



**GETTING TO KNOW
YOUR DONORS,
SUPPORTERS, &
ADVOCATES**

**FOR EXECUTIVE DIRECTORS AND
DEVELOPMENT STAFF**

Easy access to information to shape your decision-making and support development plans has been a key component of @EASE.

Batsch Group Team

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Introduction

To know your donors, there is a need to capture information about them to better understand who they are and why they give to your charity.

Many Donor Management Systems house only donations which seems counter intuitive to the goal of knowing a charity's donors and building all important relationships.

@EASE has a strong profile area to identify key attributes about a donor to build and maintain relationships with their donors.

We look at fundraising as a collaboration between a charity that supports a mission and a donor who has invested in its mission and its successes.

Knowing your donors and being able to identify opportunities means the data used must be accurate, accessible, and current.

The charitable sector has many competitors for donation dollars. If you look at your donors as customers and explore your own customer experience, we believe a great deal can be done to enhance the donor experience and their relationship with a charity.

@EASE has added many analytical reports for our clients. As well we have provided a rich environment to record what is learned as staff members interact with donors.

The key to a successful donor Knowledge Base is where all staff contribute utilizing the tools provided through @EASE.

We think fund development and raising dollars is much like a business. It is hard work, and every person needs the tools to be effective and efficient.

Little is simple and it requires thought.

One area we should delved into is the segmentation of the data, especially corporate data, to better access the support of businesses, religious organizations, service clubs and more.

A further point is ensuring all stakeholders are recorded, including city, provincial and federal elected officials, and media. Rapid and accurate is critical to getting things done now, not tomorrow or some time in the future.

Getting to Know Your Donors
Relationships, Operational Intelligence and Success

We are here to assist our clients. @EASE has been a collaboration of client needs with our talented development team. The @EASE Tutorials reflect our relationship with our clients and our desire to help them be successful.

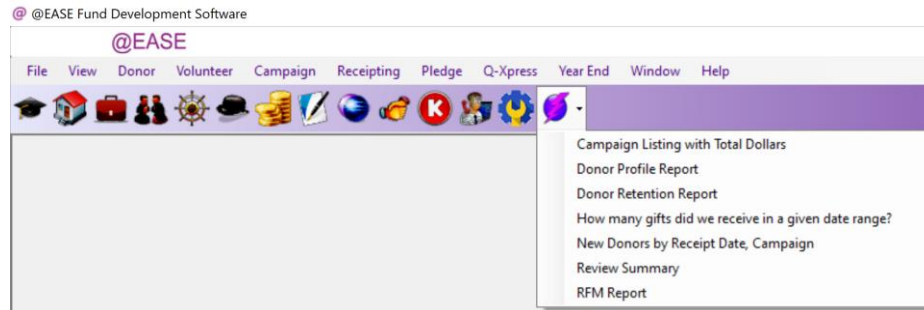
We look forward to receiving your input.

The Batsch Group Team

New QuikLink



To facilitate access for senior management to reports we have added a **QuikLink** to the main menu. QuikLink gives rapid access to several reports, QuikEase selections and Q-Xpress to view new donors. All reports are valuable when reporting to a board, determining the success of campaigns, or supporting decisions.



Profiles: What do you know about your Donors?

@EASE has rich donor profile fields to record informational data that can be reviewed through each donor's Profile tab. Additional information includes family members, achievements and a link to the Communication tab brings all elements together. Profiles for Private and Corporate records include the following fields to record pertinent data:

- Donor Summary which includes first, and last fiscal year donated and total donations by Donation Type for each year they have given including amounts on the current fiscal year.
- Demographic code and description
- Qualities are donor characteristics.
- Memberships including committee activity, newsletters, and review dates.
- Donor Interests is used to record why an organization or individual gives to a charity. Research on giving criteria is recorded in Interests.
- Donor Recognition show casing how the charity has identified giving practices.
- Relationships that exist within the database
- Supported Campaigns which details the last fiscal year a specific type of ask was supported.
- Volunteer Profile fields include years and hours of service, recognition, interests, and accreditations.
- A Pledge overview of monthly giving
- Dickens to record past, present and future notes, and activities with a donor.

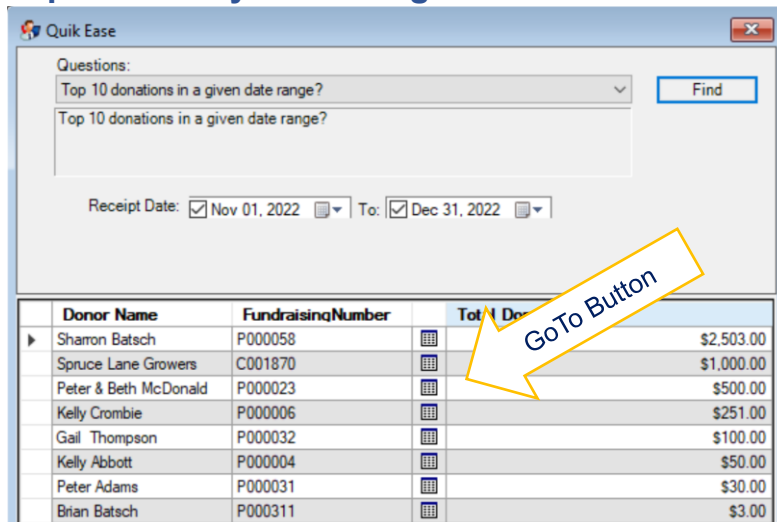
Corporate Donors include all supporters that are not private individuals. These donors have the benefit of Other Addresses so that large corporate supporters and foundations can use one master record and profile regardless of various locations.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

@EASE has been designed to manage all donors, prospects, elected officials, media, like charities worldwide and professional contacts to build a knowledge base with accuracy and immediate accessibility.

The following segments will help our clients understand the benefit of having all this information in one place and how the results of interactions strengthen their ability to raise funds with ease.

Donor Relationships Top Donors by Date Range



Quik Ease

Questions:
Top 10 donations in a given date range?

Top 10 donations in a given date range?

Receipt Date: Nov 01, 2022 To: Dec 31, 2022

Donor Name	FundraisingNumber	Total Donations
Sharon Batsch	P000058	\$2,503.00
Spruce Lane Growers	C001870	\$1,000.00
Peter & Beth McDonald	P000023	\$500.00
Kelly Crombie	P000006	\$251.00
Gail Thompson	P000032	\$100.00
Kelly Abbott	P000004	\$50.00
Peter Adams	P000031	\$30.00
Brian Batsch	P000311	\$3.00

GoTo Button

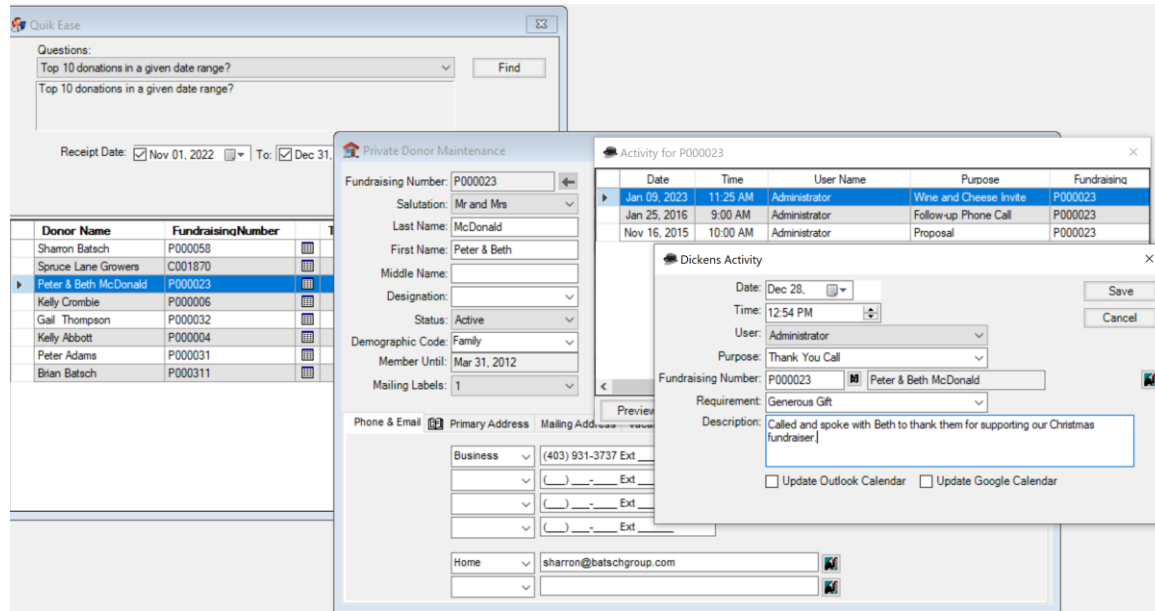
Use the GoTo button to return to the donor's record and to review their Donor Profile.

Opportunity:

Go to the donor's record and give them a call. Giving you a chance to say Thank You for a generous gift directly to the donor is something they will not soon forget.

So that you don't forget you made the call, use Dickens as shown below to record your call.

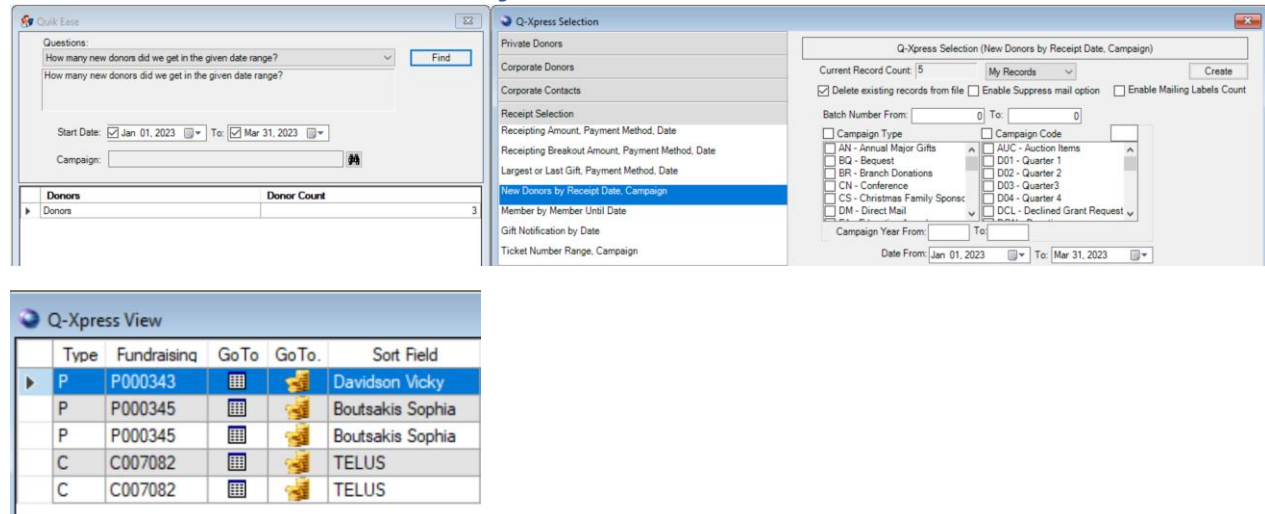
Getting to Know Your Donors Relationships, Operational Intelligence and Success



Click on Dickens to add a note or record a quick thank you call. A phone can be priceless.

We call it a Knowledge Base, but you may call it Organizational Memory!

The Number of New Donors by Date



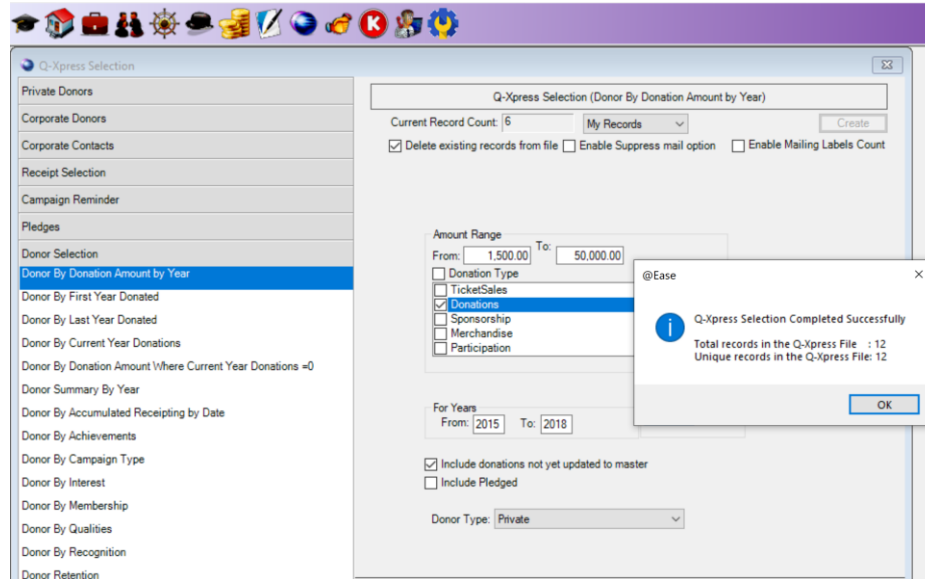
In the example, there were three unique donors who donated for the first time in the date range given.

Opportunity:

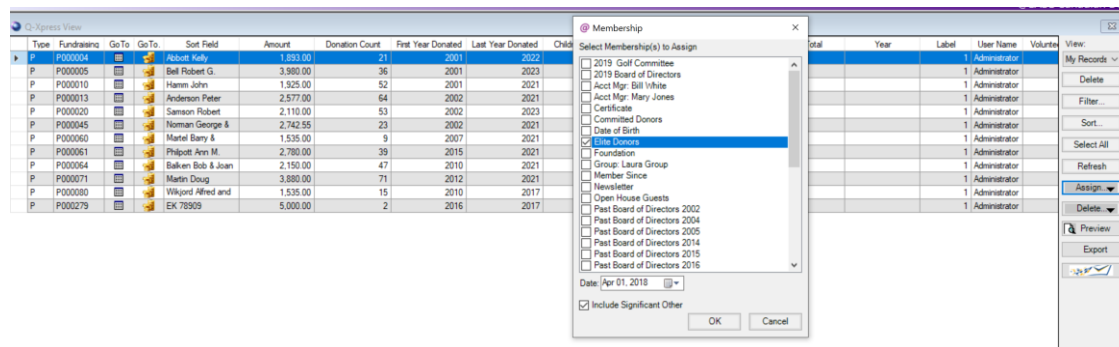
Send a note in the form of a colourful postcard to say welcome using the Q-Xpress New Donor selection found under the Receipting menu.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

Locating Elite Donors by Gift Size



Note: We selected Donations and checked Include donations not yet updated to master. The Fiscal Year range determines the time we are examining as does the amount range. The results will be cumulative over the year range selected. To view the results, go to the Q-Xpress menu and select View.

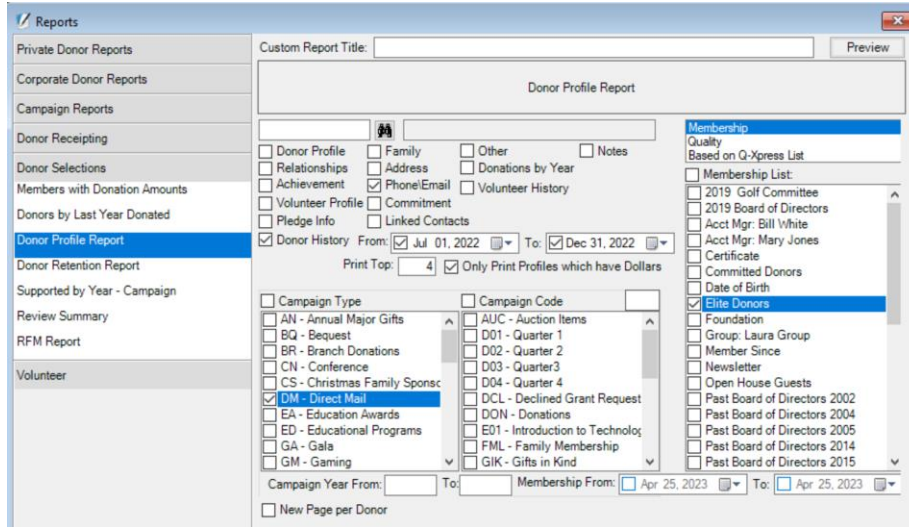


Viewing the Elite Donor Profiles

How do you find your Elite Donors? These may be private or corporate donors selected based on dollar support. Once you have determined those on your Elite List, viewing their activity is quick and easy.

Getting to Know Your Donors

Relationships, Operational Intelligence and Success



1. Check Membership \ Elite Donors
2. Check Phone/Email
3. Check Donor History and enter the date range.
4. How many gifts do you want to see?
5. Check Only Print Profiles where donations have been received.
6. Click Preview

Elite Donors July - Dec 2022

Donor Number	Donor Name	First Year	Last Year	Donations
P000004	Abbott Kelly Phone/Email: Home (780) 489-9096 Home ease@batschgroup.com	2001	2022	6,458.00
Significant Other:				
Donations:	Campaign	Donor	Receipt# ReceiptDate	Amount Registration Payment Method Receipt Breakout
	2021DMD01	P000004	500197 Dec 5, 2022	\$50.00 \$0.00 Cheque DirectMail
P000006	Crombie Kelly Phone/Email: Home (780) 441-3506 Home ease@batschgroup.com	2001	2022	30,926.00
Significant Other:				
Donations:	Campaign	Donor	Receipt# ReceiptDate	Amount Registration Payment Method Receipt Breakout
	2022DMD04	P000006	0 Dec 29, 2022	\$250.00 \$0.00 Cheque DirectMail
P000023	McDonald Peter & Beth Phone/Email: Business (403) 931-3737 Home sharon@batschgroup.com	2002	2022	12,386.00
Significant Other:				
Donations:	Campaign	Donor	Receipt# ReceiptDate	Amount Registration Payment Method Receipt Breakout
	2022DMD04	P000023	0 Dec 29, 2022	\$500.00 \$0.00 Cheque DirectMail

Opportunity:

Short messages sent by email keep all donors involved. Keeping your Elite Donors close to you so they can understand the value they bring the charity is how strong relationships evolve.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

Complete Profile on a Donor

Profile Batsch Family April 25, 2023
Donor Number = P000058

Donor Number	Donor Name	First Year	Last Year	Donations
P000058	Sharron Batsch BSC	2007	2022	113,074.00

Address: 201 - 10435 178 Street NW
PO Box 333 Spr Mann
Edmonton AB T5S 1W6
Home (780) 489-9911
Business (780) 489-9911
Cell (780) 960-3333
Toll Free (877) 489-9911
Home sharron@batschgroup.com
Web Site www.7asetudwiththese.guru

Significant Other: Batsch Brian

Other:
Recognized As: Batsch Family
Line Field: CML Export: No
Language Pref: English
Opt-In: Yes
Need:

Demographic:
Memberships:
Description Date Title
Review Date Oct 01, 2021
Newsletter Jul 01, 2021
Newsletter Jan 01, 2021
Newsletter Oct 01, 2020
Certificate May 19, 2020
Elite Donors May 07, 2019
Committed Donors Feb 25, 2019
Past Executive Committee 2015 Jul 11, 2017 Chair
Request eReceipts Mar 16, 2016
Past Gala Committee 2011 May 01, 2011 Chair

Resorption:
Description Date

Qualities:
000Terri 00WaltPart AM: Team A
Information: Yes Please Once a Year 03 Mar

Donor interests:
CI: Planned Gift Priv: Home Care Priv: Pediatrics

Relationships:
Relationship Donor Number Name Relationship
Board Member C000776 Sunny Garden Holdings Ltd Company: Landscape
Owner C000482 Batsch Group Inc Company: Financial
Wife P000591 Batsch Brian Husband

Family Members:
Family Name Relation School Grade Date of Birth Event Date Description
Batsch, Harold Family Cat
Batsch, Maddox Grandson Jan 19, 2009
Batsch, Macy Granddaughter Apr 9, 2009

Achievements:
Achievement (Degree or Award) Major Description Granting Institution Achievement Date
Order of Canada Companion of the Order of Canada Government of Canada 31 Oct, 2007
BSC Mathematics U of Calgary 01 Jun, 1980
Paul Harris Fellow Rotary International 14 Feb, 2009

Donor Number	Donor Name	Receipt #	Receipt Date	Amount	Registration	Payment Method	Last Year	Donations
2022GATCK	P000058	800195	Feb 14, 2023	\$180.00	\$180.00	CHEQUE		GAT/Ticket
2022ANONG	P000058		0 Jan 31, 2023	\$1.00	\$0.00	Visa		Direct/All
2022ANONG	P000058		0 Jan 31, 2023	\$2.00	\$0.00	Visa		Direct/All
2022ANONG	P000058		0 Jan 31, 2023	\$2.00	\$0.00	Visa		Direct/All
2022ANONG	P000058		0 Dec 31, 2022	\$2.00	\$0.00	Visa		Direct/All

Pledge Details:

Campaign	Description	Pledged	Paid To Date	Outstanding
2010DMO01	2010 Direct Mail Campaign Writer	100.00	100.00	0.00
2016MOPLG	2016 Monthly Pledge	485.00	485.00	0.00
2016MOONG	2016 Monthly Ongoing	1,300.00	1,175.00	125.00
2017MOPLG	2017 Monthly Pledge	99,001.00	99,001.00	0.00
2019MOONG	2019 Monthly Ongoing	91.00	91.00	0.00
2020MOONG	2020 Monthly Ongoing	748.00	648.00	100.00
2020MOPLG	2020 Monthly Fixed Length Pledge	2.00	2.00	0.00
2022ANONG	2022 Monthly Ongoing	27.00	5.00	22.00

Donations by Year:

Year	Count	Total	Average
2022	4	1,047.72	261.93
2021	680	56	0.08
2019	799	25	0.03
2018	19,804	17	0.00
Total	26,007	174	0.00

Linked Contacts:

Fundraising Number	Donor Name	Title
C000482	Batsch Group Inc	Director, Community Investment
C000479	ABC Foundation	Board Chair

Additional Pieces of Information

1. Dickens

Donor Name: **Batsch Sharron**

User: **All Users**

View: **All**

A date range can be set to show only the most current entries

Click Preview for a print out of the screen entries.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

Dickens Activity for Everybody

Find in Field: Donor Name Value: batsch Sharron Date From: Date To: User: All Users Filter Re-Ease

ID	Date	Time	User Name	Purpose	Requirement	Fundraising No.	Go To	Donor Name	Description
✓	May 16, 2018	01:26 PM	Administrator	Planned Gift	Discuss the final requirements	P000058	Batsch Sharron	Batsch Sharron	Meeting next week to finalize details
✓	May 09, 2012	11:00 AM	Administrator	FF Silver Sponsor	Sponsorship	P000058	Batsch Sharron	Batsch Sharron	This is my reference to myself.
✓	Jun 05, 2012	03:56 PM	Administrator	Address Update	Phone Call	P000058	Batsch Sharron	Batsch Sharron	P000058
✓	Jul 03, 2013	12:00 PM	Administrator	Email Sent	Meeting	P000058	Batsch Sharron	Batsch Sharron	Description of what we are doing
✓	Jul 03, 2013	01:00 PM	Administrator	Stewardship	Major Gift	P000058	Batsch Sharron	Batsch Sharron	10K
✓	Mar 17, 2015	01:00 PM	Administrator	Discovery	Major Gift	P000058	Batsch Sharron	Batsch Sharron	hkhjht
✓	May 29, 2015	11:47 AM	Administrator	Discovery	Planned Gift	P000058	Batsch Sharron	Batsch Sharron	notes
✓	May 29, 2015	12:44 PM	Administrator	Discovery	This is the require	P000058	Batsch Sharron	Batsch Sharron	This is the body of the email or the start of a
✓	Jul 17, 2015	12:00 PM	Administrator	Planned Gift	Cultivation	P000058	Batsch Sharron	Batsch Sharron	Lunch Meeting... at with certain people
✓	May 07, 2012	11:36 AM	Administrator	Notation	Sponsorship	P000058	Batsch Sharron	Batsch Sharron	100,000
✓	Nov 28, 2017	11:00 AM	Administrator	Discovery	Major Gift	P000058	Batsch Sharron	Batsch Sharron	
✓	Feb 14, 2023	10:36 AM	Administrator	Address Change	Phone in	P000058	Batsch Sharron	Batsch Sharron	P000058
✓	May 23, 2018	01:00 PM	Administrator	Meeting	Planned Giving	P000058	Batsch Sharron	Batsch Sharron	Reminder about our meeting next week at your site
✓	Jul 24, 2018	02:16 PM	Administrator	Meeting	Lunch	P000058	Batsch Sharron	Batsch Sharron	Something
✓	Jan 31, 2019	01:00 PM	Administrator	Proposal		P000058	Batsch Sharron	Batsch Sharron	note as to the content
✓	May 06, 2019	11:07 AM	Administrator	Address Change	Old Address	P000058	Batsch Sharron	Batsch Sharron	P000058
✓	Jul 13, 2020	10:00 AM	Administrator	Meeting	Confirmation-	P000058	Batsch Sharron	Batsch Sharron	H Sharron, I am confirming our meeting for Monday at your office.
✓	Jul 09, 2020	11:35 AM	Administrator			P000058	Batsch Sharron	Batsch Sharron	Notes are in Dickens ----
✓	Nov 01, 2021	01:16 PM	Administrator			P000058	Batsch Sharron	Batsch Sharron	
✓	Dec 13, 2022	10:21 AM	Administrator	Address Change	Mail	P000058	Batsch Sharron	Batsch Sharron	P000058
✓	Nov 08, 2017	01:43 PM	Administrator			P000058	Batsch Sharron	Batsch Sharron	

Profile Batsch Family April 25, 2023
Donor Name = batsch Sharron

Task Completed	Date	Time	User Name	Purpose	Requirement	Fundraising No.	Donor Name	Description
Yes	May 16, 2018	1:26 PM	Administrator	Planned Gift	Discuss the final requirements	P000058	Batsch Sharron	Meeting next week to finalize details
Yes	May 09, 2012	11:00AM	Administrator	FF Silver Sponsor	Sponsorship	P000058	Batsch Sharron	This is my reference to myself.
Yes	Jun 05, 2012	3:56 PM	Administrator	Address Update	Phone Call	P000058	Batsch Sharron	P000058 Ms Sharron Batsch B.Sc. Mr Brian Batsch CLU 201 - 10435 178 StNW Edmonton AB T5S 1R5
Yes	Jul 03, 2013	12:00 PM	Administrator	Email Sent	Meeting	P000058	Batsch Sharron	Description of what we are doing
Yes	Mar 17, 2015	1:00 PM	Administrator	Stewardship	Major Gift	P000058	Batsch Sharron	10K
Yes	Mar 17, 2015	1:00 PM	Administrator	Discovery	Major Gift	P000058	Batsch Sharron	hkhjht
Yes	May 29, 2015	11:47 AM	Administrator	Discovery	Planned Gift	P000058	Batsch Sharron	notes
Yes	May 29, 2015	12:44 PM	Administrator	Discovery	This is the require	P000058	Batsch Sharron	This is the body of the email or the start of a
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Yes	May 07, 2012	11:36AM	Administrator	Notation	Sponsorship	P000058	Batsch Sharron	100,000
Yes	Nov 28, 2017	11:00AM	Administrator	Discovery	Major Gift	P000058	Batsch Sharron	
Yes	Feb 14, 2023	10:36AM	Administrator	Address Change	Phone in	P000058	Batsch Sharron	P000058 Sharron Batsch B.Sc. Mr Brian Batsch CLU ChFC 201 - 10435 178 StreetNW Edmonton AB T5S 1R5
Yes	May 23, 2018	1:00 PM	Administrator	Meeting	Planned Giving	P000058	Batsch Sharron	Reminder about our meeting next week at your site
Yes	Jul 24, 2018	2:16 PM	Administrator	Meeting	Lunch	P000058	Batsch Sharron	Something
Yes	Jan 31, 2019	1:00 PM	Administrator	Proposal		P000058	Batsch Sharron	note as to the content
Yes	May 06, 2019	11:07AM	Administrator	Address Change	Old Address	P000058	Batsch Sharron	P000058 Ms Sharron Batsch B.Sc. Mr Brian Batsch CLU ChFC 524 Wain Place Edmonton AB T5S 1R5
Yes	Jul 13, 2020	10:00AM	Administrator	Meeting	Confirmation- Monday July 13	P000058	Batsch Sharron	H Sharron, I am confirming our meeting for Monday at your office. I will arrive at 10 AM. If there are any changes please let me know.
Yes	Jul 09, 2020	11:35AM	Administrator			P000058	Batsch Sharron	Notes are in Dickens ...
Yes	Nov 01, 2021	1:16 PM	Administrator			P000058	Batsch Sharron	
Yes	Dec 13, 2022	10:21AM	Administrator	Address Change	Mail	P000058	Batsch Sharron	P000058 Sharron Batsch B.Sc.

2. The Communications Tab

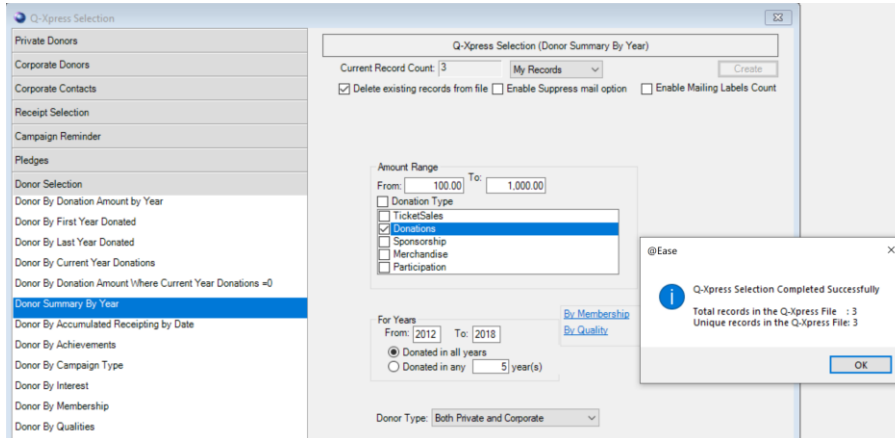
Is there a document of notes? If yes, click on the link to take you to the notes that have been recorded.

Phone & Email Primary Address Mailing Address Vacation Address Family Achievements **Communications**

Link Type	Link Path	Link
Itunes Podcast	https://podcasts.apple.com/us/podcast/npi-non-profit-intelligence/id1482297097	
Web Site	www.raisefundswithease.guru	
SM Facebook	www.facebook.com/sharron.batsch	
SM Twitter	http://twitter.com/ClimbedMtKili	
SM Blog	http://fundraisewithease.com/	
Donor Notes	C:\EaseResources\EaseKMS\DonorCommunications\Batsch Family\Sharron Notes.txt	

New Delete

Looking for Specific Donors The Consistent Donors



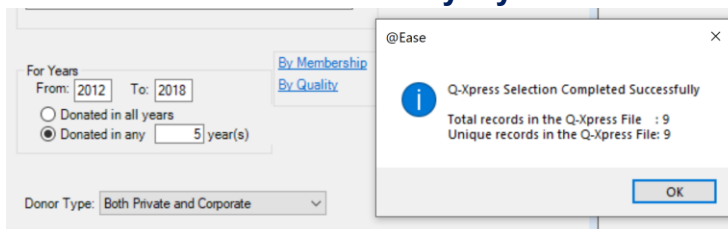
We are looking for donors who have given in a specific dollar range over a specific number of fiscal years.

We selected in **Donated in all years**.

All donations must be posted or U2M for total donations to be available.

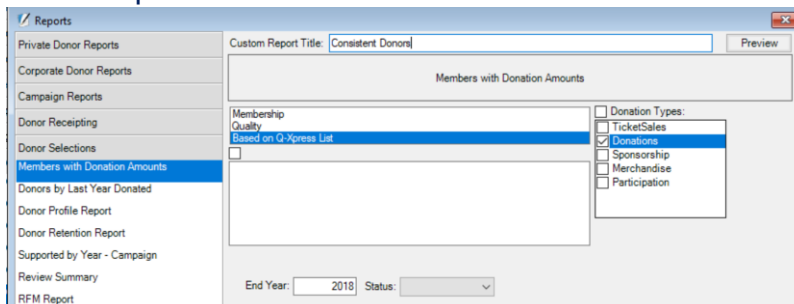
The dollar range is important for a donor to be included.

With only three records selected and a fiscal year range of seven, we can modify the selection to **Donated in any 5 years**.



The selected records are in Q-Xpress View.

Go to Reports – Donor Selections – Members with Donation Amounts



Note we used the **End Year** from the original selection.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

Consistent Donors

By QXpress List

Donation Type = Donations

Donor No	Donor Name	Status	2018		2017		2016		2015		2014		Total		Average
P000004	Abbott Kelly	Active	125	3	653	6	100	1	1,015	11	1,300	1	3,193	22	145
P000013	Anderson Peter	Active	209	17	553	18	300	12	1,515	17	300	12	2,877	76	38
P000064	Balken Bob & Joan	Active	280	8	520	13	420	12	930	14	420	12	2,570	59	44
P000057	Brightmann Ludwig	Active	200	8	400	13	300	12	300	12	300	12	1,500	57	26
P000010	Hamm John	Active	450	11	825	16	275	11	375	14	500	20	2,425	72	34
P000060	Martel Barry & Sandy	Active	150	1	500	1	150	1	735	6	150	1	1,685	10	169
P000071	Martin Doug	Active	340	9	1,635	25	1,460	23	445	14	360	12	4,240	83	51
P000023	McDonald Peter & Beth	Active	106	7	253	6	120	4	945	22			1,424	39	37
P000020	Samson Robert	Active	355	9	470	13	495	13	790	18	495	13	2,605	66	39
Count:	9	Total:	2,215		5,809		3,620		7,050		3,825		22,519		

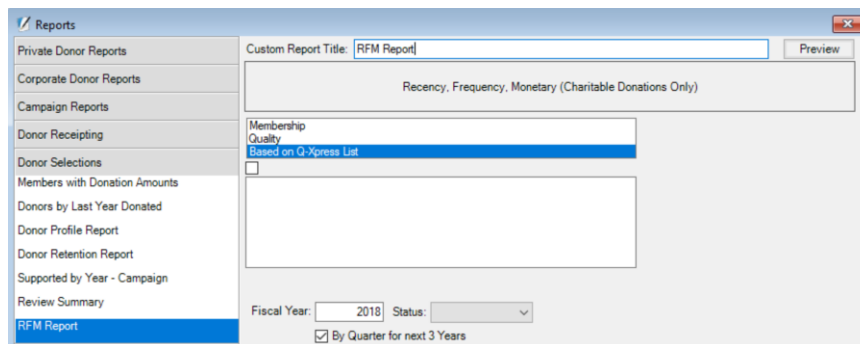
The numbers in blue show the number of times the donor gave in each fiscal year.

Opportunity:

1. Send a Thank You for being a long-time donor!
2. Monthly donors could come from examining a list like this.

Using the same data in Q-Xpress View you can run a RFM report by Quarter or by Month.

We selected a group of consistent donors, now let's look at them from the perspective of the RFM Report. Recency, Frequency & Monetary



RFM Report

By QXpress List

Fiscal Year From 2018 To 2020 Receipt Date From Jan 1 2018 To Dec 31 2020

FND No	Donor Name	Jan 2018	Apr 2018	Jul 2018	Oct 2018	Jan 2019	Apr 2019	Jul 2019	Oct 2019	Jan 2020	Apr 2020	Jul 2020	Oct 2020
P000004	Abbott Kelly	75	2	0	0	50	1	0	0	0	0	0	580
P000013	Anderson Peter	78	6	27	3	26	2	78	6	78	6	78	6
P000064	Balken Bob & Joan	105	3	35	1	35	1	105	3	105	3	105	3
P000057	Brightmann Ludwig	75	3	25	1	25	1	75	3	75	3	75	3
P000010	Hamm John	75	3	75	3	225	2	75	3	75	3	75	3
P000060	Martel Barry & Sandy	0	0	0	0	150	1	0	0	0	0	0	260
P000071	Martin Doug	190	4	30	1	30	1	90	3	90	3	90	3
P000023	McDonald Peter & Beth	3	3	2	2	101	2	0	0	0	0	2,000	1
P000020	Samson Robert	105	3	35	1	110	2	105	3	605	4	105	3

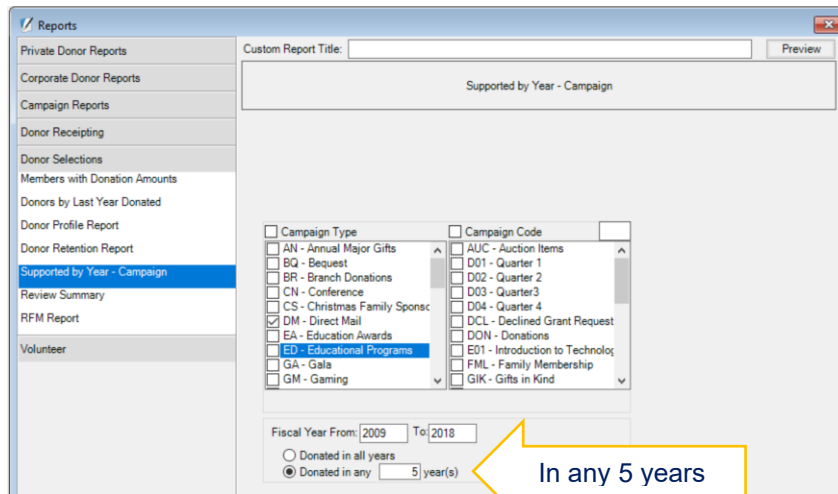
The next step might be to run Donor Profile Report on the group of donors selected through and displayed in Q-Xpress View. What would it tell you more about who these

Getting to Know Your Donors Relationships, Operational Intelligence and Success

donors are and how they have connected with a charity if information has been captured in @EASE.

Check the Breakout Code or Fund they selected when gifting. This is another way to know your donors and connect with them.

Find Donors who Support Specific Campaigns over Years



This selection is limited to a 10-year range.

Supported by Year - Campaign by
Fiscal Years 2009 - 2018 Donated in any 5 Years
AND CampaignType IN ('DM')

Donor No	Donor Name	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
P000004	Abbott, Kelly	Y	Y		Y	Y	Y			Y	Y
P000013	Anderson, Peter				Y		Y	Y			Y
P000058	Batsch, Sharron	Y	Y	Y	Y		Y		Y	Y	Y
P000006	Crombie, Kelly		Y		Y	Y	Y		Y	Y	
P000002	George, Kate	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
P000010	Hamm, John	Y	Y		Y		Y			Y	Y
C000151	High Street Marketing	Y		Y	Y	Y	Y				Y
P000007	Lutz, Mike	Y		Y	Y		Y	Y		Y	Y
P000060	Martel, Barry & Sandy	Y		Y	Y	Y	Y				Y
P000045	Norman, George & Mary	Y	Y	Y	Y	Y	Y				Y
P000020	Samson, Robert	Y		Y	Y	Y	Y		Y	Y	Y
C000776	Sunny Garden Holdings Ltd	Y		Y	Y	Y	Y			Y	Y
P000016	Williams, Glen	Y	Y		Y					Y	Y

Determining a Donor's Value

There are many determinations when assessing a Donor's Value regarding their donations. We look at their total donations and how many years they have donated.

In some instances, the cost of appeals is considered or a guess at the longevity of the donor. The maintenance of donors through the charity's communication with them, referred to as stewardship, is essential. The use of Dickens to record when a donor is contacted adds continuity to the process and ensures all staff are aware of interactions.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

In @EASE, we can easily calculate a donor's total number of donations and provide a donation count. The selection gives the First and Last Year donated.

A further consideration when determining value is how the charity has captured information pertaining to the donor. Where the donor database contains only gift information, there is little to create an interaction other than asking for another donation.

Donors at different dollar levels can be segmented and further reviewed using the RFM and Donor Profile reports. This analysis can further add to the donor's profile so that valuable insights are not lost.

Operational Intelligence and Decision Making Which Campaigns are Funding Your Organization?

Which campaigns by Type are bringing in the most dollars?

It is important to know if your fundraising efforts are effective. If the majority of annual dollars fall to grants or many donations are in Memory, the question is do you have regular donors and if so, are they donating more than once?

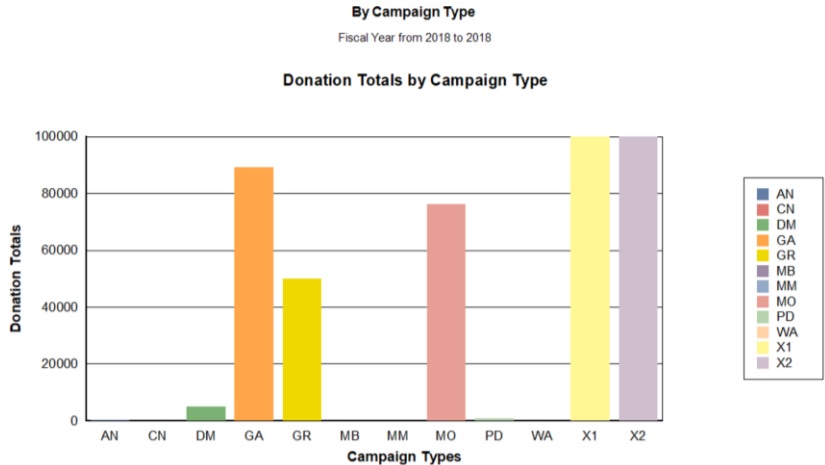
The screenshot shows the @EASE Reports interface. On the left is a sidebar with categories: Private Donor Reports, Corporate Donor Reports, Campaign Reports, and Volunteer. Under Campaign Reports, 'Campaign Listing with Total Dollars' is selected. The main area has a 'Custom Report Title' field and a 'Preview' button. Below is a list of checkboxes for 'Campaign Type' and 'Campaign Code'. The 'Campaign Year From' is set to 2000 and 'To' is 2018. The 'By Fiscal Year' radio button is selected. A yellow arrow points to the 'By Campaign Type' radio button.

Note the Campaign Year From and To. This is the range of potential campaigns that received donations in the Fiscal Year Range shown below.

By Campaign Type

Getting to Know Your Donors

Relationships, Operational Intelligence and Success



Using this same report, you can compare by fiscal years all campaigns or campaigns of a specific type and code over several fiscal years.

Reports

Private Donor Reports

Corporate Donor Reports

Campaign Reports

Campaign Listing with Total Dollars

Campaign Listing

Campaign Contribution Analysis

Campaign Expense Report

Pledge Status Report By Campaign

Capital Campaign Report

Campaign Contributor Listing Report

Pledge Revenue Report

Pledge Outstanding Report

Gift Notification Report

Donor Receiving

Donor Selections

Volunteer

Custom Report Title: Preview

Campaign Listing with Total Dollars

Campaign Type Campaign Code

AN - Annual Major Gifts AUC - Auction Items

BQ - Bequest D01 - Quarter 1

BR - Branch Donations D02 - Quarter 2

CN - Conference D03 - Quarter 3

CS - Christmas Family Sponsc D04 - Quarter 4

DM - Direct Mail DCL - Declined Grant Request

EA - Education Awards DON - Donations

ED - Educational Programs ED1 - Introduction to Technolog

GA - Gala FML - Family Membership

GM - Gaming GIK - Gifts in Kind

Campaign Year From: 2000 To: 2018

By Fiscal Year By Receipt Date Amount From: 0 To: 0

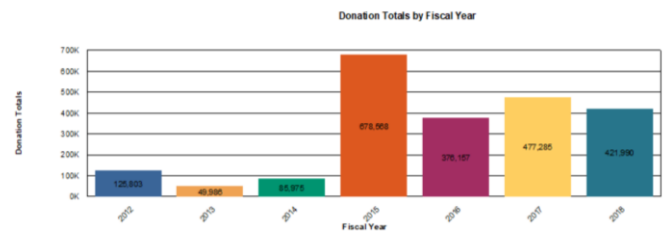
Fiscal Year From: 2012 To: 2018

Output Type: Comparison Report by Year

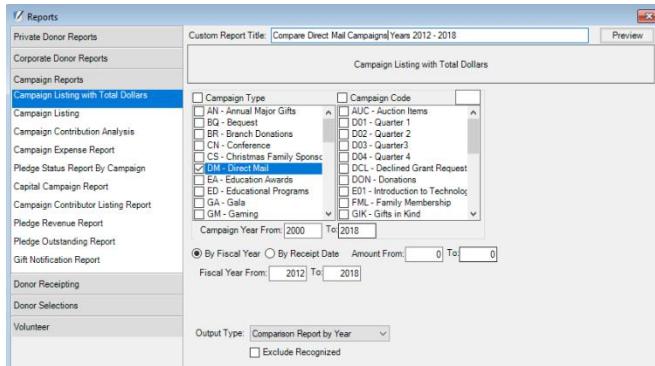
Compare by Year

By Campaign Years 2012 - 2018
Fiscal Year from 2012 to 2018

Fiscal Year	Total Campaign	Total Count	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2012	125,802.55	19	45,140.00	35,000.00	44,862.55	0.00	800.00
2013	49,986.05	14	5,405.50	15,000.00	9,902.55	19,678.00	0.00
2014	85,975.00	18	70,560.00	400.00	5,015.00	10,000.00	0.00
2015	678,567.55	34	640,035.00	12,500.00	25,562.75	0.00	469.80
2016	376,157.00	16	363,400.00	0.00	12,757.00	0.00	0.00
2017	477,285.00	30	359,002.00	10,000.00	107,481.00	0.00	802.00
2018	421,990.00	20	261,202.00	85,000.00	75,788.00	0.00	0.00
Total	2,215,763.15	151	1,744,744.50	157,900.00	281,368.85	29,678.00	2,071.80



Getting to Know Your Donors Relationships, Operational Intelligence and Success



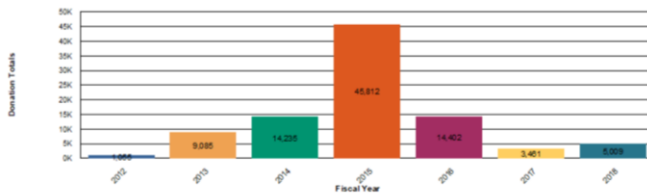
Compare all Direct Mail over a year Range.

Compare Direct Mail Campaigns Years 2012 - 2018

Fiscal Year from 2012 to 2018

Fiscal Year	Total Campaign	Total Count	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2012	1,055.00	1	60.00	0.00	995.00	0.00	0.00
2013	9,085.00	1	5,230.00	0.00	3,855.00	0.00	0.00
2014	14,235.00	3	12,000.00	0.00	2,235.00	0.00	0.00
2015	45,812.00	5	34,225.00	0.00	11,575.00	0.00	12.00
2016	14,402.00	4	12,000.00	0.00	2,402.00	0.00	0.00
2017	3,461.00	2	0.00	0.00	3,461.00	0.00	0.00
2018	5,009.00	3	3,001.00	0.00	2,008.00	0.00	0.00
Total	93,059.00	19	66,516.00	0.00	26,531.00	0.00	12.00

Donation Totals by Fiscal Year



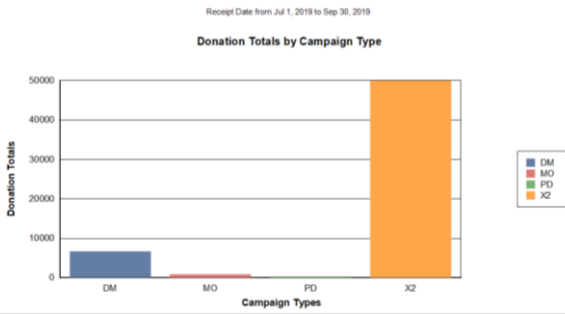
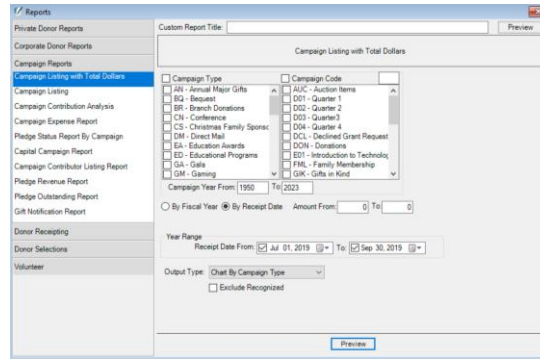
Comparing Campaign Performance by Quarter or Date Range

The Campaign Listing with Total Dollars can be run by date range. This is useful when determining totals for campaigns and U2M has not yet been run for a specific date range to be included in the report.

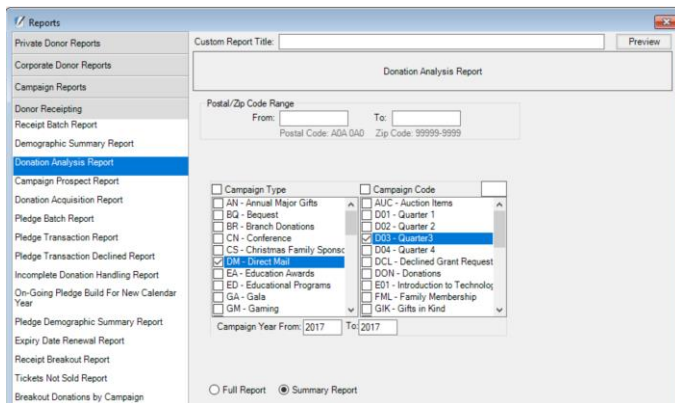
The reporting by date range offers campaign totals, a graph of campaign totals and a graph by campaign type.

Using the date range from a fiscal year or a set of fiscal years, development staff can compare the effect of different asks and how donors have responded.

Getting to Know Your Donors Relationships, Operational Intelligence and Success



Determining the Catchment Area



Select the Campaign Year, Type, and Code.
Select **Summary Report**.

If a Campaign Response File was created at list export time, a count of the number of appeals by postal area is displayed.

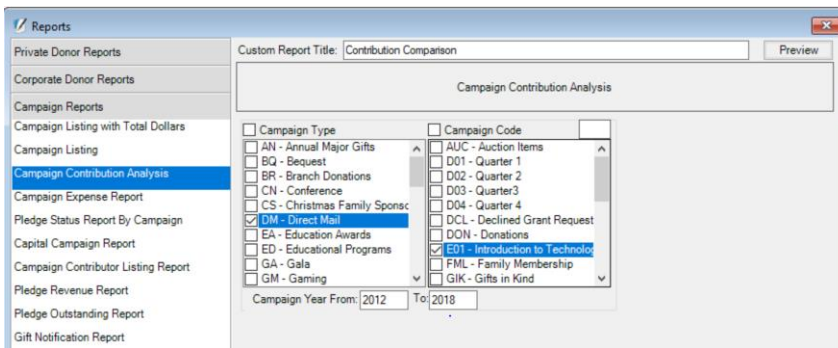
Getting to Know Your Donors Relationships, Operational Intelligence and Success

Donation Analysis Report by Campaign

Postal Code	Mail Count	Response Count	<=10	<=25	<=50	<=100	<=250	<=500	<=1,000	<=5,000	<=10,000	<=25,000	<=50,000	<=100,000	<=1,000,000	Company Amount	Campaign Amount	% By Postal
Campaign: 2017DMD03																		
T6J	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0.00	200.00	5.61
T2P	0	4	0	1	0	1	1	1	0	0	0	0	0	0	0.00	725.00	20.35	
T5M	0	3	0	1	1	0	0	1	0	0	0	0	0	0	0.00	575.00	16.14	
T5S	0	3	3	0	0	0	0	0	0	0	0	0	0	0	0.00	3.00	0.08	
T5T	0	5	1	2	0	1	0	1	0	0	0	0	0	0	0.00	460.00	12.91	
T6H	0	1	0	0	0	0	0	0	1	0	0	0	0	0	0.00	500.00	14.03	
T6L	0	1	0	0	0	0	0	0	1	0	0	0	0	0	0.00	1,000.00	28.07	
T7Y	0	1	0	0	0	1	0	0	0	0	0	0	0	0	0.00	100.00	2.81	
Report Total:	0	19	4	4	1	3	2	4	1	0	0	0	0	0	0.00	3,563.00	100.00	

A percentage of the total campaign total is displayed by postal zone.

Contribution Analysis



Campaign Contribution Analysis

Campaign:	<=10	<=25	<=50	<=100	<=250	<=500	<=1,000	<=5,000	<=10,000	<=25,000	<=50,000	<=100,000	<=1,000,000
2013DMD02	1	8	20	13	4	3	2	2	0	0	0	0	0
2014DMD01	0	1	7	0	0	0	0	1	3	0	0	0	0
2014DMD02	0	2	0	2	2	1	0	1	0	0	0	0	0
2015DMD01	1	0	2	7	6	2	0	3	0	0	0	0	0
2015DMD02	1	12	9	45	25	12	4	6	0	0	0	0	0
2015DMD04	97	3	2	2	0	1	0	0	0	0	0	0	0
2016DMD01	1	0	0	2	1	1	0	1	0	0	0	0	0
2017DMD03	2	2	0	2	2	4	1	0	0	0	0	0	0
2017DMD04	0	0	0	0	0	0	0	0	0	0	0	0	0
2018DMD02	8	2	1	6	2	3	1	1	0	0	0	0	0
2018DMD04	0	0	0	0	0	0	0	0	0	0	0	0	0

Opportunity:

The Donation Analysis Report and Campaign Contribution Report help to answer the questions:

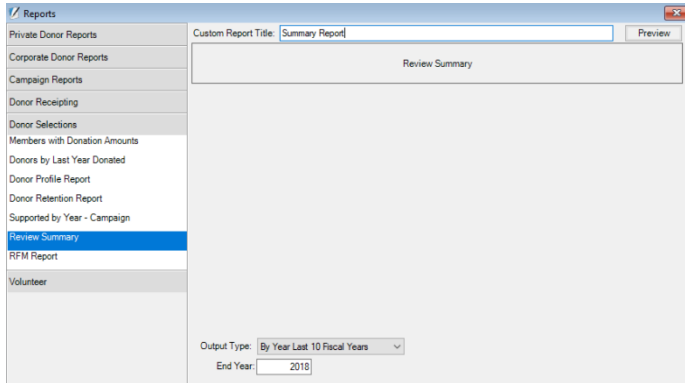
- Right audience
- Right message
- Right timing

Getting to Know Your Donors
Relationships, Operational Intelligence and Success

Success

Clarity has its benefits. The following reports are designed to show data on the number of donations, average gift size and a unique donor count.

Review Summary Report



The Review Summary will display:

- the last 10 years,
- the last 12 months or
- by quarter, the last 10 quarters.



The report shows the number of charitable donations, the number of gifts and the number of unique donors. The same information is provided for non-charitable donations.

The Last Ten Years

Review Summary										
Fiscal Year Range : 2018 - 2009										
Type	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Charitable-No Receipt Required (\$)	329,825	228,141	472,856	1,298,208	58,390	9,048	23,860	465	425	0
Charitable-No Receipt-Lowest Value (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Received In-House (\$)	7,139	218,944	3,401	18,000	3,255	6,670	34,318	3,238	7,808	6,765
Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Total (\$)	336,964	446,283	476,057	1,315,738	61,645	15,716	57,378	3,303	8,233	6,765
Charitable-Transaction Count	176	347	154	423	107	176	206	43	88	30
Charitable-Average GR (\$)	1,915	1,286	3,091	3,110	576	89	279	77	94	226
Charitable-Unique Donors	37	161	29	110	20	36	70	14	17	12
Non Charitable-Registration Amount (\$)	0	802	0	470	0	0	800	400	5	0
Non Charitable-No Receipt Required (\$)	85,026	30,200	100	112,360	54,330	34,270	67,500	53,130	35,705	1,300
Non Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0
Non Charitable-Received In-House (\$)	0	0	0	0	0	0	125	0	50	0
Non Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	6,000
Non Charitable-Total (\$)	85,026	30,200	100	112,360	54,330	34,270	67,625	53,130	35,755	7,300
Non Charitable-Transaction Count	8	15	1	153	23	12	11	18	20	5
Non Charitable-Unique Donors	7	12	1	142	14	4	10	13	18	3

Total Donation Count
Number of Gifts
Unique Number of Donors
Average Gift Size

By the Months in the Fiscal Year

Getting to Know Your Donors Relationships, Operational Intelligence and Success

By Month Fiscal Year 2018
Month Range For Fiscal Year Ending on : 12/31/18 11:59:59 PM

Type	December	November	October	September	August	July	June	May	April	March	February	January
Charitable-No Receipt Required (\$)	881	795	840	791	171,526	4,712	25	50	53	52	50	150,060
Charitable-No Receipt-Lowest Value (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Charitable-Received In-House (\$)	102	130	126	126	0	0	227	4,427	375	742	492	392
Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Charitable-Total (\$)	983	925	966	917	171,526	4,712	252	4,477	428	794	542	150,442
Charitable-Transaction Count	16	22	14	14	10	18	7	11	14	17	17	16
Charitable-Average Gift (\$)	61	42	69	66	17,153	262	36	407	31	47	32	9,403
Charitable-Unique Donors	14	16	13	13	7	18	7	9	11	13	15	14
Non Charitable-Registration Amount (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Non Charitable-No Receipt Required (\$)	0	0	0	0	0	85,000	25	1	0	0	0	0
Non Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Non Charitable-Received In-House (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Non Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	0	0	0
Non Charitable-Total (\$)	0	0	0	0	0	85,000	25	1	0	0	0	0
Non Charitable-Transaction Count	0	0	0	0	0	6	1	1	0	0	0	0
Non Charitable-Unique Donors	0	0	0	0	0	6	1	1	0	0	0	0

By Quarter over 10 Years

Output Type:
 End Year:

By Month Fiscal Year 2018
Quarter 3 Starting July 1

Type	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
Charitable-No Receipt Required (\$)	177,029	50,325	26,740	10,840	665	4,301	100	0	155	0
Charitable-No Receipt-Lowest Value (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Received In-House (\$)	126	80,886	0	3,860	0	890	27,485	85	1,915	450
Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Total (\$)	177,155	131,211	26,740	14,544	665	5,191	27,585	85	2,070	450
Charitable-Transaction Count	42	39	31	50	23	72	45	3	23	1
Charitable-Average Gift (\$)	4,218	3,364	863	291	29	72	613	28	90	450
Charitable-Unique Donors	30	15	10	25	7	31	33	1	5	1
Non Charitable-Registration Amount (\$)	0	1	0	156	0	0	0	0	0	0
Non Charitable-No Receipt Required (\$)	85,000	0	0	50,560	0	5,060	17,500	0	34,650	0
Non Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0
Non Charitable-Received In-House (\$)	0	0	0	0	0	0	0	0	0	0
Non Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	0
Non Charitable-Total (\$)	85,000	0	0	50,560	0	5,060	17,500	0	34,650	0
Non Charitable-Transaction Count	6	0	0	6	0	3	2	0	10	0
Non Charitable-Unique Donors	6	0	0	4	0	2	2	0	9	0

Review Summary Using QuikEase for a Specific Campaign

The date range used is the Fiscal Year date range for the selected campaign.

Getting to Know Your Donors Relationships, Operational Intelligence and Success

Quik Ease

Questions:
 How many gifts did we receive in a given date range? Find
 How many gifts did we receive in a given date range?

Receipt Date: Jan 01, 2023 To: May 30, 2023
 Campaign: 2023DMD02 2023 Direct Mail Campaign Spring

Type	Total Count	Total Amount
Charitable-No Receipt Required	18	\$1,890.00
Charitable-No Receipt-Lowest V...	0	\$0.00
Charitable-Received Externally	0	\$0.00
Charitable-Received In-House	4	\$425.00
Charitable-To be Receipted	0	\$0.00
Charitable-Total	22	\$2,315.00
Charitable-Average Gift	22	\$105.23
Charitable-Unique Donors	19	\$0.00
	0	\$0.00
Non Charitable-Registration Amo...	0	\$0.00
Non Charitable-No Receipt Req...	0	\$0.00
Non Charitable-Received Exter...	0	\$0.00
Non Charitable-Received In-Ho...	0	\$0.00
Non Charitable-To be Receipted	0	\$0.00
Non Charitable-Total	0	\$0.00

A right click of the Mouse in the body columns brings a Preview menu to select the printer and fields to print.

Print Options

Printer: Microsoft Print to PDF

Columns to print
 Type
 Total Count
 Total Amount

Page Orientation
 Portrait Landscape

Rows to print
 All Selected

Fit to page width

Title of print
 List

OK Cancel

List

Type	Total Count	Total Amount
Charitable-No Receipt Required	18	\$1,890.00
Charitable-No Receipt-Lowest Value	0	\$0.00
Charitable-Received Externally	0	\$0.00
Charitable-Received In-House	4	\$425.00
Charitable-To be Receipted	0	\$0.00
Charitable-Total	22	\$2,315.00
Charitable-Average Gift	22	\$105.23
Charitable-Unique Donors	19	\$0.00
	0	\$0.00
Non Charitable-Registration Amount	0	\$0.00
Non Charitable-No Receipt Required	0	\$0.00
Non Charitable-Received Externally	0	\$0.00
Non Charitable-Received In-House	0	\$0.00
Non Charitable-To be Receipted	0	\$0.00
Non Charitable-Total	0	\$0.00
Non Charitable-Unique Donors	0	\$0.00

Donor Retention

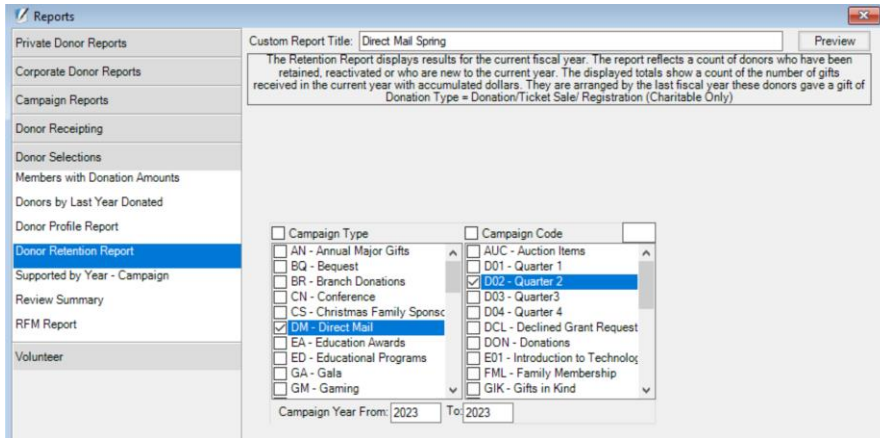
Donor Retention Reports and the Donor Retention Q-Xpress selection can only be run when the data is in its current year. Retention is only calculated on charitable donations.

Retention by Campaign

This report shows the number of new donors, and the last year existing donors gave who also gave to this campaign.

Getting to Know Your Donors

Relationships, Operational Intelligence and Success



Direct Mail Campaign Retention by Campaign
Campaign 2023DMD02

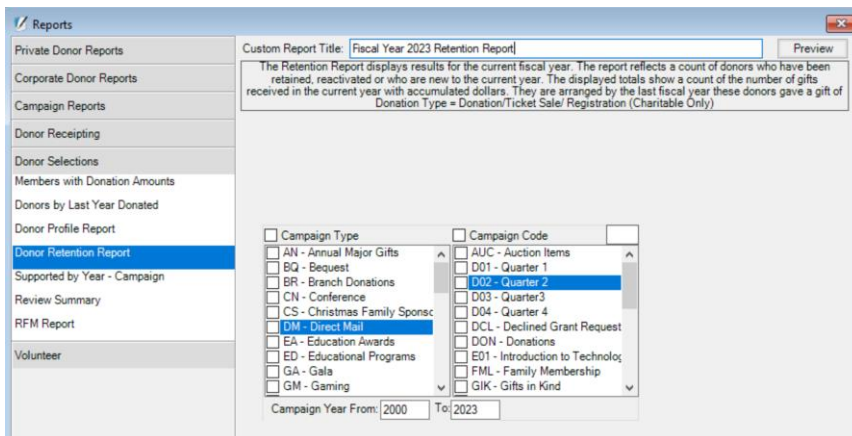
Year	Unique Donor Count	Retention %	Total Donations
New Donor	1		100.00
2022	4	22	420.00
2021	11	61	1,450.00
2020	1	6	135.00
2017	2	11	210.00
Total	19	100	2,315.00

Retention by Year

This system is currently in 2023.

To view the Retention to date for all charitable campaigns, we use a Campaign Year that is very broad to ensure all donations given in the current year that come from previous year campaigns like In Memory or monthly donors are included.

No Campaign Type or Campaign Code values are selected.



Getting to Know Your Donors
 Relationships, Operational Intelligence and Success

2023 Retention Report by Campaign

Year Between 2000 AND 2023

Year	Unique Donor Count	Retention %	Total Donations
New Donor	4		1,750.00
2022	6	22	1,300.00
2021	14	52	3,075.00
2020	1	4	135.00
2019	2	7	50,000.00
2017	3	11	1,210.00
2015	1	4	1,500.00
Total	31	100	58,970.00

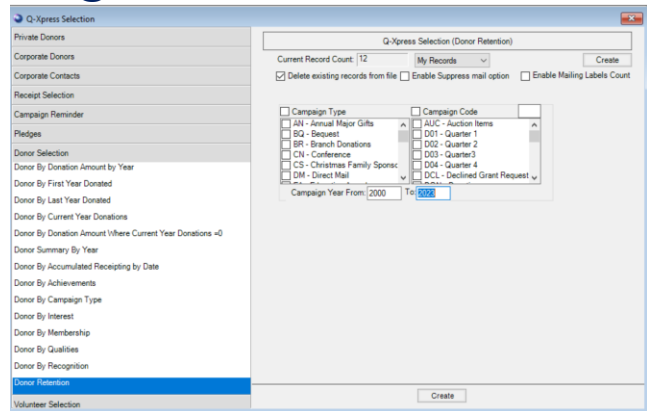
The Campaign Year range of 2000 – 2023 implies all charitable donations with years in this range that received donations in 2023 are considered.

The percentages are calculated excluding the New Donor Count.

Q-Xpress Retention Report Data Selection

The report above can be pulled through a Q-Xpress selection to examine the donors.

The @EASE Tutorials section has a document on the results of this selection.

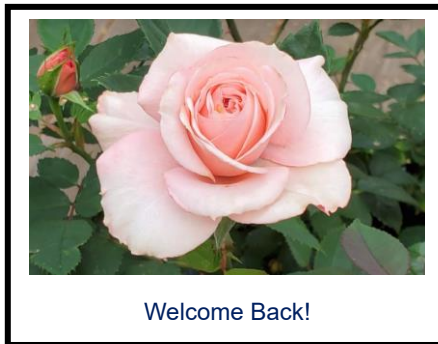


Getting to Know Your Donors Relationships, Operational Intelligence and Success

Q-Xpress View					
Type	Fundraising	Go To	Go To	Sort Field	Profile Desc
P	P000002			George Kate Anna	Donated in : 2021
P	P000004			Abbott Kelly	Donated in : 2022
P	P000005			Bell Robert G.	Donated in : 2021
P	P000006			Crombie Kelly	Donated in : 2022
P	P000007			Lutz Mike	Donated in : 2021
P	P000010			Hamm John	Donated in : 2021
P	P000013			Anderson Peter	Donated in : 2021
P	P000017			Miller Glenn	Donated in : 2021
P	P000020			Samson Robert	Donated in : 2021
P	P000023			McDonald Peter &	Donated in : 2022
P	P000029			Billings Stuart	Donated in : 2021
P	P000031			Adams Peter J.	Donated in : 2022
P	P000057			Brightmann Ludwig	Donated in : 2021
P	P000058			Batsch Sharron E.	Donated in : 2022
P	P000060			Martel Barry &	Donated in : 2021
P	P000061			Philpott Ann M.	Donated in : 2017
P	P000063			Wilson John & Mary	Donated in : 2020
P	P000064			Balken Bob & Joan	Donated in : 2021
P	P000071			Martin Doug	Donated in : 2021
P	P000080			Wikjord Alfred and	Donated in : 2017
P	P000311			Batsch Brian G.	Donated in : 2022
P	P000343			Davidson Vicky	Donated in : New Donor
P	P000345			Boutsakis Sophia	Donated in : New Donor
C	C001559			Williams Prof. Corp.	Donated in : 2015
C	C007082			TELUS	Donated in : New Donor

Opportunity:

Using the Retention Q-Xpress selection, why not send a Welcome Back card to donors that have lapsed.



Final Remarks

- @EASE has provided reports so that staff can make knowledgeable decisions.
- @EASE has donor profiles to enable staff to make connections with supporters based on the donor's interest. This can be through short, targeted emails or best yet short, targeted videos.
- Raising funds to support an organization is not an easy task. It requires an organized work environment with standards that are beneficial to the charity, and which are adhered to by all team members. Chaos undermines time and effectiveness.

@EASE has provided the tools and methodology to allow our clients to do important work and leave busy work to those competing for the same charitable dollars.

The Batsch Group Team