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Creating an In Memory or In Honour Campaign

Campaign Name

We recommend that In Memory gifts use the campaign type MM and In Honour gifts use the campaign type HN defined in the **@EASE** Campaign Type Lookup Table. The Campaign Year is the current fiscal year. If the new fiscal year has not been updated through the Fiscal Year End process, the year needs to be entered correctly. The Campaign Code is a number. With each new fiscal year, the numbers for the Campaign Code begin at 001. These numbers are not defined in the Campaign Code Lookup Table and can be entered through the keyboard.

The numbering sequence for In Honour and In Memory are unique to one another.

Example: In 2015 we had two in honour campaigns: 2015HN001 and 2015HN002

                      In 2015 we had two in memory of campaigns: 2015MM001 and 2015MM002

Description

The Description field for the campaign addresses the person who is deceased or being honoured. No end date is associated with the name as gifts may be received over many years.

Example: in memory of Rose McGuire
                      in honour of the 50th Wedding Anniversary of Mary and John Wilson

Breakout Code
Donations can be allocated to a specific breakout or fund at the request of the next of kin or to a general breakout like Memoriam. The code selected when the campaign is created can be over-ridden should individual donors specify a different fund designation at the time the gift is entered through the Receipt Maintenance window.

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Other Campaign Master Fields

- The Donation Category is Donations
- Thank You under Print on Receipt needs to be checked in order to print the message on the receipt. This serves two purposes, first to thank the donor who has given money and second the name of the person in memory or being honoured.
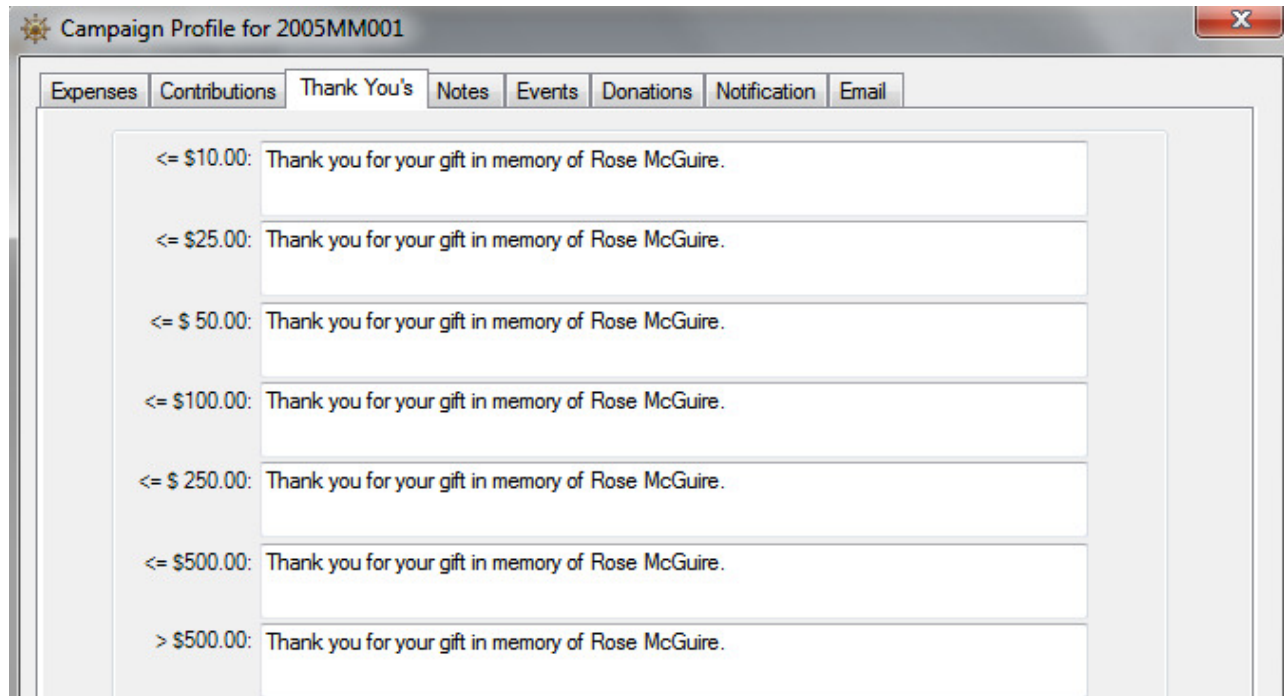
Campaign Profile

Thanks You's

@EASE has the unique feature of being able to provide a specific Thank You message for donations when a receipt is printed.

To enter the Thank You messages, click the Save button for the campaign being entered and click on the Profile button. The Thank You tab shows different messages for different gift levels, however all messages can be the same. Each field is 160 characters in length. The field appears on the Receipt, so we recommend that it be well worded and spell checked by your vigilant eye.

For speed, put your first message in. Highlight the line, right click and copy. Move to the next Thank You field using the mouse or Tab key and press Ctrl+V to paste. Continue until all Thank You messages have been filled.

Click on the Okay button found at the bottom of the Profile window to save the Thank You messages entered. Did we mention there is NO Spell Check???

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Creating a Notification List of Next of Kin or Family Members

Notification Tab

For gifts In Memory or In Honour there will be people who want to be notified. In consultation with clients, we found that often more than one person requests notification. To address this need, a Notification Tab has been added to the Campaign Profile. This enables multiple entries.
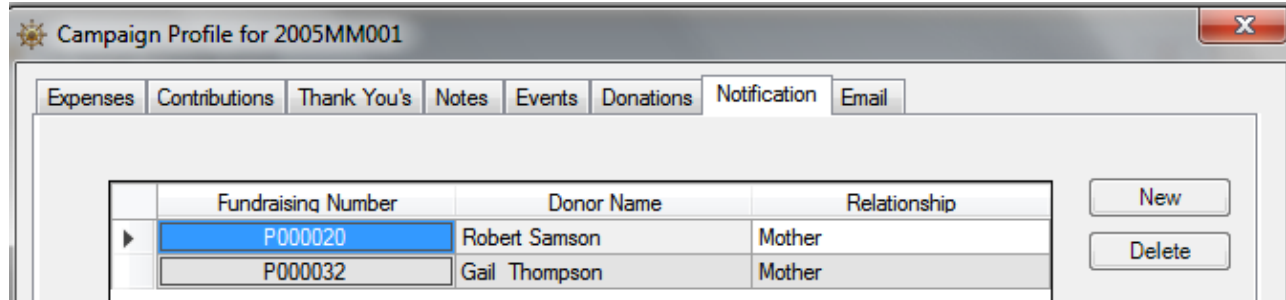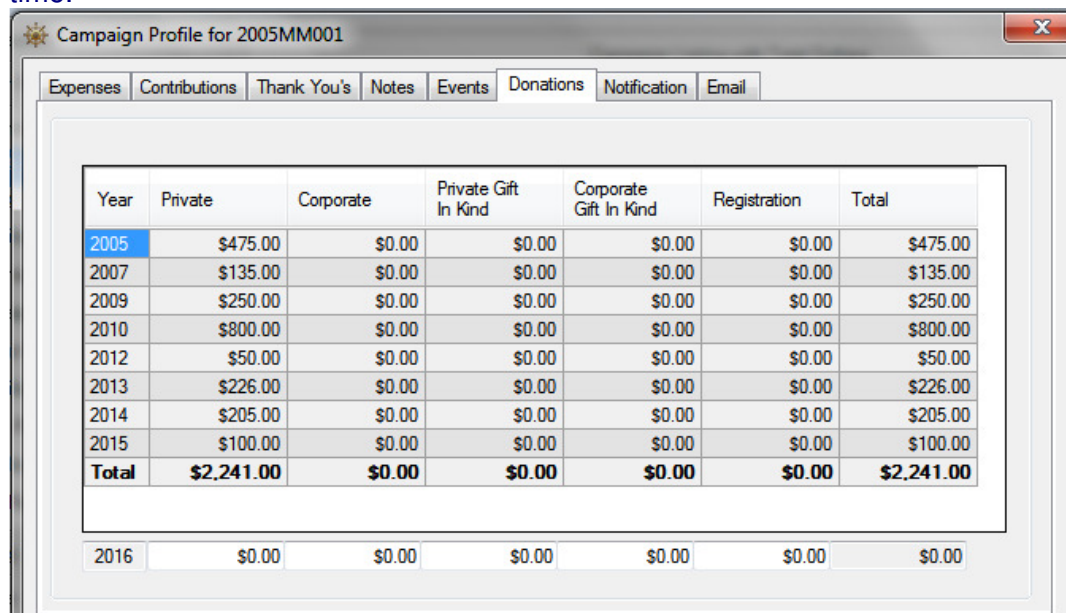

> **Please Note:** The Notification tab includes a Relationship field used to show **the relationship of the person being remembered or honored to those person(s) being notified**. It is **important** this field be used consistently.

The first notification name and relationship exports when creating a Q-Xpress \ Receipt Amount Payment Method Date export file. The first person listed is considered the primary person to notify. This name and relationship can be used in thank you letters to donors.

Donations Tab

By viewing the Donations Tab it is apparent that Rose has been receiving donations for some time.

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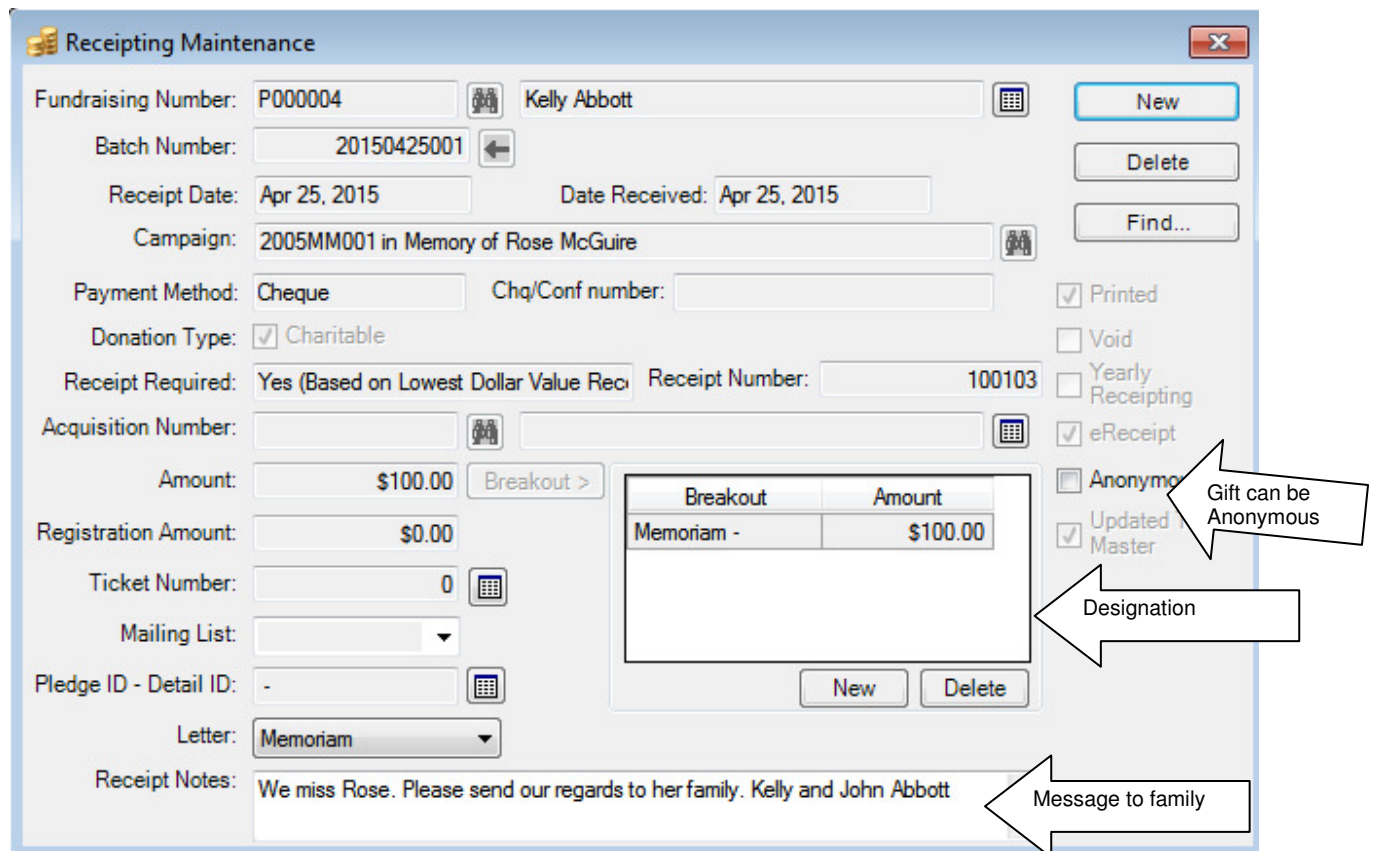## Entering an In Memory or In Honour of Donation

Entering the donations is no different than other type of gift. Searching for a memoriam can be done by using the Campaign Description field. This helps to ensure no duplicate entries occur.
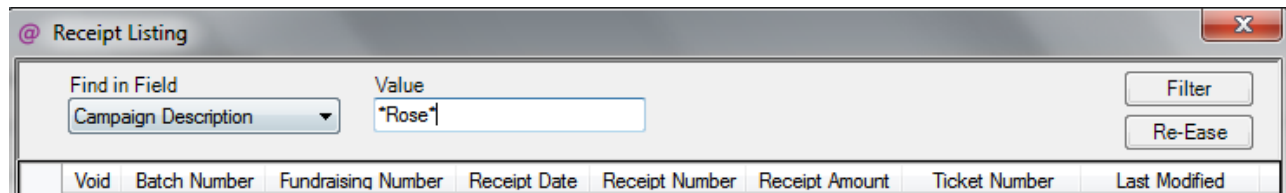
The Receipt Notes on the screen below, prints on the Notification Report. It is an opportunity to record any message that a donor wishes to relay to the individuals being notified. This field is 250 characters in length.

A donor may request that their donation be allocated to a specific breakout. The breakout for the campaign can be modified at entry time through the entry fields found at the bottom right hand side of the window.

The donor may also wish to remain anonymous which means they would not be listed on the Gift Notification Report. The Anonymous check box only applies to In Memory and In Honour gifts.

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Reporting Donations by Date Range

Campaign Reports \ Notification by Date

The Gift Notification Report is created by requesting the report by Date Range. The Date Range in question is the date range that gifts have been received. Eg. April 1, 2015 – April 30, 2015. This report produces separate reports for each In Memory or In Honour campaign receiving donations in the date range entered.

Gift Notification Report

The report gives the **Campaign Description** and **the Breakout Description** in the title. These values come from the Campaign master record for the campaign being reported. The Breakout Description is whatever has been entered to describe the Breakout code in the Lookup Tables under Receipt Breakout. Be sure that the content, spelling, and presentation of this information is fitting for the Notification Report.

Gift Notification Report Body

Name, Address & Telephone: The body of the report lists all donors who gave gifts in the date range entered. Along with a name, the report lists the Primary address and telephone numbers.

Receipt Notes Message: Where the donor sent a message along with their gift, if the message was entered in the Receipt Notes field on the Receipt window, the message will be included.

Donor Designation: Where the donor selected a different Breakout or fund from the default Breakout Code or fund on the Campaign master record, the requested Breakout Description is printed. *** This is now an optional feature as shown on the Notification Report by a check box. ***

Two options exist where the Designation and Contact Information can be excluded from the report should the charity not wish to share that information.

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Gift Notification Q-Xpress Selection

The Final Step in handling an In Memory or In Honour gift is to notify the next of kin or family members that requested a list of donations.

@EASE Gift Notification by Date is found in the Q-Xpress Select Menu. This selection requests a date range and we recommend that the same date range used for the Notification Report be used to produce this file.

The export file includes:
1. Campaign Description,
2. Campaign Breakout Descriptions,
3. the total Amount of the donations received for the period reported
4. the total Amount of all donations to the campaign
5. the Notification Relationship for the primary person being notified

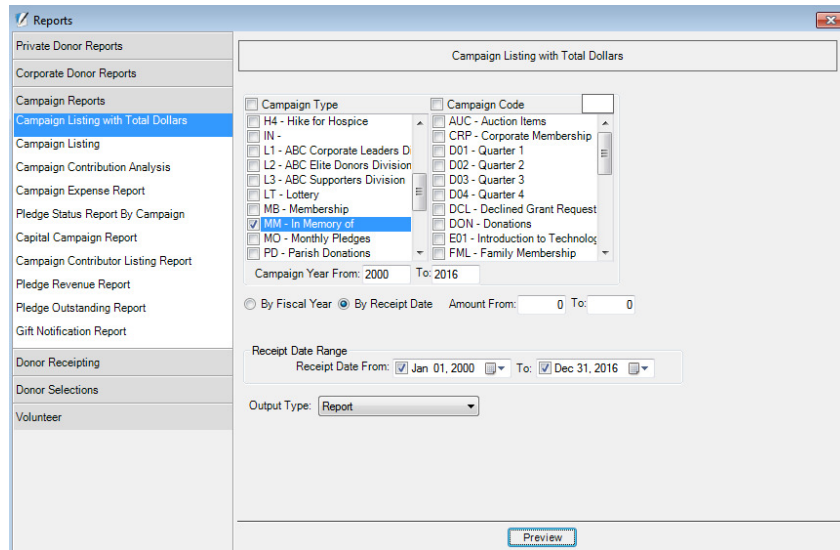All or some of these fields can be used to create a thoughtful letter.
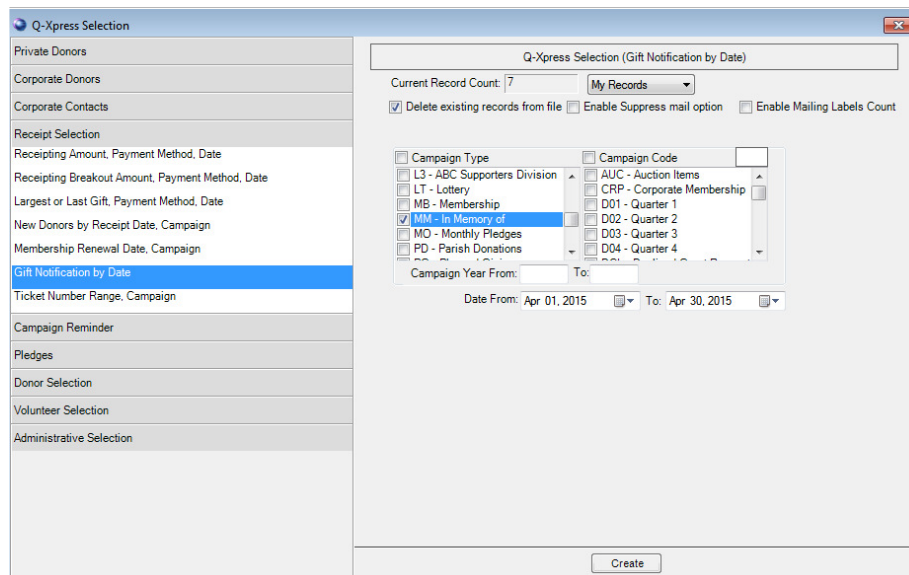
Once the Label file has been built, it is exported using Q-Xpress \ Export.

Using Word and the Mailmerge.txt file created in **@EASE**, letters can be created and printed.

Other Reports that may be Required for In Memory or In Honour Campaigns

Newsletter Listings of In Memory Campaigns Receiving Donations

To report which In Memory campaigns have received donations in a given period, you can use either the Campaign Listing Report or the Campaign Listing with Total Dollars.

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This selection will list all campaign types MM for Memoriam campaigns entered in years 1990 – 2016 that received donations from Jan 1, 2000 - present.
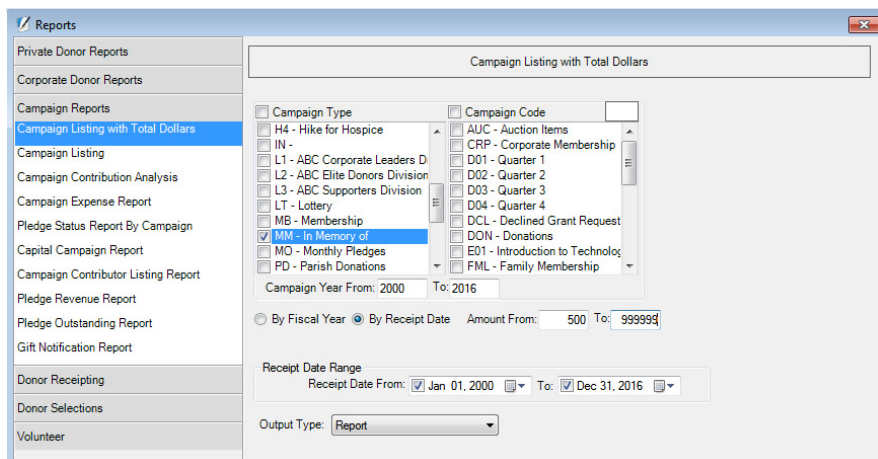
Campaign Listing with Total Dollars

Receipt Date from Jan 1, 2000 to Dec 31, 2016

Campaign	Campaign Description	Total Campaign	Total Count	Corporate $	Corporate In Kind	Private $	Private In Kind	Registration
2005MM001	in Memory of Rose McGuire	2,245.00	32			2,245.00		0.00
2010MM001	in memory of Wilson Puck	625.00	6			625.00		0.00
2014MM001	in Memory of John Brown	2.00	2			2.00		0.00
Total		2,872.00	40			2,872.00		0.00

This report can be exported as an Excel file and all unnecessary rows and columns removed for use in a Newsletter or reporting in an Annual Report.

In Memory Campaigns and Your Donor Wall

Some clients need to know which Memoriam Campaigns have reached a specific dollar value for their Donor Wall. To get accumulated donations by In Memory campaigns in a given dollar range, go to Campaign Reports and select Campaign Listing with Total Dollars.

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In the sample selection we have asked for all type MM or memoriam campaigns with campaign years 1990-2016 that have accumulated donations of $500.00 plus from Jan 1, 2000 – Dec 31, 2016.

Receipt Date from Jan 1, 2000 to Dec 31, 2016

Campaign	Campaign Description	Total Campaign	Total Count	Corporate $	Corporate In Kind	Private $	Private In Kind	Registration
2005MM001	in Memory of Rose McGuire	2,245.00	32			2,245.00		0.00
2010MM001	in memory of Wilson Puck	625.00	6			625.00		0.00
Total		2,870.00	38			2,870.00		0.00

This report can be exported to Excel and modified to suit your purposes.

Exporting to Excel

The Report window in **@EASE** lets you view and print reports. The Export option in the upper left corner of this window lets you export files. Different EASE reports will export differently. This is a function of the data levels used to create the report.

This report exports very well. In fact it can be exported in many different formats from Adobe Acrobat PDF formats, RTF to XLS formats.
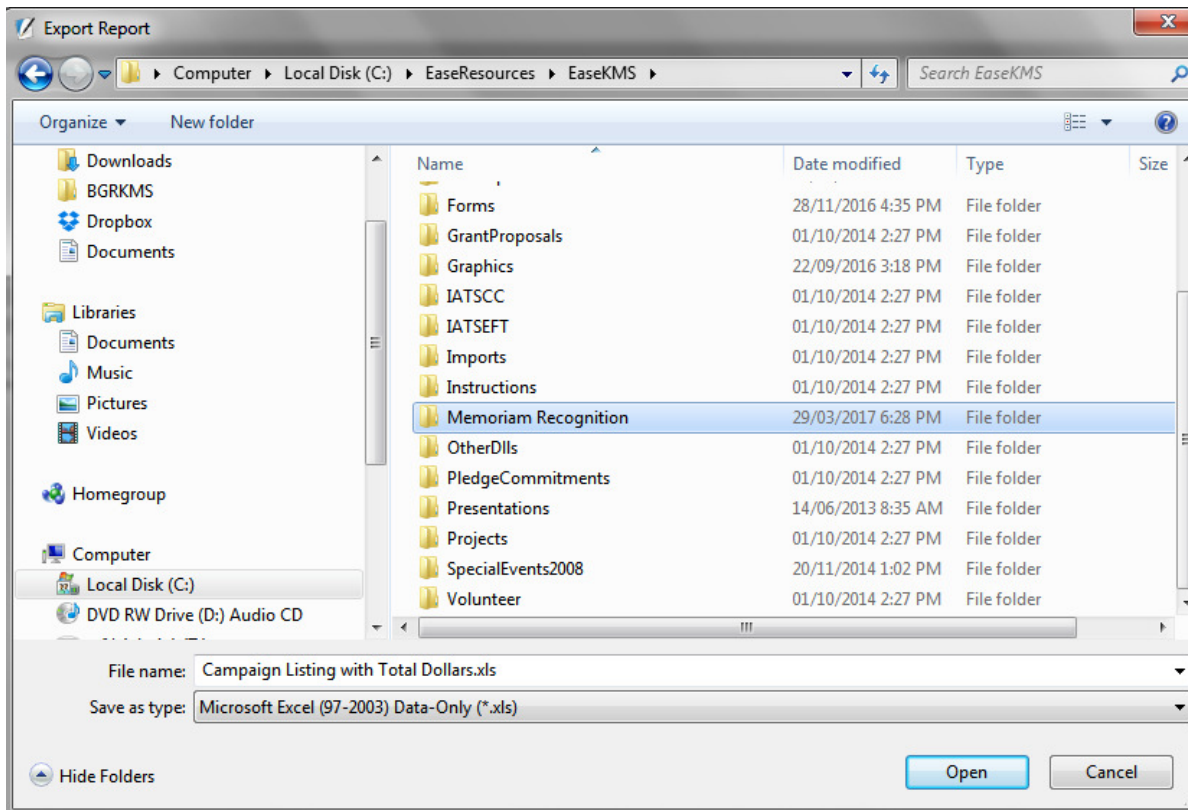
The Save screen needs to be watched as you need to recall the name of the exported file. A location in the EaseKMS ensures safe and immediate access to the information.