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Areas where Consistency Counts

We have developed @EASE so that our clients do not need to understand the technical world of programming while having access to valuable decision making data.

Campaigns

We will begin the discussion with how the program sets up campaigns and the conventions used.

Unlike other programs, @EASE uses 4 parameters to define a donation opportunity. These 4 fields are the following:

Fiscal Year

This is the fiscal year the campaign or event starts and may carry a gift through many subsequent years as in the case of In Memory gifts or Fixed Length / On-going pledges. The Fiscal Year value runs according to the accounting year and not the calendar year unless one is the same as the other.

Campaign Type

The Campaign Type is a two character code which identifies the Type of Ask. We have set standards which clients can use but regardless of using our standards or ones they create, it is important to maintain a level of consistency for decision making purposes.

In some situations, we have recommended the best way to handle specific types of situations. These include In Memory, In Honour of, Third Party and Unsolicited gifts.

Some of the recommended values are:

DM – direct mail; TP – third party; MM – in Memory; HN – In Honour of; UN – Unsolicited;
BQ – Bequest; EN – Endowment; GA – Gala; GO – Golf; MO – Monthly; MG – Major Gift;
GR or FG – Grants



Capital Campaigns are managed a little differently as the Campaign Type is used to identify dollar ranges and to prevent total chaos we use letters at the bottom of the alphabet.

Campaign Code

The Campaign Code identifies how the donor has responded. This field can tell the development team a great deal and some of the standards we use include the following:

Campaign Code	Value	Campaign Code	Value
AUC	Auction Donation	D01- D04	Donations on repeated campaigns by Quarter
GIK	A gift in Kind for the use of the Charity	SLS /LIV	Purchases at a special event – silent auction 7live
REV	Cash revenue	TCK	Ticket Purchase
DON	Donation	PRT	Participant
SPS	Sponsorship	REG	Registration
PLG	Donations to a Fixed Length Pledge	ONG	Donations to an On-going Pledge

There are others but the point here is staff can tell by reviewing the campaign names the type of data they would expect to find.

Breakout Code

This is an odd name which refers to the Fund or GL account the dollar amount is allocated to. All gifts need at least one BO Code value. Codes fall into one of two types, designated and non-designated. We have provided methods for handling designated donations which are too minimal to allocate a GL account for ... such as Wish List gifts for a charity. We have suggested where no specific BO value is allocated when the



campaign is created that the source of the gift be identified. The non-designated fund might have \$500,000 at the end of the year. How was it populated?

The Batch Report in Grand Total mode will quickly identify gifts like Memoriam, Unsolicited, Direct Mail, Third Party as the source and all can be allocated to the General Donations GL account.

Why is this coding system valuable?

It Prevents Clutter

For example in other products a Campaign, Appeal Code and Fund are used.

If a charity runs one Direct Mail a year for 10 years and one Annual Campaign in December, the codes in @EASE would be

Fiscal years 2008 – 2017

Campaign Type DM and AN

Campaign Code DON

Other software would require 20 appeal codes to achieve the same result.

Reporting

- Using a consistent strategy you can report all years of DM DON to see what the dollar values are. When calculated using the Receipt Date option, the number of donations along with total gifts are displayed.
- While reporting by fiscal year the Contribution report shows how many donations are received by dollar range.
- Campaign Listing with Totals Dollars can showcase how ThirdParty donations have come in
- Running Campaign Listing from Fiscal Year 1900 – 2018 will show all campaigns which are still receiving donations which would include pledges, in memory gifts, endowments, etc



Q-Xpress Exports

Selecting reports from @EASE is equally easy. Clients are not required to pick fields from different tables. Rather if a list is requested by Campaign type either by Fiscal Year or Receipt Date a complete list of names is readily available.

We know Consistency Counts, as it benefits the ability of development staff to understand the source of a gift and whether it started in the current year or years before and it enables easy access to reports and extracts.

In reviewing your campaigns, if you have found issues you would like fixed please let us know as they can be easy to correct.

Donation Type

When campaigns are created development staff decide how they want dollars accumulated to the donor's record by fiscal year.

The categories include:

Registration

This field accumulated Benefit dollars where a ticket or registration has a charitable portion and a non-charitable or benefit portion. The Thank You fields found in the Campaign's Profile is where these amounts are identified for receipting purposes.

Donations

This is used for Charitable donations whether receipted or not. This category is quite often reserved for cash only as totals by donor are used to support the donor wall.

Sponsorships

This is used to identify campaigns which house organization which sponsor events.



Merchandise

Gifts in kind, auction donations, purchases, cash revenue all fall into the Merchandise category allowing the charity to recognize the good will by donors which is usually not receipted.

Volunteer Hours Only

This is used for Volunteer Hour Campaigns which have no dollars, no receipting and are used only to organize how volunteers assist the charity.

Campaign Setup

Campaign set up and understanding how each choice made affects reporting, how dollars are allocated and accumulated supports a great deal of decision making data.

In our original design the decision was made that once a campaign was defined and donations were received, that no changes could be made to the Donation Category. This was done with the intention of encouraging all @EASE users to plan first as it had been our experience to see data handled as though it was not that important where in fact it is one of the most important assets a charity has.

There are several tutorials under Campaign Setup and Managing Grants which are useful.

- How to Manage Third Party Campaigns

- How to Set up In Memory and In Honour of Campaigns

- Managing Grants

- Others are listed as well.



Other Areas where Consistency Works Best

Other areas which benefit from good data include the Quality codes. This would apply as well to other coding systems found in the Lookup Tables.

For Example:

Exclude values: Grouping “**Exclude**” values using a prefix like Exclude: ensures not entries are missed. @EASE stores Qualities by Value so modifying your data at the Lookup Table level enables a change that would be reflected in donor records using the code.

We have examples in @EASE for Proposal Due and Board Change. You will note that we added a numeric value to ensure the order of the codes make sense.

Working with a Database, particularly one as valuable to a charity as its donor data, is a thoughtful process and not one to be rushed or thrown together by individuals who do not understand the scope of how it impacts organizational sustainability.