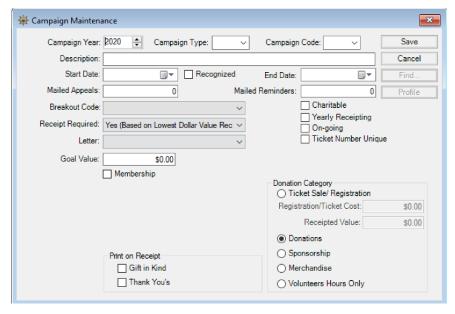# Campaigns

Table of Contents

Campaigns

The use of Campaigns was established as a method for recording donations and volunteer hours since @EASE's inception in 1988.
Campaigns have rules, and one of the principles of @EASE is to plan first. Consequently, certain changes have been disallowed once donations have been entered to protect the charity and the validity of its data. Where an error or change is required, Batsch Group is always able to assist.
We have addressed many types of campaigns and the preferred method to enter gifts associated with them.

Naming conventions for campaigns reduce clutter and enable comparative reporting. We will use the recommended naming strategies in this session.

Campaign Window

Features:

Campaign Year*	Fiscal Year the campaign begins.
Campaign Type*	The type of Ask.
Campaign Code*	How the donor responds.

Campaign Description*
Name of the campaign, which includes the fiscal year, except for In Memory or In Honour of campaigns.
We recommend consistency from one year to the next.

Start Date & End Date   Both dates are documentary.

Mailed Appeals & Mailed Reminders
        Documentary, useful for ROI calculations.

Recognized   This checkbox is used for 'In Memory' campaigns to identify those that have
        been added to a recognition wall.

Breakout Code*   The default fund to which gifts are being allocated.

Receipt Required*   The value varies depending on the type of gift being recorded.
- Charitable and receipted according to the lowest dollar value defined in Organizational Defaults
- Yes, regarding of lowest value.
- No receipt for this type of donation.
- Manually generated enabling the addition of a Receipt number at gift entry.

Letter*   This field is used to determine what letter is required for mailed receipts.
        This field should NEVER be blank. NoLetter is used where none is sent.

Goal Value	This is a documentary field.

Membership*   This box is checked if the campaign manages memberships.
- One Year from Receipt Date
- Two Years from Receipt Date
- Month-end One Year from Receipt Date
- Month-end Two Years from Receipt Date
- Renewal Date

Print on Receipt*

- **Gift in Kind** – when checked, the campaign selection defaults the **Payment Method** to **Gift In Kind**. Prints **Receipt Notes** from the Receipt record on the Receipt.
- **Print Thank You's** – Each Campaign has its own set of Thank You messages recorded in the Campaign Profile. This provides a reminder to the donor and information to CRA showing why the donor gave.

Charitable*   Are donations for this campaign charitable or non-charitable.

Yearly Receipting*   Donations to this campaign will be receipted yearly.

On-going*   A pledged donation where there is no specific end date.

Ticket Number Unique*
   Ticket numbers are used for lottery tickets and auction item numbers.

- **Starting Ticket Number & Ending Ticket Number**
   All numbers will be unique, and values must lie between first and ending.

Donation Category*
   Determines how values are accumulated to a donor's record by fiscal year.

- **Ticket Sale / Registration**
   Registration/Ticket Cost   Benefit Amount
   Receipted Value   Charitable Amount

   The *two amounts equal to the total of one purchase*. This is used for a split gift.

- **Donations**   Cash, charitable donations
- **Sponsorships**   Cash or GIK sponsorships
- **Merchandise**   GIK, purchases, revenue items
- **Volunteer Hours Only**
   Campaign is for volunteer hours

* Default Values   When a campaign is selected, all marked fields provide default values.

Campaign Profile

	Expense	Amount	
			New
			Delete

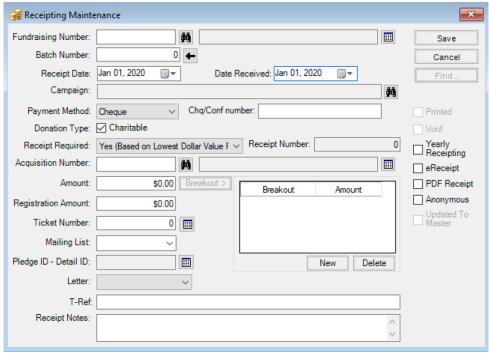|	
Expenses	Costs for a campaign can be recorded. Expense Report shows revenue less costs. Revenue comes from Donations, and U2M must be up to date. Lookup Table entries.
Contributions	Count the number of donations received by dollar range. Campaign Contribution Analysis Report compares like campaigns.
Thank You's	Thank you message displayed on the receipts.
Notes	Notes area
Events	Lists tasks with time and date for volunteer assignments. Lookup Table entries.
Donations	U2M tallies the campaign totals. Totals include private, private in kind, corporate, corporate in-kind, registration, and total by fiscal year.
Notification	Identifies names of those who want to be notified of In Memory or In Honour of campaign donations.
Email	**Thank you message accompanying an eReceipt when emailed.** Social Networking sites are added when defined on Organizational Defaults/Email tab.

Receipt Window

Features:

Donor Number	Corporate number can include a Contact Name.
Batch Number	Used to manage receipts and U2M activity.
Receipt Date	Date the receipt is issued.
Received Date	Date the donation was received.
Campaign	When selected, the amount field and acquisition numbers are reset.
Payment Method	Additional payment methods can be entered to identify the source Canada Helps, Bank Draft, Benevity, etc Lookup Table entries.
Donation Type Charitable*	Charitable or Non-charitable
Receipt Required*	
	If a receipt should be issued. Lowest amount is found on Org Defaults. The options are the same as described under Campaigns; entry to this field can over-ride the campaign setting.

Acquisition Number and Acquisition Name

Identifies who is responsible for the donation. The acquired by number is used to update the Profile's Participation amount field by fiscal year using the Amount field on the receipt record.

Amount	Charitable or non-charitable amount depending on the campaign.
Registration Amount	Benefit amount of a split gift.
Ticket Number	Unique ticket number(s).
Mailing List	Displays how the gift was received.

This field is useful for many purposes, including special events to identify sponsor levels, auction categories, how a donor/participant found out about an event, the name of a third party event.
Lookup Table entries.
The **Campaign Prospect Report** provides results by campaign.

Pledge ID -Detail ID	Added when a pledge detail is posted.
Letter*	Used for written thank you letters. Lookup Table entries.
T-Ref	Used by Donate Now to identify Team Members. It can be used for Tables.
Receipt Notes	Used for Gift-in-Kind information or notes regarding voids or receipt copies.
Breakout* and Amount	

Fund or funds to which a donation is allocated.
The total of all amounts must equal the Receipt Amount.
Lookup Table entries.

Printed	Checked by the program when a Receipt is issued.
Void	Checked by @EASE when a Receipted record is deleted.

Receipt records that have been receipted or where there is a credit card payment with a confirmation number can not be removed only voided.

Yearly Receipting*	Identifies campaigns or donors who have requested yearly receipts.
eReceipt	Updated from the donor's record or an import from Donate Now. Checkbox can be updated manually.
PDF Receipt	Checkbox can be updated manually.

Updated from Organizational Defaults where pre-printed receipts are no longer in use.

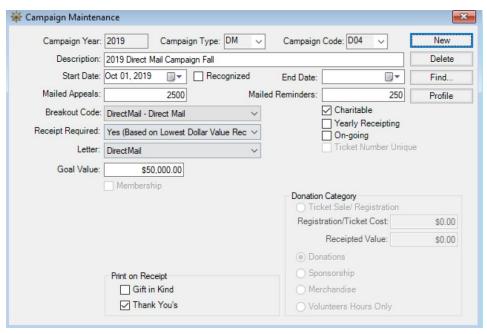**Anonymous**   Used only for In Memory or In Honour of Gift Reports

Updated to Master   Checked when a receipt record has been posted or U2M.
Deleting or Voiding a receipt that has been updated reverses all additions.

Donation Campaigns

Direct Mail, Major Gifts, Unsolicited Donations

Features

Campaign Type	defines the Ask like	DM Direct Mail
Campaign Code	defines the response type and timeline	
	For example, D04 is Donation, Quarter 4	
	Benefit: All direct mail campaigns can be compared for results and by time frame.	

Mailed Appeals and Reminders
are documentary but useful for ROI calculations

Breakout Code   This field non-specific but identifies the source, the fund might be Greatest Need

Receipt Required   Yes (Based on Lowest Dollar Value)
The lowest dollar value for which a receipt is issued is defined in Organizational Defaults/Receipt tab.

Letter   DirectMail which implies the use of pre-printed receipts.

Goal   Potential amount.

Charitable   All gifts will receive a charitable receipt.

Print on Receipt   All receipted campaigns should have a Thank You message!
Thank You messages from the Profile Thank You's tab will be printed on the receipt.

Donation Category   Donations is selected which implies **cash** gifts.
U2M accumulates to a donor's Donor Profile. The Donation category is updated by the Amount of the charitable gift. The Donation Count is incremented with each gift.
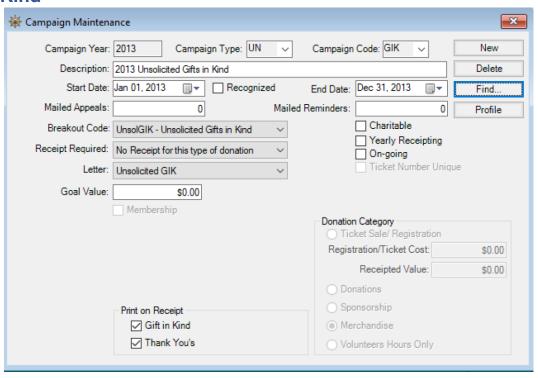
This format is standard for major gifts, unsolicited donations, donations from different audiences in capital campaigns, direct mail, etc.

The key to great reporting is the use of consistent naming conventions for the campaign type and campaign code.

Where a charity receives several In Memory donations, we recommend creating a campaign for each deceased individual. The Campaign Code is numeric starting over at 001 for each new fiscal year. The campaign created is used over multiple years should future gifts be received.

This method is applied to In Honour of gifts. For example, a wedding or anniversary or birthday requests that all gifts go to the charity. An In Honour campaign is set up, and all cash gifts are allocated to it.

Gifts-In-Kind

Features:

Campaign Type

Where no ask is associated with a gift, the campaign might be Unsolicited. Other situations where an ask occurs might be a Gala or Golf tournament.

UN Unsolicited, GA Gala, GO Golf

Campaign Code   For gifts-in-kind donated to the charity, we use GIK as the campaign code.

For gifts donated to an event auction for resale, AUC is what we suggest to differentiate the two forms.

Breakout Code   The code is non-specific but identifies items as gifts-in-kind not cash.

-

Receipt Required   No Receipt.

This can be modified at the point of entry.
Private donors can receive a receipt where **FMV** is provided or determined.
Corporate GIK can receive a regular receipt for the value of the item(s).

There are very specific rules for receipting gifts in kind which the charity must adhere to.

Letter   Unsolicited GIK, which implies the use of pre-printed receipts.

It is expected that the Receipt Notes on the receipt record will describe the gift. This information is printed on a charitable receipt if one is issued.

Charitable   The box is unchecked as only a few gifts in kind are receipted.

Donation Category   Merchandise

Print on Receipt

- **Gift-in-Kind**
  The descriptive content of Receipt Notes is printed on the receipt.

  Checking this box ensures a Payment Method of Gift In Kind on the Receipt Record.

- **Thank You**
  Messages from the Profile Thank You's is printed on the receipt.

Donation Category   Merchandise

This type of campaign can be used for all forms of gifts in kind, for special events, auctions, and gifts to the charity.

One Exception:

For Sponsorship Campaigns, we do not differentiate between cash and gifts in kind. This is left to the discretion of the charity.

Campaigns & the Acquisition Number

The Acquisition Number and Acquisition Name are used to identify, who or how, the gift was sourced.

Community Foundations & United Way are vehicles by which donors give to a charity. They are, in most cases, not the donor but the method used to move cash to a charity as requested by the donor.

Third Party events are hosted by a group, individual or company. They are another example where the Acquisition Number is used.

Matching Gifts fall into this category as a company donates due to an employee's gift.

Participation Events where individuals or groups access donations in support of a walk, run or some other types of physical event utilize the Acquisition Number to calculate the value of the gifts they acquire.
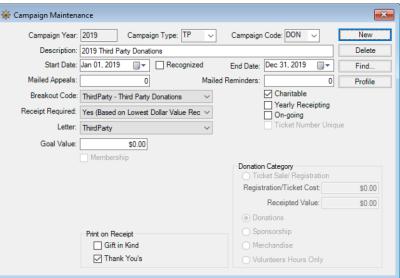
Capital campaign cabinet members are another use for the Acquisition Number.

Fundraisers will apply their donor number to major gifts as a way to demonstrate their contribution.

Different types of campaigns are set up for all these situations.

In some cases, receipts are not required, but in almost all cases the donations are charitable.

Third Party Events

We recommend only one Third Party campaign be created for each fiscal year. @EASE has tools to differentiate between events and hosts.

Where a third party event is being entered with **no receipt** required, the **Receipt Required** on the Campaign can be modified for the duration of the entry. The Breakcode can be modified at the campaign level should the event be targeting a specific fund.

We recommend that the **Mailing List** on the Receipt be entered through a Lookup Table selection to ensure accurate data and accurate reporting.
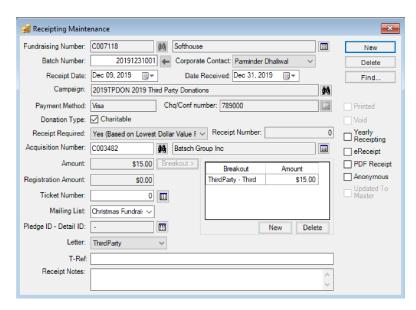
The Mailing List field is used for the Event Name.

Letter Merges

Where the acquired by is a Private individual, and a Q-Xpress selection has been made for thank you letters, the Acquisition Name will show last name, first name. In these instances, we are using the Profile Desc field to show the name in the correct sequence.

Corporate acquired by numbers, will place the company name in the Acquisition Name.

Third Party Receipt

The window shows a standard third party entry where the charity will perform receipting.

The Donor is Softhouse.
The Host is Batsch Group Inc.
The event name is Christmas Fundraiser.

DAFs and United Way

The source of the DAF may be a gift through a Community Foundation; a company or individual donating to a United Way can identified a charity for their gift.

In each case, the Community Foundation and United Way organization are recorded through the Acquisition Number. These organizations did not give the gift; they facilitated its delivery to the charity.

Matching Gifts

Matching gifts come when an employee has given a donation, and their employer has a policy of donating equal value to the charity. In this case, the staff member who donated and is now responsible for their employer's gift. It is the staff member's donor number, which appears in the Acquisition Number.

Participants in a Fundraising Event

Participants collect donations on behalf of the charity. For each donor who donates on the participant's behalf, you record the participant's donor number in the Acquisition Number field on the donor's receipt.

Major Gifts

A fundraiser or member of the development team has their donor number recorded on each of the major gifts or major gift pledges they have acquired.
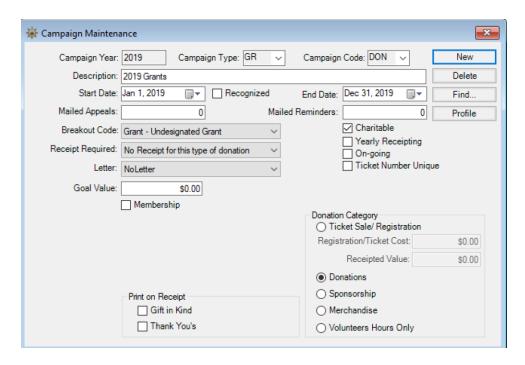
Capital Campaigns

Donations and pledges can be credited to individual campaign cabinet members or campaign cabinet groups at the point of entry through the Acquired by Number on the receipt or a pledge master record.

Summary

When any of the above gifts are U2M, the individual or organization identified in the Acquired by field will have their Participation dollars updated by fiscal year.

In each of the above cases, reporting in @EASE can show how many dollars they raised by fiscal year. High-value groups can be recognized.

Grants

Grants are donations from foundations that are charitable but are not receipted. This is an important distinction for reporting purposes.

Features

Campaign Type	GR
Campaign Code	DON
Campaign Year	Current Fiscal Year
Breakout Code	is general as most grants are designated, but not all grants allocate to the same fund.
Letter	NoLetter
Donations Type	Donation

Other Campaigns

Revenue Campaigns

Revenue campaigns are those where dollars are collected but are not charitable.

These campaigns are defined as **Donation Type Merchandise**.

They include all cash revenue from events, tickets which have no charitable value, the sale of items.

These campaigns are all Non-charitable, No Receipt Required, with NoLetter in the letter field.

Sponsorships

Sponsors of special events can be cash or gift-in-kind. We mentioned earlier that this is the only situation where we will put the two types of gifting in one campaign.

Donation Type	Sponsorship
Receipt Required	No
Charitable	No

Why is this important?

When campaigns are correctly defined, donor recognition is accurate and accessible.

Building relationships with donors based on good quality data creates trust.

When donation information is poorly recorded, reporting for boards and government becomes challenging.