to unlock the full potential of DonorPerfect in their daily operations, it will help them manage things like event planning and donor communications better as well, hence targeting multiple issues with the same solution. We propose that the partnership make the most of the current software or switch to CRM with better integration capabilities if budget and time permit. While implementing all the solutions in completion will take some time; we firmly believe progress can be visible in a short period of time if the recommendations are followed diligently.

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