Helping a Million Donors Choose: Online Search in the CFC



A Report in a Series on the Combined Federal Campaign A MILLION DONORS CHOOSE

WORKPLACE GIVING ALLIANCE

May 2013

Workplace Giving Alliance 125 Washington Street, Suite 201 Salem, MA 01970

Helping a Million Donors Choose: Online Search in the CFC

This report was researched and written by the staff of the Workplace Giving Alliance*, whose opinions are expressed herein.

May 2013

* The Workplace Giving Alliance is a trade-name for Human & Civil Rights Organizations of America, Inc. The Alliance includes 12 federations that share administrative staff to provide services to over 500 notfor-profit organizations in the Combined Federal Campaign and in state and municipal fundraising campaigns.

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A Word of Thanks

A number of volunteers have helped us with this project. Our special thanks go to Jeffrey Federico and Mark Lyons, WGA federation board members, and to Charles Turner.

May 20, 2013

Dear Colleague:

We release this report at a time of major change for the Combined Federal Campaign. The Office of Personnel Management has proposed new regulations to govern the CFC, and understandably many of us are spending much time digesting what the government has suggested and offering our comments.

Whatever form the final regulations take, the CFC is clearly entering a new phase of its life reflecting the advent of the digital age. One key element of this new world is online search. As we say in our report: If the CFC gets this right, much else will go well. But, if the CFC handles online search poorly, the campaign and those who benefit from the generosity of federal employees will suffer.

We identify ways that the CFC can strengthen its use of online search, but we do not claim to have all the answers. Our object is to create a dialogue about search within the CFC community. Our hope is that all of us can design a system that will engage and serve donors and lay the groundwork for years of growth within the campaign.

We look forward to your ideas.

Sincerely,

Marshall Strauss CEO, Workplace Giving Alliance

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Executive Summary

The Combined Federal Campaign is going digital. Online pledging has clearly arrived, with many donors now using such systems.

The government strongly supports this move toward a Web-based CFC. Indeed, in draft regulations released in April 2013, OPM proposed the end of the print directory.

If the CFC is to succeed in this brave new digital world, the program will need to substantially improve a key element of its operation: online search. Handled well, online search can help the CFC flourish. Implemented poorly, it may seriously undercut the campaign.

Earlier this year we surveyed the websites of the top 30 administrative zones of the CFC. The search tools we tested varied widely in their effectiveness, and this report discusses a number of ways that many current search tools fall short of common performance expectations.

This report also explores two approaches to online search widely used in both the commercial and notfor-profit worlds: *faceted search* and *keyword search*. Faceted search relies on categories that enable website visitors to navigate rapidly through a large body of data, narrowing their focus until they reach their desired object. Keyword search allows visitors to find objects based on terms, or *tags*, assigned to those objects. We believe either approach could complement or even replace the search functions that the CFC has implemented so far.

For half a century, the CFC has used a print directory to provide users with their donation choices. Over time, CFC administrators developed ways to ensure equity among the participating charities – in effect ensuring that no charity has a continuing unfair advantage over others. Now as the CFC moves into the digital world, maintaining that equity presents added challenges. For example, new systems must make sure that no charity is "overlooked" because a search tool fails to find it. Like all other aspects of the CFC, search systems will need to be designed transparently so that stakeholders understand the rules.

We believe that the performance of online search can make or break the credibility of the campaign. Donors are unlikely to view the CFC as an attractive giving method if the tools available to find charities are clumsy and non-intuitive.

Our report ends with a challenge: We invite everyone to visit CFC websites this summer and fall and test the campaign's search tools. Together, we can develop an online search system that serves donors and charities alike, and takes advantage of the opportunities offered by the digital age.

Chapter One: The Current CFC System

Search is not new to the Combined Federal Campaign. For many years, CFC donors have been searching for charities using a well established medium with which we are all familiar: print. Put less pretentiously, donors have been flipping through a paper directory.

In recent years, the picture has become more complex as donors have also been able to use CFC websites to look for charities to support. The paper directory still has the upper hand, but federal employees are shifting rapidly to the online world.

In this report, we describe how online search tools are now being used in the CFC, and we recommend ways they can be more effectively employed. But to understand these newer tools, we believe it important to also understand the "legacy" system. So we start there, focusing briefly on the system that has been in place for decades.

Our review of the current system actually begins with the campaign's local administrators since they publish both the print directory and website for each zone of the campaign. Once we have set our context, we touch upon changes that the government is proposing to this system. They are changes that will very much shape how future CFC donors will find charities they wish to support.

Local Administration within the CFC

The Combined Federal Campaign is administered across the country in geographically defined zones. Over the years, the government has been urging zones to merge, but there are still about 180 of them.

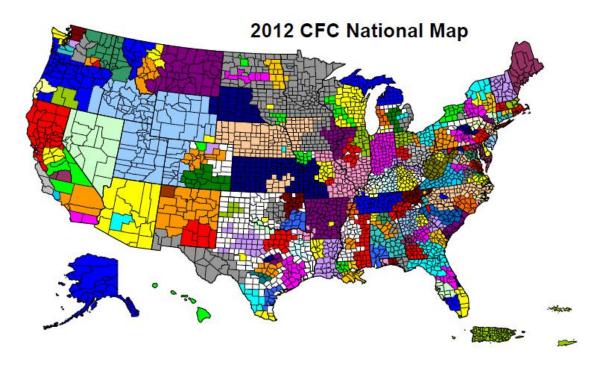
Government regulation assigns the day-to-day responsibility of running the CFC to community-based organizations called Principal Combined Fund Organizations (PCFO). Some PCFOs manage extensive portions of the country involving more than one state while others manage more densely populated areas that cover less geography within a single state. A PCFO is also assigned to run the CFC overseas, reaching the many government employees who are working abroad, in particular the military.

By regulation, the PCFO must be a 501(c)(3) tax-exempt organization and must be audited annually and governed by a board of directors. Local federal volunteers oversee the PCFO in each zone of the CFC.

The PCFO zone system is central to how donors search for charities. Each PCFO publishes a printed directory which includes all of the national and international groups participating in the CFC that year – and the local charities eligible in that specific zone. We discuss these print directories in a moment.

As noted above, PCFOs also manage individual websites, which usually include a search function. We discuss how widely these search functions vary in chapter 3.

Below is OPM's map of PCFOs for the 2012 CFC.



The Current System: Print and Websites

Each year, about four million employees are invited to participate in the CFC. In the fall of 2012, about 850,000 employees did so.

In each zone of the CFC, as noted, federal employees receive a printed directory that lists every eligible national and international organization plus the many local groups that have qualified in their local community. The size of the directory varies, reflecting the number of local groups, but the "book" commonly runs to more than 100 pages.

Pledge cards are distributed to employees who are advised that they each can pick one or more charities from the list of qualified organizations and pledge to each one. Federal donors may make a one-time cash donation, but most employees authorize their payroll office to withhold a fixed amount each paycheck.

A key aspect of the print system is that no charity be favored year after year by virtue of its position in the book. The directory's long list of eligible charities is broken into three sections: national, international and local. To minimize any potential visibility advantage, the CFC rotates the three sections each campaign year. So, if international groups are first in one year, the next year they fall to the middle of the directory, and then fall to the back of the book the year after that.

Within each section of the book, the order of the national and international federations is also randomized every year. Some charities, of course, elect not to affiliate with a national or international federation. The international *Independent* charities are treated collectively as one more "federation" for purposes of the annual randomization in the directory. The same is true for national Independent charities.

We focus on the directory because, as we will discuss later, even a print system allows for search. And, how that search has been handled becomes the backdrop for any online system that might come.

Below are images from CFC charity directories – the legacy search system.

A table of contents



THE CFC: ITS STORY AND ITS MISSION
ARIZONA COMBINED FEDERAL CAMPAIGN INFORMATION.
INTERNATIONAL ORGANIZATIONS
Jewish Aid Worldwide: America, Israel, and Beyond, Inc.
Child Aid International
International Independent Organizations
Global Impact
Do Unto Others
Aid for Africa
Build a Better World
LOCAL ORGANIZATIONS
Local Independent Organizations
United Way of Tucson and Southern Arizona
Community Health Charities of Arizona
Animal Welfare Fund
Minina weater fund
Valley of the Sun United Way
NATIONAL / INTERNATIONAL ORGANIZATIONS
Sports Charities USA
Women, Children, and Family Service Charities of America
Wild Animals Worldwide
EarthShare
Arts Federation
Conservation & Preservation Charities of America
Jewish Charities of America
Community Health Charities
Military Support Groups of America
Charities Under 5% Overhead
National Black United Fund
AIDS Global Action
National/International Independent Organizations
American Red Cross
Christian Charities USA
Aging and Disabilities Charities of America 47
CancerCURE of America
Animal Charities of America
Human Service Charities of America
America's Charities
Human & Civil Rights Organizations of America
Children First – America's Charities
Charities Under 1% Overhead 55 Military Family and Veterans Service Organizations of America 55
Mental Health and Addiction Network
United Service Organizations
Children's Charities of America
Children's Medical & Research Charities of America
Educate America!
Human Care Charities of America
Christian Service Charities
Peace and Reconciliation Charities
Health & Medical Research Charities of America
Health First – America's Charities
Hispanic & Latino Charities of the U.S. and the Americas
Child Aid USA
Medical Research Charities
INDEX OF CHARITIES



2012 Arizona Combined Federal Campaign

330 N. Commerce Park Loop, Ste 200 Tucson, Arizona 85745 520-903-9000 | ext. 255 or 235

www.cfcaz.org

Information about the CFC is also available at the local CFC website shown above.

A page from a directory.

- Fish & Wildlife Foundation (202)/857-wnfwf.org EIN#521384139 Established by , NFWF is the leader in directing federal protect wildlife and natural resources while ivate capital to leverage those in vestments. on Jollars v raising priv 5.8% C,D
- Forest Foundation (406)542-2805 www. prests.org EIN#521786332 Improving the 1205 nationaltorests.org EIN#521786332 Improving the health, productivity, and diversity of our nationa forests and grasslands through wildlife habitat watershed restoration, recreational and community-based forest ograms. 5.4% C,S
- National Parks Conservation Association (800) 528-7275 www.npca.org EIN#530225165 Preserver national parks from the Grand Canyon to Gettysburg protects endangered wildlife and cultural sites promotes new notes 12071
- al Resources Defense Council (212)727-2700 nrdc.org EIM4132654926 MDC defends tted wildemess, rivers, clean air, coasts and a across America and around the globe. Saved whales, Canada's Spirit bears, and Californide kas. 14.8% C.D.Z.
- 86.14.2% CU2 Conservance, The (703)641-5300 www. org ENNF330242652 Buys and protects land o our world's rare plants and animals from ion. Over 119 million acress protected -ests, prairies, wetlands, mountains, beaches.
- Deean Conservancy (800)519-1541 www.ocean conservancy.org EIN#237245182 Through research, dducation and science-based advocacy, Ocean conservancy informs, inspires and empowers worph to speak and act on behalf of the oceans. 55 49. C P. S. people to sp 25.3% C.D.S 10 051
- Decana, Inc. (202)833-3900 www.oceana.org EIN#510401308 Works internationally to protect Inte. (202) piss-3900 www.ocean.org 20108 Works internationally to protect difieand human health through programs une vibant, health yocean. 17.9% C.D.O. Fund, The (800) 377-3716 www. und.org [1HK231989973 Saves eagles, falcons, and other endangered birds research, beeding, and conservation Helps preserve rainforests. Educates diadus about nature and science. 12.8%
- D.B C.D.B Pesticide Actian Network North America (Pesticide Action fretwork North America Regional Center) (415)891-1771 www.panna.org ElM#94294966 Working to eliminate poisonous pesticides. Links consume, labor, health, environment and agriculture groups intermitionally to advance series, ecologically sound pest control alternatives. 12.4% K.C.R 11437
- sound peet control alternatives, 12-4%, KC,H Physicians of Scienci Respansibility (220):667-4260 www.pstorg EIMP2370569731 Guided by the values and experite of meliche and public health, PSR works to problec human life from the gravest hiterast to health and varival 18-9% C,M,O Rails-to-Tails Conservemeng (86):(22-9788 www. railstortails.com) 2475/127006 Convert thousands of miles of unseed alterad controls the public individual controls in the public hostication. All strains (2003):(2003): conservemeng (86):(22-978) hostication. All strains (2003): conservements (96):(2003): hostication. All strains (2003):(2003): conservements (96):(2003): hostication. All strains (2003):(2003): conservements (2003): hostication. All strains (2003):(2003): h
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- . one America's Estuaries (703) 524-0248 www. nies.ong EIN#541965304 Works to preserve the is network of estuaries by protecting and ing the lands and waters essential to the ess and diversity of coastal life. 6.3 % C,S,B

- Hiver Network (503/241-3506 WWK/tremetwork org EN#3069999 Provide state, regional and local partner organizations throughout the US with technical training, direct consultation, publications electronic networking and events (annual National River Pally), 28.0% C,S,W River Hally). 28.0% 0,5,1W Rocky Mountain Institute (970)927-3851 www. rml.org EIN#742244146 We drive the efficient and restorative use of resources to create a world thriving, verdant, and secure, for all, forever. 25.3% 11438
- W nic America (202)638-0550 www.st #232188166 Safeguards Americal uty and community character by yoard blight, reducing visual isecting open space, and preserving i racter of public lands. 23.8% C,S,W
- Lierra Club Feandatien, The (20)(216-2110 www.scf.org EIM/94/2009/990 Fights to preserve sidemess and protect environmental guality worldwide through a powerful combination of ducation, scientific research, publishing and tigation. 12.3% C,RW
 - nt Conservation Association, The (603)543 www.theSCA.org EIN#910880684 The onl al organization building new correct 10 www.theSCA.org EIN/491088068 iconal organization building new gen iservation leaders by engaging colle isof-age individuals in hands-on servi ests and communities. 15.6% C,N,O
- Surfrider Foundation (800)743-SURF www.surf rider.org EIN#953941826 Protects and preserves the recruing LINF+535417826 Protects and preserves the world's oceans, waves and beaches through conservation, activism, research and education Activities include: water quality monitoring environmental education and grassroots activism. 20.5% C,S,T
- 20.5% C.S. T Sustainable Harvest International (207)669-8254 www.sustainableharvest.org E1N#432023182. Pro-vides faming families in Central America with the training and tools to restore our planet's tropical forests while overcoming poverty. 21.8% C,K,S 11440
- forests while overcoming poorty 21.8% C.K.S. Transf for Pablic cand., Tee (80)717-14.AUD wow, tipLorg ENR237222333 The Trust for Public Land conserves land for poople to enjoy as parks, gardens, and other natural places, ensuinting leaded commanilies for generations to come. 13% C.S. Union of Cencerned Scientists (80)668-627 Union of Cencerned Scientists (80)668-627 CBMV as a stransfer of the Vision of the Scientists and Charane working on exclusions to induce all pobliciton unclear proferencies, and ensure a sustainable, safe food system, 13.0% U.C.D.
- food system. 13.0% U.C.0. WILD Found ation (International Wildemess Leader-ship Foundation) (303)442-8811 www.wild.org ENR237308749 Probesting wilderness and wildlife internationally while helping communities participate in and benefit from wild nature through on-the-ground field projects, policy and research and communications. 85% C.D.2.
 - communications. 8:4% C,D,S Wilderness Saclety, The (800)THE-WILD www. wilderness.org ERM=50167303 Works to protect special wild places from development so that future generations will have the opportunity to enjoy America's natural heritage. 20:2% C,D,W
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- seconomy programs. 19.9% (20,8 World Resources Institute (202)/729-7600 www. writing EIN#521257057 A global environmental think tank providing independent research, policy analysis, and on-the-ground solutions to protect Earth's environment and its people. 16.7% C,U,S World Wilder Earth's Earth Second Solutions to the second 12072 World Wildlife Fund (202)293-4800 www.world wildlife.org EIN#521693387 Multinational con
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- 10.6% 8,8,9 Associated Services for the Blind Inc. (215)6 0600 www.asb.org ENM231370500 ASB promu-seff-esterm, Independence, and self-determina among people who are blind or visually impa through its programs and services and commu-action. 32,5% PEF
- autoin. 32.5% PEF Braille Institute of America (323)906-3108 www. braileinstbute.org EIN#951641426 Independent nonprofit organization whose mission is to eliminate barriers to a fulfilling life caused by bindness. and severe sight loss. All services are free. 18.7% B.E.P.
- Braille Press, National (617)266-6160 www org EIN#042104740 Only 20% of blind ch learn to read and write. Help promote early literacy and produce braille books for blind re of all ages. 36.6% P,0,W 25435
- Carroll Center for the Blind (800)852-3131 www carroll.org EIN#042106173 Provides blind/visualt 3092 carroll.org EIN#042106173 Provides blind Impaired children and adults the skills t independent, self-sufficient life through er rehabilitation, cane travel, computer/job trai 19.1% P,J,E
- 19.1% PJ,E Center for Children, New England (508)481-1015 www.MECC.org.EIN4042708/762 Autism, the fastest-growing developmental disability, occurs in 1 out to every 110 biths. We educate children with autism helping them live to their potential. 10.5% B,G,P 44428
- 49454 Disability Rights Advocates (510)665-8644 www dralegal.org EIN#943189313 Advances rights of
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- underment. 32.37% E1,19 Help the Helpless (800)762-8857 www.helpthe helpless.org EIM-411878721 We provide care, education, and izve to abandoned, handicapped deal, and poor children at Sk Mary's School and Orphanage thus beaking the cycle of poverty. 4.5% LBX 61020
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Chesapeake Bay – Prominent homepage search link



Atlantic Coast – Search box on homepage



NorCal – No apparent search links, though both Employee Express and CFC Nexus include a search function



In recent years, the list of eligible organizations has been published on CFC websites as well as in print. On these sites, employees are invited to search for charities of interest and to make their pledges online if their local zone has an online giving system. More donors use these online tools every year. What we don't know is the degree to which donors have been "splitting" their media – such as using the traditional print directory to find charities and the online sites to pledge.

On the left are images that show invitations to search the charity list on various CFC websites. We discuss the websites and their use of search more substantially later in this report.

About Employee Express and CFC Nexus. Employee Express (EEX) is an online system that allows employees in certain government agencies to manage various payroll and benefits options. Employees who use EEX can pledge to the CFC through it, and we understand there is a way to search for charities through EEX. We were unable to access EEX because it requires log-in. However, by design, it can never be the most accessible search option on a CFC website because an employee must leave the website and log into EEX in order to use it. The majority of government employees do not use EEX.

CFC Nexus is a proprietary system that is publicly available on many CFC websites, including two-thirds of the sites on which we conducted our test searches. We discuss those searches later in this report.

Proposed Changes to the CFC Structure

The CFC operates under the regulatory supervision of the U.S. Office of Personnel Management (OPM). In early April 2013, OPM released draft regulations that will, if adopted, substantially change the CFC's administrative structure. Here are some key changes that will affect how search is handled:

- 1. OPM proposes to replace the current system of PCFO-administered zones with a new system based on Regional Coordinating Committees. The number of new zones and their boundaries will be set by OPM.
- 2. OPM proposes to consolidate much of the administration of the CFC, assigning back-office tasks currently managed by PCFOs to one or more Central Campaign Administrators. The Central Campaign Administrator(s) will be charged with developing and managing a unified website that will support the CFC nationwide. Among other functions, this website will publish the list of eligible CFC charities and allow donors to search for charities they wish to support.
- 3. OPM proposes to eliminate the print directory and print pledge cards.

In short, the government proposes a much more centralized administration and the elimination of paper processes. The latter will be replaced with new Web-based systems. Inevitably, search will be central to the success of this new system.

Chapter Two: A Brief Introduction to Online Search

We turn now to online search. Before diving into how the CFC has been deploying search tools, we believe it will be helpful to discuss briefly some of the major categories of search used in the wider digital world. We will touch on three forms, each of which may have some utility for the CFC:

- Indexed search
- Faceted search
- Keyword search

Search in the digital world is a large and constantly evolving field, of course. The descriptions that follow are not exhaustive but are designed merely to orient the reader.

Indexed Search

Looming over the Internet and every attempt to tackle search is the market leader: Google. From our perspective as users, the service is simple, fast and effective. Others compete with Google, of course, but the idea of a Google-like box often is what comes to mind when anyone raises the challenge of bringing online search to the digital CFC. It is the most prominent example of what is often called *indexed search*.



Whether the search engine is Google or Bing or Yahoo or some other competitor, these systems operate in generally the same way. The search engine "crawls" the web, creating an index of terms and pointers to the locations of these terms. When someone initiates a search by entering one or more words into the search box, the engine reaches into the index and returns links the magical algorithm has decided are relevant. (Google and other engine owners may argue that this is not magic, but ...)

In the case of Google, the search interface is essentially a blank screen with a box in the middle. No instructions are provided. There are two buttons under the search box that do nothing until something is typed in the box. When text is entered into the Google box, something will always be returned. It is very rare for a Google search to return an empty result. Even if a slip of the finger leads to a non-existent word, Google attempts to determine the intent. Google also treats alternate spellings of words as equivalent – like "theater" and "theatre" – and it ignores things that people often ignore or get wrong such as punctuation. It also recognizes alternate forms of search terms. For example, a search for "disability" will find "disabilities."

The ways described above of handling search terms are achievable with readily available software, some of it open source. Google and its competitors do much more, of course, and we do not suggest that CFC online search tools need to imitate all their functions. In fact, we believe that they do not. These search engines are designed to search the entire World Wide Web, which is vast and constantly changing. The CFC charity search universe is tiny and stable by comparison. Still, it is important to acknowledge that

presenting CFC donors with a search box is likely to evoke expectations of a Google-like search experience.

We should mention that search results on Google and similar systems are ordered according to the rules that underlie the engines' operations, some of which have to do with popularity or an engine's assessment of site quality. Google and others are, of course, trying to ensure that the results of a search are relevant to the individual who is searching. It is an approach to ranking which, if not addressed carefully by the CFC, can lead to search results that do not mimic the order of the print directory.

As we will discuss later in this report, Google-like boxes have become common on CFC websites. As we shall also see, their performance can disappoint – in part, we suspect, because potential CFC donors have been trained to expect a Google-like result, which they do not receive.

Faceted Search

A second approach to online search is almost as familiar as the Google search box. Known as *faceted search*, it is widely used on e-commerce sites. Some non-commercial sites such as libraries also apply this method.

The hallmark of faceted search is that it invites visitors to begin by choosing categories, or facets, to narrow the search universe and exclude non-relevant results. For example, to search Amazon.com for a recently published book on drawing for a four-year-old child, one would begin by choosing Books (more than 100,000 results). Then one could choose Children's Books, then Arts, Crafts & Music, then Last 30 Days, then Ages 3-5, and finally Age 4, with 8 fully relevant results.

Searchers can move through facets in different sequences. In the Amazon search described above, after choosing Books, one could next select Last 30 days. Arts, Crafts & Music might come next, then perhaps Children's Books, and so on. The categories could be selected in any order to arrive at the same final set of results.

On the next pages are two examples of faceted search on the Web. The first is drawn from the commercial world: Zappos.com. The second is drawn from the not-for-profit world: the North Carolina State University library. Readers will be familiar with many other examples: Homedepot.com, Ikea.com, Macys.com, and so forth.

While faceted search is an interesting option for the CFC because of its ability to mimic the print directory, it does bring particular challenges. A faceted system requires categories that fit the content to be searched. It is also important that the facets make sense to the individual who is searching. We will return to these points later in this report.

Keyword Search

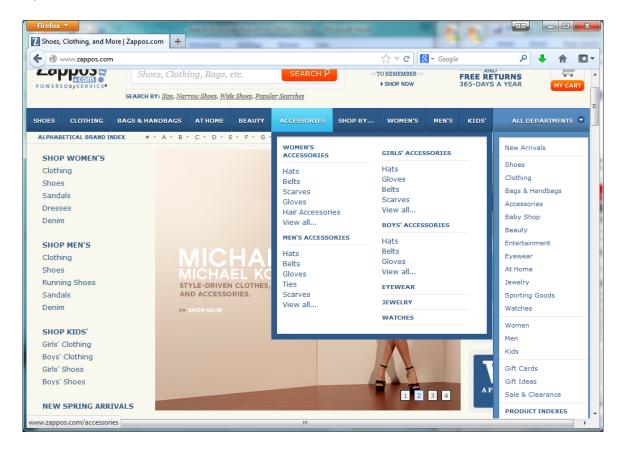
A third way to handle online search is to rely upon keywords. The searcher enters such a word; if there is a match, the search tool provides a link. Often the keywords are referred to as *tags*.

Keyword search is similar to faceted search. In faceted search, specific words or phrases are used to filter the available content, creating a series of layers through which the visitor navigates. In a keyword system, the searcher is not constrained by a master list of terms. There are no layers to dive through. Rather, the searcher enters a word or phrase – and if that word or phrase has been used to tag an object, the system returns the result.

In many keyword systems, the administrator creates the tags. In a commercial system designed to help visitors find clothing, for example, one can imagine that the owner of the system, the company, would create tags such as "dresses," "shoes," "coats," and so forth. The company might offer tags that match various manufacturers. The point is that the entity owning the site sets the tags. A user-friendly keyword search system might include a list of available tags or tag categories, or present a tag cloud, so searchers would not have to guess at which keywords have been used.

We turn next to a specific review of how search has been used within the CFC.

Examples of faceted search



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Catalog.lib.ncsu.edu/search?N=)&Nty=1&Ntk=Title&view=full&Ntt=leukemia+research&sugg=s		C C S - Google	ې FAQ LOG OUT C		⊡ 	
	RVICES LIBRARIES ABOUT	_	h books, articles, journals,		Search		
Library Catalog			Expand Your Searc	ch			
leukemia research in Search within results Start Ov	Title Search ar		 78 results at Trian 650+ results at Lib Looking for articles 	raries worldwide	S		
Your Current Search 🔊 in Title 'leukemia research' 🛛	Results 1 - 10 of 31 Brief View Full View 1. Leukemia research (Online)	Sort B	y: Relevance	List (0)	Ask Us chat now		
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Format	4. Gene technology : stem cell and leukemia research	1		Add to List			

Chapter Three: Current CFC Search

As noted, the CFC has published its charity list in printed directories for decades. In any campaign zone, this directory includes the entire list of national and international charities and every local charity eligible within that zone.

The CFC is no longer limited to the print medium, of course. Online tools offer important opportunities to the CFC. They cut costs and reduce processing mistakes, and they help donors examine charities faster and in greater detail.

While the CFC has entered the Web-based digital age, it has not answered the question that it resolved in the print world: How will equity be sustained in a digital environment?

In print, readers immediately understand how they can search the document regardless of its length. They look for a table of contents or alphabetical index, or simply flip through pages.

On a website everything is different. Visitors may hop around, moving from page to page, but if they are seeking a specific target, such as a shoe to purchase or a charity to support, they quickly look for a way to *search*.

If the CFC implements search well, donors and charities alike will be well served. If search is implemented poorly, donors will be frustrated and may abandon the campaign in favor of easier giving methods. Equally detrimental, potential donors may be misled as to whether an organization is in the CFC. Such confusion will undercut the campaign and likely lead to a loss of financial support for thousands of charities. For the CFC, the stakes could not be higher.

The Search Experience on Current CFC Websites

To assess the state of search in the CFC, we visited the websites of the top 30 administrative zones (by pledge totals) in late January and early February 2013. Almost 70% of total CFC pledges in 2012 were made in these zones. The table on the next page lists the zones, noting the providers of their search tools.

Please note that, throughout this report, "search" on a CFC website refers to a search of the approved list of charities and not to other site content.

Top 30 CFC Administrative Zones and Their Search Tools

	Zone #	Campaign Name	Website	Search Tool Provider
1	0990	CFC of the National Capital Area	http://cfcnca.org/	Global Impact
2	0995	Overseas CFC	http://cfcoverseas.org/	Global Impact
3	0405	Chesapeake Bay Area CFC	http://www.cbacfc.org/_root/	CFC Nexus
4	0225	Hawaii- Pacific Area CFC	http://www.cfc-hawaii.org/	CFC Nexus
5	0105	SoCal CFC	http://www.socalcfc.org/_root/_	CFC Nexus
6	0852	San Antonio Area CFC	http://www.cfcsanantonio.org/	Atomz (free tool available online)
7	0897	South Hampton Roads CFC	http://www.cfcshr.org/ root/	CFC Nexus
8	0524	Heartland CFC	http://www.heartlandcfc.org/_root/	CFC Nexus
9	0211	Metropolitan Atlanta CFC	http://www.cfcatlanta.org/ root/	CFC Nexus
10	0106	CFC Norcal	http://www.cfcnorcal.com/	CFC Nexus
11	0839	Dallas-Fort Worth (DFW)	http://www.dfwmetroplexcfc.org/ root/	CFC Nexus
12	0712	Central Oklahoma CFC	http://www.cfc-centralok.org/	PDF directory only
13	0096	Greater Los Angeles Area CFC	http://www.cfcofgreatersocal.org/ root/	CFC Nexus
14	0686	Miami Valley CFC	http://www.miamivalleycfc.org/_root/	CFC Nexus
15	0870	Intermountain CFC	http://www.intermountaincfc.org/	CFC Nexus
16	0249	Chicago Area CFC	http://www.chicagocfc.net/_root/	CFC Nexus - UG*
17	0141	Metropolitan Denver Area CFC	http://www.metrodenvercfc.org/ root/	CFC Nexus
18	0528	Gateway CFC	http://www.gatewaycfc.org/ root/	CFC Nexus
19	0004	Tennessee Valley CFC	http://amcomdmz.redstone.army.mil/cfcp/cfcp_main	Unknown (unbranded tool)
20	0923	King County CFC	http://www.kingcountycfc.org/ root/	CFC Nexus
21	0845	Texas Gulf Coast CFC	http://www.cfctexasgulfcoast.org/	ONEEACH TECHNOLOGIES
22	0751	Southeastern PA & Lehigh Valley	http://www.sepa-lehighcfc.org/	No search or PDF directory**
23	0140	CFC of the Pikes Peak Region	http://peakcfc.com/	CFC Nexus
24	0656	Southeastern North Carolina CFC	http://www.senccfc.org/ root/	CFC Nexus
25	0189	Atlantic Coast CFC	http://www.atlanticcoastcfc.org/	ONEEACH TECHNOLOGIES
26	0051	Arizona CFC	http://www.cfcaz.org/	CFC Nexus and unbranded tool
27	0452	Southeastern Michigan Area CFC	http://www.cfcsemi.org/_root/	CFC Nexus
28	0626	CFC of New York City	http://www.cfc-nyc.org/	PDF directory only
29	0684	North Coast Ohio CFC	http://www.northcoastcfc.org/site/pp.aspx? c=lpISKUOtFoG&b=5593303	PDF directory only
30	0185	Northeast FL- Southeast GA Region	http://www.cfc-at-work.org/charitylist.html	CFC Nexus
		* UG = Universal Giving	** True as of 5 Feb 2013, after pledge period had ended	

Here is a summary of the search tools we found on the sites of the top 30 zones:

- CFC Nexus provided search for 20 of the 30 sites.
- The National Capital Area and Overseas zones used CFC Accelerator, a system developed by Global Impact, the administrator of those campaigns. (EarthShare took over as administrator of the National Capital Area zone this spring.)
- The Texas Gulf Coast and Atlantic Coast zones used a system provided by OneEach Technologies, which developed their sites.
- The San Antonio zone used a free tool called Atomz, which is supported by ads.
- The Arizona zone had a search tool that was not branded. We spoke with someone in the local administrator's office and learned that the tool was provided by the vendor that created the website. The same website also offered the search tool provided by CFC Nexus.
- Tennessee Valley used a search tool that was not branded. It is reasonable to assume it was provided by their website vendor, but we have not confirmed that.
- Two sites only provided the directory in PDF format.
- One site had neither a search tool nor a PDF directory. However, we checked the site after the period for pledging had ended and do not know what was there while the campaign was underway.

Note: Some of the sites we visited in January and February had changed by the time of this writing. This is to be expected in the CFC since the spring is when PCFO contracts are renewed or changed, and administrators may take down their charity lists and tools for pledging to avoid confusion during a period when the CFC is not soliciting.

The various search tools employed on the sites we visited had very little in common except that they all presented visitors with a box in which to enter search terms, just as Google does. Generally speaking, the sites also provided a PDF version of the print directory. A PDF document is searchable, but we have assumed that visitors will take the easier path and use the website search function.

We evaluated these search engines by performing test searches to simulate CFC donors looking for charity information. We performed our tests with both Windows and Macintosh systems, using popular browsers including Internet Explorer, Firefox, Chrome and Safari. We focused on website search boxes, entering terms without using filters since usability studies show this is what most searchers will do, especially on sites where the filters are less visible and more cumbersome than the box itself. Here is what we found:

- 1. Search tools were highly inconsistent in their design. User interfaces varied widely. The search tools or links to them were in different locations on different sites. Some sites required visitors to scroll to the bottom of a long homepage to enter search terms.
- 2. Results for the same search query varied greatly from one site to another.
- 3. On many sites, searches returned a charity listing only when the search terms exactly matched the text of the charity list released by OPM. Below are examples of how this sometimes played out:

- A search for "St. Jude Children's Hospital" came up empty because the complete name of the organization, "St. Jude Children's *Research* Hospital," was not used.
- A search for "alzheimer's" (with an apostrophe) yielded a result set different from a search for "alzheimers" (without an apostrophe).
- A search for "Alzheimers Research and Prevention Foundation" came up empty because the apostrophe was omitted.
- A search for "Susan G Komen" came up empty because there was no period after the G.
- A search for Disabled American Veterans (DAV) Charitable Service Trust failed when the acronym, DAV, was omitted.
- A search for Make-A-Wish Foundation[®] of America failed apparently because the registered trademark symbol was not used, even though we could find no way to enter that symbol in the search box.
- 4. Topical searches often yielded no results or spotty ones at best. For example, a search for "disabilities" and "veterans" together often came up empty. No tool would deliver anything like a comprehensive list of charities relevant to the search.
- 5. Some tools offered options for searching organization names or descriptions but not both at the same time.
- 6. Searches for some short words were matched with the string of characters *anywhere* in the charity listing. For example, a search for "art" returned all members of E**art**hShare (the environmental federation) because the three characters appeared consecutively in its name. A search for "cat" returned every instance of "edu**cat**ion."

Before performing the searches described above, we tested every site to be sure its search tool returned a charity listing when the organization name was entered precisely as shown in the charity list. Our test search was "St. Jude Children's Research Hospital." One site actually failed that test.

Universal Giving: The Challenge Gets Bigger

During the next few years, something the CFC community calls "universal giving" will likely be implemented. The system will allow any donor to pledge to any charity – national, international or local – anywhere in the country. Right now, of course, donors can support any national or international charity, but only local charities that have been admitted to that donor's CFC zone.

Universal giving has been a goal of many CFC stakeholders for a number of years. The preface to the draft regulations recently released by OPM mentions that electronic pledging will support universal giving. In addition, the CFC initiated a pilot program of universal giving in the 2012 CFC. This leads us to believe that it will be part of the CFC's future.

The universal giving pilot was conducted in the Chicago area, in part of Alabama, and in part of Washington State. It is not our purpose to evaluate the success of the pilot. However, the test did allow us to assess the impact of universal giving on online charity search.

Universal giving, as stated in OPM's analysis of the draft regulations, "removes campaign boundaries with regard to donors." To see the implications of this, consider that the 2012 CFC charity list included over 2,500 national and international charities, which were listed in all local CFC directories. Additionally, each zone included local charities numbering in the hundreds (National Capital Area is the outlier with a substantially higher number of local organizations). By including all local groups in all parts of the country, universal giving adds more than 20,000 organizations to the charity list.

With this greatly expanded number of charities to choose from, well-designed online search can be immensely valuable. On the other hand, a larger pool of candidate organizations can magnify the inadequacies of poorly designed search tools. For example, when we searched for "red cross" in the 2012 universal giving list using one of the website tools available in a zone participating in the pilot, we received 370 results mostly comprising local chapters of the American Red Cross from all parts of the country. The national organization was number 333 on this list, and we wonder how many donors scrolled that far.

We acknowledge that filters could be used to search the universal list to refine by national, international or local presence of the charity. Rather than scrolling through 370 results, users could look for ways to narrow the search. They probably would find the filters available under Search Options. In the case of the American Red Cross, performing the search while filtering for national groups did yield the national organization only. However, if a military donor from Ohio, stationed in Alabama, wanted to give to the local Red Cross chapter back home, filtering for local groups would yield 356 results, and a search for "American Red Cross Ohio" would return nothing. If the searcher noticed the option to search by ZIP code in addition to filters applied, that choice might be more successful.

Searching the universal giving list for "St. Jude Children's Research Hospital" generated similar results. Entering "St. Jude" yielded 122 results. Entering the complete organization name yielded 78 results. Applying the "local" filter yielded 77 results, and a search for "St. Jude Children's Research Hospital Ohio" came up empty. Again, filtering for national groups did return the national organization as long as we entered the name exactly as it appeared in the OPM charity list including the period after "St."

The challenge presented by local organizations is exacerbated by a provision in the current regulations that allows local groups to enter the CFC in zones adjacent to their home zone. In the 2012 universal giving list, those groups appeared once for every zone in which they participated – or so we concluded. We can state with certainty that some local organizations were in the result set multiple times. This is clearly inconsistent with OPM's current practice for the print directory which does not allow a charity to appear more than once. The proposed regulations would eliminate this problem by ending eligibility by adjacency, but this will only be a marginal improvement in a system that currently has no standards or operational requirements.

Chapter Four: Faceted and Keyword Search Applied to the CFC

Earlier in this report, we suggested that the CFC consider faceted and keyword search as complements or alternatives to Google-like indexed search. In this chapter, we explore that suggestion in greater detail.

Faceted Search in the CFC

How might faceted search work in the CFC? There are a number of approaches, and we believe the traditional print directory is a good place to begin.

The directory's table of contents provides a system of facets starting with the initial top level of national, international and local charities. Once a donor selects a main category, the print directory offers choices at the secondary level – federations plus the appropriate group of independent charities.

In the print directory, a donor who picks a federation must naturally leave the table of contents. On a website, the process of narrowing choices would continue seamlessly with the donor being led to a list of member charities. Selecting an organization's name would reveal its listing details.

Looking at other possibilities, the letters of the alphabet can serve as facets, allowing the equivalent of the index in the print directory. Ranges of Administrative and Fundraising Rate (AFR) percentages can be presented as facets for donors who desire to use overhead rates to narrow a search, and addresses can generate geographical facets.

Prospective donors might wish to begin by choosing a topic. The only topical categories currently available in the CFC charity list are the National Taxonomy of Exempt Entities (NTEE) taxonomy codes, and we believe the program will need to develop a more nuanced set of topical codes to better reflect how donors think of charities. We will come back to the NTEE system in a moment.

We acknowledge that the filters or advanced search options provided by some CFC search tools already give results similar to faceted search. But faceted search systems invite visitors to *begin* their search by narrowing the search universe rather than doing so after initial search attempts have proven unsatisfactory. Faceted search also offers more options at once.

We provided examples of faceted search earlier in this report (see pages 15 and 16). You will note that those sites offer a search box in addition to faceted search. You will also note how large categories or facets can be narrowed by applying other facets.

Keyword Search in the CFC

For the CFC, a keyword search system will require that words, or *tags*, be assigned to charities. Donors would be invited to enter their own keywords into a search box. If there is a match, the charity listing would be returned.

The CFC could assign keywords to charities, but we believe it would be far easier for the program and far more effective for both charities and donors if the charities themselves were invited to select words that best describe their mission and work. The CFC could start by offering a set of candidate tags. Later, we recommend that the CFC invite charities to suggest new tags.

Over time, the CFC and its participants (both charities and donors) would be able to see what words had been chosen previously. Tag clouds could display the extent to which each tag had been selected by

charities and the extent to which each had been selected by donors. Tag clouds or lists of tags might also be provided to aid donors in selecting keywords for their searches.

We do not propose to work out all of the details here. Our point is that a third approach – keyword search – is available and may allow for a level of interaction between charities and donors not yet seen in the CFC.

About NTEE Codes

As we have just discussed, topical categories are essential for both faceted and keyword search. In today's CFC, such categories are provided by the NTEE taxonomy.

When charities apply to the CFC, they select up to three of these codes to describe themselves. The codes, which are shown to the right, are printed after each charity's listing in the CFC directory.

The NTEE taxonomy was developed by a research organization that is now part of the <u>Urban Institute</u>. It was designed to aid in reporting on the activities of tax-exempt organizations. The taxonomy is used by the IRS and has the advantage of already existing, which may be its *only* advantage. The NTEE categories do not seem to be intuitive for the charities. Indeed, our review of past campaigns shows that charities often choose different codes in different years, and it is common for the codes chosen to be different from those the IRS chose for them.

From a donor's point of view, some of the codes, particularly in the first half of the alphabet, may be helpful in locating charities of interest. On the other hand, many category names in the latter half of the alphabet are too abstract to offer much guidance. Furthermore, pledge results from the CFC make it clear that certain categories not represented in the NTEE codes (military and veteran issues, for example) are of great interest to donors.

Ideally, in developing a robust charity search system for the CFC, OPM will improve on the current NTEE system. An online search system should provide *feedback*. As suggested in the discussion of keyword search, search tools can "listen" to donors and identify topics of interest by analyzing the search terms they enter. Over time, the

	Taxonomy (NTEE) Codes
А	Arts, Culture, and Humanities
В	Educational Institutions & Related
	Activities
С	Environmental Quality, Protection &
	Beautification
D	Animal Related
Е	Health - General and Rehabilitative
F	Mental Health, Crisis Intervention
G	Disease, Disorders, Medicinal Disciplines
Н	Medical Research
I	Crime, Legal Related
J	Employment, Job Related
К	Food, Agriculture, and Nutrition
L	Housing, Shelter
М	Public Safety, Disaster Preparedness &
	Relief
Ν	Recreation, Sports, Leisure, Athletics
0	Youth Development
Р	Human Services - Multipurpose and
	Other
Q	International, Foreign Affairs, National
	Security
R	Civil Rights, Social Action, Advocacy
S	Community Improvement, Capacity
	Building
Т	Philanthropy, Voluntarism &
	Foundations
U	Science & Technology Research
	Institutes, Services
V	Social Science Research Institutes,
	Services
W	Public, Social Benefit: Multipurpose,
	Other
Х	Religion Related, Spiritual Development
Υ	Mutual/Membership Benefit Orgs.,
	Other
Ζ	Other

results of this analysis could create a more effective list of categories. This would allow the search system to incorporate topics that match the way donors think.

One final note on this topic: Urban Institute, the current "owner" of the codes, uses a combination of faceted and Google-type search, and its facets are *not* NTEE codes.

Chapter Five: How to Proceed

Our observations suggest that, to date, online search in the CFC has received very little consideration. It has been more like an afterthought. The search tool on the central CFC website envisioned in OPM's recently published draft regulations will be used by nearly one million donors searching for targets to pledge hundreds of millions of dollars. So our first and strongest recommendation for online search in the CFC is this:

Take it seriously.

OPM must make clear decisions about how charity search should work on a centralized website and what standards should apply to search tools as long as the current administrative arrangement exists. Every year at CFC conferences, PCFOs report on the growth of online pledging and it is cheered as a good thing. The more CFC processes go online, the more important search becomes. No one should expect prospective donors to view the CFC as an attractive giving method if the tools they use to find charities and make pledges are clumsy and non-intuitive. How donors are able to search the charity list will have a significant impact on how they pledge.

Our recommended actions fall into three categories:

- (1) System Requirements Decide how search should operate and communicate those decisions to contractors as requirements
- (2) *Development and Testing* Test the system as it is being developed and after it is launched to ensure that requirements are being met
- (3) *Data Collection and Analysis* After launch, gather data about how the system is being used, and analyze the data to identify areas for improvement

To a great degree, the burden will fall on OPM to set policy in these areas. Equally important, OPM will need to ensure that those who are hired to build and manage these systems understand the particular challenges presented by the CFC.

Here are our recommendations in the three areas:

System Requirements

- The CFC should go beyond indexed search, providing faceted and/or keyword search as a supplement or alternative.
- User interfaces should follow common industry practice (e.g., tools for indexed search should be clearly placed in the upper left hand side of the home page; they should be easy to use with clear instructions; if an alternative to indexed search is provided, it should be easy to find).
- The dataset for any universal giving search system should list each charity only once, as now occurs in the print directory.
- OPM must be clear as to whether search results should be ordered according to the principles applied to the print directory.
- If indexed search is used, OPM should insist that the tool meet a variety of reasonable expectations, such as the requirements listed below. All of them are achievable with widely available software, some of which is open source:
 - Recognize and return words, not just strings of characters, because string-only recognition returns many irrelevant results, especially with the long universal giving list

- Ignore punctuation because donors will not expect it to matter when entering search terms
- Recognize alternative forms of search terms and return results based on all forms (entering "disability" will also produce results for "disabilities")
- Recognize misspellings of search terms and return results for the correct word (e.g., entering "aminal" will produce results for "animal")
- If faceted search is used, OPM should determine the facets and specify the sequence in which donors will encounter them (what categories will be visible on the initial screen and what will appear only after certain selections have been made, whether to provide alphabetical or geographical facets, and so on).
- If keyword search is used, OPM should determine the method by which keywords are assigned to charities, preferably allowing charities to be involved in that selection.

Development and Testing

- Vendors should be required to publish a "test suite" (a series of detailed use instances that test and document the search tool, proving that it embodies OPM guidelines).
- Vendors should publish beta versions of their search tools to allow testing by the CFC community.

Data Collection and Analysis

- Each system should generate search logs and analytical reports.
- Each vendor should periodically demonstrate that the system continues to meet requirements.
- Each vendor should report system-generated data to the CFC community so that interested parties including donors and charities can help identify new ways to improve the system. An example of such improvements would be the development of a more intuitive taxonomy to replace NTEE codes for improved faceted search.

OPM may wish to require more detailed data that would compare search reports against pledge results on a year-over-year, donor-by-donor basis (with identities shielded). It is conceivable, in fact likely, that the shift to online search and pledging will drastically change the amounts raised by some charities. Should that occur, OPM may find it helpful to have data to aid in understanding whether the change reflected a shift in donor interest or was an unintended consequence of the search mechanism.

Chapter Six: A Call to Action

Online search is coming to the CFC. If the government eliminates the print directory, online search will become a key element of the campaign.

We understand that it may be difficult for current search providers to meet all the requirements laid out in the previous chapter in time for the fall 2013 solicitation. But as search becomes more important with each passing year, the deficiencies cited in this report will become increasingly consequential. Providing potential donors with a search tool that functions poorly is the equivalent of handing them a print directory with random pages missing. It should not be allowed.

As we have noted, online pledging already represents a substantial portion of the money raised in the CFC. We anticipate that this will grow in the next campaign cycle. So everyone involved in administering the CFC should work to ensure that online search functions properly.

We invite others to do as we will do this summer and fall – test the search tools deployed around the country. We plan to return to the top 30 PCFO websites to repeat test searches we performed earlier this year. Because the entire CFC community has a stake in the quality of online charity search, we invite our readers to conduct their own test searches and let us know what they find.

For the record, here's some of our planned effort for August 2013:

- Search for the names of the 20 best performing organizations in the 2012 CFC, intentionally introducing minor errors that a searcher could make
- Search for organizations by their commonly known names rather than their legal names
- Search for "Alzheimer's" with and without the apostrophe to see if we get the same results
- Search for "art" to see if we get members of Earthshare or groups that engage in partnership; search for "cat" to see if we get groups that educate
- Be sure the problem just mentioned wasn't solved by preventing the search tool from finding three-letter words
- Search for "cancer" plus the name of the PCFO's home state to see if the tool will return the state chapter of the American Cancer Society
- Search the universal giving list for a Red Cross chapter in a given state
- Determine whether we can distinguish between national and local groups with the same name in search results
- Search for "Animal Welfare Fund" in the universal giving list to see if it still appears more than 20 times

We invite readers to suggest other test searches to add to our list. Contact us at <u>wga@wg-alliance.org</u>.