



@EASE Fundraising Software

@EASE Campaigns

Plan First

Campaigns

A Campaign is used to collect donations, sponsorships, merchandise purchases and or volunteer hours.

Think of a Campaign as a Box. Each Box has a very particular character relative to its purpose. It functions, as it is defined. So Plan well but Plan First.

Characteristics which differentiate boxes include:

- The fiscal year it starts
- The type of Ask – if there is an Ask
- What kind of data does it collect – cash or GIK
- Is it charitable or non charitable
- Are donations designated or non-designated
- If receipted what prints on a donor receipt
- Is it a membership and what are the renewal parameters
- Is there a ticket number as in a lottery
- If it's an event ticket what is the benefit and non-benefit amounts
- When updated to master how are gifts accumulated to the donor's record



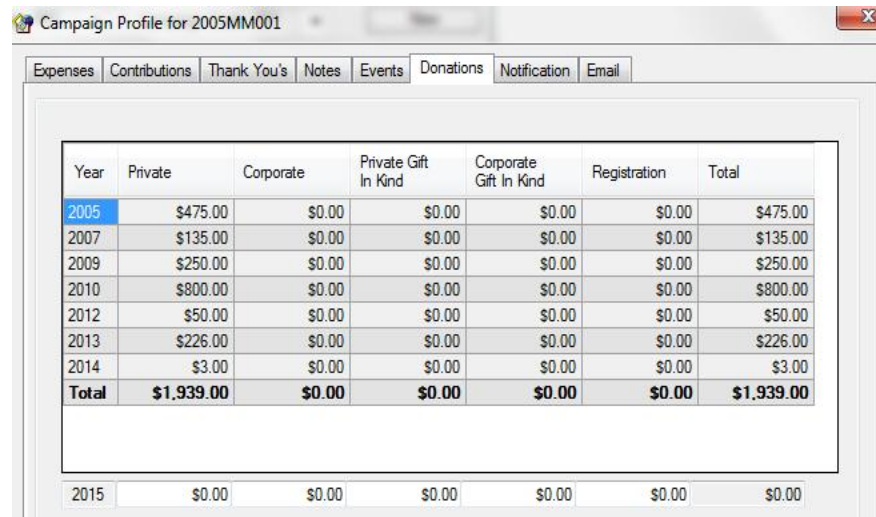
Campaigns

Naming Conventions

Naming conventions are important and best when consistent from year to year or quarter to quarter.

The Fiscal Year identifies the year the Campaign is run for the first time. Campaigns like 'in memory' will run over multiple years where gifts are received on the anniversary of a loved one's passing. Campaigns like Direct Mail begin anew with each new Ask.

Capital campaigns, campaigns for monthly donations all have a fiscal year start year which may continue over several following years as donations continue to be added to the campaign 'box'.



The screenshot shows a software window titled "Campaign Profile for 2005MM001". The window has several tabs: Expenses, Contributions, Thank You's, Notes, Events, Donations, Notification, and Email. The "Donations" tab is selected. Below the tabs is a table with the following data:

Year	Private	Corporate	Private Gift In Kind	Corporate Gift In Kind	Registration	Total
2005	\$475.00	\$0.00	\$0.00	\$0.00	\$0.00	\$475.00
2007	\$135.00	\$0.00	\$0.00	\$0.00	\$0.00	\$135.00
2009	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00
2010	\$800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$800.00
2012	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00
2013	\$226.00	\$0.00	\$0.00	\$0.00	\$0.00	\$226.00
2014	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3.00
Total	\$1,939.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,939.00
2015	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

We are viewing a Memoriam campaign which started in fiscal 2005. As gifts were received from fiscal year to fiscal year, they were accumulated to donor's records and to the campaign's donations in the profile.

There was no need to create a new campaign for our fictitious Rose McGuire, simply one campaign with fiscal years of data tallied.

Campaigns

Naming Conventions continued

The Campaign Type identifies the type of ASK. This is a two character code which is enough to define the method a charity used to solicit for funds.

DM Direct Mail	GA Gala	These are samples / examples.
NL Newsletter	GO Golf	
FG Foundation Grant	MG Major Gift	

Some types are the result of donor initiative.

UN Unsolicited	MM In Memory	
HN In Honour of	TP Third Party	BQ Bequest

The Campaign Code identifies how the donor responds & possibly when the ask is offered. This is a three character code and should not be confused with a payment method or an event name.

DON Donation	D01 Donation Quarter One	D02, D03, D04
PLG Fixed Length Pledge	TCK Ticket	AUC Auction Donation
SPS Sponsorship	GIK Gift in Kind	REV Cash Revenue Item
SLS Silent Auction Sales	LIV Live Auction Sales	



Campaigns

Naming Conventions continued

Campaign Listing with Total Dollars

Fiscal Year from 2000 to 2010

Campaign	Campaign Description	Fiscal Year	Total Campaign	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2002FFAUC	2002 Fall Fest Auction Donations	2002	2,895.00	0.00	2,895.00	0.00	0.00	0.00
2004FFAUC	2004 Fall Fest Auction Donations	2004	6,000.00	0.00	6,000.00	0.00	0.00	0.00
2007FFAUC	2007 Fall Fest Auction Donations	2007	3,650.00	400.00	3,250.00	0.00	0.00	0.00
2008FFAUC	2008 Fall Fest Auction Donations	2008	6,700.00	0.00	6,700.00	0.00	0.00	0.00
2010FFAUC	2010 Fall Fest Auction Donations	2010	3,700.00	0.00	3,700.00	0.00	0.00	0.00
Total			22,945.00	400.00	22,545.00	0.00	0.00	0.00

The report above is possible because we used consistent naming conventions. Had we used many different campaign type and code values it would have been impossible.

The Fiscal Year shows each campaign and total donations allocated to it by year.



Campaigns

Other Campaigns Fields

Documentary

- Start Date – for special events we recommend the date of the event
- End Date – for fiscal year activity like unsolicited gifts we recommend using the end of the fiscal year.

How to Calculate Cost per Mailing / Cost per gift

- Mailed Appeals – mail count
- Reminder Mailings – reminder count (Create a Campaign Response File at export time)
- When used with the Profile Expenses ROI values can be determined

Goal Value

- Total amount fund development would like to receive

Print on Receipt

- Thank you checked will ensure that Thank you messages by dollar amount are printed on any charitable receipt or charitable eReceipt or non-charitable receipt
- Gift in Kind – used for charitable gifts with a payment method of Gift in Kind, the Receipt Notes area prints on the receipt
- Membership is used for external members to determine a renewal date
- Ticket Number unique is used for lotteries and auction items.



Membership

One Year From Receipt Date

Month End One Year from Receipt Date

Renewal Date



Campaigns

Profile Tabs

- Expenses – the costs associated with a campaign can be recorded to calculate a net value
- Contributions – when U2M is run, contributions by dollar amount range are updated to show a count of donations. Comparative reports can be run to see if donation amounts are changing.
- Thank You's – messages that print on a charitable receipt or non-charitable receipt determined by the dollar amount of the gift
- Notes – used to record information pertaining to the campaign. This is useful to record the criteria used to select a list and to show the exclude categories used.
- Events – a schedule of volunteer jobs necessary for the campaign. This might pertain to help with a mail out or scheduling volunteers to help with a casino / bingo or a gala event.
- Donations – updated with U2M is run. This tab shows by fiscal year private and corporate dollars totals, gift in kind totals and registration dollars.
- Notification is used for 'in honour of' or 'in memory of' campaigns where family members have asked to be advised of gift donors (excluding amounts). The Gift Notification Report will print a listing by gift date if this tab has values.
- Email – where a charity wishes to send out eReceipts, the Email must be filled in or eReceipts are not allowed.



Campaigns

Running Comparisons

Campaign Listing with Total Dollars

Fiscal Year from 2000 to 2015

Campaign	Campaign Description	Fiscal Year	Total Campaign	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2001DMD03	2001 Direct Mail Campaign Fall	2001	1,870.00	1,375.00	0.00	495.00	0.00	0.00
2002DMD03	2002 Direct Mail Campaign Fall	2002	5,705.00	4,705.00	0.00	925.00	75.00	0.00
2007DMD03	2007 Direct Mail Campaign Fall	2007	4,175.00	2,475.00	0.00	1,700.00	0.00	0.00
2011DMD03	2011 Direct Mail Campaign Fall	2011	351.00	0.00	0.00	351.00	0.00	0.00
2011DMD03	2011 Direct Mail Campaign Fall	2012	1,055.00	60.00	0.00	995.00	0.00	0.00
Total			13,156.00	8,615.00	0.00	4,466.00	75.00	0.00

Campaign Contribution Analysis

Campaign:	<=10	<=25	<=50	<=100	<=250	<=500	<=1,000	<=5,000	<=10,000	<=25,000	<=50,000	<=100,000	<=10,000,000
2001DMD03	0	2	4	2	5	1	0	0	0	0	0	0	0
2002DMD03	0	1	9	6	5	2	2	1	0	0	0	0	0
2007DMD03	0	0	7	6	9	2	1	0	0	0	0	0	0
2011DMD03	1	14	7	6	1	0	0	0	0	0	0	0	0

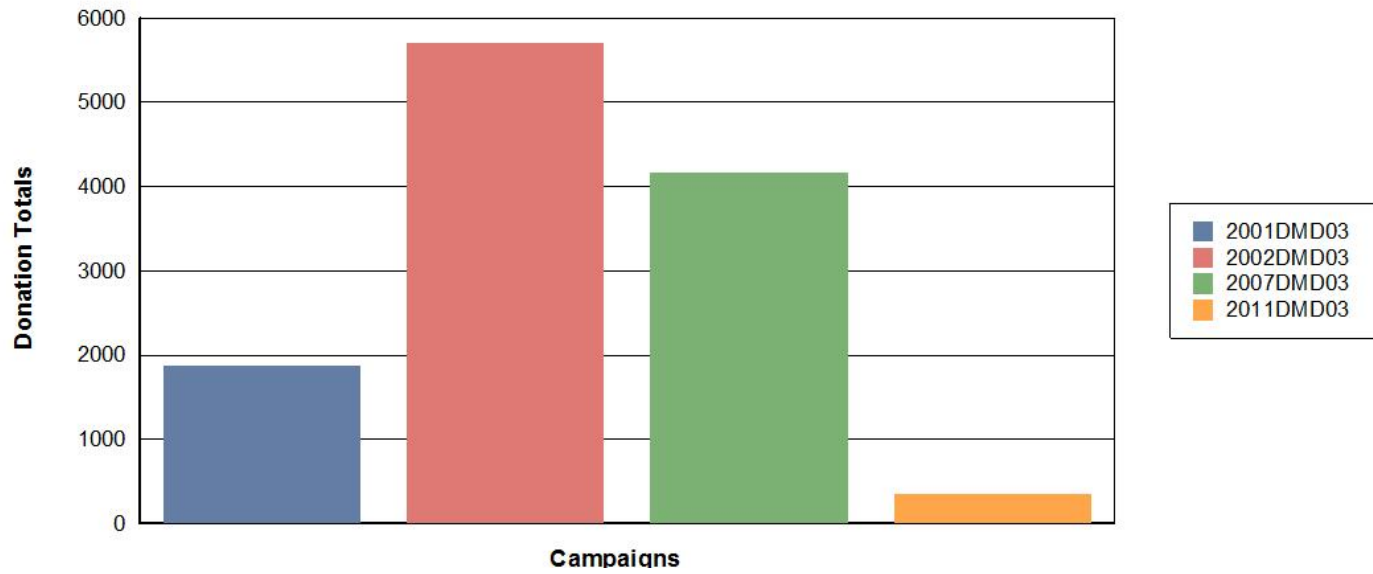


Campaigns

Campaign Listing with Total Dollars

Fiscal Year from 2000 to 2011

Donation Totals by Campaign



Campaigns

Default Values

When a campaign is selected in the Receipt Maintenance window the following default values are provided by the campaign:

1. The name of the campaign
2. The Breakout Code or fund
3. The Charitable status
4. The Letter code
5. The Receipt Required value
6. If the receipt should be printed Yearly

Values like Charitable status, Receipt Required and Breakout Code can be modified at the point of entry.

When U2M (Update to Master) is run, the Campaign indicates how the dollar amount it added to the donors record.

Upon receipt print, the Campaign is used to determine the Thank you message to be used and whether the Receipt Notes will be printed on the receipt where the payment method is Gift in Kind and descriptive text has been added to the notes area.



Campaigns

Campaigns Working in Concert

Special Event Gala

Function	Code	Charitable	Receipt Required	Donation Type	Notes
Tickets	TCK	Yes	Yes	Ticket Sale	A benefit and charitable amount
	TCK	No	No	Merchandise	Alternative to charitable ticket
Sponsorship	SPS	No	No	Sponsorship	
Auction Items	AUC	No	No	Merchandise	Can be modified to charitable with receipt at entry time
Donations	DON	Yes	Yes	Donation	
Auction Sales	SLS	No	No	Merchandise	
Cash Revenue	REV	No	No	Merchandise	Cash sales at the event
Volunteers	VOL	n/a	n/a	Volunteers	



Campaigns

Campaigns which in Concert

Donation Appeals

Function	Code	Charitable	Receipt Required	Donation Type	Notes
Donation	DON	Yes	Yes	Donation	
Pledge Fixed Length	PLG	Yes	Yes / Yearly	Donation	
Pledge On-going	ONG	Yes	Yes / Yearly	Donation	

When a Pledge master record is created, the Campaign provides information about the yearly status for receipting and if the pledge will be On-going or Fixed Length.

On-going and fixed length pledges should never be included in the same campaign as they are handled differently by @EASE.

The Campaign Code provides instant information to the program's users.



Campaigns

Campaigns which in Concert

Here are some examples of campaigns that work together to provide a complete picture of activity. Keep in mind that each campaign is designed to manage one function only.

Function	Code	Charitable	Receipt Required	Donation Type	Payment Method on Receipt	Notes
Requests	RQS	Yes	No	Donation	Pledge	
Declines	DCL	Yes	No	Donation	Pledge	Noted on Receipt
Award Donations	DON	Yes	No	Donation	TBD	
Award Pledge	PLG	Yes	No	Donation	TBD	



Campaigns

We provided a Campaign Management Worksheet in the EaseKMS forms folder. One can be downloaded from the QuikEaseTutorials.

© EASE Campaign Management Worksheet

Default Values	Campaign	Campaign	Campaign	Campaign
Campaign Name				
Start Date				
Print on Receipt:				
Thank You Messages				
Gift in Kind				
Entered Thank You's				
Charitable				
On-going				
Lottery Max No.				
Yearly				
Membership				
Letter				
Breakout Code & Account				
Donation Type				
Receipt Required				
Notify				

Campaigns play a very important role when managing donations, sponsorships and more.

When set up well, the job of entering donations accurately becomes that much easier.

The Campaign Listing Report found under Campaign Reports is a useful way to check campaigns before entry starts, as once donations are entered fields like Donation Type cannot be altered.

Campaign Listing

Campaign	Description	Start Date	Print on Receipt		Yearly Receipt	Charitable	Pledge Ongoing	Lottery	Membership	Letter	Breakout Code	Donation Category	Receipt Required
			Thx	GIK									
2015DMD02	2015 Direct Mail Spring	Mar 15, 2015	Y	N	N	Y	N	0		DirectMail	DirectMail	Donations	Yes (Based on Lowest Dollar Value Received)

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