



# Habitat For Humanity Canada

Website Strategy

June 15, 2018



# Agenda

- ▶ What We Did
  - ▶ The Challenge
  - ▶ Insights Gathered
- ▶ Vision for the Site Redesign
- ▶ Dependencies & Risks
- ▶ CMS, Content Creation & Workflow
- ▶ Global Village | Corporate Partnerships | Donate | Volunteer | Find a ReStore
- ▶ 2018/2019 Opportunity Prioritization & High Level Timeline
- ▶ Next Steps



# What we did

# Habitat in Canada

A complex ecosystem of experiences, with multiple ways in,  
and innumerable ways to connect with people



# The Habitat Ecosystem (Ontario example)

To the user, Habitat represents many opportunities to engage with people. The needs of the target audience and the touchpoints that meet those needs are varying and diverse. Given the federated model and the many ways to donate and participate, the experience can feel fragmented and the choices overwhelming.



# The challenge

To design an experience that feels more connected and flows more easily, addresses the needs of the different people who participate in it, and ultimately converts them to engage, we must first **understand it.**



# Insight Gathering

To better understand your ask, we did the following:

- **UX audit** - To better understand the existing site's visual design, navigation, accessibility responsiveness across breakpoints
- **Competitor review** - To understand best-in-class practices in the charity world
- **Customer journey** - To map the donor journey across 3 personas (Successful Doer, Worldly Idealist & Social Influencer)
- **Review [habitat.org](https://www.habitat.org)** - To learn from the redesign of the American national site
- **Review of Tim Dolan's strategy work** - Including transcripts of stakeholder interviews & the completed strategy deck



# Insight Gathering, Continued

- **Attended the 2018 National Conference** - To participate digital engagement strategy workshops.
- **8 user interviews** - To understand why people volunteer their time and money to charitable organizations, including Habitat for Humanity, and their experiences on Habitat's digital properties
- **16 interviews with Habitat Canada stakeholders** - To understand the business needs and priorities from all your departments, including Marketing and Communications, Direct Marketing, Partner Services & Stewardship, Global Engagement & ReStore





# Vision for the site redesign

# 1. Create and define a site publishing process that:

- Relies on stylized components for key content types (campaign story, videos, donation forms etc.), contributing to a more modern look & feel for the redesigned site
- Allows for staging of content and archival of pages
- Supports easy authoring by users without a technical background



## 2. Create refreshed site navigation, home page design and site structure that clearly indicates:

- Full scope of options for involvement with/supporting Habitat (through both national organization and affiliates)
- Holistic integration of Global Village and Corporate Partnership into the national site
- Mandate, business lines and corporate priorities of national organization (e.g., international programs, corporate sponsorships, government relations, etc.)



### 3. Build empathy & drive engagement through storytelling

- Communicate clearly about what Habitat does at home and abroad. Tell the stories of how families are helped & communities are built.
- Show potential and current supporters the impact of their involvement, whether it was volunteering at a local build, a financial donation, a Global Village trip, or a corporate partnership opportunity.



## 4. Provide visitors with strong transitions from national site to affiliate sites

- Explain the federated charity model and tell the story of Habitat Canada and its relationship with its 56 affiliates. Build a mental model to showcase local opportunities.
- Ensure visitors are able to clearly identify opportunities to volunteer with or donate to affiliates, and that the site guides them to take concrete action on these opportunities
- Provide visitors with mechanism to identify a Restore with which they want to engage (to donate, buy, volunteer)



## 5. Improve the Global Village experience for team leaders & members

- The website will support volunteers through their entire journey, from learning about GV to the application, preparation and post-trip experiences, easing the load on team leaders offline. This can include:
  - A redesign of the application flow to address drop-offs and confusion points
  - Integration of additional tools, including an account login (through Blackbaud) and an intranet to support internal communication



## 6. Implement a process to flexibly deploy campaigns and donation forms

- Integration of donation forms into broader site experience (not segregated on Luminate-hosted pages)
- Ability to provide clarity to potential supporters about why they should donate



## 7. Implement analytics strategy

- Better understand, measure and optimize how the website is helping Habitat Canada hit its KPIs, particularly for GV trip registration & donor engagement





# Dependencies & Risks

# Dependencies & Risks

## **Blackbaud enhancements to Global Village & Donations**

Tribal & Habitat Canada are currently in discussion with Blackbaud to identify technical feasibility and additional costs to implementing strategy recommendations

## **Accommodating full scope of content requirements**

Habitat Canada staff have identified specific and extensive requirements for content on refreshed site (primarily around storytelling and positioning/interpreting of corporate mandate), the entirety of which may not be addressable in current phase

## **Comprehensive projects map**

Habitat Canada does not currently maintain centralized data on domestic and international projects

## **CMS components for affiliate sites**

Habitat Canada likely will not have technical alignment with all affiliates to deploy such standards



# Dependencies & Risks, Continued

## **Deploying mechanisms for lead generation**

Creation of process for cultivating and collecting CRM leads through web site may not be achievable in first phase without closer consultation with Direct Marketing team

## **Implementation of a robust CRM program**

Separate work stream that is not in scope for current phase



# **CMS, content creation & workflow**

# A New CMS

Replatforming the site on to a new CMS with defined content components and standard features like version control, workflow management and a staging server will transform your authoring experience.



# Key CMS Requirements



## Standardize content creation

Introduce a system of components, along with a style guide, for key types of content.



## Update content easily

Users with limited technical knowledge should be able to add, edit and remove content.



## Manage updates on a staging server

Introduce a staging server to review changes before publishing and post-date pages for future publication.



## Archive pages & posts

Introduce the functionality to archive pages and posts.

# **Publishing workflows & asset management**

# SME responsibilities



## CURRENT EXPERIENCE

Each SME is responsible for flagging out of date content and identifying updates for the site section they own. Updates are passed on to a member of the Marketing department, who makes the edits in the CMS.

## PAIN POINT

It's technically difficult to update complex sections like GV or Corporate Partnerships, SMEs have not been able to update these sections themselves.



# Asset management



## CURRENT EXPERIENCE

Some multimedia assets are hosted on the existing Habitat intranet (Sharenet, but replatforming to Sharepoint.) Different departments each have their own asset repositories.

## PAIN POINT

Asset management has been siloed to different departments within Habitat Canada, making it difficult to share content between teams.

# Opportunities

## Workflows & Asset Management

- A new publishing workflow - Empower SMEs to author and publish on the new site, but also provide a point-person from the Marketing team if they need assistance.
- Digital Asset Management (DAM) - To give everyone in the national office access to videos and images that can easily be added to a component in the CMS.



# Supporting affiliate content needs

# Habitat Canada features affiliate stories

## CURRENT EXPERIENCE

Crafting an affiliate story and featuring it on the national site is labour-intensive, requiring coordination between the head office, the affiliate, volunteers and the homeowner to tell the story of the build. Often a campaign is involved.

## PAIN POINT

There is sensitivity around which affiliates to feature on the Habitat Canada homepage, as the national site must be geographically diverse.



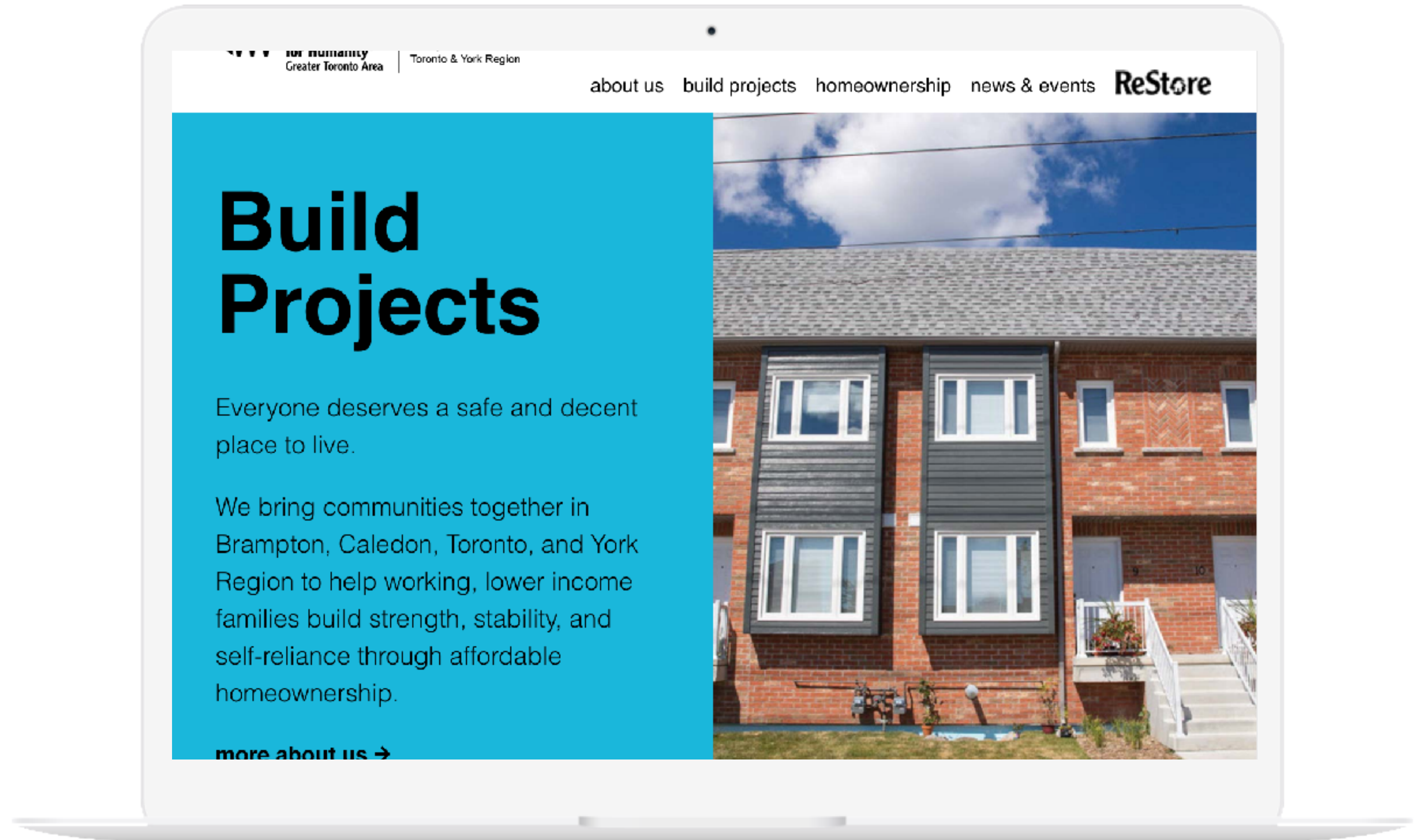
# Affiliates own their local content

## CURRENT EXPERIENCE

Affiliates will always own the content for their sites. They're responsible for documenting and managing all local project data and they know their communities, volunteers and families best.

## PAIN POINT

Affiliate sites are hosted on a number of different content management systems and vary in look/feel.



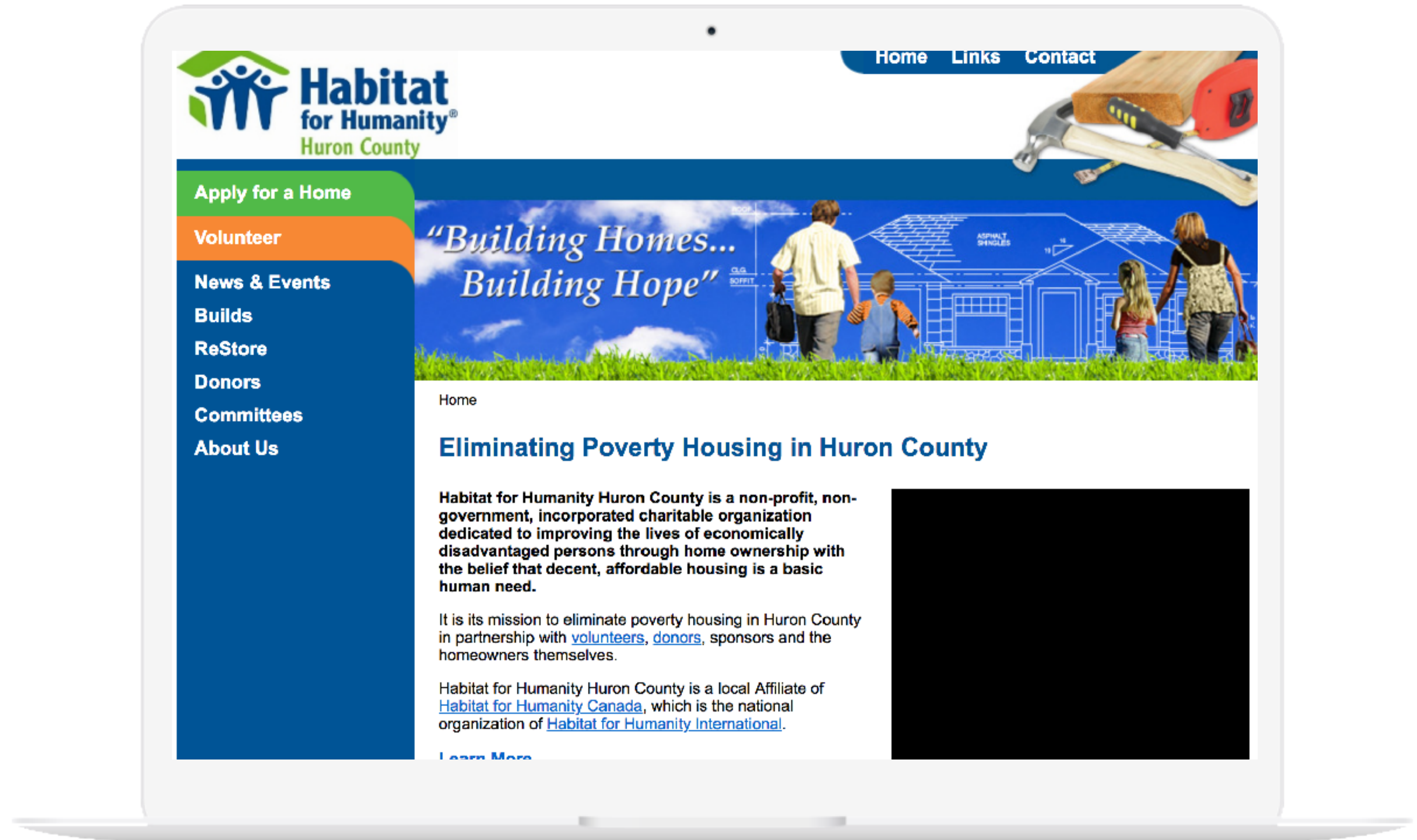
# Affiliate sites vary in sophistication

## CURRENT EXPERIENCE

Larger affiliates have the capacity and technical knowledge to create robust local sites, vs. smaller volunteer-run affiliates who struggle to maintain their sites.

## PAIN POINT

Only some affiliates want help (specifically templates) from the national office in designing their local websites.



# Opportunities

## Supporting Affiliate Content Needs

- **Pattern libraries & content creation guides** - Offer guides to affiliates to help standardize style & content on their sites.
- **Shared CMS templates** - Make components available for affiliates on the same CMS as the replatformed national site.
- **Affiliate content in the national editorial calendar** - To plan for and feature affiliate content on the Habitat Canada site.
- **One CMS** - TO one day replatform all affiliate sites on to the same CMS as the national site. Design specific experiences to support small market and large market affiliates.



# Global Village



# Global Village

1. Set the groundwork with a full visual redesign and integration of Global Village into the Habitat Canada site.
2. Explore new content and feature opportunities (through Blackbaud) for the website to support volunteers through the application, preparation and post-trip experience, easing the load on team leaders.



# Applying for a Global Village trip



# Step 1 - Engagement

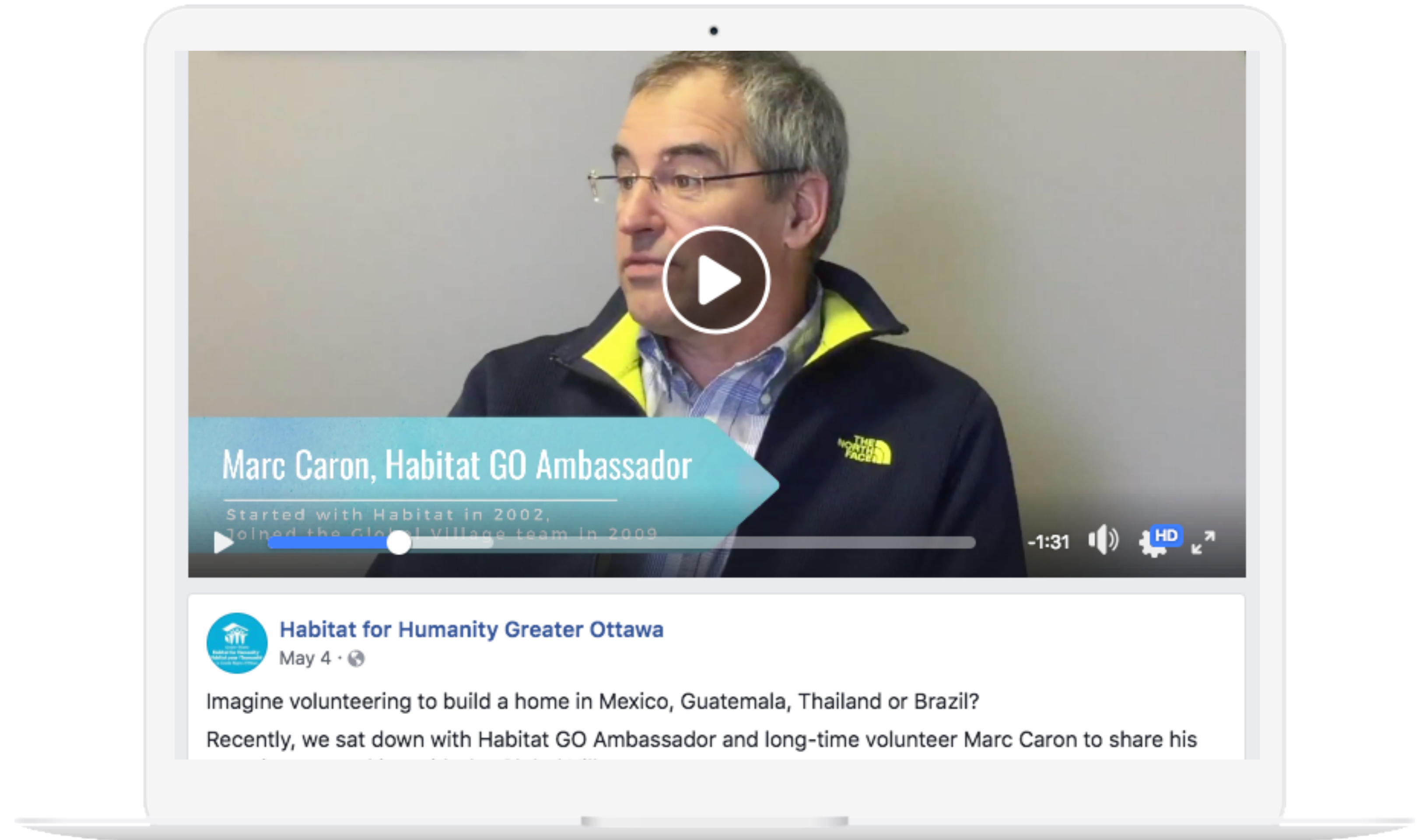
# Engagement with Global Village

## CURRENT EXPERIENCE

- Google volunteer tourism.
- Attend an outreach event.
- Learn about a Global Village opportunity from a friend or family member.
- Learn about leader or participant Global Village experiences on social media.

## PAIN POINT

- A lack of awareness over who's visiting the GV site or the success of outreach initiatives.
- Some team leaders rely heavily on the website to (vs. their own personal networks) to recruit.



# Opportunities

## Step 1 - Engagement

- **Analytics** - Start tracking outreach events and identify which trips are tracking and why.
- **Outreach calendar** - Advertise GV informational sessions on the website. Consider posting events on Facebook.



# Step 2 - Learning

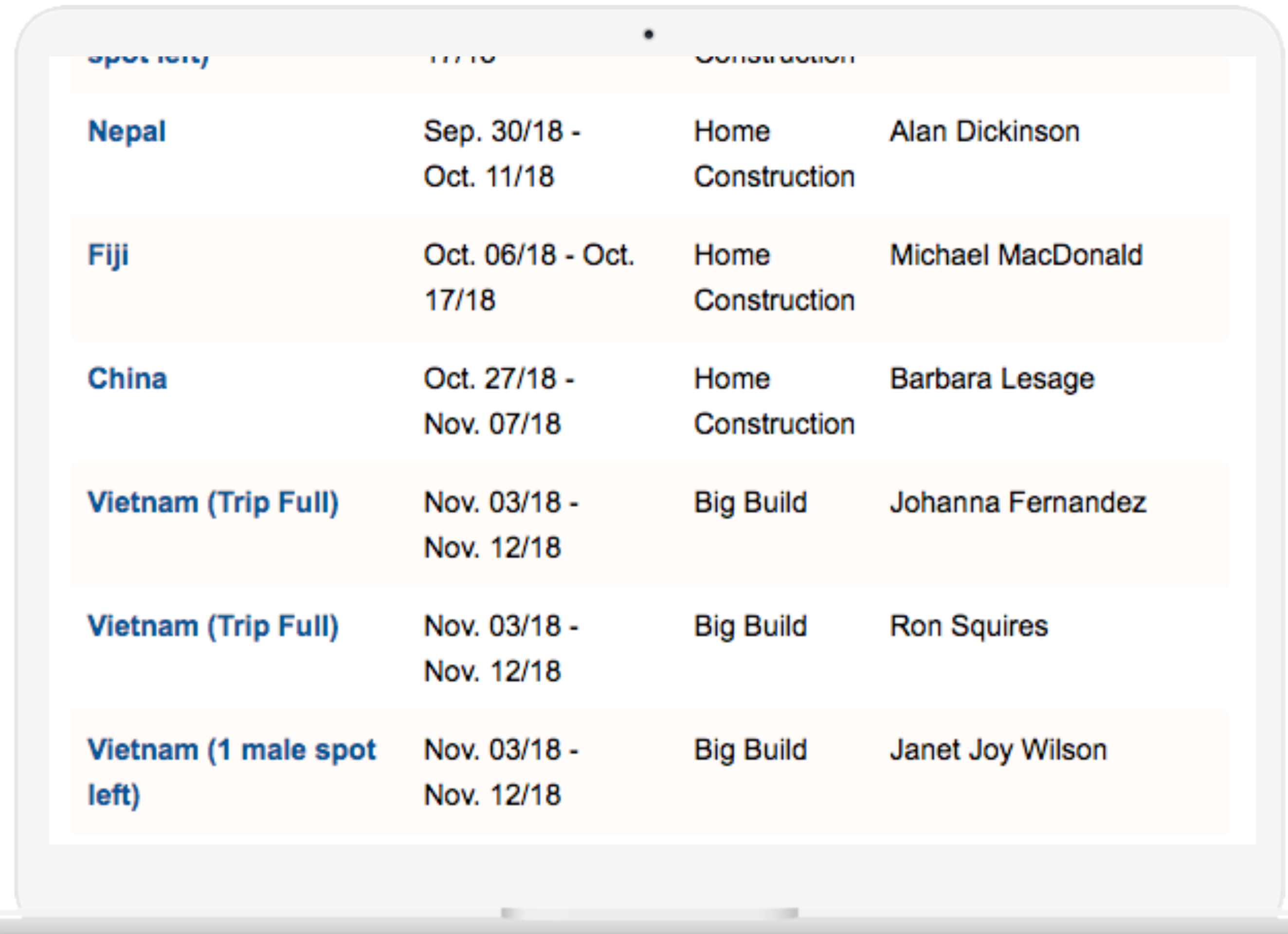
# Look at the trip schedule

## CURRENT EXPERIENCE

The Trip Schedule page only shows open trips (ie. Trips that are available for public registration).

## PAIN POINTS

- Closed trips (where a team leader builds a team privately) are not posted online; these volunteers get a PDF flyer through email.
- The website doesn't explain how Habitat operates internationally.



Country	Dates	Activity	Leader
Nepal	Sep. 30/18 - Oct. 11/18	Home Construction	Alan Dickinson
Fiji	Oct. 06/18 - Oct. 17/18	Home Construction	Michael MacDonald
China	Oct. 27/18 - Nov. 07/18	Home Construction	Barbara Lesage
Vietnam (Trip Full)	Nov. 03/18 - Nov. 12/18	Big Build	Johanna Fernandez
Vietnam (Trip Full)	Nov. 03/18 - Nov. 12/18	Big Build	Ron Squires
Vietnam (1 male spot left)	Nov. 03/18 - Nov. 12/18	Big Build	Janet Joy Wilson

# Read about a specific GV trip

## CURRENT EXPERIENCE

Each trip page (called “web flyers” internally) has generic locale content, info about lodging & meals, cost of the trip, additional travel costs, flight arrangements, tax receipts & team leader bios.

## PAIN POINTS

- Volunteers don't understand the impact of the build (macro), the day to day details (micro) and the cost of the trip.
- Volunteers want to know more about the families being helped by the build.



Our lodging will be in a basic, safe and clean hotel with two or more people sharing rooms. Breakfast will be taken at the hotel, lunch at the worksite and dinner will be typical Nepalese food at the hotel or local restaurants.

## What will it cost?

The cost for this 12 day opportunity to build in Nepal is approximately  
**\$2,580 + round-trip airfare + approx \$290 for R&R\***

The trip cost includes: lodging, food, ground transportation, traveller's medical insurance, orientation materials, and a donation to HFH Nepal and the Global Village program. Participants will need to arrange and pay for air transportation from their point of departure to Kathmandu, Nepal. Flight arrangements should be done in consultation with the team leader.

There are additional travel costs such as passport, visa and immunizations which the team leader will discuss with you. These costs are not tax deductible.



\*Habitat for Humanity Canada will issue a charitable donation tax receipt for the trip cost and the eligible airfare – these will



# Opportunities

## Step 2 - Learning

- **Closed trips** - Add closed trips to the trip schedule, allowing opportunity to learn more about how to sign up for a closed trip.
- **Interactive map** - Showing all trips (past, current, upcoming) and active builds by region.
- **Trip cost** - Explain how is money raised by GV trips used on international builds.
- **Practical trip content** - Include info about the destination (what to pack, weather) and day to day activities on the trip page.
- **Storytelling** - Tell the story of the families being helped through Global Village builds.
- **Regional content**- Share the impact of the Global Village programs by region, including active/completed builds and alumni stories.



# Step 3 - Application

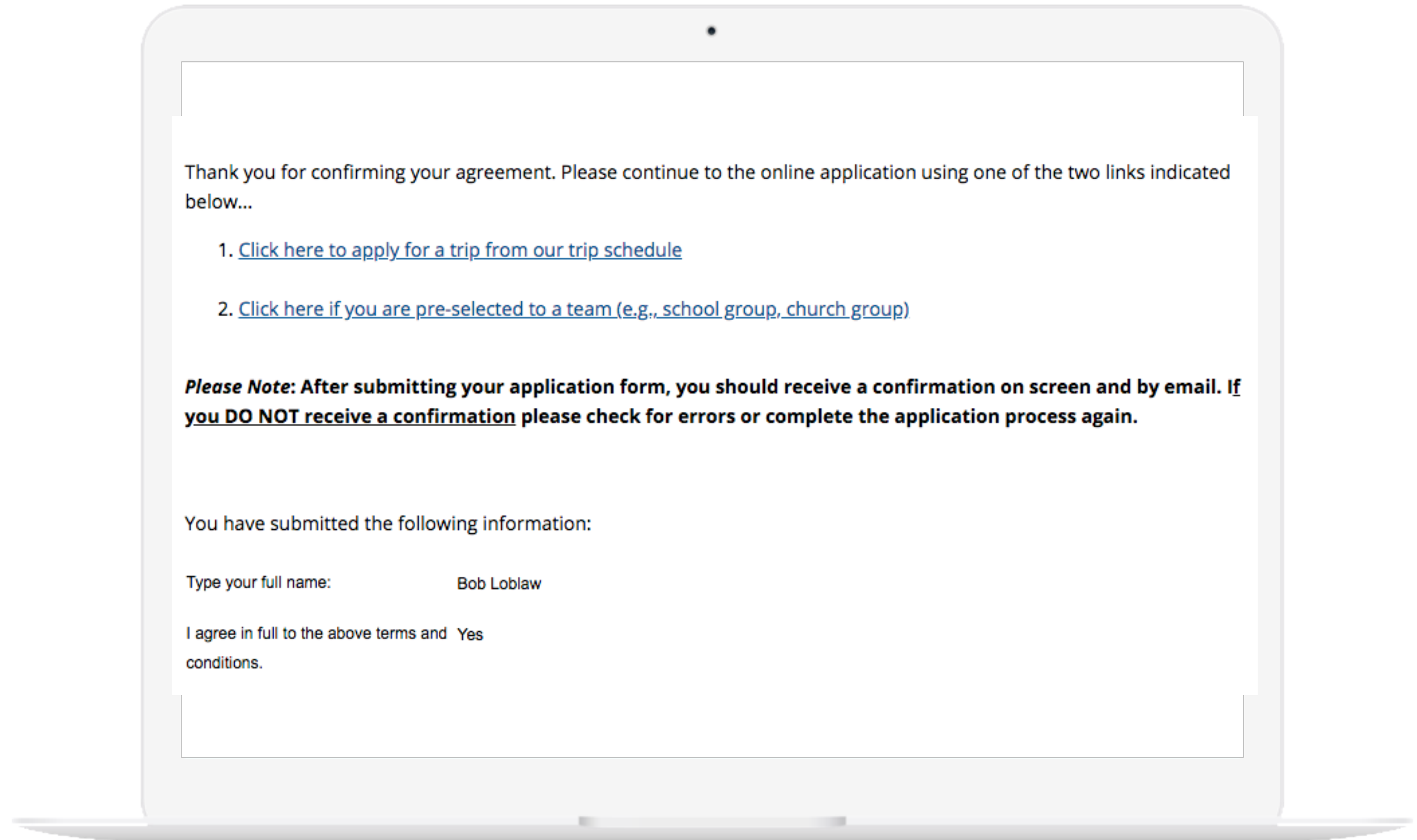
# Apply for a trip

## CURRENT EXPERIENCE

1. Click the 'Apply Now' CTA from the trip page.
2. Choose from an open or closed trip.
3. Complete an online application form.
4. Receive a confirmation email.
5. Wait for the team leader to get in touch.

## PAIN POINTS

- When the application process becomes confusing, users abandon the site to call the team leader.
- There is a lack of clarity around how the approval process for the trip works.



# Opportunities

## Step 3 - Application

- **Application flow** - Streamline the number of clicks from the trip page to the registration form. Add structure to the process by labeling steps.
- **Post-submission experience** - List out next steps for users, both online & offline.
- **Account creation** - Require users to create an account to apply for a GV trip, adding security to the application process and setting the stage for participants to be approved, pay for/raise funds and complete necessary tasks for their trip.



# Step 4 - Preparation

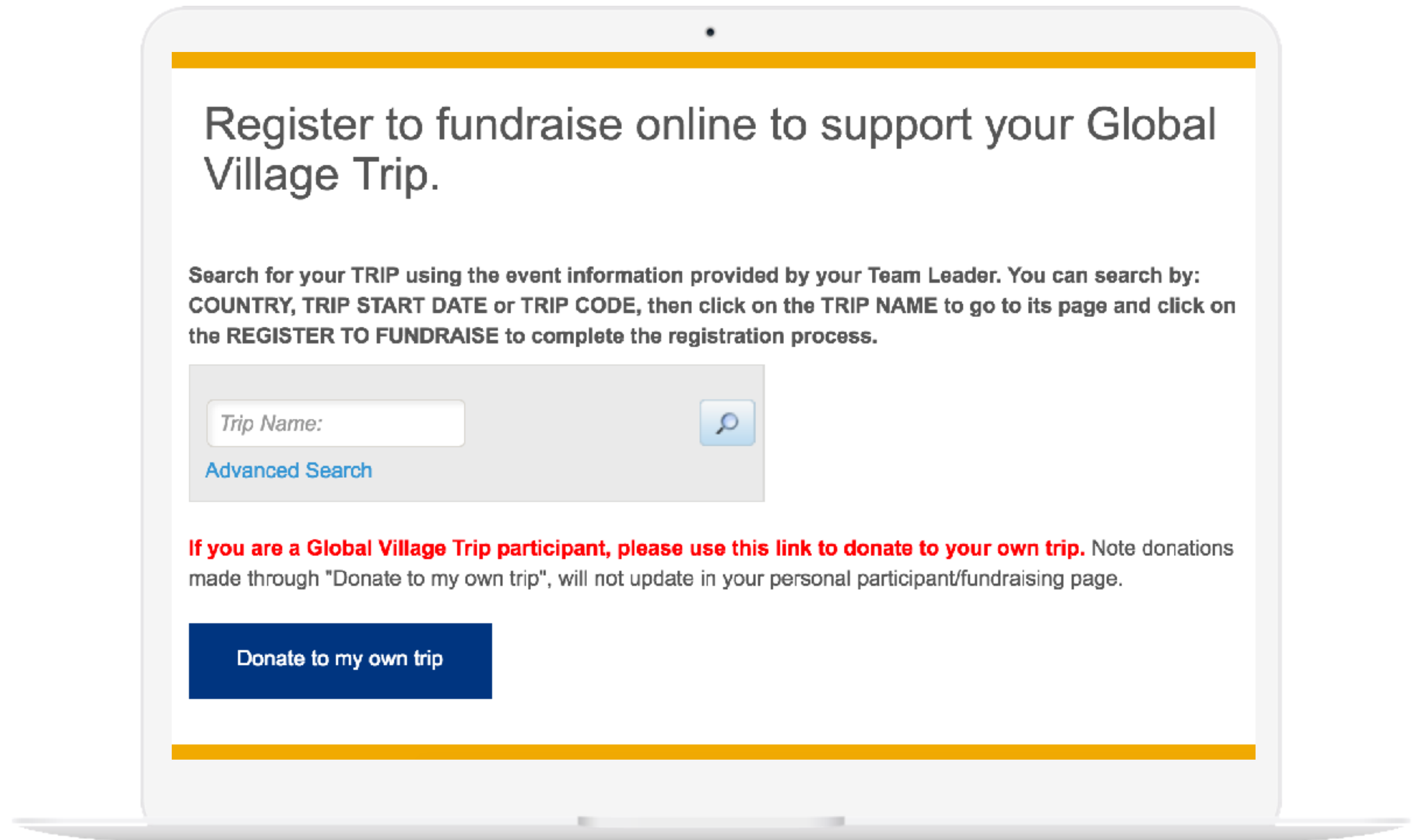
# Pay for a trip

## CURRENT EXPERIENCE

- Secure position on trip with a non-refundable deposit.
- Donate to your own Global Village trip using an online form.
- Register to fundraise online for a specific trip.
- Keep track of how much money they've fundraised for a trip and the deadline by which the trip must be paid for.
- Record funds raised on the GV donation form.

## PAIN POINTS

Team members don't understand the payment options (fundraise or pay outright) for their trip.



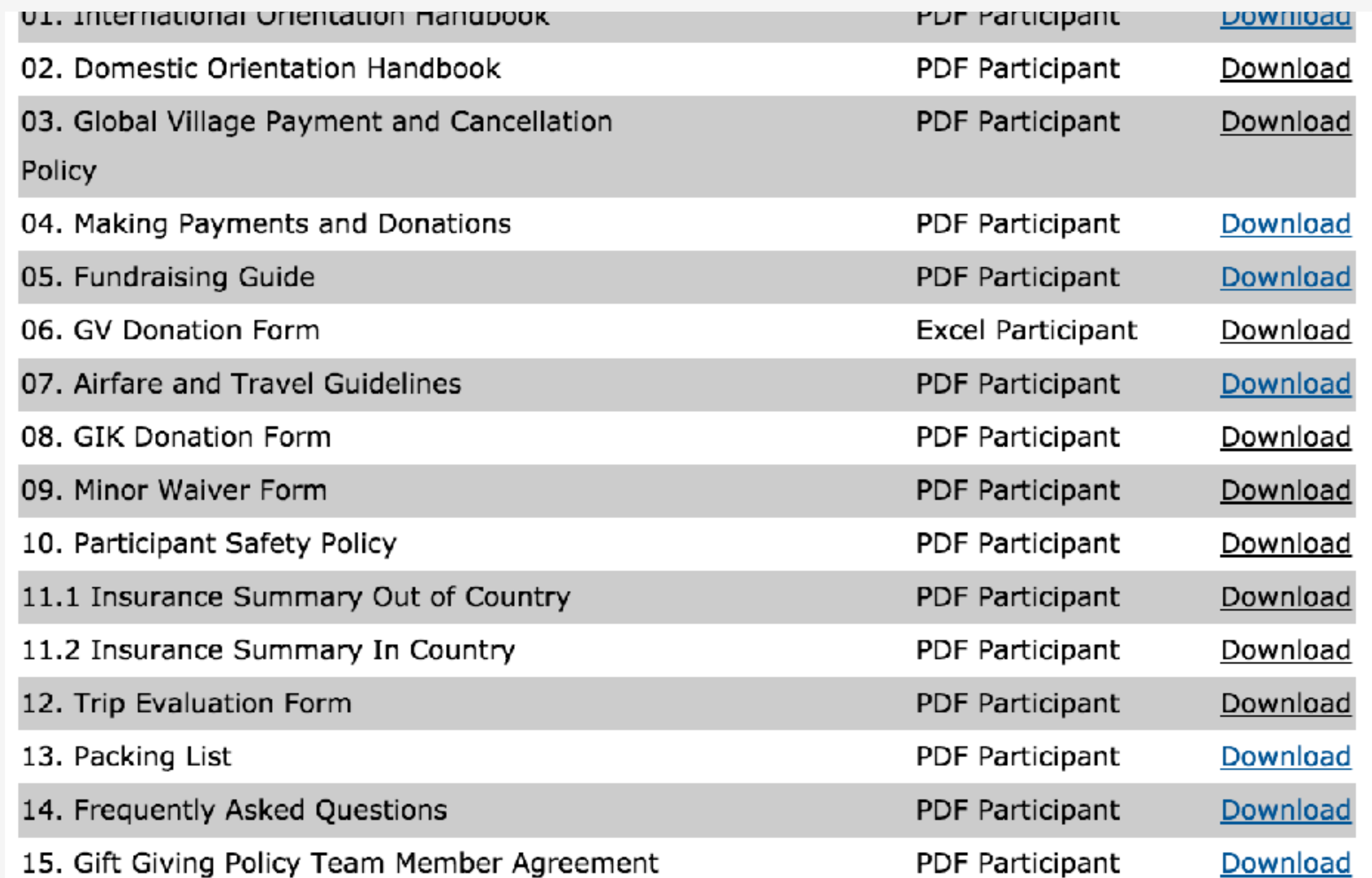
# Make arrangements for the trip

## CURRENT EXPERIENCE

- Book a flight.
- Get tax receipt for flight.
- Check medications & vaccinations for trip.
- Learn about accommodation and food from team leader.
- Arrange travel insurance.
- Check passport is up to date.

## PAIN POINTS

Team members won't read PDFs from the resources section, instead asking team leaders for guidance on trip tasks.



01. International Orientation Handbook	PDF Participant	<a href="#">Download</a>
02. Domestic Orientation Handbook	PDF Participant	<a href="#">Download</a>
03. Global Village Payment and Cancellation Policy	PDF Participant	<a href="#">Download</a>
04. Making Payments and Donations	PDF Participant	<a href="#">Download</a>
05. Fundraising Guide	PDF Participant	<a href="#">Download</a>
06. GV Donation Form	Excel Participant	<a href="#">Download</a>
07. Airfare and Travel Guidelines	PDF Participant	<a href="#">Download</a>
08. GIK Donation Form	PDF Participant	<a href="#">Download</a>
09. Minor Waiver Form	PDF Participant	<a href="#">Download</a>
10. Participant Safety Policy	PDF Participant	<a href="#">Download</a>
11.1 Insurance Summary Out of Country	PDF Participant	<a href="#">Download</a>
11.2 Insurance Summary In Country	PDF Participant	<a href="#">Download</a>
12. Trip Evaluation Form	PDF Participant	<a href="#">Download</a>
13. Packing List	PDF Participant	<a href="#">Download</a>
14. Frequently Asked Questions	PDF Participant	<a href="#">Download</a>
15. Gift Giving Policy Team Member Agreement	PDF Participant	<a href="#">Download</a>

# Connect with your team members & leaders

## CURRENT EXPERIENCE

- Attend team meetings through Skype.
- Get updates from team leader through email.
- Join a private Facebook group to connect with my team.

## PAIN POINTS

The current site does not provide a space for leaders to connect with each other and members on their trip.

Hi Team,

Attached is your Acceptance Letter and checklist for next steps in registering for Team Bolivia 2018. The Acceptance Letter provides links to all pertinent documents and I encourage you to read through these documents in detail over the coming weeks. Most urgent and important is to register on-line and to get your initial downpayment into Habitat Global Village as once the majority of the team is registered they will open up the lines of communication between our host in Bolivia and myself so that I can get started on working the budget, getting more details from Bolivia directly and getting some ideas on R&R activities in the area.

I have also attached a sample BIO for myself and would ask each team member to do the same, including a picture of yourselves, and send to me in the next 3 weeks so that I can assemble them and distribute to the team as well as our host in Bolivia as it will help them to get to know the team a wee bit before our arrival.

We will be a team of 18 members up from the previous 15 as I had 16 committed members following the information session. Bolivia agreed to accept up to 18.

Welcome to the team, happy reading and as always if there are any questions please do not hesitate to e-mail me.

Cheers

Marc





# Opportunities

## Step 4 - Preparation

- Payment flow - Address the verbiage and design of the 'Donate to My Own Trip' form.
- Participant resources - Surface content from PDFs and integrate into the site.
- Custom to-do lists - Tie trip prep lists to account & include co-dependencies and deadlines. Deep link to specific PDFs for additional information.
- A new intranet tool: One option currently being discussed is Microsoft Teams.



# Step 5 - Post Trip

# Post-trip engagement

## CURRENT EXPERIENCE

- Nothing - the trip is a 'one and done' experience.
- Attend an alumni event.
- Eventually go on another international build.
- Sign up to receive the email newsletter.
- Follow Habitat for Humanity on social media.

## PAIN POINTS

Alumni are unlikely to get involved with their local affiliate & struggle to see the impact of their international builds after they return home.

## GLOBAL VILLAGE ALUMNI - COME CELEBRATE WITH US!

### Greetings from Habitat for Humanity Greater Vancouver!

Hi there,

Because you are a Global Village participant or team leader, I am reaching out to invite you to connect with our rather large community of local "Habittaters" who have also helped provide homes for thousands of families across the globe.

There are over 800 warm and generous Vancouverites like you who have participated on a Global Village trip somewhere in the world. Personally, my wife and I have been on 3 trips, so we are keenly aware of the life altering perspectives one gains from the GV

# Opportunities

## Step 5 - Post Trip

- **New local content** - Explain how local affiliate work contributes to international work and vice versa.
- **Social media outreach** - Support team leaders in arranging alumni events and sharing local volunteer builds on Facebook.
- **Targeted email communication** - Update alumni about the families and builds from their trips through e-newsletters.



# Corporate Partnerships

# Corporate Partnerships

1. Set the groundwork with a full visual redesign and integration of Corporate Partnerships into the Habitat Canada site.
2. Shift the focus from corporate team building to the varied opportunities for organizations to partner with Habitat Canada.
3. Ensure the site serves as an effective funnel for organizations to get in touch with the appropriate departments at Habitat Canada.



# **The redesigned site will play a dual role: engage with interested organizations & tell the stories of successful partnerships**

**Partnership  
Opportunities**

**Getting in Touch**

**Partner Recognition  
& Storytelling**



# Corporate team building microsite

## CURRENT EXPERIENCE

The corporate partnerships microsite focuses exclusively on team building; there are detailed breakdowns on Habitat Build Days, Build Weeks and Home Sponsorship.

## PAIN POINT

Digitally, corporate partnership opportunities focus too strongly on team building.





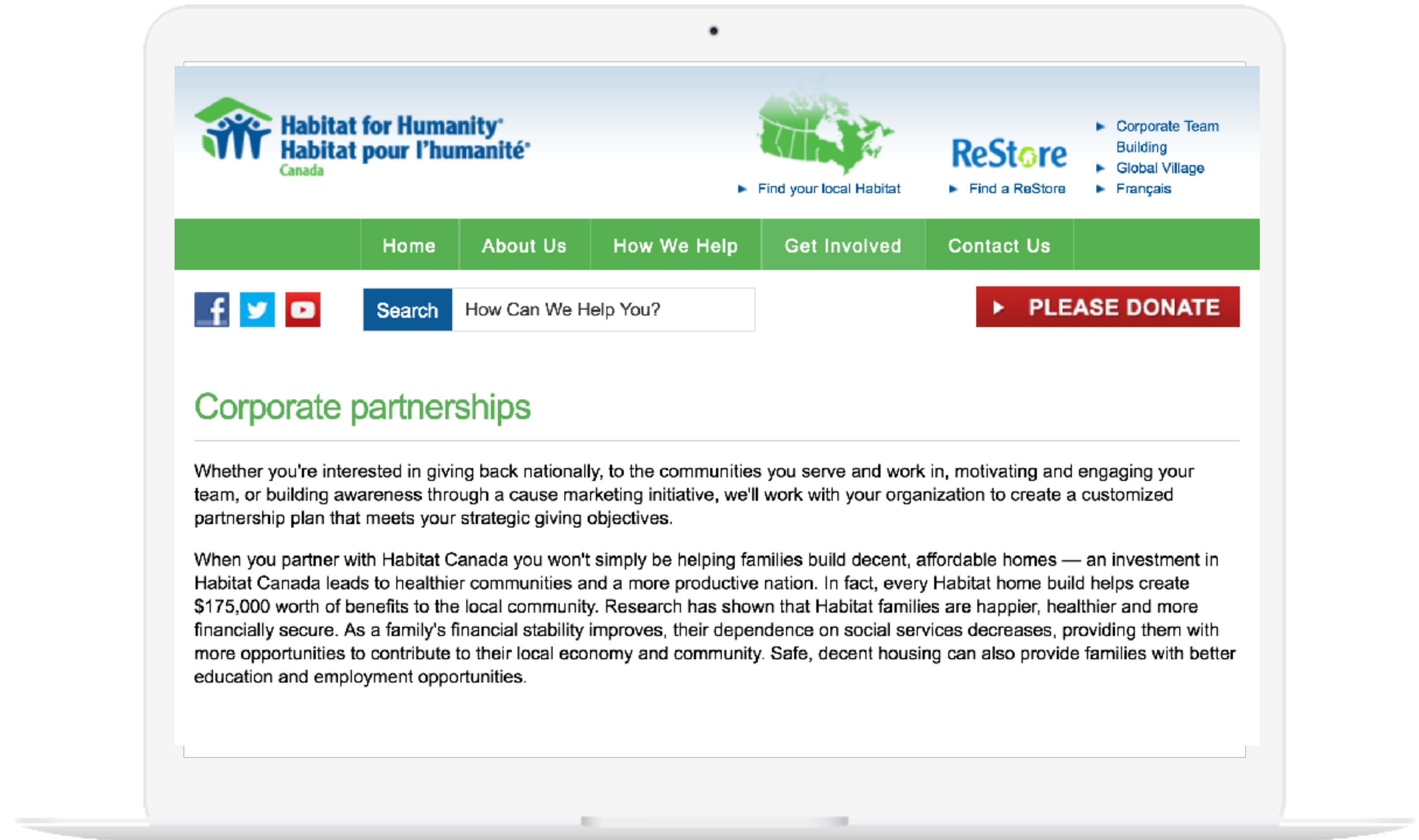
# Corporate partnerships on the national site

## CURRENT EXPERIENCE

The national site contains content under the *Get Involved* section on different opportunities and how to become a corporate partner.

## PAIN POINT

The user experience is fragmented between the national site and corporate partnerships microsite.



# Getting in touch



## CURRENT EXPERIENCE

Each partnership opportunity has a unique phone number & email address on the *Contact Us* page.

## PAIN POINT

Interested partners cannot figure out who to contact at Habitat, depending on the opportunity they're interested in and level of involvement.

# National vs. local partnerships



## CURRENT EXPERIENCE

Corporate partners are directed to contact a local affiliate if they want to do a local build or make a local ReStore donation.

## PAIN POINT

If they want to build across Canada or make a national GIK donation, they must contact Corporate Partnerships directly (which is unclear).

# Partner recognition and storytelling

## CURRENT EXPERIENCE

Habitat Canada recognizes its corporate partners on the *Our Partners* page, where logos for partnering organizations are grouped by tier/amount given.

## PAIN POINTS

- The partners page is not discoverable or sophisticated.
- Corporate partnerships aren't figured prominently enough on the home page.
- The stories of the corporate partnerships are missing from the site.



# Opportunities

## Corporate Partnerships

- **Site Integration** - Integrate corporate partnership content into the Habitat Canada website.
- **Equal weight to all partnership opportunities** - Reposition team building as part of a robust offering, along with ReStore donations, the Meaning of Home contest, Youth Initiative, Cause Marketing, the Indigenous Housing Program & Global Village corporate trips (upcoming).
- **Integrated holistic contact information for lead generation** - If a partner wants to donate to ReStore, include contact information on the Contact Us page, the ReStore page and the Partnership Opportunities page.
- **Website as funnel** - Help interested partners identify the opportunities they're interested in so they can contact the appropriate departments at Habitat Canada, local or national.



# Opportunities Continued

## Corporate Partnerships

- **An elevated partners page** - Go beyond logos and add new content about each partner and how they've supported Habitat Canada.
- **New content for case studies & build stories** - Case studies can highlight innovative partnerships (ex. the Swiffer/ReStore partnership). Corporate team build stories can emphasize employee benefits & brand opportunities.



**Donate**

# Donate

1. Tell a compelling story about how donations contribute to Habitat Canada's mission.
2. Identify opportunities with Blackbaud to address technical issues with donation processing and enhance the donor experience.





# Blackbaud & donation processing

# Tax receipts



## CURRENT EXPERIENCE

Tax receipts are not automatically generated and sent to donors through email after their donation.

## PAIN POINT

The Direct Marketing team has to manually create tax receipts, as the system cannot distinguish between a Global Village tax receipt (with a specific tax code) vs. a tax receipt for a donation.

# Hosting donation forms



## CURRENT EXPERIENCE

Donation form pages are hosted separately by Blackbaud; the user is redirected away from the Habitat Canada website to make a donation.

## PAIN POINT

The donor experience is fragmented and separate from the Habitat Canada experience.

# Styling limitations



## **PAIN POINT**

No flexibility to integrate video and media galleries onto custom campaign donation pages.

## **PAIN POINT**

Blackbaud doesn't support sending e-cards for campaigns.

# System limitations & dependencies



## PAIN POINT

The way that a donation is processed and data is captured can create duplicate records in the database.

## PAIN POINT

The system doesn't allow for A/B testing of different creative assets and landing pages to determine what's soliciting more donations.

# Opportunities

## Blackbaud & Donations Processing

- **Blackbaud API** - Give Habitat Canada the flexibility to deploy, manage and host their donation forms, allowing for form integration or generic donation forms to be integrated directly into pages on the Habitat Canada website and a more seamless experience.
- **Enable the gift service centre feature on Luminate Online** - This will allow donors to see the details of their donations, manage donation preferences (ie. update monthly donations) and access tax receipts.
- **Ongoing** - Work with Blackbaud to address technical difficulties (database issues, dependencies) and identify the feasibility of additional improvements on to donation forms.
- **One Blackbaud platform** - Move all national and affiliate donations on to Blackbaud.



# **Making donations on the national site**

# Why donate to Habitat?



## CURRENT EXPERIENCE

Our user research showed that people make regular, recurring long-term donations to charities that have a familial connection or personal significance to them.

## PAIN POINT

The Donations Department doesn't have enough insight into why donors choose Habitat or their journey to the Habitat national site.



# Campaign donations

## CURRENT EXPERIENCE

Habitat Canada runs fundraising campaigns throughout the year, often in partnership with a corporate sponsor who matches funds raised. Campaigns usually have a landing page and custom donation page on the national site.

## PAIN POINTS

There is overlap between national & local campaigns, in that existing donors might be targeted twice (Habitat is trying to address this duplication issue with kill lists).

**2X THE IMPACT**

You + Hunter Douglas = Twice the value!

**Your donation goes further**

For each house your donation helps build, Hunter Douglas will provide all the window coverings that protect families from the elements

[Donate Now](#)

Like you, our generous partner Hunter Douglas believes in the transformative power of Habitat homes.

Each dollar you contribute toward this special offer is worth twice the value to families with urgent need of affordable homeownership - and we rely on your donations as well as donated building material from partners like Hunter Douglas to make a Habitat home a reality for more families in need of housing.

# Generic donations

## CURRENT EXPERIENCE

The website lists out the different ways a supporter can make a generic (non-campaign) donation:

- One-time or monthly donations
- Donations made in honour/memory of someone
- Legacy gifts, stocks and securities
- Designated donations

## PAIN POINTS

The triggers to make a generic donation on the website are tactical instead of emotionally meaningful.

1 Gift Information 2 Payment Information 3 Review Gift

### Donation Amount

\* Select Gift Amount:

\$50.00

\$100.00

\$200.00

Enter a custom amount

I would prefer to make a monthly gift [Donate Monthly](#)

# Making a designated donation

## CURRENT EXPERIENCE

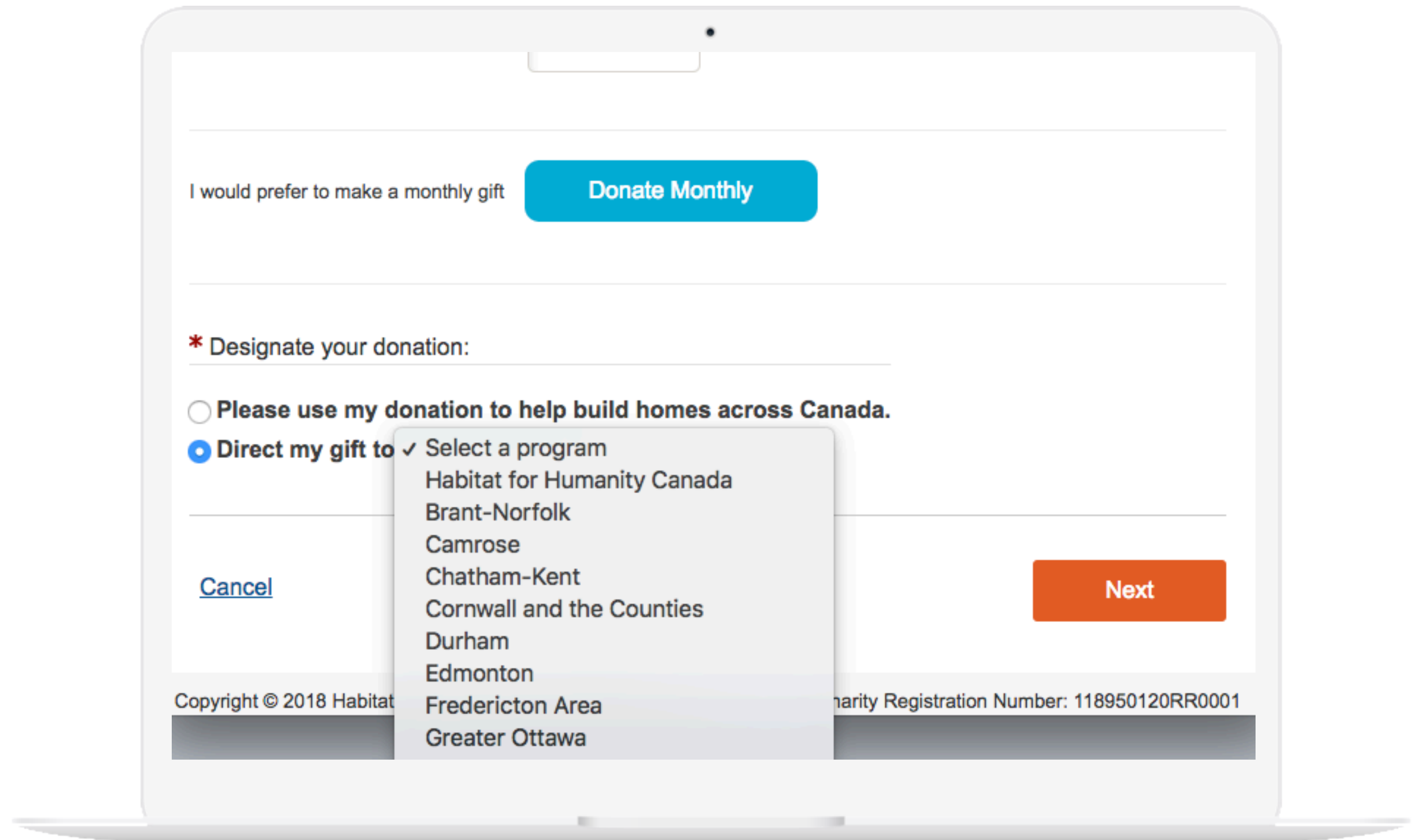
Donations can be designated to:

- Habitat for Humanity Canada
- A local affiliate
- Global Village
- Indigenous Housing Program
- International Housing Program

Habitat Canada takes 20% of each donation designated to a local affiliate on the national site.

## PAIN POINTS

Donors don't understand the implication of designated donations and the dropdown is difficult to navigate.



# Post-Donation Experience

## CURRENT EXPERIENCE

- There is not a 'Thank you for donating' page. The user sees a confirmation page with info submitted through the form.
- Donors don't receive any email communication or newsletters.
- Donors don't receive their tax receipt electronically.

## PAIN POINTS

- Donors don't feel that Habitat Canada is meaningfully recognizing their contribution.
- Donors lack insight into how their donations are being used.
- Donors have to call Habitat to get a copy of their tax receipt.

Transaction Summary	
Transaction Date:	29/05/18
Donation Amount	
Level:	Enter a custom amount
Amount:	
Gift Designation:	Waterloo Region
Address Information	
First Name:	John
Last Name:	Zachariah
Street 1:	
Street 2:	
City:	Toronto
Province:	ON
Postal Code:	
Country:	Canada

# Opportunities

## Make a donation on the national site

- **Analytics** - Continue to optimize the donation experience as we learn more about conversion funnels, why people drop off in the donation funnel and goal data.
- **Form design** - Redesign the 'Thank You' page to better recognize the donor contribution
- **Contextual, time-of-year donation solicitations** - If it's a week before Father's Day, ask potential supporters who visit the site to make a donation in honor of their dad.
- **Transparency & impact statements** - Add new content into the donation flow with specific examples of how donations are used depending on designation, whether it's to support a local build or administrative costs at the head office.
- **Personalized donor newsletter** - Align newsletter content to type of donation made. If a donor contributed to a local affiliate, can the newsletter tell the story of the local build?



**Find local volunteer opportunities**

# Volunteer

1. The redesigned website must help new users understand the federated charity model and the relationship between Habitat Canada and its local affiliates.
2. More effectively funnel users from the national site to their local affiliate if they are interested in volunteering on a build.



# Volunteer at a local Habitat

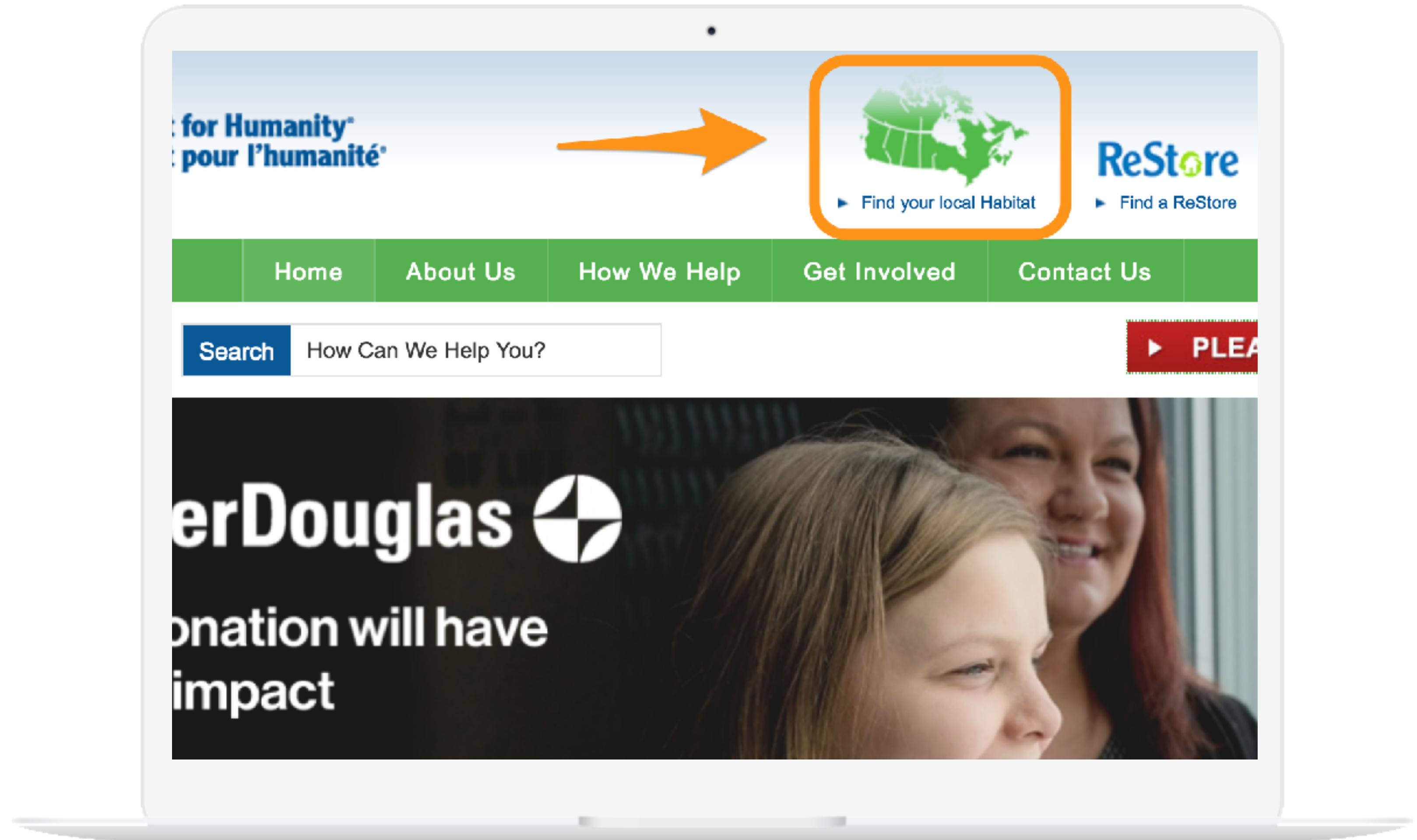
## CURRENT EXPERIENCE

Users can click to find their local Habitat in the global navigation.

## PAIN POINTS

New users don't have a mental model of federated charities. They conceptualize Habitat Canada as a national organization running builds across Canada and are unaware that Habitat has local affiliates.

Because of this, they don't immediately form a connection between the 'Find Your Local Habitat' CTA and local volunteer opportunities.





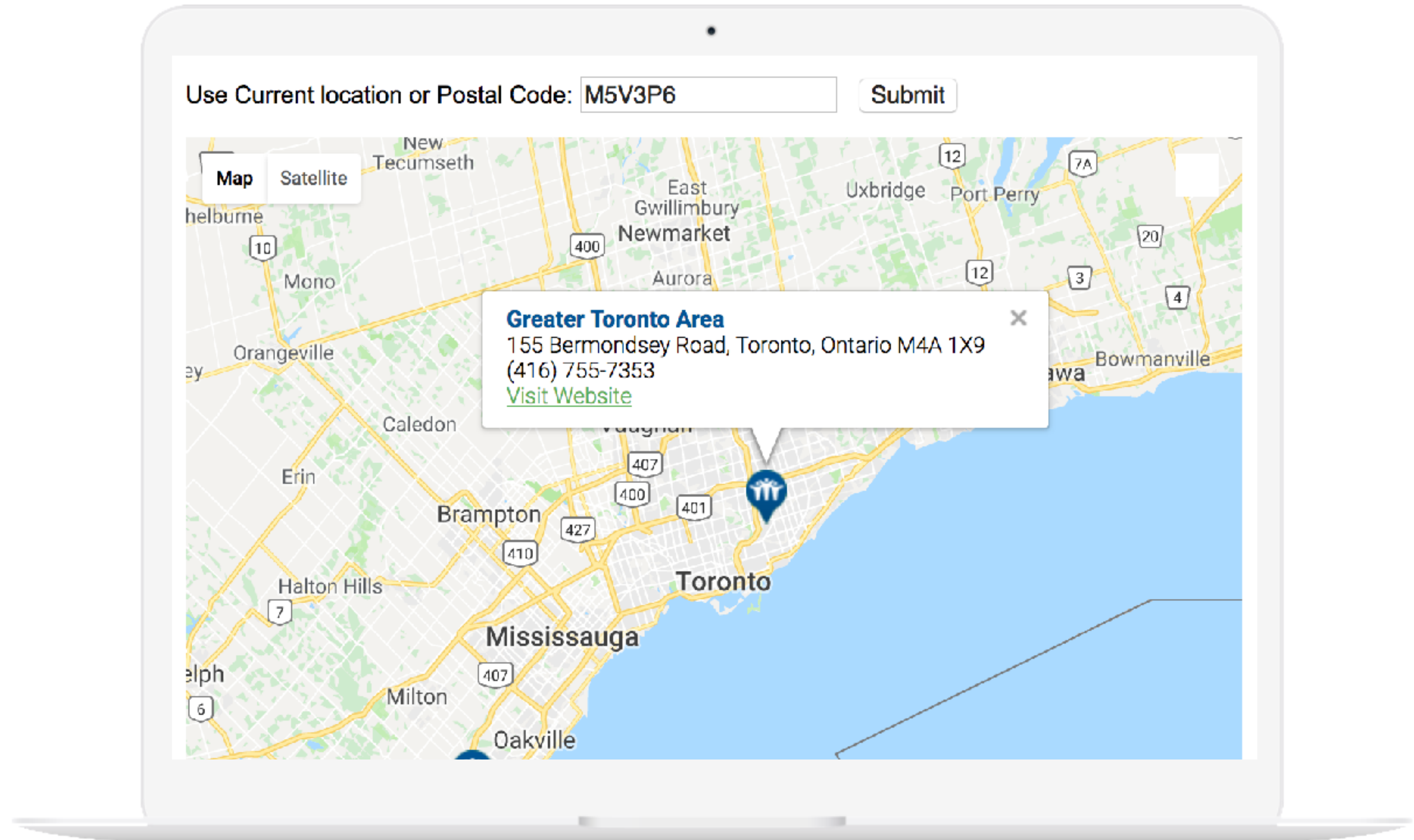
# Find an affiliate by postal code

## CURRENT EXPERIENCE

On the 'Find Your Local Habitat' page, the user can either enter a postal code to look up Habitat locations near them or drill down on a Google map containing all the Habitat affiliates in Canada.

## PAIN POINTS

In the search results, users expected to see a list of builds closest to them. Users did not make the connection that local volunteer opportunities would be listed on the affiliate websites and didn't immediately click to visit, stating they would get on the phone instead.



# Opportunities

## Find Local Volunteer Opportunities

- Add a new section for Locations/Chapters in the main navigation - Tell the story of Habitat Canada's 56 affiliates and what they do as compared to the national office (build Habitat homes, family selection process, etc.) Repurpose the affiliate map as a way to show Habitat's involvement across Canada.
- On the home page, geolocate visitors to their local Habitat - Instead of encouraging potential volunteers to find their local habitat on a map; show their closest Habitat info on the home page. Clearly demonstrate the opportunities available at each local Habitat.
- On the home page, guide visitors directly to specific pages on affiliate sites - Consider CTAs such as "Volunteer in Toronto" that links to <https://habitatgta.ca/get-involved/volunteer-time/> or "View All Toronto Builds" that links to "<https://habitatgta.ca/builds/>"



# Find a Local ReStore

# Find a Local Restore

1. The redesigned national website must better educate users on what a ReStore is and what types of product are accepted as donations.
2. More effectively help users locate their closest ReStore and provide location-specific contact information.



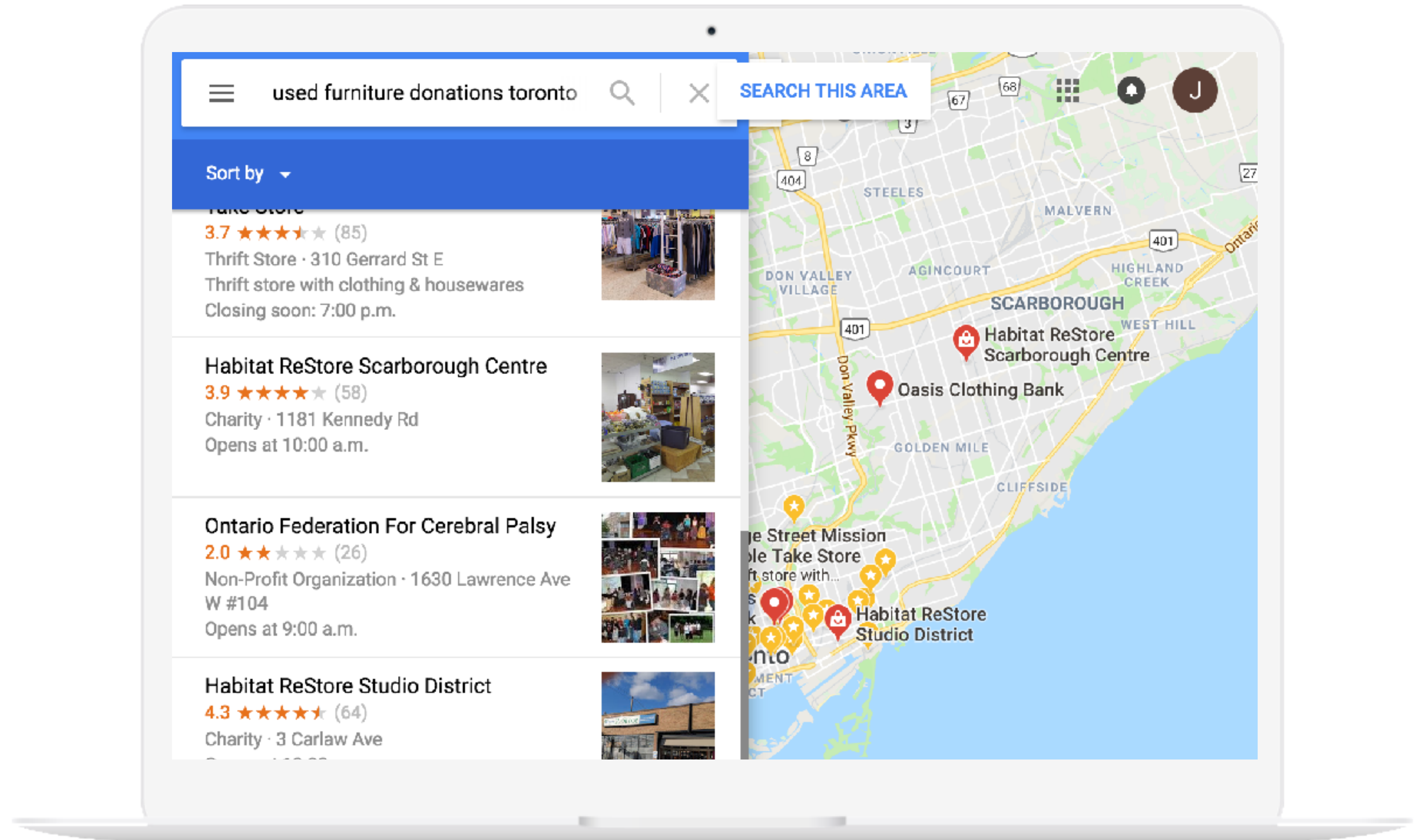
# How are people finding ReStore?

## CURRENT EXPERIENCE

- Google Maps searches
- Familiarity with a ReStore location in their neighbourhood (driving or walking by, etc.)
- From participating in a local build
- Through word of mouth (from a family member, coworker, etc.)

## PAIN POINTS

New users are not always aware of what a ReStore is; it's unclear that it's a place to donate furniture & building materials.



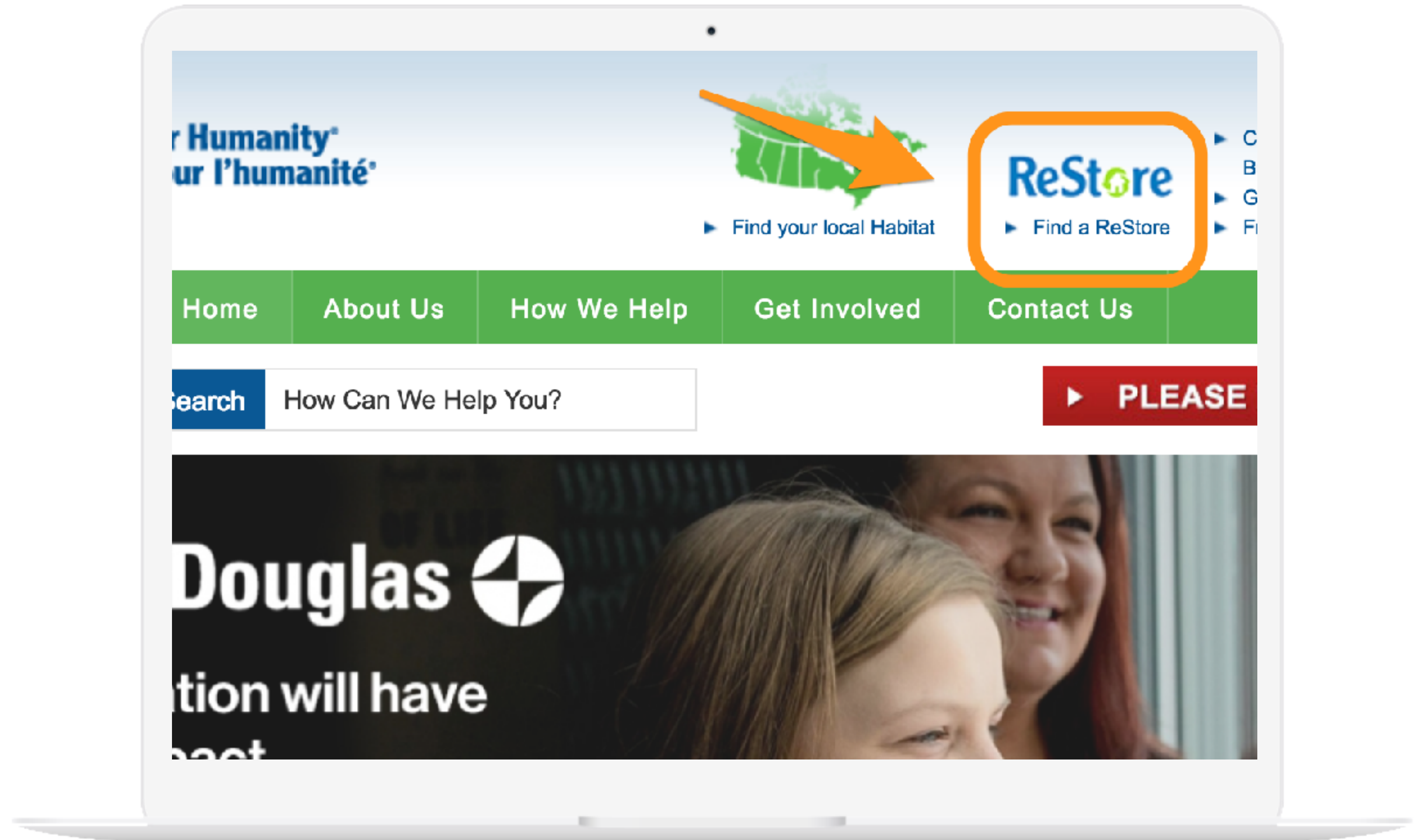
# Find a ReStore from the home page

## CURRENT EXPERIENCE

Users can click to find their local ReStore in the global navigation.

## PAIN POINTS

- Users are struggling to find local ReStore information. The national office gets at least 20 calls a day about how to donate to a ReStore (will you take my grandma's couch?)
- These calls often go to voicemail, and there is a risk that users will go elsewhere (Salvation Army or Diabetes Canada).



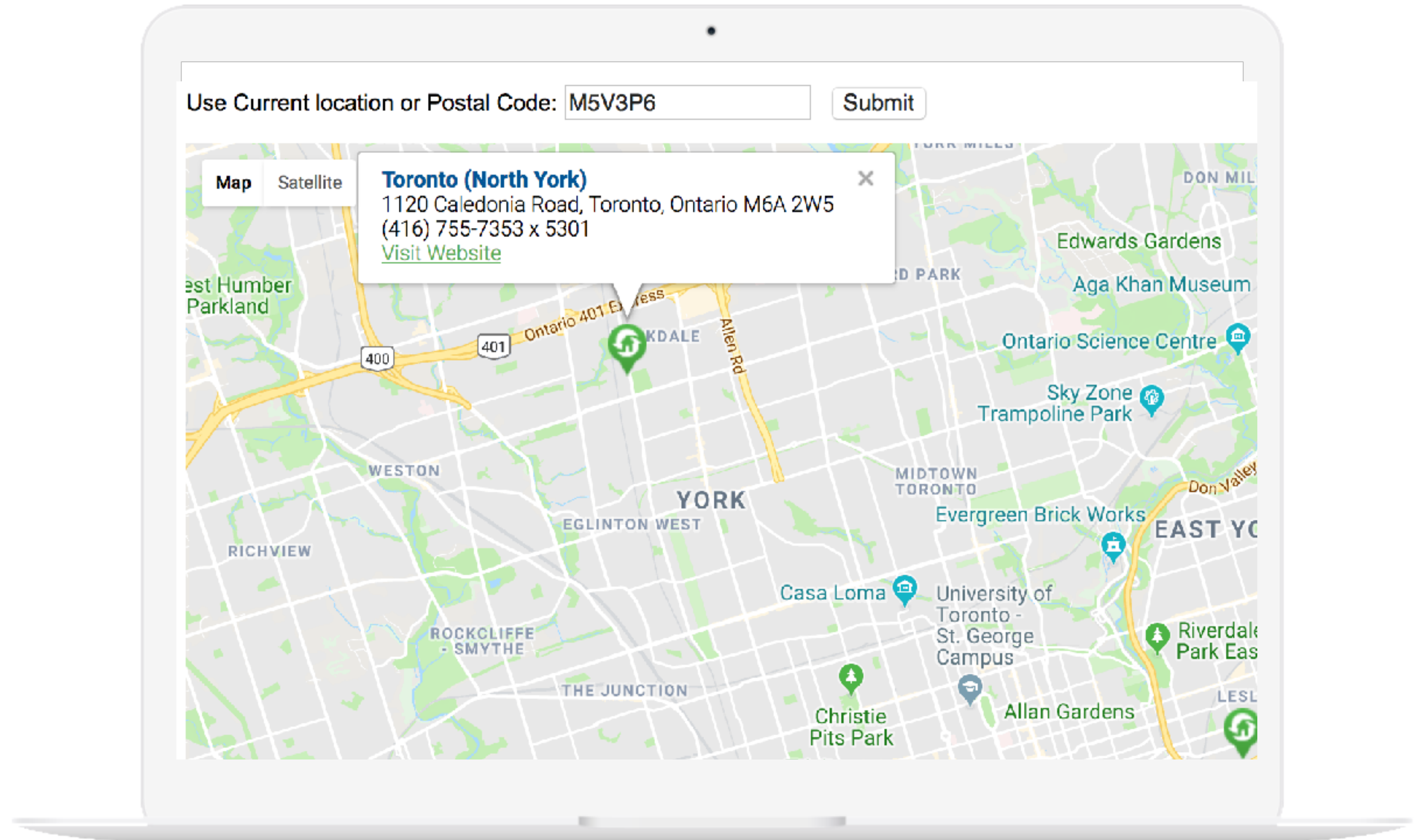
# Find a ReStore by postal code

## CURRENT EXPERIENCE

Users are comfortable entering a postal code to look up a ReStore, as they associate the word 'ReStore' with having a store front.

## PAIN POINTS

- The ReStore map is buried on the ReStore page and the search results are difficult to navigate.
- The contact information and website links are inconsistent: sometimes the contact information is for a local affiliate, sometimes it's for the local affiliate's Restore.



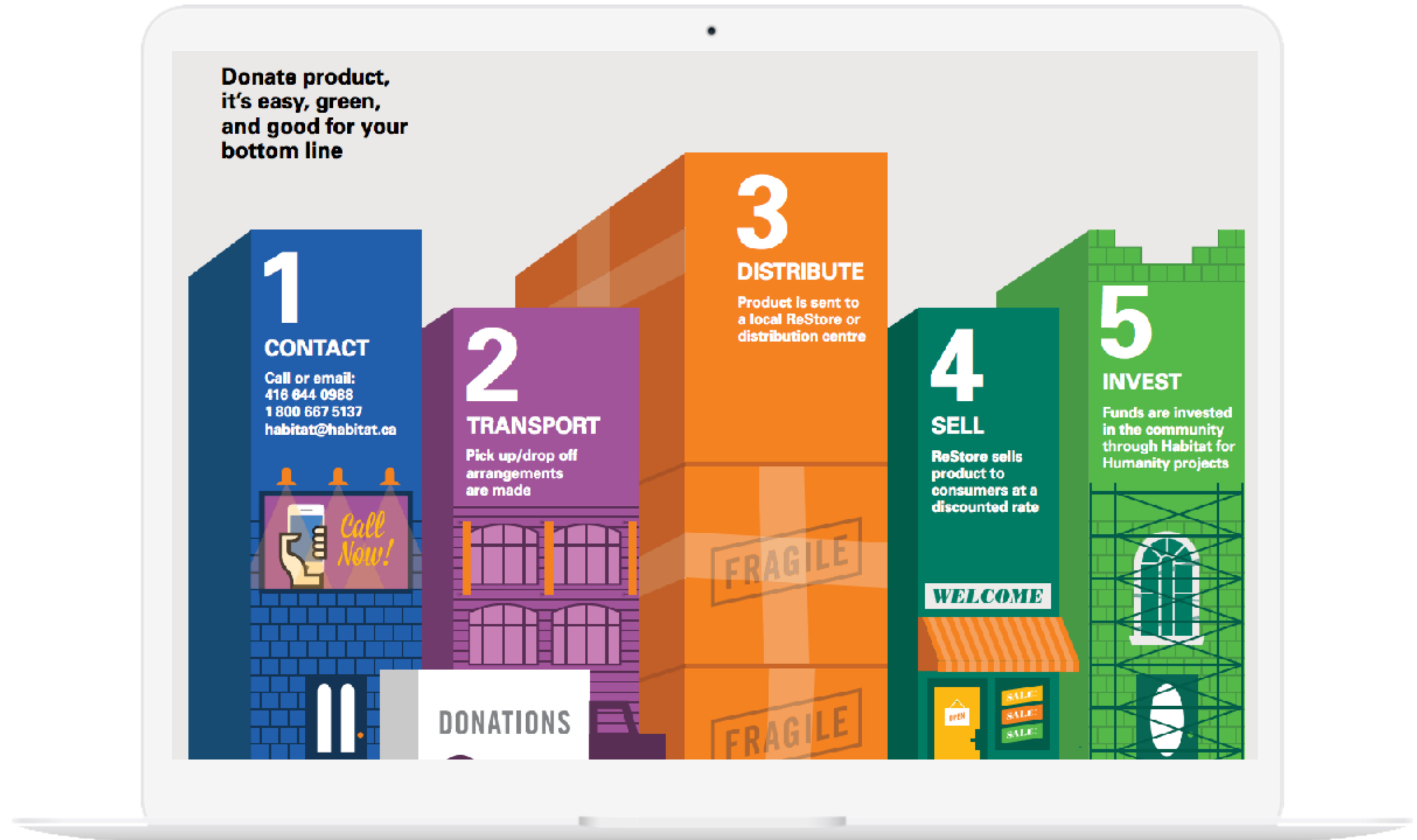
# Learn about ReStore

## CURRENT EXPERIENCE

The national site has a dedicated 'About ReStore' page with introductory copy and a ReStore finder on a Google map.

## PAIN POINTS

- Key benefits of donating to a ReStore are buried in a PDF and not transparent to users (pickups and tax receipts for donations)
- Users need more guidance about what donations will be accepted.





# Opportunities

## ReStore

- Better communicate what ReStore is on the home page & ReStore section - Focus on the types of inventory ReStore accepts and opportunities to volunteer at a ReStore.
- On the home page, use geolocation to show users their closest ReStore - Offer the opportunity to find a different location if they're interested (very similar to a store finder).
- Revisit the site IA and navigation to guide users in actionable ways - For example, "Donate furniture & building materials" instead of "Find Your Local ReStore".



# Opportunities, Continued

## ReStore

- Ensure that all search results for the ReStore locator are ReStore specific.
  - Display phone numbers for ReStore locations, not affiliates.
  - Directly link to ReStore pages on affiliate sites.
  - Rename titles for extra clarification (Barrie ReStore vs. just Barrie).
  - Add new content to the ReStore search results, such as direct email contacts (ex. donations@habitathuronia.com) and store hours.



# 2018/2019 Opportunities & Timeline

# Phase 1 of the redesign will build a foundation and includes the following for 2018:

- CMS replatform/redesign & new publishing workflow
- Pattern library & content creation guidelines for affiliates
- Consolidation of Habitat Canada, Global Village & Corporate Partnerships into one site
- Geolocation for local ReStore & Affiliate information
- Enhancements to the affiliate and ReStore maps
- New navigation & site architecture
- Analytics strategy
- French version
- Responsive across desktop/tablet/mobile
- Meets accessibility guidelines
- Links to Meaning of Home



# Out of scope for 2018:

- Digital Asset Management
- Shared CMS components for affiliate sites
- Replatform of all affiliate sites to one CMS
- All affiliate donations moved to Blackbaud platform
- Interactive map with past and current builds

# Content Opportunities

Tribal has identified a number of content opportunities to tell stories about donations, corporate partnerships and Global Village trips on the national site.

While Tribal will be responsible for creating the CMS content components as part of the 2018 redesign, Habitat Canada will be responsible for all net-new content creation and authoring.



# Content opportunities for 2018

<b>Donate &amp; Volunteer</b>	<b>Corporate Partnerships</b>	<b>Global Village</b>
How ReStore works and what products they accept	Stories about corporate partnership: team builds and innovative campaigns	Surfaced content from PDFs in Participant Resources section
Tactical ways that Habitat uses financial donations	New content about other corporate partnership opportunities	Practical trip content on destination, what to pack and trip costs etc.
Contextual, time-of-year donation solicitations on the home page	Stories about existing partnerships and how they've supported Habitat Canada	Stories about families helped by Global Village builds
A new section on the relationship between Habitat and its affiliates	Integrated holistic contact information for lead generation	A new section about the regions where Habitat builds across the world
		How local affiliates contribute to international work



## 3rd Party Dependencies

Tribal has identified a number of opportunities for the Donations and Global Village section that are dependent on 3rd party integrations.

The following opportunities are out of scope for the 2018 redesign. However, we understand that there is an appetite for this work and are currently talking with Blackbaud to cost out these opportunities.





# Opportunities dependent on a 3rd party

## Donations

Blackbaud API for donation form integration on the Habitat Canada site

Enabled gift service centre in Luminate Online to handle donation preferences & electronic tax receipts

Addressing additional technical difficulties (database issues, dependencies) and feasibility of visual redesign of generic donation forms

Personalized donor newsletters, especially for monthly donors

## Global Village

A new intranet tool for collaboration between team members & leaders

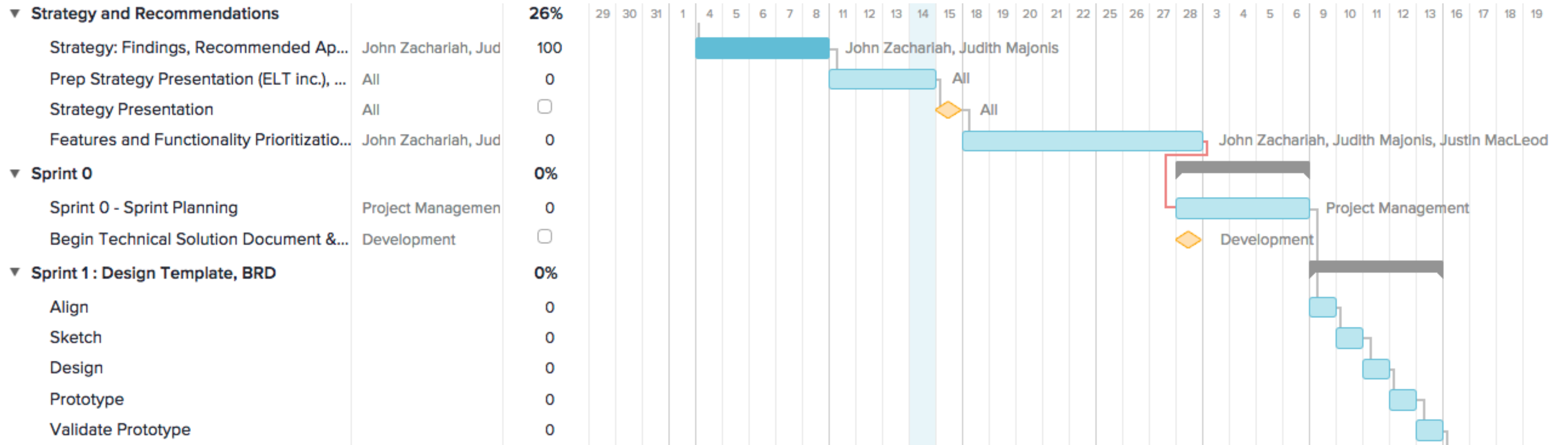
Trip application behind a login & account management

Redesigned application flow & forms, including handling for closed trips and the post-submission experience

Personalized alumni newsletters with updates about builds & families from their trip



# Project timeline



# Next Steps

# Next Steps

1. Tribal to facilitate a prioritization exercise with key Habitat stakeholders to finalize the opportunities for Phase 1 of the redesign.
2. Tribal to continue discussions with Blackbaud to clarify opportunities for Global Village and Donations.
3. To prepare for the design sprints, Tribal to begin work on:
  - BRD with all functional requirements
  - Proposed site map
  - Technical solution documentation
  - CMS recommendation

