Management Course

@EASE Management Course

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Contents

Introduction

@EASE needs to be a daily tool for your Fund Development Officer, Volunteer Director, Executive Director and staff in your Fundraising Department.

We believe that the content of this manual will help transform your fund raising perspective and move you and your organization into a Fund Development mode.

We look forward to introducing you to this powerful knowledge based fund development tool as members of the **@EASE family!**

The **@EASE Management Course** is designed to help our clients determine how they want their donors, key contacts and campaigns defined to assist them in their relationship building, marketing activities and campaign analysis. The **@EASE** motto is **plan first.** This course will examine three areas where the **Lookup Tables** will be particularly useful:

1 **Relationship Building:** your ability to develop a committed set of key donors; those donors who will become your major supporters;

2 **Management and Decision Making:** good management information and methods are invaluable. The number of hours available to us in a week is constant. Our expectation's of what we think we can do in a week has greatly increased. @EASE can help an organization to use its time and resources effectively as well as efficiently; and

3 **Data Consistency:** simple things like correct spellings or one newsletter instead of many, gives the impression of a well organized, well run charity.

What to Look for in this Manual

This manual is a reference for you as your fund development efforts become more rigorous.

Each Table consists of a set of sections to describe the table, its functions and some suggestions on how it can be populated.

The job of defining a customized set of tables can seem overwhelming. If you are not sure how to proceed and you have questions ... call us, that's what we are here for!

The sections for each table include the following:

1   A description of the Table.

2   Reports that are affected by the Table ... and reports where table information appears.

3   Q-Xpress record selections that are directly related to the Table and the Q-Xpress fields that are populated, as a result of the table.

4   Which Tables enable global assign or delete activity

5   Tables that provide Exclusions to a Q-Xpress selection to create a more focused export file.

6   How the Table is populated ... by Reference or by Value.

7   Management Practices related to the effective use of the Table.

8   How the EaseKMS can be used to store forms and decisions related to the table.

9   Ideas and suggestions on how the Table can be used.

Knowing how to use @EASE as a management tool takes it far beyond its receipting capacity.

We hope you enjoy using this manual and taking advantage of the opportunities it and @EASE offers you.

C H A P T E R 1

Management & Relationship Building

Time is non-renewable and limited. **@EASE** recognizes this and will help you make better use of your time and your resources. One way to do this is to consider how you want your information stored in **@EASE** for fast and timely access. This is where the **Lookup Tables** come in.

> **Using Notes:** We want to comment on the use of notes. Notes do not provide instant access, and they do not offer consistency. They provide supporting commentary. We only consider them somewhat useful in the context of fund development.
>
> **@EASE Lookup Tables** should be used to house any data that you will want to recall or access with speed and accuracy.

We are going to introduce you to each of the tables and examine how they can be used to create better, more consistent information. Using the **Lookup Tables** takes thought and planning, two key components of any successful activity.

When used effectively, **@EASE** becomes a knowledge base. Using **@EASE** as a knowledge base significantly increases its value to an organization. Utilizing the programs full capacity ensures that a legacy of knowledge is created to support current and future growth.

What an organization **KNOWS** *is an asset.* This asset has unlimited potential. For information to become an asset, however, management needs to build a **system** to house it.

@EASE is a repository to store the results of valuable research related to giving criteria. When we forget to record this information, we make it unavailable for future use. The original investment becomes a cost as well as a loss.

To assist our clients, data capture or research work sheets have been provided in the **EaseKMS\Forms** folder. These forms have corresponding work sheets with recommendations on which Lookup Tables to use. Forms for Corporate, Foundation, Service Club, Small Business and Private donors have been developed for @EASE clients to use.

Management information is key to today's competitive fundraising market place. **@EASE** supports decision making and offers our clients an opportunity to react to what they learn.

In This Chapter

Private, Corporate and Contact Tables

Demographic Code

@EASE contains a great deal of postal information that tells you how many donations you have received by postal zone and the size of donations by dollar ranges ... totals included.

The **Demographic Code** can be used to provide more information about the people that give to you. This is a 10 character code assigned to a private or corporate donor with a 50 character descriptive field.

Reports:

1   The Demographic code provides the basis for the **Demographic Report** that segments donations by demographic code, and includes a count of donations along with totals.

   @EASE has an interesting option to this report that can be used for events where Pledges are collected by participants such as people walking or running for your cause. This option will use the Demographic of the participant (person running or walking) to show which demographic groups are helping an organization. This has valuable consequences and can be acted upon!

2   The **Pledge Demographic Report** provides a tally of fixed length and on-going pledged gifts by detail date range for each Demographic Code. Valuable campaign results are generated without waiting for the first gift to be processed and posted.

Q-Xpress Selection: The Demographic Code and the Demographic Description are provided for all selections, like contact information they are part of a donor's basic data.

Global Assign and Delete: Demographic Codes can be assigned globally and removed globally.

Q-Xpress Exclusions: None ... however, selections by demographic value are possible... collect the ones you want and assign a Quality so that you can exclude a specific group.

Populated by: Value

<div align="center">

Think Creatively!

</div>

Ideas:

Some ways in which clients have used the **Demographic Code** include:

1   show staff and alumni

2   affiliation within an organization ... i.e., a specific club within an association of clubs

3   membership type

4   area ... urban, rural, out of province or state

5   statistics on dollars raised by event participants (walkers or runners)

Qualities for Private and Corporate Entities

Qualities are a multi-purpose field that has significance for management as well as relationship building. There are two areas to record qualities in **@EASE** ... the first is at the Donor Profile level found for Private and Corporate donors.   The second is at the Corporate Contact level which is addressed in the next section.

Management and Relationship Building:

1   Once a Year Donors: Many donors have become beleaguered by numerous donation requests. Your key donors might ask that you contact them at a particular time during the year. The Only Once field found on both the Private and Corporate master record enables you to exclude these valued donors from general donation requests. The use of a Quality to identify the time of year they want to review their gift offers you the opportunity to provide a special service to your donor. **@EASE** includes the quality values **Only Once a Year 01: Jan - Only Once a Year 12: Dec** so that you can record which month to make contact. **See Management Practices below.**

2   Proposal Due Dates: Foundations and Corporation may have specific times during the year when they accept funding requests. **@EASE** provides the opportunity to record these time frames by adding a **Quality**. These times could be recorded in a monthly diary or on a palm pilot. We suggest that you would want this information where it is readily available. The benefit of using a **Quality** is that it only needs to be recorded once and not updated on a yearly basis. **Proposal Due Dates** work with **Donor Interests** to record what an organization will support. **@EASE** includes the quality values **Proposal Due 01: Jan - Proposal Due 12: Dec** so that you can record this valuable information. Remember, **@EASE** builds a knowledge base you cannot afford to lose. **See Management Practices below.**

3   Board Changes: Service clubs and other organizations important to you will have Board changes during the year. There is nothing more disturbing than realizing you have contacted the wrong individual. **@EASE** includes the quality values **Board Change 01: Jan - Board Change 12: Dec.** Building a knowledge base takes time and thought. Entering complete data is better than a partial effort as time never seems to allow unfinished tasks to be completed. **See Management Practices below.**

4   Type of Business: Many clients run Capital, Annual or Major Gift campaigns. It is always preferable to know something about who you are contacting, particularly if volunteers will be making contact. Pairing an accountant with accounting firms could make sense. Of your corporate donors, only a few may rise to the surface as committed, however as you develop your relationship you will want to increase what you know about a donor as you look for ways to engage their interest in your organization. Please see the samples below.

5   Associations: Use qualities to identify groups of associations that are of interest to you. Third Party activities can be very rewarding. Associations like unions, trades, and professional groups can be a potential source of support.

6   Newsletters: Businesses and associations often have newsletters. Some of these newsletters may provide an ideal opportunity to tell your story, particularly if your charity is related to some form of prevention program, or information that affects a group of people. Awareness is the key to greater fundraising possibilities. Marketing what you know and what you do is always a good thing

7   Like Non-Profits: Fundraising can feel like a very isolated experience. Use **@EASE** to build national and international connections. **@EASE** can be used to develop your **email lists.**

8   Profession: Sometimes it can be useful to know the profession of a private donor or corporate contact.

9 Account Manager and Group Steps for Planned Activities: A plan may consist of 5 key steps through which you wish to take a group of donors. Each set of donors may have a specific Account Manager. Qualities can be used to identify the group of individuals as well as the Account Manager. They can be used to manage donors as they move from one level to the next in a planned process. The use of the AND option for reports and Q-Xpress selections helps to simplify accessing the right set of group members with the right message.

10 Just in Time Memory (JITM): Often we meet people that we would like to contact at a later time. Usually when the time comes our memory lets us down. Use a Quality to recall people with special skills, or individuals you would like to invite to special events. **JITM** could be a small business that might be interested in participating in a third party event, or a volunteer interested in being on your Board ... and more.

Management Practices:

Throughout all your activities and the activities of your staff, keep in mind that everyone is helping to build a knowledge base, and not personal lists that are not included in **@EASE**. Things like **Just in Time Memory** additions provide future opportunities that can be acted upon.

Good management practices serve an organization well. We recommend that the following management practices be written into a job description so these important activities are not overlooked.

To be run at the **beginning** of each month:

1   Request a list of all donors that are **Once Only** and have requested that they be contacted in the current month.

2   Request a list of all **Board Changes** for Service Clubs and Associations.

3   Request a list of all Foundations and Corporations accepting funding requests for the following month. A Donor Profile can be run showing their Donor Interests, using the Quality category **Proposal Due** ... providing staff with a list of opportunities. Include **Notes** in the Donor Profile report, as there may be a reference to the name and location of a company's proposal format stored in the EaseKMS.

Reports:

1   Reports for qualities come from two places:

> **Private Donor Reports\ Donor Listing by Quality** and

> **Corporate Donor Reports\Donor Listing by Quality**.

The Private or Corporate Donor Listing provides the opportunity to access lists by Quality. Please note that more than one quality can be selected. If the **OR** option is chosen, any entry that has any one of the checked qualities present will be added to the list. The **AND** option selects only those donors where all qualities checked are present.

2 Donor Selections \ Donor Profile Report by Quality lets you see the profiles of a specific set of donors.

If a comprehensive list of both private and corporate is required, use the Q-Xpress selection mentioned below and build your own report format by exporting the selected entries and merging them with a word processing tool.

Q-Xpress Selections:

Selection by Quality is found under **Q-Xpress Selection \ Donor Selection \ Donor by Quality**. It enables you to access both private and corporate entries in the same list. The selected records must be exported through the **Q-Xpress Export** for reporting purposes.

The use of the **AND** option ensures that in order to be selected, a private or corporate entity must have all the qualities selected. The **OR** option requires that at least one of the qualities is present for the entity selected.

When **AND** is used, the file builds multiple records of the same donor. Use **Q-Xpress\ Remove Duplicates** to reduce the list to one entry per selected company or individual.

The **OR** option provides a different opportunity.

The **Q-Xpress** file has a field called **Profile Description** which is populated with the value of the Quality when a selection is being created.

Global Assign and Delete:

Qualities for Private and Corporate entities can be globally assigned and deleted.

> When doing removals we recommend that you make a *backup of your data file first* .... and that you only do removals when you will not be interrupted, you are not overly tired and not in a hurry!!!

To globally assign a quality, select the group of private or corporate records desired through a Q-Xpress selection. Use the **Q-Xpress \ View Q-Xpress** screen and click on the **Select All** button. Next, click the **Assign** button below and choose Quality. Check the quality values you wish to assign. Multiple assigns are allowed at the same time.

If you want to remove a quality, choose your list by the quality to be removed through a **Q-Xpress** selection using Donor Selection \Donor by Quality. Go to **Q-Xpress\ View Q-Xpress**, click on **Select All** and use the **Delete** button *found below* the Assign button. Choose Quality and check the quality values you want removed.

Q-Xpress Exclusions:

You can build a Q-Xpress file and then **exclude** records from it by Quality. If you have several qualities you want to exclude, we suggest that you do a few at a time. Where donors have been identified as Significant Others and an export selection has been made with Suppress Mail activated, the exclusion will be acted on regardless of which donor it appears on.

Populated by: Reference

Ideas:

When entering Quality values, use categories to group items. Keep in mind the size of the quality value is 25 characters.

Examples:

Types of Business:

TB Ent: Food

TB Fin: Bank

TB Fin: Insurance

TB Prof: Accounting

TB Prof: Financial

TB Retail: Clothing

TB Trade: Electrical

TB Trade: Plumbing

Type of Profession:

Prof: Accountant

Prof: Lawyer

Prof: Artist

Just in Time Memory

JIT: Invite to Gala

JIT: Invite to Golf

JIT: Potential Board

JIT: Potential Volunteer

JIT: Music Violin

Newsletters for Article Submissions

News: Unions

News: Small Business Assoc

News: Corporate

News: Health

Qualities for Corporate Contacts

Qualities for Corporate Contacts

Corporate Contacts are people you connect with for various reasons. One reason might be to submit a funding proposal or sponsorship request. Another might be due to their influence in a community or they may be someone you want to communicate information to for further distribution.

Corporate Contacts are often people who hold positions that we need to maintain a relationship with. Please note, it is the position they hold that is sometimes the key and not the individual.

Individuals who work for a business or organization that are of interest on a personal level should be recorded through the private donor maintenance area to enable a full profile of their interests and your interest in them.

Corporate Contacts have both a management and a relationship building significance that can be addressed through the Quality tab. The **Rule of Thumb** is **Never** enter a corporate contact without a quality that will identify how you want to access them in the future. The last thing you need to build is a black hole.

Recommendation: We recommend that qualities used to describe individual contacts be different than qualities used to describe corporate or private records.

1 **Position:** What position does this person hold that is important to you ... Community Investment, Head Honcho, PSA for your service announcements, media for articles? If this person is government are they provincial/state or federal? It is important to consider the question ... if I wanted to include this person on a report or a Q-Xpress selection ... how would I recognize them?

2 **Profession:** What profession is this person? Is this valuable to you as you look for future Board members?

3 **Government Positions:** Government members often have two addresses ... that of their constituency office as well as the capital city for their province, state or country. Some become ministers in the government.

4 **Whose Contact are they?** Knowing how an organization first connected with a contact can be important and it offers continuity when the initial contact person leaves or moves to a new position.

5 **Email Lists:** Who among your contacts can be reached via email? This can be useful information. You may want to create a few categories to handle different email groups ... like Email PSAs or Email Community Investment to work alongside PSAs and Community Investment.

6   **Just in Time Memory:** Again we address Just in Time entries for those people you meet that you want to invite to special events, consider for Board positions or to Chair a special event.

Reports:

1   Corporate Contacts can be reported by selecting **Corporate Donor Reports \ Corporate Contacts**. This report will provide the name of the organization, the contact's name and title and their phone and email information. The report can be listed alphabetically by organization name and contact, or alphabetically by contact name.

2   **Corporate Contacts Profile** is a powerful report that shows all address and contact information for a selected Corporate master or group of Corporate Masters identified through a Quality or Membership. This report will show all contacts, their personal phone and email information, which corporate address they use, any qualities they might have and whether or not they have a Private Donor Report. Viewing all your Rotary Club contacts is a simple click away.

Q-Xpress Selections:

Q-Xpress selections for contacts can be found under the **Q-Xpress** selection **Corporate Contacts**.

1   They can be selected by **Name** or by **Quality**. Where they are selected by Quality the Profile Description field in the **Q-Xpress** file will be populated by the **Quality** value. The Title field in the file will house the contact's title.

2   **Donor by Corporate Qualities** lets you select all contacts for a given company or group of companies based on selecting a Quality attached to the Corporate record. Select a list by the Quality Media found on 20 corporate records and all contacts attached to this group will be added to the Q-Xpress file for export.

Global Assign and Delete:

Currently you globally assign and remove qualities for Contacts. When looking at the **Q-Xpress View**, the first column indicates where the name listed is viewed as a Company - listing a letter **'C'**, or a Private person - listing the letter **'P'** or a Contact - listing the letter **'T'**. You must have contacts in the Q-Xpress selection to assign or remove qualities globally.

Q-Xpress Exclusions:

1   Contacts with a specific quality can be excluded from an existing selection by Quality. We recommend that qualities for contacts be very different from qualities used for corporate or private entities to prevent confusion.

2   Contacts can be excluded in situations where contacts also have a Private record and the relationship has been recorded on the Corporate Contact record using the Private Donor Number field. The option arises to choose to remove all contacts from the file or all Private records from the file, where both records exist in the export and the cross reference has been recorded.

Populated by: Reference

Ideas:

Government Contacts:

1   Build a Corporate Master record for the constituency office ... i.e., Member for Edmonton East.

2   Enter two addresses for the Corporate master record; the Primary address for the constituency office and use **Other Offices** to enter the Legislature address.

3   Build four quality values ... ie MP Local Address, MP Capital Address, Minister Local Address, Minister Capital Address.

4   Enter the Member as a contact.

5   On the Corporate donor screen, under contacts, select the Member as the key contact for the constituency office. Add to the Corporate Profile Quality tab, a quality for MP Local Address or if the Member is a Minister, add Minister Local Address.

6   Go to the Corporate Contact record for the member and under **Primary Address**, select the Legislature address. Go to the Corporate Contact Profile \ Quality and add to the quality MP Capital Address or if the member is a Minister add Minister Capital Address.

7   This can be a bit tricky but what you need to remember is that if you want a list of members at their home address you select using a Corporate Quality. If you want the capital or legislature address you select using the Corporate Contact Quality.

The reason this works and requires less redundancy is due to the fact that you have the member attached to the corporate record as the key contact.

Executive Assistants for both the home and capital offices can be added as well. Remember to select the correct address!

Service Clubs

1   Service Club President

2   Service Club Community Investment

Corporate

Because titles no longer provide the value they once did ... we suggest that you provide your own naming convention for key senior executives.

1   Head Honcho

2   Community Investment

3   Public Affairs

4   Key Influencer

5   Managing Partner

> **Recommendation:** Using a category like POS: before each of these qualities will identify them as Positions Held in a company and group them so they are easy to find and easy to use.

Media

Media is a large and powerful group that needs to be addressed. Consider the types of media ... **Print**, **TV** and **Radio**. Think about your methods of access ... phone, fax and email. For each type of access a Quality needs to be developed and applied to the appropriate person or position. (We mention position because moving staff around is not unusual and your contact might be the position and not the person.)

With **Radio**, is the listening audience significant? Do you need to know if the stations are classical, rock or country? A little time spent considering your options is essential. The same is true of **TV** ... is the station local, is it public broadcasting ... do you want only stations in your current area or is your appeal provincial or state wide ... or country wide for that matter?

With **Print** you might have columnists that would benefit from knowing about research your group is doing, new services you offer and more.

Media might also relate to **community** papers. We mentioned newsletters when discussing Corporate and Private entities and **Newsletters** might very well be considered here as well.

Just in Time Memory: Do you recall that we discussed this in the previous Qualities section ... the same considerations do apply to contacts as you meet individuals at association gatherings and other events. Recall is often difficult at the spur of the moment, but not if you have been using @EASE successfully.

> **Recommendation:** When you return from a luncheon meeting with a clutch of business cards, take a moment and record a quality on them so that your data entry people can enter and code them appropriately for future reference.

Membership

Memberships are groupings that you create to make your information more meaningful. Memberships could be your Board Members, Committee Members, service clubs, elite donors, and special groups where you want more in-depth information.

Management Practices:

Run a report monthly of those entries that have a Review Date pending to ensure that Giving Criteria and Donor Interests have not changed.

Reports:

1   You can obtain lists of members in a membership group. These lists are separated by private or corporate. A good example would be your list of Board members or Committee members for a particular special event. These reports are accessed through **Private or Corporate Donor** ... **Private or Corporate Donor Listing** by selected membership category.

2   There are other reports that can be run for members of groups identified by a membership category. The **Reports \ Donor Selection \ Members with Donation Amounts** report will show you total gifts by giving category over a period of five years from whatever end year you choose.

For example, if service clubs are big supporters of your organization you may want to view a report of all service clubs or a specific group of service clubs showing their donations by fiscal year from the current year back five years for all Active donors. The same report can be used to show Board member support ... or the support of your Elite Donors.

3. The **Donor Profile Report** can be generated by membership category.

4. The **Corporate Contacts Profile** can be generated by membership category.

Q-Xpress Selections:

Record selections can be made by membership category. The Profile Description, Profile Date and Title fields are populated in the Q-Xpress file depending on the type of membership you have requested.

Global Assign and Delete:

Membership categories can be globally assigned including an active date. When memberships are assigned globally, it does not provide a value for the Title field.

Membership values can be removed by date range when they are no longer valid.

Q-Xpress Exclusions:

A membership group can be excluded from a selected group records. For example, you can create a list of individuals to invite to a gala and once the selection has been completed, you can exclude all 2003 Board Members.

Populated by: Reference

Ideas:

Groups of Relationships

You have recorded people that reside in @EASE that are good friends using **Relationships**. Create a Membership category called Groups of Friends so these friends can be reported through the Donor Selections \ Donor Profile Report by choosing to show only Relationships.

Groups on Boards

You have recorded people who reside on Corporate Boards using **Relationships**. You have grouped them using the membership category, **Groups on Boards** so that all relationships can be reported by running the **Donor Selections \ Donor Profile Report** choosing to show **Relationships**.

Groups
_____

Groups of Friends

Groups with Board Members

Groups of Individuals on Boards

Group View

Group Participation

Board Members

You can identify all Board Members by year including position titles. This provides a historical reference and shows how individuals have participated in the organization.

Board Members

2003 Board of Directors

2003 Executive Committee

*   Titles are defined in the Lookup Table for Titles

Committee Members

Make contacting Committee members easy by listing all committee members along with committee titles.

Committee Members

2003 Fall Fest Committee

2003 Golf Tourney Committee

*   Titles are defined in the Lookup Table for Titles

Elite Donors

Identify your elite donors so that you can maintain easy contact with them and view their giving history.

Service Clubs

Identifying members of a service club affords easy reporting or tracking of possible presentation opportunities.

Service Clubs

SC Rotary

SC Lions Clubs

SC Lioness Clubs

SC Royal Canadian Legion

SC Royal Canadian Legion Ladies Aux

Key Donor Birthdays

Birthday 01: Jan	include the actual date if you can get it in the Membership Date field

Review Date to support the Fund Development focus of @EASE

Review Date	use a Membership with a Date

Add a Review Date to all Corporate and Foundation records where gifting criteria has been entered under Donor Interests. This small addition will help you keep track of information that needs a tweak and information that is badly out of date.

Donor Interest

Donor Interests can be used to aid in the search for funds and in the pursuit of stewardship.

Search for Funds

Foundations and Corporations may have criteria that defines what they will fund ... @EASE enables you to create a set of well defined key words and store them in Lookup Tables under Donor Interests.

When a Foundation or Corporation is researched and funding criteria is established, key words can be recorded that will enable you to find these Foundations and businesses at a later time. Researching funding potential the first time is an investment, researching it a second time is a cost. Other types of complementary information, like Proposal Due Date(s), can be recorded. If a sample proposal format is available, house it in the **EaseKMS** under Forms, and use Notes to record the document name, and that it exists.

Pursuit of Stewardship

Some donors give for specific reasons. Understanding these reasons is useful in reporting the benefits their donations bring. Your **web-site** and your **newsletters** should support these interests and tell a compelling story. Do not create an unlimited list of interests ... keep it manageable.

Moves Management

Your interest in a donor may be related to their potential to support your organization. The **Donor Interests** area can be used to identify those donors of particular interest to your organization as you develop relationships that will culminate in a major gift.

Reports:

You can obtain lists of members of a membership group. These lists are separated by private or corporate. A good example would be your list of Board members or Committee members for a particular special event. These reports are accessed through **Private or Corporate Donor** ... **Private or Corporate Donor Listing** by selecting the **Donor Interest** category.

Q-Xpress Selections:

Records can be selected by Donor Interest category. The Profile Description field is populated in the Q-Xpress file by the Donor Interests selected. If more than one Donor Interest is chosen, multiple records will result. The use of the **AND** and **OR** options will expand or limit your selection.

Global Assign and Delete:

Donor Interests can be assigned globally. They can also be removed globally.

Q-Xpress Exclusions:

There are no exclusions available. However, a selected group based on Donor Interest can have a Quality that identifies this as an exclusion group ... so think creatively!

Populated by: Reference

Ideas:

When recording Donor Interests, we suggest that you use a category to identify Foundation criteria, Corporate criteria or Individual interests. If it is reasonable to separate Service Club criteria, a further category would be added.

Where Corporate criteria and Foundation criteria are the same, we still recommend that you keep the keywords separate so that you can clearly identify what you are looking for.

Corporate Interests

Corp: Education

Corp: Health

Corp: Technology Hardware

Foundation Interests

Fdn: Education

Fdn: Health

Fdn: Technology Hardware

Individual Interests

Priv: Education

Priv: Health

Donor Recognition

Using Donor Recognition enables you to easily identify levels of commitment to your organization, and whether dollars or participation was donated.

Recognition can be based on accumulated giving, a specific year, a specific campaign or a specific time period.

Reports:

There are no reports available for recognition categories. You would use the Q-Xpress Selection below and export a merge file to be used with a word processing report. Be sure to use your **EaseKMS \ Forms** folder to store the merge format to report donor recognition for future use.

Q-Xpress Selections:

Donors who have a specific recognition category assigned in a given time frame can be selected through Donor Selections \ Donor by Recognition. When donors are selected by Recognition, the Profile Desc and Profile Date fields are populated providing the Recognition category and the active date.

Global Assign and Delete:

Recognition can be assigned globally with an active date, and removed globally by category and date range.

Q-Xpress Exclusions:

No exclusions are available.

Populated by: Reference

Ideas:

Donor Recognition

Bronze

Silver

Gold

Platinum

Special Letters

Board Calls

Relationships

Relationships provide insight and opportunity. **@EASE** lets you record in your system, how people are related. You can record people who are friends of others on your system. You can record people who are Board members for corporate donors or service clubs. Relationships can include husbands, business owners, wives, sons, daughters, parents and more.

When a relationship is created **@EASE** automatically creates a reciprocal value.

Reports:

The **Donor Profile Report** found under **Donor Selections** has a **Relationship** check-box that will provide relationships for a specific individual or a group identified by a Quality or a Membership category.

If you return to the Membership area discussed earlier, we identified a Membership category called **Group of Friends.** Group of Friends would report relationships created by you through the Relationships area.

Q-Xpress Selections: None Available

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas:

Relationships

Service Club

President

CEO

Board Member

Key Influencer

Father

Best Friends

Achievements

@EASE has a series of tables that enable you to record donor **Achievements**. These achievements maybe academic achievements such as a university degree or it could be a community achievement. However you choose to use this area, it provides further information about an individual on your Private master file. **Achievements** are found on the Private Donor window.

The three fields related to Achievements include:

1   the Achievement as a degree or an award,

2   the Achievement Major or Description, and

3   the Granting Institution.

An example of how these fields might be used are the following:

Source	Degree / Award	Major / Description	Granting Institution
University or College	B.Sc.	Mathematics	U of Calgary
Community	Paul Harris Award	none	Rotary International
Government	Order of Canada	Companion of the Order	Government of Canada

Reports:

The Achievements are printed on the Donor Profile Report found under Reports/Donor Selections. It has its own check box and once checked will print all information contained in this area.

Q-Xpress Selection: Donor Selections/Donor by Achievement is used to select those donors that have a specific degree or award. The degree or award selection can also include the Granting Institution(s). The export file includes Achievement Degree, Achievement Major, Achievement Institution and Achievement Date.

Global Assign and Delete: None Available

Q-Xpress Exclusions: None ... however, selections by Achievement are possible ... collect the ones you want and assign a Quality so that you can exclude a specific group.

Populated by: Reference

<div align="center">

Think Creatively!

</div>

Ideas:

1   show community service awards

2 degrees \ certification

Language Preference

Preference or **Language Preference** can be found with all private and corporate donors and contacts. This field is populated using the Language table described later under Volunteer Summary.

The default value for the **Language Preference** field is defined using the **Other** tab in **File\System Maintenance\Organizational Defaults**. Once a value has been entered it will automatically come up when a new donor, company or contact is being entered. For existing donors where no preference is given, a blank field assumes the default value found in Organizational Defaults under Preference.

Reports:

The Language Preference is listed on the Profile Report when the Other information box is checked.

Q-Xpress Selection: There are no selections for this field. It is however considered to be one of the standard export fields for donor information and will accompany a record whenever the record is selected through any of the Q-Xpress selections. The field on the Q-Xpress file is called Preference.

Global Assign and Delete: None available

Q-Xpress Exclusions: None available

Populated by: Reference

Family Tables

The Family tables include School Grade and a Date Description. Both of these fields are found in the Family tab of a Private Master record.

The Family Date Description can be used to identify any other key date like a Baptism Date. There is a date field associated with the description selected from the table.

The School Grade is used where it might be important to identify in what grade a child is currently enrolled.

Reports:

The School Grade, Event Date and the Description print on the Donor Profile Report when Family has been selected as part of the print criteria.

Q-Xpress Selection: None Available

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas: ?

Volunteers

Volunteer Type

The Volunteer Type table is currently documentary.   It identifies something about the volunteer.

Reports:

The Activity Hours - Volunteer or Staff is currently the only report that shows Volunteer Type.

Q-Xpress Selections: None Available

Global Assign and Delete: None Available

Q-Xpress Exclusion: None Available

Populated by: Reference

Ideas:

Volunteer Type:

> Board Member
>
> Practicum Student
>
> Student Nurse
>
> Staff
>
> Corporate

Volunteer Interests

Volunteer Interests can be used to show **Skills** as well as **Interests**. Your Volunteer Form (used to capture information about new volunteers) should conform to the Skills and Interests found in the **Volunteer Interests** table.

NEVER use Miscellaneous as a Skill or Interest category ... as it is meaningless!

Times available can be entered. These need to be more generic...

ie   TA: Weekdays PM   Time Available Weekdays PM

          TA: Weekdays AM   Time Available Weekdays AM

The ability to search for Volunteers using their Interests with an AND operator lets you find volunteers with a particular interest that are available weekdays, in the morning.

Reports:

1   There are no listings available for **Volunteers by Interest**. All reports would be created using Merges and Q-Xpress selections found under **Q-Xpress Selection \ Volunteer Selection**. Merge formats for Volunteer Reports can be stored in the **EaseKMS** under the **Forms** folder for shared use

2   Volunteer Interests can be reported as part of a **Donor Profile Report**.

Q-Xpress Selections:

Volunteers can be selected by **Volunteer by Interest** found in the **Q-Xpress Selection \ Volunteer Selection**. There is an **AND** and an **OR** option. Using the **AND** option implies that a volunteer must have all values in their **Profile \ Volunteer Interest** before they are selected. The **OR** option implies any of the check box values need to be present for a volunteer to be selected.

When selecting records for volunteers using the **AND** or **OR** options, all records that meet the criteria are selected. This may mean that you get a volunteer three times if you are looking for all volunteers that have three specific criteria. The **Profile Description** field stores the Volunteer Interest value.

You can view all volunteers with all their criteria or you can use the **Q-Xpress Menu \ Remove Duplicates** to get a finite list.

This list can be exported; it can receive globally assigned values. The export file can be used for letters and labels or whatever else you require.

Global Assign and Delete:

You can globally assign Volunteer Interests to a selected group of donors found in Q-Xpress View. You can also globally remove an Interest when it is no longer relevant.

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas:

Volunteer Skills

Skills: Key Boarding

Skills: Desktop Publishing

Volunteer Interests:

Int: Reading

Int: Golf Tournie

Please note: The use of a prefix or category provides better information and groups your information logically.

Volunteer Recognition

Volunteer Recognition is important for the volunteer as well as other members of an organization.

Volunteer Recognition is based on hours contributed by year or over a series of years. It can also be based on specific tasks.

Reports:

There are no reports for Volunteer Recognition. Q-Xpress Selections are required to select Volunteers with a particular recognition. The selected file of volunteers can be exported to create a merge file for use in certificates, letters and listings.

Q-Xpress Selections:

Volunteers can be selected by **Recognition** category and by **Date** range for reporting, creating thank you letters or certificates with a word processing tool.

Global Assign and Delete:

Volunteers can be selected for recognition by hours contributed by current year or over a series of years. Once selected, **Volunteer Recognition** can be assigned globally using **Volunteer Recognition** with an active date and deleted by **Volunteer Recognition** by using date range.

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas: ?

Volunteer Credentials

Volunteer Credentials is used to tell you about special qualifications your volunteer might have. There is a date field associated with the credential and where applicable this date can be used to indicate the date the credential was accredited or when the credential needs to be renewed. We recommend that you document any **Credentials** where the date is significant and add **Q-Xpress** selections to the list of **Monthly Management Practices**. Documentation for Credentials and date usage should be stored in the **EaseKMS** under **Decisions** particularly where the dates are sensitive.

Credentials can be used to ensure that volunteers do not fall through the cracks. Important information like Security Checks need to be managed. We recommend using **Security Check Pending** in all cases where this information is incomplete. It is easier to ask for those volunteers where the *Security Check is Pending* as opposed to how many volunteers do not have a *Security Check ...* as it may not be required in all cases.

Reports:

There are no reports for **Volunteer Credentials**. You can create a report format for use with a Q-Xpress Selection for Volunteer Credentials. We recommend that the report formats for use with Volunteer Credentials be stored in the **EaseKMS \ Forms** folder.

Q-Xpress Selections:

Volunteers can be selected by Credential. The Profile Description and Profile Date fields found in the Q-Xpress export file are used to identify the credential and the date associated with it.

Populated by: Reference

Ideas:

Accreditations that need to be in place for a volunteer to begin:

Pending: Security Check with the first date pending

Pending: Level II Swimming Instruction

Accreditations with a renewal date:

Life Saving 101 Include the date that the accreditation expires

CPR

Accreditations with no renewal requirement:

CGA

Accreditations that tell you about your volunteer:

Birthday 01 Jan Include the birthday date in the date field so that you are timely

Volunteer Active   Include the Active Date...

Volunteer Inactive   Include the Inactive Date

... a volunteer should be either Active or Inactive

Languages Spoken and Written

@EASE lets you record the **Languages** your volunteers speak and write. For now this information is documentary only and should you require searchable language skills we recommend using a Quality or a Volunteer Interest.

Reports: None Available

Q-Xpress Selections: None Available

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

C H A P T E R   2

Campaigns to Record Dollars & Time

Campaigns are used in **@EASE** to record dollars, time or participation. The naming strategy used for Campaigns greatly assists when running comparative reports or identifying activities that belong to the same event. A Campaign name is made up of a fiscal year (the year the campaign started), a campaign type and a campaign code.

The type identifies the object of the activity while the code(s) specify the element being captured.

A sample of a series of campaigns linked for a specific purpose could be a gala or a golf tournament. It could also be a series of levels such as a capital campaign where each level then identifies methods of participation.

In This Chapter

Campaign Type and Campaign Code

Campaign Types

The naming standards used for Campaigns offers a method of linking groups of campaigns together and provides the opportunity for comparative reporting.

@EASE provides some standard **Campaign Types** that helps to maintain continuity between clients.

MM	Memoriams
HN	In Honour of
MB	Memberships
DM	Direct Mail
TP	Third Party
UN	Unsolicited Donations

Campaign Codes

Campaign Codes differentiate how donors participate in a campaign. A Direct Mail campaign may only have Donations ... DON. If the Direct Mail is run in the Spring and again in the Fall, it is necessary to provide a naming convention for each time frame so that the donors from one are not confused with donors from the other.

eg: 2003 DM SPR and 2003 DM FLL ... or 2003 DM APR and 2003 DM SEP. We would use a month only if the month is a constant. We say this because you may want to run comparative reports on donation totals from 2000 - 2003 for all DM SPR campaigns. This is a little more difficult if the spring direct mail uses SPR for one campaign, MAR for another and APR for a third.

Consistency makes reporting easy and provides a level of continuity from one year to the next.

A Special Event could have several elements such as the following:

2003 GA DON 2003 Gala Donations

2003 GA TCK 2003 Gala Tickets

2003 GA AUC 2003 Gala Auction Donations

2003 GA SPS   2003 Gala Sponsorships

2003 GA SLS   2003 Gala Auction Sales

2003 GA PRZ 2003 Gala Prizes

2003 GA VOL 2003 Gala Volunteers

2003 GA REV 2003 Gala Revenue

Reports:

There are several campaign reports available in @EASE. These reports are found under Reports \ Campaign Reports. They include:

1   Campaign Listing
2   Campaign Listing with Dollars
3   Campaign Contributor Listing
4   Capital Campaign Report

Q-Xpress Selections:

The selection Receipting Amount Payment Method Date chooses records based on the criteria provided. If the **Include Amount** box is checked, the Campaign Description and Campaign Name are included along with all giving details.

Global Assign and Delete: None Available

Q-Xpress Exclusions:

Donors who have given to specific campaigns in a given data range can be excluded from a Q-Xpress file. This might include donors whose donations arrive prior to the formal start of a campaign.

Populated by: Value

Ideas:

Campaigns are used to record donations, volunteer hours and participation.

1   Set up a Campaign to record presentations. Recording presentations lets you see the relationship between a face to face presentation with a group and the donation that follows it.

Eg: 2003 PR PRS

2.   Set up a Campaign to record all foundation grants.

3.   Set up a Campaign to record Unsolicited donations.

4.   Set up a Campaign to record Third Party gifts using the **Acquisition Number** field on the Receipt to identify the organization or individual responsible for the gift(s). The **Mailing List** field can be used to further describe the event.

Ie: Kelly's Bar and Grill hosted an event for St Patrick's Day. Kelly's donor number is C100010. All participants at the event who gave cheques will receive a receipt. On the receipt window in @EASE, the **Acquisition Number** shows C100010 and the **Mailing List** field shows St Patrick's Day. A selection for this campaign will provide the donor's information along with the Acquisition Number, the Acquisition Name and the name of the event, St Patrick's Day, found in the **Mailing List** field.

Campaign Expenses

Campaign Expenses are used to record major expense categories, first at a budget level, and updated with actual values at the conclusion of the event.

Campaign Expense codes report in alphabetical order based on how they are defined. A category to prefix each expense gives clients some control over the sequence of the report. eg. Admin: Postage

Reports:

1 The **Campaign Expense** report is a comparative report that can show costs for all Direct Mail over a series of years.

Q-Xpress Selections: None Available

Global Assign and Delete: None Available

Q-Xpress Excludes: None Available

Populated by: Reference

Ideas:

To create logical groupings, we have used a category for each type of expense.

Please note: The Campaign Expense Report prints in alphabetical order by expense description.

Administrative Expenses

Admin: Postage

Admin: Clerical

Promotional Expenses

Promo: Printing

Promo: Artwork

Event Expenses

Event: Food & Beverage

Event: Entertainment

Campaign Events

Campaign Events are jobs or tasks that will be handled by volunteers or staff.

Campaign Events are specific activities, not generic as you find under Volunteer Interests.

Campaign Events are created when you want to build a Schedule of tasks with dates and times that you will assign volunteers to for future events.

Campaign Events are used to identify how volunteers have contributed their hours in a less formal fashion. For example, the hours contributed by Committee members or areas worked for hospital facilities.

Reports:

@EASE provides the following reports found under **Reports \ Volunteers** that use Campaign Event information:

1   Volunteer Schedule

2   Activity Hours Volunteer / Staff

3   Volunteer Event Hours

Q-Xpress Selection:

The Q-Xpress Selection \ Volunteer Selection \ Volunteer by Campaign can select volunteers by Campaign Event.

Global Assign and Delete: None Available

Q-Xpress Exclusions: None ... however, record selections by campaign event value are possible.

Populated by: Reference

Ideas:

Note the use of a **category** to group activities. For a Special Event, there would be no need to re-create Mailout activities.

Special Events:

Gala: Welcome Desk

Gala: Cloakroom

Gala: Committee

General Hours for a Health Centre:

HC: Pediatrics

HC: Reading

Administrative Help:

Admin: Data Entry

Direct Mail Campaign:

Mailout: Folding

Mailout: Stuffing

Letter

Campaign Letter can be used to access different sets of text or completely different documents when gift information has been exported for the purpose of creating letters.

Using the **Campaign Letter** field ensures consistency as this information is one of the Campaign master record default fields. It accompanies the selection of the Campaign on the Receipt Maintenance window when a donation is being entered.

The **Letter** field is automatically updated to the Receipt record when a pledge is posted.

@EASE has elected to leave this field open for update on the Receipt window, even once Update to Master has been completed and /or a receipt has been printed.

The field can be evaluated during a Merge activity with wordprocessing tools like Word. This allows for different paragraphs of text, different statements of text or different letters to be printed.

Reports: None Available

Q-Xpress Selection: None, however with Q-Xpress selections like Receipt Amount Payment Method Date or Receipt Breakout Amount Payment Method Date, where Include Amounts is checked the Letter field is one of the pieces of information that is added to the Q-Xpress file.

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas:

Memoriam	In Memory letters
Major Gift	Usually based on larger donations
Third Party	Specific to a third party event
General	General thank you letter
Blank	Used for the General thank you letter

CHAPTER 3

Receipting to Record Gifts and Activities

Receipting is our method of tracking dollars donated and volunteer/staff participation. The **Receipt Maintenance** area can be used to record things like presentations so that the activity of a presentation, followed by a donation, may easily be tracked.

The Receipt window is used for donations, auction items, the purchase of merchandise and more.

How dollars entered are reflected in a donor's record is dependent on the campaign selected when a gift is being entered. For example, the purchase of an auction item is not a donation but rather the purchase of merchandise. **@EASE** courses like the **@EASE Special Events Course** emphasizes planning so that dollars are distributed according to how you want to see them reflected in a donor's personal giving record.

In This Chapter

Receipt Payment Method

Receipt Payment Method

There are several standard payment methods found in **@EASE** when you purchase the package. These cannot be modified. You can add to this list however, to show how a gift has been given.

Standard payment methods include Visa, Amex, MasterCard, Cash, Cheque, EFT (direct debit), Pledge, Gift in Kind and Employee Deduction.

Gifts in Kind have their own payment type which is important to use for receipting and government reporting. It is important that campaigns that accept gift-in-kind donations has the Print on Receipt **Gifts in Kind** box checked on the Campaign master record, for appropriate recording when a receipt is printed.

Small 'P' Pledge payment type is used to show a desire to pay. For example booking a table for a gala where payment is still to come. The dollars have not yet arrived but a pledge has been made to make the payment.

Reports:

1 The **Receipt Batch Report** shows the method of payment and details of the data entry to ensure correctness.

2 The **Receipt Breakout Report** shows which funds the donation has been allocated to.

Q-Xpress Selections:

The **Receipt Payment Method Date** Q-Xpress selection enables you to access donations by payment method. In the case of Pledges for table purchases at a gala, simply check the payment method **Pledge**, include the date range of the transactions entered and check the box **Include Amount** for full details on what has been pledged. The **Payment Method** field in the Q-Xpress export file will show how a gift has been paid. Customized invoices can be created by exporting this file and merging it with a word processing document.

Using the same **Q-Xpress** selection above, when it comes time to report what gifts in kind have been received in your calendar year, follow the same selection criteria, but choose **Gift in Kind** as the payment method.

The **Gift in Kind** selection can also be used to thank generous donors for Auction Items. This requires that the **Receipt Notes** field has been filled out so that the information can be merged into a letter and read correctly. In the **@EASE Special Events Course** we take this a step further and use the entry from the **Receipt Maintenance** window to build **Bid Sheets** and a **Bid Catalogue.**

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas:

We recommend that our clients create a payment method called **Presentation** and use it to record presentations. Where a **Presentation** payment method is used, we recommend that a corresponding **fund or receipt breakout** called **Present** be used so information like donation count on the Receipt Batch Report doesn't get confusing.

Another example is **Gaming Money**. Quite often these donations need to be reported separately. We have recommended creating a payment method called **Gaming** which makes all these donations easy to find and easy to report.

Other examples: a complimentary gala table could have a payment method of **Complimentary**; people who walk for donations, when recorded would have a payment method of **Walker**.

Receipt Breakout Codes

Receipt Breakout Codes are your general ledger funds. You can designate a donation to one or more funds at the point of entry making less work for your accounting department and providing you with information concerning the source of your donations, and in some cases areas of interest expressed by your donors.

A default **Breakout Code** can be established for a campaign at the time the campaign is defined. As a default value, when the campaign in question is selected during donation entry, the default breakout code is automatically populated. This doesn't mean that it cannot be overridden by a specific designation expressed by the donor. **@EASE** offers the opportunity to take a gift and designate it to several funds or **Receipt Breakout** values.

Reports:

1   There is a **Receipt Breakout Report** that will identify all donors who have given to a selected **Breakout Code** within a given date range. This report is found under Reports \ Donor Receipting.

2   The **Donor Breakout Report** used to confirm data entry shows how a donation has been allocated. This report is important to ensure correct data entry prior to proceeding to **@EASE** functions like **Update to Master**.

3   **Donation Breakouts by Campaign** will show which campaigns have received gifts allocated to a specific fund.

Q-Xpress Selections:

1. The selection **Receipting Amount Payment Method Date**, where **Include Dollar Amounts** is checked will include the Breakout Code for a given donation.

> Where there are **multiple designations** for a given donation, **Multiple** is recorded in the Q-Xpress file Breakout Code and "Designated as Requested" is stored in the Breakout Description field.

2. **Receipt Breakout Amount Payment Method Date** will select all gifts allocated to a specific fund. This selection can provide Accumulated dollars.

Global Assign and Delete: None Available

Populated by: Reference

Ideas:

We strongly recommend that **Breakout Codes** be used for all donations.

If all donations are allocated to the same account in your general ledger, you still have an opportunity to show how that fund has been populated. The **Breakout Code** table consists of a 10 character code used by data entry with a complementary fund defined by your accounting department. Many **Breakout Codes** can be allocated to the same accounting fund.

There are two descriptive fields that can be used to describe the Breakout or Fund and where necessary a Facility, in Description Two. The description fields are 100 characters in length. Text that can be merged into letters should be used in these fields to simplify thanking donors.

For Example:

@EASE Code	G/L Fund Account	Description One	Description Two

	@EASE Code	G/L Fund Account	Description One	Description Two
Equipment	SSEquipCmp	1000-25	Computer Equipment	Sunnyside Volunteer Office

For a given date range, the **Receipt Breakout Report** reports who donated to a specific Breakout Code (General Ledger Fund).

If you are using @EASE to record your **presentations**, we recommend that you create a Breakout Code called **Present** to capture the activity count of the presentation entries.

Receipt Mailing List

The Receipt **Mailing List** field is used to identify how a gift arrived. **@EASE** also uses this field to show how a gift is categorized for a silent auction.

When running a lottery or raffle for example, the fund development department might want to know how many purchases were made as a result of different advertising methods ... ie TV, newspaper, radio, volunteer or newsletter.

The **@EASE Special Events** course recommends using the Mailing List field to provide the gift category of the item to be auctioned. This facilitates **Bid Sheets** and **Catalogue** creation. When used in this manner, it is nice to know that you can add your categories to the Mail List lookup table and once your event is done, remove them. Mailing List is one of the tables that provide its entries by **Value** and not by **Reference**.

Reports:

The **Campaign Prospect Report** found under Reports \ Donor Receipting will give a complete count of the number of gifts for each Mailing List value and the average size of the donation for the category.

Q-Xpress Selections:

Selecting receipt records using **Receipt Amount Payment Method Date** and checking the **Include Dollar Amount** box ensures the Mailing List value is included on the Q-Xpress file.

Q-Xpress Exclusions: None Available

Global Assign and Delete: None Available

Populated by: Value

Ideas:

The **Mailing List** field can be used to record how people found out about your lottery, raffle or special event. Knowing how effective your choice of an advertising option has been can be useful. ie Newsletter, Newspaper, Radio, TV, Volunteer, etc

Special event auction items can be categorized at the point of entry to simplify creating Bid Sheets and your Auction Catalogue.

Third Party events can use the **Mailing List** field to more accurately describe the event that a donor has hosted on your behalf. We used the example of Kelly's Pub and Grill running a special St Patrick's Day event.

CHAPTER 4

Pledge Handling

@EASE has a very powerful pledge handling module. Organizational
Defaults is used to define Bank Export information if you are integrating
your @EASE Bank Export files with your banking institution when
processing monthly donations.

In This Chapter

Pledge Notes

The **Pledge Notes** field is used to document why a pledge has been cancelled.

For Active Pledges, this field is used for a **special note** so when an **active pledge donation** has been processed and posted, the contents of Pledge Notes is stored in the Receipt Message field.

Reports: None Available

Q-Xpress Selections:

The **Receipt Message** field is populated based on a value existing in the Pledge Notes when a gift is posted. You can use Pledge Notes to show insurance policy information for a planned gift being paid through @EASE Pledges.

Another method of extracting the number of pledges that have specific Cancellation reasons would be to use the Q-Xpress selection listed below.

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas:

Standardizing why donors have chosen to terminate a pledge can provide good management information. Usually Pledge Notes in the form of Cancellation information only apply to fixed length pledges.

Pledge Decline Code

Pledge Decline Codes are used to identify why a donation was not paid. If you are using the **Bank Export** functionality of @EASE for credit card or direct debit (EFT) payments we recommend that you use the decline codes provided by your bank. This does not mean you cannot use your own terminology to describe the decline value.

@EASE offers a special decline code called **Write-off.** A **Write-off** is used to identify an intended gift where circumstances have changed and the gift or a portion of it will no longer be paid. Write-offs apply to fixed length donations.

Reports:

1. The **Pledge Transaction Declined Report** provides a full list of all donors whose gifts could not be processed. The format for this report includes **Payment Method**, **Decline Code** and the **Pledge Detail Date**. There are further options to be campaign specific as well as the ability to exclude Pledges that have been cancelled.

2. The **Pledge Status Report** lists, for any given pledge campaign(s), the total amount pledged as well as any **Write-offs** and **Declined** values. Write-offs are added to the original gift, Declined Payments with a Retry value of No are not included in the original total. Recording Write-offs as a separate category shows a change of intent.

3. The **Capital Campaign Report** shows Write-off's in the same manner as the **Pledge Status Report**. For the purpose of Capital Campaigns, we recommend that Write-off's only be used to reflect donations that were originally agreed to but will no longer be part of the full payment of the pledge.

Q-Xpress Selections:

Pledged transactions that are declined can be accessed by Decline Code and the associated Retry Value through **Q-Xpress Selections \ Pledges \ By Decline Code and Retry**. This can be useful particularly where a credit card number is in error, or an expiration date for the card has not been updated. We recommend keeping different **Decline Codes** in separate export files so that letters to donors reflect the reason their gift was declined.

@EASE has facilitated a requirement by specific clients to include the Pledge Notes value with the posting of active and good payments. The Pledge Notes information is copied into the Receipt Message field.

> **Please Note:** This may impact situations where Pledge Notes identifies why a donor has discontinued their pledge but only after a specific date has passed ... leaving some active pledges still to be processed.

Global Assign and Delete: None Available

Q-Xpress Exclusions: None Available

Populated by: Reference

Ideas:

Write-offs should be used for all Capital Campaign donations that modify the original amount of the gift. It is important to note that unlike a Decline Code (donation that was not received) a Write-Off does not impact on the original size of the gift but does impact on the amount outstanding.

CHAPTER 5

Data Consistency Tables

Data Consistency helps your information look better. Proper spelling of building names and cities is just good practice. Proper abbreviations for lengthy titles are respectful.

We recommend that you develop standards based on data entry and the use of the tables provided through **@EASE**.

Your communications are a reflection of your organization!

In This Chapter

Address and Contact Fields

Fields that fall into Address and Contact Fields include:

1   Building Name

The Building Name table is valuable for spelling and for global replacement capability when a name change occurs.

2   City

The City table ensures correct spelling and correct abbreviation for those long names. The City table has a postal / zip code value associated with it. When entering a postal / zip code it must be entered in the correct format with correct characters. The selection of the city includes the postal value. This is useful when a charity is supported by small towns and villages.

3   Street

The Street table is useful for recording abbreviations ... or providing a template for rural information.

4   Province

5   Country

The Country table is important as it influences the format available when entering Postal / Zip Codes. If a country other than the default country is selected the format of the Postal / Zip Code is altered. This only occurs when the table entries are used. Please note: it is not necessary and not desirable to enter Canada as the country if Canada is the default country entered in your Organizational Defaults.

6   Phone Type

Phone type provides more information about the telephone number recorded. Do not use Work and Business ...as it is redundant.

7   Email Type

The email field is 100 characters long. There are two values and we recommend that the second email be used for Web-Sites with a Web-Site descriptor ... or for Intl Phone (International Phone) numbers as the regular phone number field is too short.

Reports:

Private and Corporate donors can be listed by City and by Postal / Zip code.

Q-Xpress Selections:

You can select private and corporate donors by City and by Postal / Zip code.

Global Assign and Delete:

There are no global assigns or deletes.

Q-Xpress Exclusions:

You can exclude by Postal / Zip code.

Populated by: Value

Ideas:

Personal and Professional Information

Personal and Professional information fields in @EASE include:

1   Donor Status

Donor Status tells you something about your donors. The four types of status include Active, Inactive, Not for Fundraising and Permanently Inactive.

2   Salutation

Salutations are populated by Reference. A change to the table impacts on all donors with that reference number.

3   Designation

Designation is populated by Value and not by Reference. This field can be keyed into, however, we recommend using the Designation table to show professional status.

4   Family Event Date Description

The Family tab found with the Private Donor lets you enter a date other than birth date. This table identifies what the other date might be. ie Baptism Date

Reports:

There are no specific reports available relative to the tables above. However, the Donor Status field can be used to specify which donors will print on some reports. eg. Donor Selections \ Members with Donation Amounts.

Family information includes the Family Event Date and Description will print on the Donor Profile Report if the Family box is checked.

Q-Xpress Selections:

Private Donor and Corporate Donor selections can be further qualified by the **Donor Status**. For example, you can ask for all donors by donor number range and within that range specify Permanently Inactive Donors.

Global Assign and Delete:

Global Assign is available for Donor Status. When assigning a Donor Status you can determine the value of Share Data at the same time. There is no Global Delete as all donors must have a status value.

Q-Xpress Exclusion:

1   Exclude by Status enables you to exclude records from your export list depending on what status you select.

Ideas: ?

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