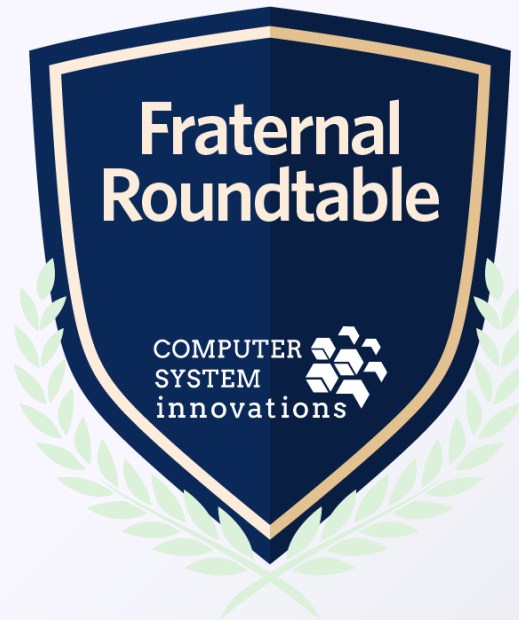


Fundraising Essentials in RiSE

Matthew Dempsey & Brandi Barber



Overview

- **How can you be more efficient with iMIS?**
- **We are taking a four-part approach!**
 - Eliminate
 - Expose
 - Evaluate
 - Engage



Eliminate Confusion



Using a Common Language

First things first: Let's start with common language.

Can someone share for me what the definition of lifetime giving is?



Stakeholder and Board Reports

Think about what data you share with stakeholders and boards. This might include things like:

- Year-to-date giving
- Donor club renewals
- Donor club advancement rates
- Year-over-year growth
- Planned gifts
- Year-to-date donations to scholarship funds
- Year-to-date donations to the general fund
- Year-to-date donations to house corporations
- Can someone give me an example of something I'm missing?



Let's dive into lifetime giving as an example.



Lifetime Giving

Includes

- all gifts
- paid pledge installments
- soft credited gifts

Excludes

- unpaid pledge installments
- stock gifts
- in-kind gifts
- donations to XYZ house corporation
- donations to ABC scholarship
- funds 3311A and 3412B

Notes

- For donors who committed a pledge prior to 2015, we count the full pledge. For all newer pledges, we only count cash that has come through our doors.



“The Hit Rule”

If you got hit by...

the lottery, could every staff member in the foundation generate the same report for the board?

Or, more importantly, could they describe the information they need to to generate the board report?



Using a Common Language

Take every field you track, every report you give to the Board, every stat you've got and see if you can answer:

- Why are we tracking this?
- What about this is relevant?
- Do we still need to track this?
- Is this information actionable?
- What can we do to standardize this?
- Can this be simplified?



Using a Common Language

THEN. Write down the “formula” for that field or stat.

Does anyone have something like this?

Psst, Matthew, click [here](#).



[Term]

Includes

- ?

Excludes

- ?

Notes

- ?



Other Ways to Eliminate Confusion

Apply Occam's Razor

- Latin: *Entia non sunt multiplicanda praeter necessitate.*
- Fancy English: Entities should not be multiplied unnecessarily.
- Matthew's English: The simplest answer is often the best.

List everything the Foundation does (outside the ICSS wheel)

- Can you fit all the details you need for your day of giving, donor club, or scholarship programs on one PowerPoint slide?



Questions?



Exposing Your Data



We're going to go through some of the “buckets” and share some best practices.

Psst, Matthew. What do you mean by buckets?



Buckets

- Donor Search
- Gift Search
- Gift Information
- Moves Management
- External Dashboards
- Automate Communications
- Template Queries
- Donor Profile
- Super Business Objects
- Quality Assurance (QA) Pages
- Alerts
- External Segmenting
- Internal Segmenting
- Some Fun Things!



Donor Search

Enter search criteria to find people or organizations

Select a query

ID equals

First name starts with

Last name starts with

Maiden name starts with

Preferred name starts with

Member Type Equals

- Have a super query you can reference
- Remember you can have multiple queries on one page.



Donor Search

Enter search criteria to find people or organizations

Select a query

ID equals

First name starts with

Last name starts with

Maiden name starts with

Preferred name starts with

Member Type Equals

Zip/Postal Code

Email contains

Home Phone Contains

Spouse first name starts with

To search multiple zip codes, wrap them in straight quotes (not curly quotes) and separate them by commas. For example: "12345","23456" would return results for both of these zip codes.

- Have a super query you can reference
- Remember you can have multiple queries on one page.
- Add helpers so all staff know how to best use the search.
- Use *all* the fields.



Enter search criteria to find people or organizations

Select a query

-- Donor Search ▾

ID equals

First name starts with

Last name starts with

Maiden name starts with

Preferred name starts with

Member Type Equals

(Any)

Chapter/Group starts with

Birth Date Between

 and 

Initiation Date

 and 

City starts with

State

(Any)

Zip/Postal Code



Email contains

Home Phone Contains

Moves Manager

(Any)

Volunteer Manager

(Any)

FY Giving - 1 Year Ago Between

and

FY Giving - Current Year Between

and

Lifetime Giving Between

and

Exclude No Foundation Contact?

(Any) ▾

Exclude No Foundation Email?

(Any) ▾

Exclude No Mail?

(Any) ▾

Exclude No Email?

(Any) ▾

Prospect Stage

(Any)

Major Giving Likelihood greater than (between 0-1000)

Planned Giving Likelihood greater than (between 0-1000)

Gift Capacity Range

(Any)

Spouse first name starts with

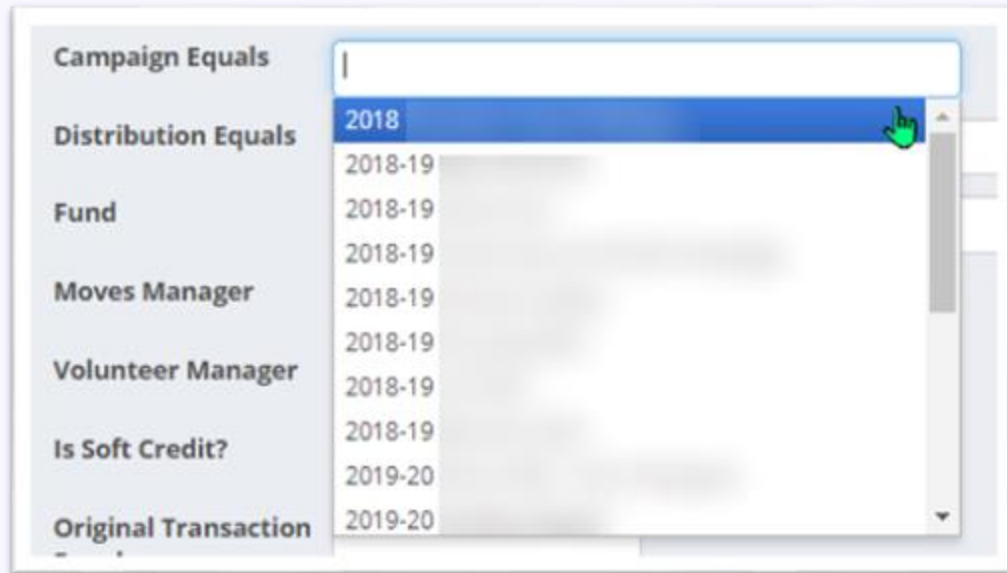
Spouse last name starts with

Find

Please enter your search criteria to view results



Gift Search



- Leverage validation lists; instead of showing every code in your system, consider having a query that only shows your “active” codes.
- Have a clear result that makes the most important details stand out.

<div> <div> <div>⏪</div> <div>⏴</div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>...</div> <div>⏵</div> <div>⏩</div> </div> <div>Page size: 20 ▼</div> </div>													
Show all 500													
	Gift Date	Original Transaction	Name	Member Type	Donor chapter	Amount	Gift Type	Appeal	Campaign	Fund	Check Number	Moves Manager	Volunteer Manager
Pledge Info													
Pledge Info													
Gift Info													
Pledge Info													
Pledge Info													
Pledge Info													
Gift Info													
Gift Info													

Gift/Pledge Information

- There is *so much* data about gifts and pledges, why don't we put it all in the same place?



CC FundraiserID

Find

1

2

3

4

Show all 500

Gift Data

Pledge Info

4/15/2020

Pledge Info

4/15/2020

Gift Info

4/15/2020

Pledge Info

4/14/2020

Pledge Info

4/14/2020

Pledge Info

4/14/2020

Gift Info

4/14/2020

Gift Info

4/14/2020

Gift Info

4/14/2020

Gift Info

4/14/2020

Additional Information

Donor Information

iMIS ID

Full Name

Chapter

Full Address

Email

Overview

Fiscal Year

Transaction Date

Date Received

Transaction Number

Gift Type

Amount

Accounting Codes

Appeal

Campaign

Distribution

Fund

Recurring Gift Information

Additional Details

Batch Num

GL Account

Payment Type

Check Number

Invoice Reference Number

Solicitor ID

Request Number

List As

Note

Soft Credit

Percentage

Credit to ID

Credit to Name

Credit to Company

Credit from ID

Credit from Name

Credit from Company

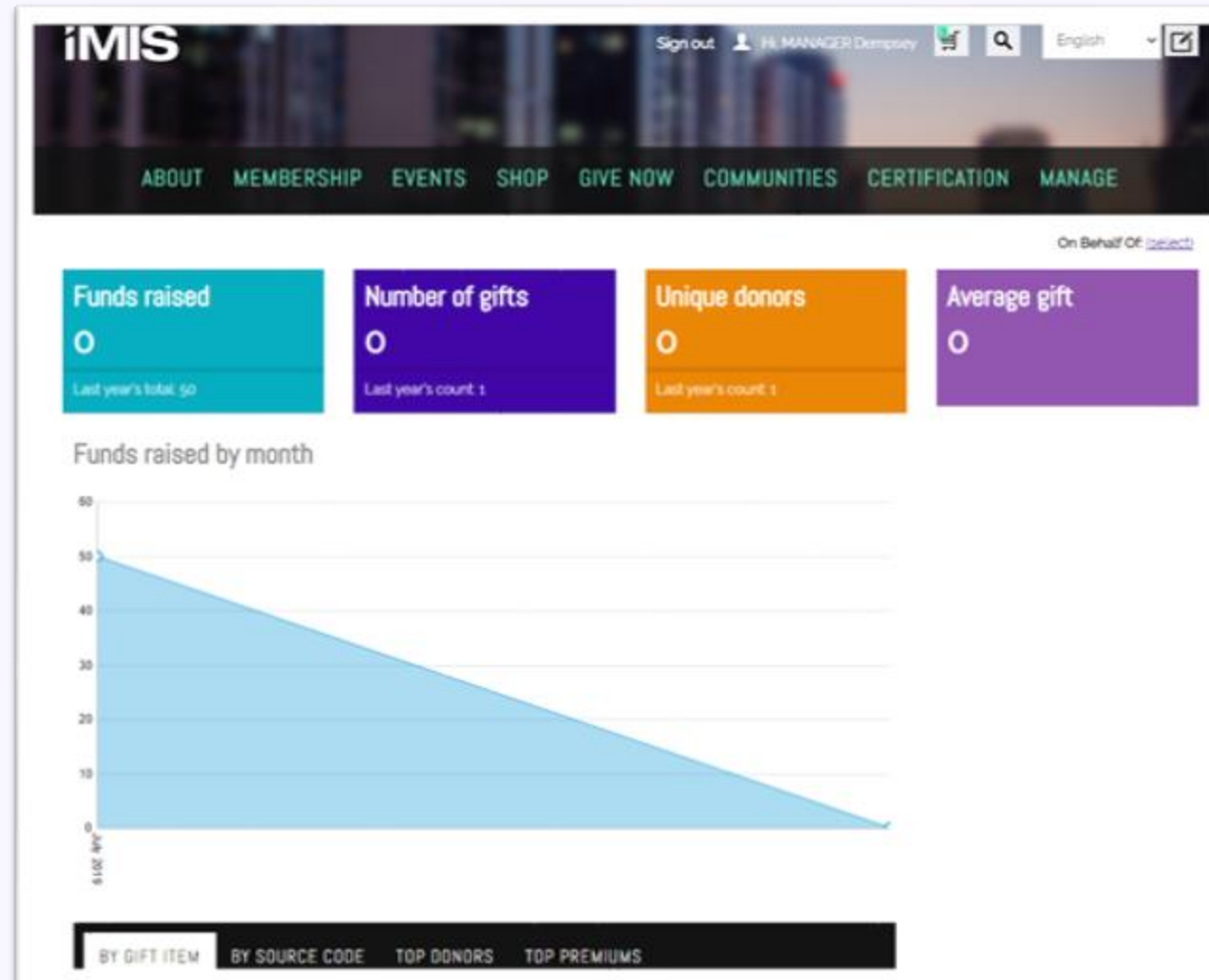


External Dashboards

How much time do we spend on preparing reports and information for boards that we work with?

What if your board got access to some RiSE pages that had all the stats they need on demand?





Automate Communications

- **Who here has any external automated communications (goes to the donor)?**
- **Who here has any internal automated communications (goes to staff)?**

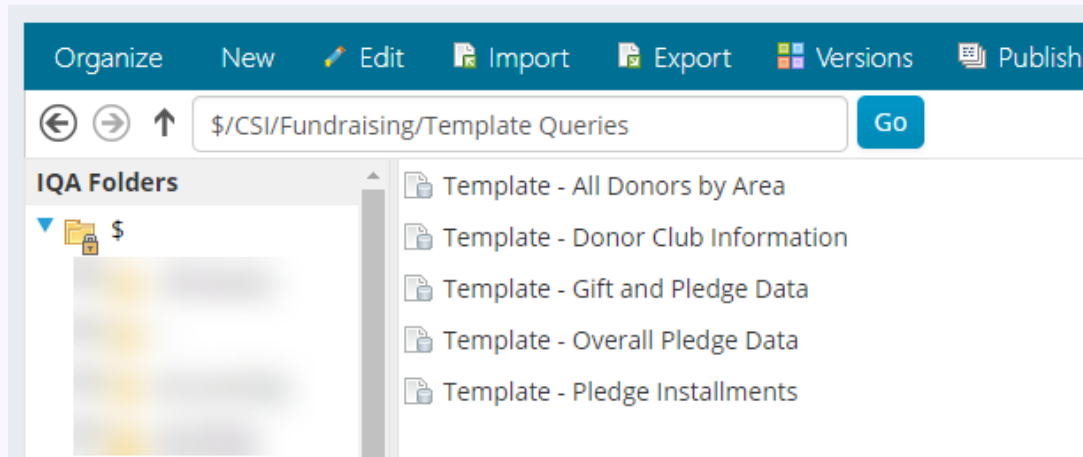
Some things we've seen are automated:

- Staff notice when a transaction is in one entity but the batch it is in is in another.
- Staff and donor notice 30-days out from pledge end date.
- Staff notice when a new ICE form has been submitted.
- Staff notice for gifts at different thresholds.



Template Queries

Have a handful of template queries that you and your team know when and how to use.



Pro Tip: Export your template queries in case someone doesn't make a copy.



Donor Profile

Your First Tab

- Consider this to be the 360°, high-level snapshot of the donor.
- Visualization for that donor's history
 - Pie chart of funds given to
 - Count of appeals
 - Giving over time
 - Essential notes

Remember organization is half the battle. Think about the major functions of the foundation and what you all do.

Let those functions inform how to best group information together.



Super Business Objects

Put all the fields you use in one business object.



Super Business Objects

Address - City
Address - Country
Address - County
Address - Full Mailing
Address - State/Province
Address - Street 1
Address - Street 2
Address - Street 3
Address - Zip
Annual Giving Society - Current FY
Annual Giving Society - Last FY
Chapter - Affiliated - Greek Name
Chapter - Affiliated - Greek, School
Chapter - Affiliated - ID
Chapter - Affiliated - School Name
Chapter - Affiliated - School Short Name

Chapter - Initiated - Greek Name
Chapter - Initiated - Greek, School
Chapter - Initiated - ID
Chapter - Initiated - School Name
Chapter - Initiated - School Short Name
Chapter - Preferred - Greek Name
Chapter - Preferred - Greek, School
Chapter - Preferred - ID
Chapter - Preferred - School Name
Chapter - Preferred - School Short Name
Comms Pref - Exclude Directory?
Comms Pref - Foundation - No Email?
Comms Pref - Foundation - No Fall Solicitation?
Comms Pref - Foundation - No Mail?



Super Business Objects

Comms Pref - Foundation - No Phone?

Comms Pref - Foundation - No Spring Solicitation?

Comms Pref - Foundation - No Stewardship Mail?

Comms Pref - Foundation - No Year End Solicitation?

Comms Pref - No Email?

Comms Pref - No Mail?

Comms Pref - No PG Newsletter?

Comms Pref - No Phone?

Comms Pref - One Mailing Per Year?

Company

Company Id

Cumulative Roll - Current FY

Cumulative Roll - Last FY

Current Year Strategy

Date - Birth

Date - Initiated

Date - Joined

Date - New Member

Donor Summary

Email

Estimated Value

Foundation Partner - Fund

Foundation Partner - Monthly Amount

Gift Type

Gifts - First Gift - Amount

Gifts - First Gift - Appeal

Gifts - First Gift - Campaign



Super Business Objects

Gifts - First Gift - Date
Gifts - First Gift - Fund Code
Gifts - First Gift - Fund Name
Gifts - Largest Gift - Amount
Gifts - Largest Gift - Appeal
Gifts - Largest Gift - Campaign
Gifts - Largest Gift - Date
Gifts - Largest Gift - Fund Code
Gifts - Largest Gift - Fund Name
Gifts - Last Gift - Amount
Gifts - Last Gift - Appeal
Gifts - Last Gift - Campaign
Gifts - Last Gift - Date
Gifts - Last Gift - Fund Code

Gifts - Last Gift - Fund Name
Id
Is Donor Advised Fund?
Is Foundation Partner?
Is Golden Lyre Society?
Is Heritage Society?
Is Life Loyal Roll?
Is Scarlet Ribbon?
Lifetime Giving Amount
List As
Membership - Category
Membership - Is Company?
Membership - Is Member?
Membership - Member Type



Super Business Objects

Membership – Status
Moves Manager - Name
Moves Manager Id
Name - Designation
Name - First
Name - Full
Name - Informal
Name - Last
Name - Last, First
Name - Maiden
Name - Middle
Name - Preferred Full Name
Name - Prefix

Name - Suffix
Number Years - Consecutive Giving
Number Years – Giving
Phone - Home
Phone - Mobile
Phone - Work
Planned Gift Amount
Prospect Grouping
Prospect Stage
Receipt Interval
Recognition Amount - Last FY
Recognition Amount - This FY
Scarlet Ribbon Count
Spouse - First Name



Super Business Objects

Spouse - Last Name

Title

Total Giving - CY - 1 Year Ago

Total Giving - CY - Current Year

Total Giving - FY - 1 Year Ago

Total Giving - FY - 2 Years Ago

Total Giving - FY - 3 Years Ago

Total Giving - FY - 4 Years Ago

Total Giving - FY - 5 Years Ago

Total Giving - FY - 6 Years Ago

Total Giving - FY - Current Year

Volunteer Manager - Id

Volunteer Manager - Name

Years - Initiated

Years - Old



Quality Assurance (QA) Pages

Have pages and/or queries that staff check (or have an alert or email notification) to ensure data is correct.

- Activities in the Future
- Fundraising - Transactions in the Future
- Invalid Member Types
- Invalid or Depreciated Member Types

All WEB Donors

Fund Does Not Equal

[Find](#)

[Export](#)

Date Received	ID	Full Name	Status	Member Type	Transaction Number	Amount	Appeal	Campaign	Fund

This list will display all donors who have the WEB member type and have the status of A.



Alerts: Going Beyond Basic Text

The image compares two styles of user alerts. On the left, a basic text alert is shown, which is a simple white box with a blue border containing three lines of text. On the right, a rich, interactive alert is shown, which is a white box with a light blue border containing multiple sections: buttons at the top, a list of top fundraising solicitors, a progress bar for a fundraising goal, and a warning message with a link to a donor's list.

Basic Text Alert (Left):

ID 101
Member since 5/28/1967
Member type Company Member
Status Active
Paid through 4/29/2003

Print Info Public Profile Resolve Duplicates

Donate Order Register Email

Top Three Fundraising Solicitors: John Doe, Susie Test, Ann Sample.

You have reached 60% of your fundraising goal!

Warning! You have not made any fundraising calls since 09/16/2018! Go to your donor's list.

Rich Alert (Right):

Print Info Public Profile Resolve Duplicates

Donate Order Register Email

★ **Top Three Fundraising Solicitors:**

- John Doe
- Susie Test
- Ann Sample

🚩 You have reached **60%** of your fundraising goal!

Warning! You have not made any fundraising calls since SUNDAY, SEPTEMBER 16, 2018!

Go to your [donor's list](#).

Moves Management

- Define a clear workflow for the stages that prospects move through.
- Automate what we can automate.
 - If someone is currently in the solicitation stage and they make a gift in response to a solicitation, then automatically move them to stewardship.
- Have a specific dashboard customized for each moves manager, so they can see where they stand.



See the Moves Management Dashboard For -

Matthew Dempsey
Brandi Barber
Trisha Haas
Alison Kinney
Jodi O'Toole
Angela Nimer
Elizabeth Wojcik

onors

Revenue from major donors

100%

% of last yr

Last year's total:

Average gift amount - major donors

100%

% of last yr

Last year's total:

All major donors by prospect stage



My Major Do

[Gift Date](#)



Internal Segmenting

We just saw internal segmenting by moves manager. We could also do this by:

- Performance by Region
- Performance by Gift Officer
- Visit to Donation Ratio
- Portfolio YOY Retention



Some Fun Things!

Remember we can do fun things, too! And sometimes this is great data to share with the rest of the organization:

- Pie chart of donations by the day of the week the gift made.
- If that staff person is a member, show their chapter brothers/sisters (within ~4 years of them) who have made a gift.



Questions?



Evaluating Your Data



Prospecting Donors

- **What can iMIS tell you about your next likely major donor?**
- **Outline criteria for IQA**
 - \$ of a certain amount
 - Wealth Score
 - Prior chapter involvement
 - Specific age range
 - Region
 - Survey responses
 - No Moves Manager assigned




Segmentation

- **It's Direct Mail time, and you need to segment donors = IQA can help**
 - Current Donors
 - Currently Monthly Donors
 - Donors with an open pledge
 - Planned Gift or Bequest
 - Lapsed Donors (LYBUNT / SYBUNT reports in Continuum)
- **You have your groups, now what?**
 - Consider adding your segment code or group to the activity you are tracking (Appeal, Donor Contact, Direct Mail, etc).
 - Your IQA export gives you the list to import activity records
 - See how a particular segment performs/responds over other as gifts come in



Appeals

- Use all the available fields
- Gives you the power to report on Appeal participation & performance
- Data in CsAppeal
- General Look Up tables
 - APPEAL_TYPE
 - Add your categories for appeal



The image shows two screenshots of a software form for creating an appeal, connected by a large blue arrow pointing from left to right. The left form is for a basic appeal, and the right form is for a more detailed one.

Left Form (Basic Appeal):

- Code: SPDM
- Title: Spring Direct Mailing
- Desc.: (empty)
- Campaign: (empty)
- Fund: (empty)
- Appeal Type: (empty)
- Goal: (empty)
- Begin: (empty)
- End: (empty)
- ☐ Perpetual
- Qty. Dropped: (empty)

Right Form (Detailed Appeal):

- Code: SPDM20
- Title: Spring Direct Mailing
- Desc.: Direct Mail Spring 2020 highlighting relief fund for member assistance grants.
- Campaign: GEN
- Fund: MREF
- Appeal Type: M
- Goal: 20,000.00
- Begin: 03/20/2045
- End: 06/01/2020
- ☐ Perpetual
- Qty. Dropped: 5,000

Appeal Summary

Intelligent Query Architect

Appeal Summary

Define Run Report Group Security

Summary Sources Filters Display Sorting

Source	Alias	Type	
CsAppeal	<input type="text" value="CsAppeal"/>	Business Object	✕ ▲ ▼
GiftsReceivedSummary	<input type="text" value="GiftsReceivedSummary"/>	Business Object	✕ ▲ ▼
Relations			
Description			
Custom (When CsAppeal.Appeal Code = GiftsReceivedSummary.Appeal)		<input type="text" value="Equals"/> ▼	✕
<input type="text" value=""/>			+



Appeal Summary

Intelligent Query Architect

Appeal Summary

Define Run Report Group Security

Summary Sources Filters Display

Source	Alias
CsAppeal	CsAppeal
GiftsReceivedSummary	GiftsReceive

Relations

Description

Custom (When CsAppeal.Appeal Code = GiftsReceivedSummary.Appeal)

Equals

+

Intelligent Query Architect

Appeal Summary

Save As Save Close

Define Run Report Group Security

APPEAL CODE	APPEAL TYPE	TITLE	DESCRIPTION	BEGINS DATE	ENDS DATE	CAMPAIGN CODE	FUND	IS PERPETUAL	QUANTITY DROPPED	GOAL	AMOUNT
BOOK		Annual Book Sale		10/1/2001 12:00:00 AM	10/2/2001 12:00:00 AM	F_CAMP	BLDG	0		50000.00	11,518.08
TELE	TELE	Spring Telemarketing	Week-long telemarketing appeal	6/15/2001 12:00:00 AM	6/22/2001 12:00:00 AM	Lcase	BLDG	0		115000.00	800.28

Export



Appeal ROI

- Did you know you can track appeal expenses?
- Why does that matter?

File Edit Cmds Utilities Help

iMIS Home Customers Billing Events Fundraising AR/Cash Orders Service Central Subscriptions System Setup Tools

Fundraising

Enter and edit gifts
Rapid gift entry
Process payments
Enter and edit adjustments
Process premiums
Set up appeal expenses
Manage requests
Generate reports
Generate executive reports
IQA

Set up tables
Funds
Campaigns
Appeals
Distributions and premiums
Donor clubs
Set up module
Fundraising help

Set up appeal expenses

New Open Edit Delete

Appeal
HN-Honorarium gift
HO-Housing Related Gift
I-Former Donor - Other
I1-Current Donor - VIP
I2-Current Donor - MD
I3-Current Donor - Other
I4-Current Donor - Other

Rec # Date

Amount

Expense Type

Campaign

Fund

Description

Expenses

0.00



Appeal ROI

Intelligent Query Architect 🔄 □ ✕

Appeal ROI Advanced mode ▾ Save As Save Close

Define Run Report Group Security

Summary **Sources** Filters Display Sorting

Add Source

Source	Type	
CsAppeal	Business Object	✕ ▲ ▼
FNDAppealExpenses	Business Object	✕ ▲ ▼
GiftsReceived	Business Object	✕ ▲ ▼

Relations

Description		
Custom (When CsAppeal.Appeal Code = FNDAppealExpenses.Appeal Code)	Equals ▾	✕
Custom (When CsAppeal.Appeal Code = GiftsReceived.Appeal)	Equals ▾	✕
<div>▾</div>		+



Appeal ROI

Intelligent Query Architect

Appeal ROI

Advanced mode

Save As

Save

Close

Define

Run

Report

Group

Security

Summary

Sources

Filters

Display

Sorting

Appeal ROI

Save As

Save

Close

Source

CsAppeal

FNDAppealExpenses

GiftsReceived

Relations

Description

Custom (When CsAppeal.App

Custom (When CsAppeal.App

Define

Run

Report

Group

Security

Export

Type	Appeal	Total Expenses	Gift Recieved
DIRECTMAIL	2000 LYBUNT, Alumnae	1,767.72	20,006.00
DIRECTMAIL	2008 LYBUNT	4,732.15	410.00
DIRECTMAIL	2001 LYBUNT	1,852.69	8,478.00
DIRECTMAIL	2004 LYBUNT	3,552.00	14,061.00
DIRECTMAIL	2000 LYBUNT, New Alumnae	712.76	615.00
DIRECTMAIL	2002 LYBUNT	2,431.05	9,277.00



Data Hygiene

- **When data is *(are)* missing**
 - Phone
 - Email
 - Receipt preference
- **Out-of-date/aged data**
 - Volunteer / survey data > 5 years
- **Important alerts / pop-ups**
 - Do not contact
 - Bad / Lost Address



Questions?



Using Your Data to Engage



Volunteers / Board Members

- **Allow volunteers or board members access to giving dashboard**
- **Donor search**
- **Complete visit reports**



Engage Staff

- **Follow-up calls based on activity/gift entries**
- **Writing birthday cards**
- **Track tasks and completion**
- **Show real-time alerts & statistics**



Member Profile

- Alerts







- Show your members you care
 - “Hey Matthew, we see your birthday is coming up, we hope you have an awesome day.”
- Eye catching recognition / Donor club icons badges

- Simplify self-service

- Show them the money!

- Calls for ambassadors

- Dynamic Donate Buttons

	Life Loyal Roll - Foundation Program
	Leadership Circle Member
	Foundation Partner
	Foundation Heritage Society
	Outstanding Foundation Pledge
	Life Loyal Member - Fraternity Program



Self-service pledge payments

Configure - Open Invoice List Display

Name: Open Invoice List

Title: Open invoices

☐ Do not render in design mode

iPart CSS class:

☐ Display a border around this content

☐ Display content within a collapsible panel

☐ Show the content as collapsed

Display on screen sizes (for responsive themes only):

☒ ☒ ☒ ☒ ☒ ☒

☒ Limit users who can view data for other contacts

☐ Restrict invoices by financial entity

Display options when no invoices are due

☐ Hide content

☒ Show empty grid with message

No open invoices message: There are no open invoices at this time.

Include the following invoice types: Regular, PastDueSubscriptionBilling, Pledge

☐ Include only invoices due within 0 days

Save & Publish Save Cancel

- Direct your members to pay pledge payments online.
- Save time for donors & staff
- Out of the box feature



Donor Clubs / Giving Levels

- Show more than just donation history
- Create an opportunity to increase giving

My donation history

1 2

Show all 17

Year	Count
▶ 2019	1
▶ 2014	14
▶ 2013	1
▶ 2012	2
▶ 2011	1
▶ 2010	1
▶ 2009	2
▶ 2008	1
▶ 2007	1
▶ 2006	1

1 2

Page 1 of 2, items 1 to 10 of 17.

My giving level

Lifetime Giving	\$21,625.00
Current Giving Society	Golden Society
Next Giving Society	Platinum Society
Amount to reach next society	\$3,75.00

DONATE NOW



Members as Ambassadors

- Ask for volunteers!
- Ask WHY?
- Combine with relationship data and giving history

Interested in being a Foundation Ambassador? ⚙️ ✎️ ⬆️

Yes I am interested! ☒

I am willing to assist with:

- ☒ Annual Fund
- ☐ Any
- ☐ Convention / Leadership Academy
- ☒ Giving Day
- ☒ Member Assistance Grants

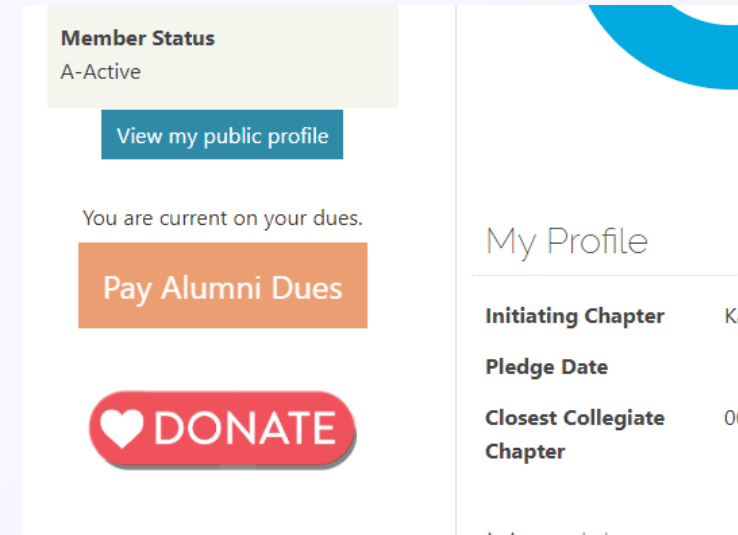
Why are you interested in being an ambassador?

I have seen the direct benefit to our members from the work of the Foundation and I would love to help expanding that reach and helping more!



Dynamic Donate Buttons







- Present your donors with the best giving options.
- Use PA+ to display a donate button based on your criteria
- LTG over \$5000

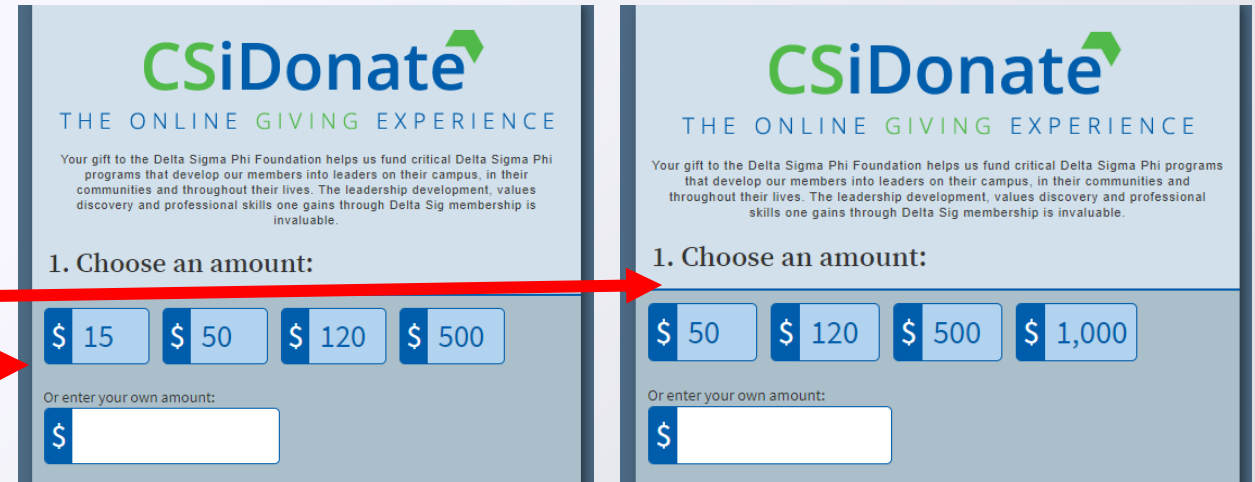


Template Manager

On this page, you can add, delete, and manage your donation templates. For help, please refer to our [Templates documentation](#).

+ New Template

	Template Name	URL Alias	Fin Account	Payments
 	Default ↗	/give ↗	CSI BluePay	
 	Profile Established Donor ↗		CSI BluePay	
 	Profile General Donor ↗		CSI BluePay	

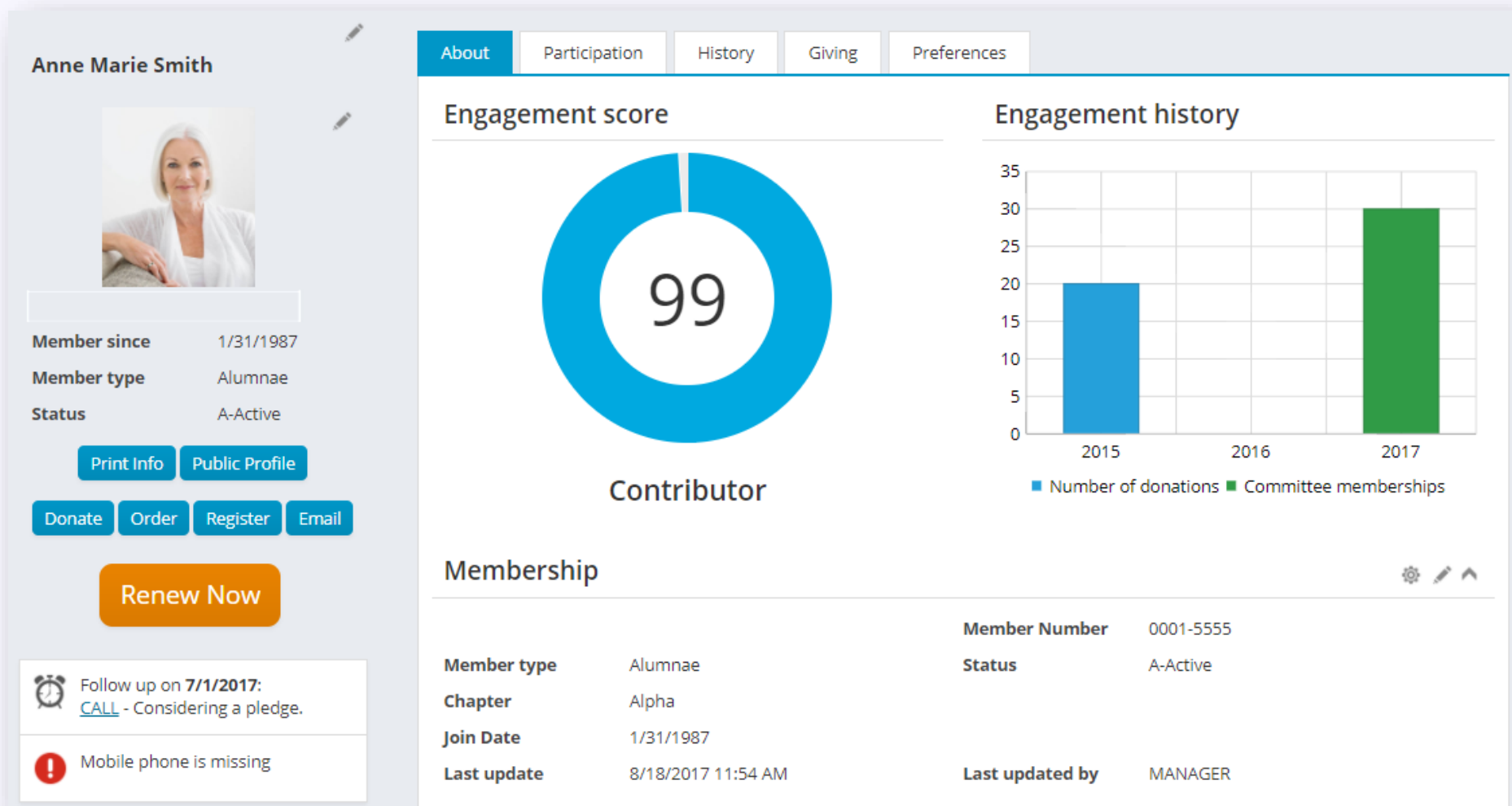


Engagement Scoring

- **Weighted scoring for engagement**
 - Specific analysis of interactions with your organization
 - Event attendance – 10 points
 - Volunteer with local chapter – 25 points
 - Previous gift to Foundation – 15 points
 - Email engagement – 5 points
 - Complete profile – 5 points
 - National volunteer – 30 points
 - Alumni Dues – 10 points



Engagement Scoring



What do you do with engagement scores?

- **Plan in advance**
- **Target donors or volunteers**
- **Show donors to encourage action**
- **Show to staff / board to offer a "snapshot"**
- **Anything but "run it and forget it"**



Endless Possibilities

- **There are so many options in to maximize your fundraising efforts – research, recognition**
- **Keep adding and evolving!**



Questions?

