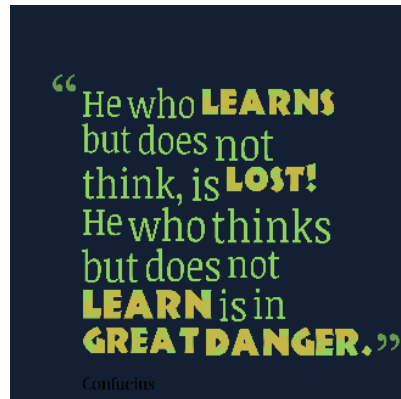


## WHY are Campaign Naming Conventions Important?

1. Simplicity
2. Continuity
3. Consistency
4. Decision Making
5. Clutter
6. Confusion
7. Standards
8. Demonstrates an Understanding of the program



The saying in the box comes from Confucius. We were in Shanghai a few years visiting one of the schools and I asked our guide what their favourite lesson or quote was and this is what she shared with me. I think this is a great adage for our all our clients when using @EASE and one that works well in general for all situations.

### Naming Strategy

Most other software pages use three fields to define an "Ask", appeal or campaign as we call it. @EASE uses FOUR fields and there fields are:

- The Fiscal year the campaign will run.
- The Campaign Type which defines the ASK
- The Campaign Code which tells how the Donor or Support responds
- The Breakout Code (there is a story here that started at the Bissell Centre) or account Fund

When you use four parameter or at least the first three you have the advantage of being able to re-use or, if you wish, recycle them.

When these principles are not adhered to, chaos results and we often work with clients to re-align their information to bring back to a stable condition.

There are a couple of anomalies to this rule and they include 'In Memory' (MM) or 'In Honour of' (HN) donations and Third Party donations.

## In Memory or In Honour of Gifts

Some of our clients have many In Memory gifts in a given year some of these gifts are given to a deceased friend or relative in on-going years.

We use a numeric value to record in Memory donations where the full campaign code is unique to that one person. For example on our sample database we have Rose McGuire. Rose passed in fiscal 2005 and was the first in memory for that year. 2005MM001 is the campaign that records all gifts to Rose. This in memory has received gifts over multiple years but always to the same campaign enabling a variety of opportunities like In Memory recognition walls.

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
<b>Total</b>	<b>\$1,939.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,939.00</b>
2015	\$402.00	\$0.00	\$0.00	\$0.00	\$0.00	\$402.00

The same is true of In Honour of donations where the expectation is that several will be received as in a wedding or anniversary or retirement celebration.

For some clients where in memory or in honour of gifts are rare, a single campaign MMDON or HNDON is reasonable with the Receipt Notes area identifying who is being recognized.

## Third Party Donations

Third party donations are wonderful to receive. They are based on the largess of a group or individual or company wishing to support a charity.

We recommend that all Third Party gifts be allocated to one TP DON campaign by fiscal year. Should, for some reason, the charity need to get involved in sponsorships or auction donations on behalf of the third party host, we would use TPSPS and TPGIK or TPAUC for the campaign name.

With every third party event there may be a host with multiple donations or it may be a single amount gifted to the charity.

## Third Party Hosted

Where there is a host and multiple gifts we recommend the following set up when recording the gifts:

The screenshot shows the 'Receipting Maintenance' window with the following details:

- Fundraising Number: P000004 (Donor: Kelly Abbott)
- Batch Number: 20120904001
- Receipt Date: Sep 04, 2012 (Date Received: Sep 04, 2012)
- Campaign: 2012TPDON 2012 Third Party Donations
- Payment Method: Cheque (Chq/Conf number: 1212)
- Donation Type:  Charitable
- Receipt Required: Yes (Based on Lowest Dollar Value Rec) (Receipt Number: 10402)
- Acquisition Number: C003481 (Host: Buffalo House Bar and Grill)
- Amount: \$50.00
- Registration Amount: \$0.00
- Ticket Number: 0
- Mailing List: Buffalo Wings Nig
- Pledge ID - Detail ID: -
- Letter: ThirdParty
- Receipt Notes: (empty)

A breakout table is displayed with the following data:

Breakout	Amount
ThirdParty - Third	\$50.00

### Features to Note:

- P000004 Kelly Abbot is the donor.
- C003481 Buffalo House Bar and Grill is the host.
- Buffalo Wings Night is the name of the event housed under the Mailing List.
- The Letter field is ThirdParty.

When extracted through Q-Xpress the thank you letter can note the donor, the host and the name of the event. If the host was a private individual, their name in proper order is found in the Profile Desc field.

Third Party No Host

Features to Note:

- C001505 Financial Ventures Inc is the donor.
- The Acquisition Number is blank.
- Casual Friday is the name of the event housed under the Mailing List.
- The Letter field is ThirdParty No Host.

In this example, the assumption is Financial Ventures gave an amount for each staff member who came in casual clothing. As such the gift can be receipted. If each staff member added dollars to a shared gift in anonymity, there would be no receipt given, but the gift would be charitable.

The Benefit:

1. You have a proper Campaign Code
2. You can compare the results of Third Party donations from one year to the next

Fiscal Year from 2012 to 2015

Campaign	Campaign Description	Fiscal Year	Total Campaign	Total Count	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2012TPDON	2012 Third Party Donations	2012	475.00	1	325.00	0.00	150.00	0.00	0.00
2012TPDON	2012 Third Party Donations	2013	175.50	1	175.50	0.00	0.00	0.00	0.00
2013TPDON	2013 Third Party Donations	2013	50.00	1	0.00	0.00	50.00	0.00	0.00
Total			700.50	1	500.50	0.00	200.00	0.00	0.00

3. You can report the Third Party events in a given fiscal year.

### Campaign Prospect Report

Mail List	Responses	Amount	Average Donation
Annual Picnic	1	\$175.50	\$175.50
Buffalo Wings Night	2	\$150.00	\$75.00
Casual Friday	1	\$325.00	\$325.00
<b>Total</b>	<b>4</b>	<b>\$650.50</b>	

In each case we have:

- better information,
- better quality recording and
- the ability to review the information from a management perspective.

Batsch Group Inc