

Combined with the power of the MEMBERS ONLY CRM, The Fundraising Module gives you tools for **designing your campaign, recording gifts, managing pledges, awarding premiums, handling earmarked donations, and reporting on the campaign or any appeal within the campaign.**

In addition, you can use MEMBERS ONLY to manage your **direct mail solicitations**, track all your communications with key donors, record your planned next steps in winning major gifts, and keep track of key relationships that can help you approach and influence your donor community. And all of this is fully integrated with the rest of your Members Only system.



Campaign Management

Using the **CAMPAIGN MANAGEMENT** window, you can model your campaign tree, breaking the campaign into any number of subappeals, and assigning these appeals to teams of campaigners. Prospects can be entered into the tree as well. Each appeal and solicitor is assigned a specific dollar goal, and numerous tools exist for comparing the actual amount pledged and collected in each appeal to the goal. The Campaign Management window serves as a gateway to viewing all of the detailed information about planned efforts, past contacts, and actual gifts and pledges you've received. You can even choose to write-off the collected balances in an appeal through the Campaign Management Window.



Recording Gifts

Newly received gifts are entered with from the Campaign Management Window or from the Donor's CRM record. The Gift can be assigned a type, which will determine how it is managed - it may be, for example a cash gift, a pledge, a transfer of securities, or an in-kind donation of services. All the finances of the Fundraising module are completely integrated with Accounts Receivable module, and handled in a FASB complaint fashion. Pledges can be given a payment scheduled, which can optionally be charged to a credit card of drafted from a bank account.



Earmarking

Each gift is recorded through a specific **APPEAL** in the Campaign Tree, and optionally is assigned to a specific **SOLICITOR**. In addition it can be assigned to a specific **SOURCE** or mailing code, so that the efficiency of various mailings can be compared. Each gift can be

earmarked to a **FUND** or multiple funds, or treated as **UNRESTRICTED**. The **FUNDS** to which a gift is earmarked determine its distribution in the general ledger.



Matching Donations

A gift can be applied as a **MATCHING DONATION** to a previously entered donation. A matching donation's soft credit, effort, and fund are the same as the donation that it matches.

- More than one matching donation can be matched to an original donation.
- If you are informed when a donation comes in that it is eligible for matching, the donation can be flagged as an **OPEN MATCHABLE**. Users can then query on the open matchables and take action to assure the matching donations are collected.



Tracking Donor Credit

Proper acknowledgment of donors is key to an effective fundraising effort. This can be difficult when the payor of the check is not the only person you need to track. **MEMBERS ONLY** provides many tools for tracking everyone associated with a donation.

- Each donation is assigned to a single payor. This is the **HARD CREDIT DONOR**, and must be the entity writing the check.
- Each donation can be assigned to any number of **SOFT CREDIT DONORS**.
- If no persons are assigned soft credit for a donation, the payor will be assigned as the only soft credit donor when the donation is saved.
- When the payor is not one of the soft credit donors, the donation is referred to as an **AGENT DONATION**. When there are more than one soft credit donors, the donation is referred to as a **SPLIT** or **SHARED DONATION**.
- A donation can be flagged as **ANONYMOUS** to hide the donor name when required.



Donation Acknowledgment

- Each donation receives a single **ACKNOWLEDGMENT**, sent to a single address, listing all soft credit donors.
- Each donation receives a **RECEIPT**. Receipts are sent to the Hard Credit donors. Acknowledgments and receipts are created as word processing merge files to give the users flexibility in formatting.
- You can award a **PREMIUM** - a pin, plaque, mug, etc. - to a donor based on the size of the donation received. The user assigns the premium when recording the donation.



Direct Mail Solicitation

At the start of each solicitation cycle, the system will place personal records on several giving lists based on past donor history. The lists are:

- High-Dollar Renewals (LYBUNT,SYBUNT)
- Low-Dollar Renewals (LYBUNT,SYBUNT)
- Non-Donor
- VIPs

These lists can then be referenced in the query to produce everything that is needed for a solicitation mailing - merge letters, labels, envelopes, etc. Lists can be crossed with other attributes - member status for example, to generate a refined mailing strategy. **MAILINGS** can also be tracked for purchased mailing lists. **MAILINGS** can be given a 15-character **SOURCE CODE**. The system can record who has received a specific mailing. **MAILINGS** track the document mailed, any inserts, letterhead type, envelope type and mailing method for mailing effectiveness comparisons.



Fundraising Reports

- **CAMPAIGN STATUS REPORT:** This report shows the current status of the campaign or any branch of the campaign tree, down to the level of the individual gift, comparing the goals to the actual amounts pledged and collected.
- **COLLECTIONS REPORT:** For the entire campaign or any branch of the campaign tree, show pledged amounts, which are yet to be collected.
- **GIFTS BY DATE:** For any appeal, shows all gifts between dates. Shows Donor, Fund, and Amount. Has to-date summary below version as well.
- **EXPECTED PAYMENTS:** Shows all expected payments on pledges in a given period.
- **CASH FLOW:** Projection Based on recorded pledges, displays summary information on payments expected in each of the next 12 months.
- **ANNUAL DONOR STATUS REPORT:** Compares donations for either two efforts or two funds over equivalent date ranges.
- **GIVING HISTORY REPORT:** For a Fund, show all donations between dates, with very flexible sorting and summary options.
- **DONOR PROFILE:** Shows Donor memo, giving interests, and history for a selected donor, or group of donors picked from the query.
- **ANNUAL INCREASE/DECREASE:** Shows donations year to date, comparing one year to another. Can be run as a summary or a detailed version.