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## Campaign Management with GiftWorks

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## **The Big Picture**

Well-planned and documented campaign data is the foundation for understanding your donors' giving patterns. It improves your solicitation processes, and ultimately increases giving to your organization. GiftWorks provides the ability to track all your campaigns, fund accounting designations, and the appeals that bring in donations to your organization.

Don't just store donation amounts and dates in your system—use all available fields as the foundation for analyzing and improving your fundraising efforts. Every donation should be assigned to a campaign, fund, and appeal to maximize opportunities to cultivate your donors and do effective annual planning.

## **A Closer Look**

### **CAMPAIGNS**

As a development professional, campaigns represent your larger, directed efforts to raise money. Examples of campaigns might be annual, scholarship, membership, capital, or endowment campaigns. Each campaign encompasses various targeted appeals (or solicitations). These larger efforts often need to be compared, in their entirety, to one another to analyze their relative effectiveness and significance to your organization.

Campaigns such as your annual campaign may be based either on the calendar year or on your organization's fiscal year. Others, like a capital campaign, typically span more than one calendar or fiscal year. Therefore, your campaigns represent groups of donations that are the result of various efforts, and are not necessarily based on the dates of the donations. Because the date of each donation will not necessarily reflect the time frame of the effort, the overarching campaign designation is necessary, and should include a reference to the approximate time span covered.

For example, a campaign named "Annual Campaign 2006" is more useful and informative than a generic "Annual Campaign" campaign. Even capital campaigns for a specific purpose, such as a "20<sup>th</sup> Anniversary Campaign" that might encompass several years of fundraising appeals should have a distinct campaign name, including the first year of the campaign.

### **APPEALS**

An appeal is a solicitation. You may use several different appeals to bring in donations to a specific campaign. Examples of appeals are Annual Appeal Spring, Annual Appeal Fall, Newsletter First Quarter, Personal Ask, Board Appeal, Golf Tournament Ticket Sales, or Golf Tournament Sponsorship.

When carefully planned and tracked, each appeal can be compared to the others within the associated campaign to determine the effectiveness in relation to the effort. This information can be an important tool in helping your organization focus on the fundraising efforts that provide the greatest results.

### **FUNDS**

Fund designations within GiftWorks reflect how donations are to be spent and should correspond to your organization's accounting funds. In addition to the General fund, your restricted funds can follow a naming convention that will be both understood by your donors and follow your program or mission allocations, like Childrens Programs, Pregnancy Center or Ghana Outreach. Your donor and accountant will both understand that donations allocated to these are "restricted" to that purpose.

Many donations will be unrestricted and available for whatever use you choose. These donations can be applied to the general fund. But when a donor specifies how they intend for you to use their donation, it is imperative that you track this restricted designation for future reporting and accountability. Your

development staff can also use this information to target future solicitations to donors who have identified an area of interest.

## Examples and Instructions

### CAMPAIGNS AND APPEALS

GiftWorks lets you customize and add your own names for campaigns and appeals.

Before adding your names, it is recommended that you plan your campaign and appeal efforts—using naming conventions that allow for easy identification, sorting, and future activities. Examples include:

#### Campaigns

Annual Campaign 2007 (always put the primary designation of “Annual” first, and the primary year of the campaign last)

Annual Campaign 2008

Annual Campaign 2007-2008 (for campaigns by fiscal year)

Annual Campaign 2008-2009

Membership 2007

Membership 2008

Capital Campaign 2006-2008

Expansion Campaign 2008 (capital but defined by what you are doing, with beginning year)

#### Appeals

Newsletter Summer 2008 (primary descriptor first, then season, then year)

Newsletter Fall 2008

Annual Appeal Fall 2007

Annual Appeal Fall 2007 Board (add the Board designation to the end so you can track gifts from Board members even if they are part of a household)

Annual Appeal Spring 2008

Year-End Appeal Letter 2007

Personal Ask (for situations where the appeal is made in person, rather than a letter or event)

Personal Ask Board

Expansion Direct Mail Package Summer 2009

Golf Player Flyer 2008

Golf Sponsor Letter 2008

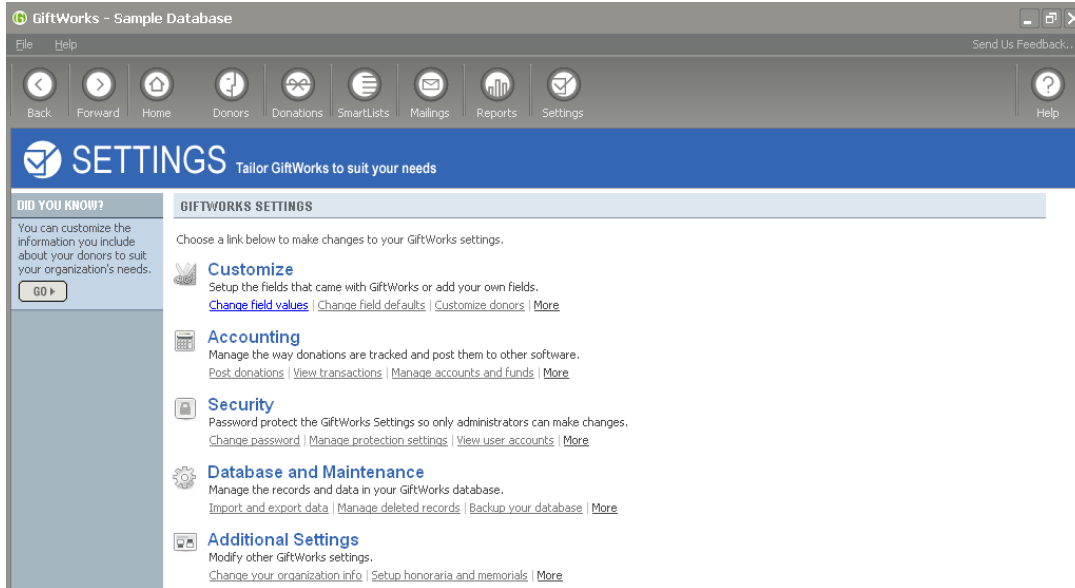
Invitation to Smith Party 2007

Unsolicited 2008 (some donations are not solicited or you can't identify the appeal; you may not need to date this appeal value, but consistency is the best practice)

**Important Tip:** If you match your appeal names and the names used for the associated solicitation mailings (when recording the mailing), the connection between the mailing and the resulting donations will be obvious, making it easier to analyze the effectiveness of the appeal.

## Steps for Adding Campaigns and Appeals:

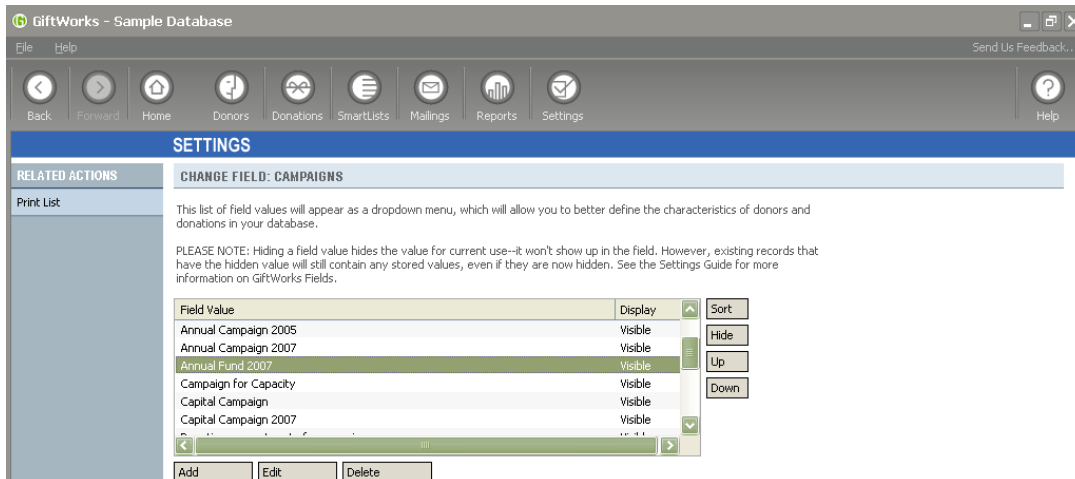
1. Click the Settings icon at the top of your screen.
2. Under the Customize heading, click **Change field values** to access the customizable fields.



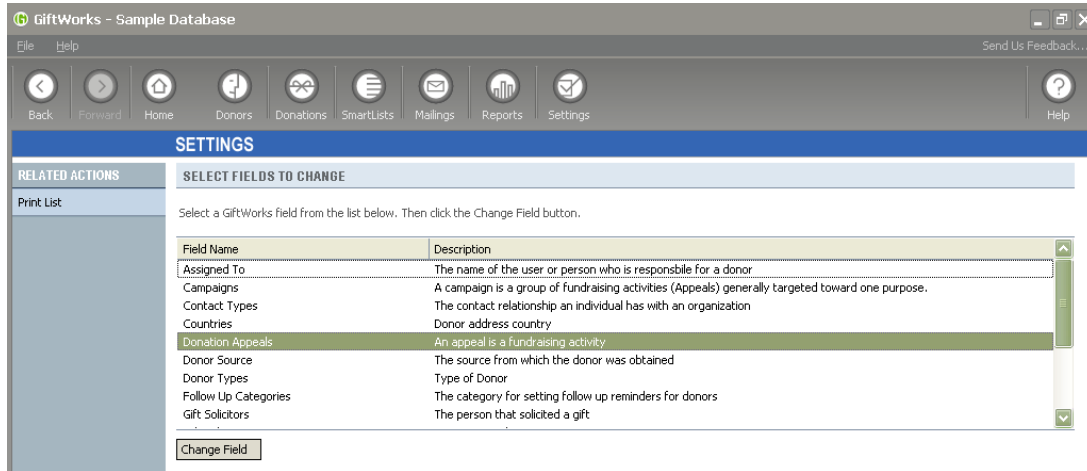
3. Highlight **Campaigns**, and then click the **Change Field** button.
4. Click **Add** and type the name you have chosen for your campaign.

GiftWorks provides samples of possible campaigns. Highlight those that are not pertinent to your organization and choose to **Delete** them or **Edit** and rename those that are pertinent but need to be adjusted for your naming conventions. You can also **Hide** them if you're not sure you'll need them.

Over time, you will enter a name for each campaign you conduct. The check box for **visible** indicates that this campaign value will be visible in a dropdown list when entering donations. Once the campaign is closed, you can uncheck this box to hide the value from the dropdown list when entering gifts.



5. When **you** have finished customizing your campaign list, click **Save** at the bottom to return to the list of customizable fields. Next, click **Donation Appeals** and then click the **Change Field** button.
  - Delete or rename any samples to reflect your organization's appeals and naming conventions. Over time, you will continue to add appeal values to represent every solicitation you send.
  - Click **Save** when you have finished customizing your donation appeals.



## FUNDS

GiftWorks stores funds with accounting information. Whether or not you use the other accounting features (like integration with QuickBooks accounting software), you still access the funds list through the Accounting area of Settings.

Before adding funds, consult with your accounting department to be sure you know what funds need to be entered. It is recommended that you use consistent naming conventions. Examples include:

General Fund or General Operating Fund

Restricted for Programming

Or add Program allocations like:

Adoption Center

Foster Care Placement

Food Bank Supplies

Endowment – Unrestricted

Endowment - Restricted

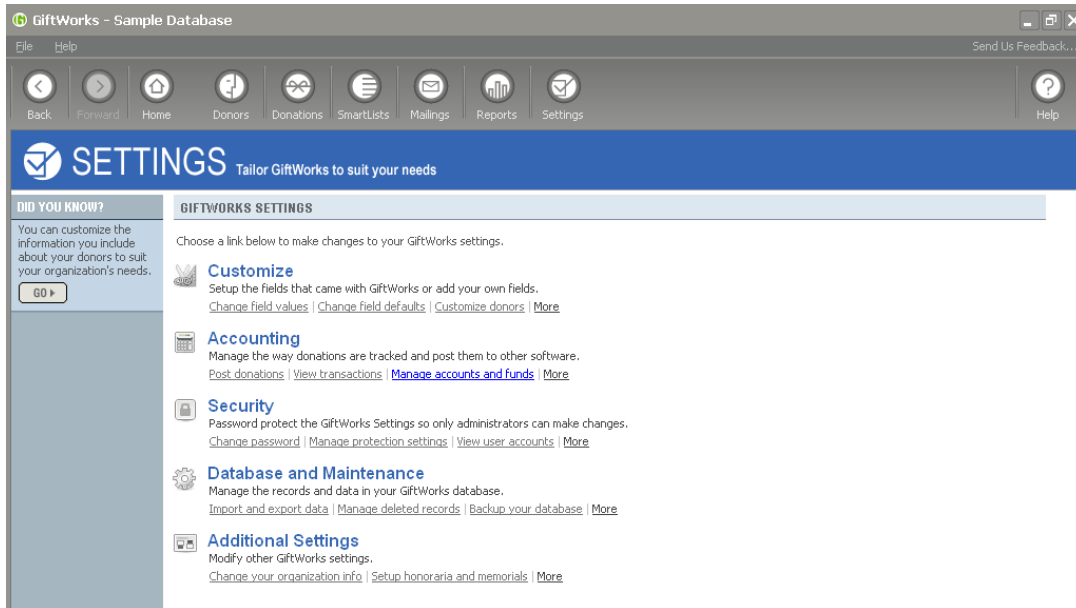
Restricted for Scholarship

Restricted for Equipment

Restricted for Equipment – Capital Expansion (Be sure to ask your accounting person if your Capital Campaign has a separate fund from other restricted equipment donations.)

## Steps for Adding Funds:

1. If you are using other accounting features, see **the Configuring GiftWorks to Work with QuickBooks Guide** for more information. If you are not using GiftWorks with QuickBooks, proceed to step 2.
2. Enter the Settings section by clicking the **Settings** button at the top of your screen.
3. Under the Accounting option, click **Manage accounts and funds** to access the customizable lists.



- If you are not using the other accounting features, and just want to add fund names, click **Next**.
- As you did for campaigns and appeals, edit, delete, or add fund names based on your organization's restricted and unrestricted funds. You may need to consult with your accounting staff to verify the correct funds to use.
- When adding a fund, you are required to enter debit and credit account information in addition to the name. Consult with your accounting staff if you are unsure which accounts to select.

- Click **Finish** to leave the Manage Accounts and Funds section.

## Scenarios

### SCENARIO 1

Your annual campaign includes a newsletter appeal in August and a year-end appeal in late November or early December. Although most donations arrive before the end of the year, some are given in the following calendar year. How do you adequately report and analyze the results of your development efforts and still meet your accounting requirements? Here are some tips.

1. When creating your mailing pieces, be sure there is some way for the person who enters the gifts into GiftWorks to identify the appeal that resulted in the gift. This may be a code at the bottom of the return envelope or card, or some other way of visually connecting the donation to a certain appeal. Otherwise, you will not capture the information necessary to compare the effectiveness of your appeals.
2. Create a campaign called "Annual Campaign 2007" and appeals called "Newsletter August 2007" and "Year-End Appeal Letter 2007."
3. When generating your mailings for the appeals—in August and again near the end of the year—be sure to record each mailing and use the same name you gave to the appeal (Newsletter August 2007 and Year-End Appeal Letter 2007). For details on creating and recording mailings, see the Mailing section of the GiftWorks Manual.
4. When entering the resulting donations:
  - As you enter the resulting donations in GiftWorks, for the benefit of development efforts, be sure to assign each one to the campaign and appeal that prompted the gift (Annual Campaign 2007/Newsletter August 2007 or Annual Campaign 2007/Year-End Appeal Letter 2007), regardless of the date the donation is received.

Donations resulting from these appeals, but postmarked and received after the campaign is closed, are still a result of the campaign and appeal efforts. It's okay that the date of the donation (2008, for example) may not correspond with the campaign and appeal values (2007).

- For the benefit of accounting, cash flow, and tracking donor giving cycles, enter the correct date of the gift. (The postmark date is the legal date of a gift, though some organizations use the date they received the contribution. The date the donor made the contribution does not necessarily match the check date and very rarely matches the date you enter it into your system.)

The screenshot shows the GiftWorks - Sample Database interface. The top navigation bar includes icons for Back, Forward, Home, Donors, Donations, SmartLists, Mailings, Reports, and Settings. The main content area is titled "DONATIONS" and displays a donation record with the following details:

Donation Amount: \$500.00  
Payment Type: Check  
Received Amount: \$500.00

A "Modify" button is located to the right of the donation details. Below this is a table showing the fund name and amount:

Fund Name	Amount
General Fund	\$500.00

The "DONATION INFORMATION" section contains several dropdown menus and a radio button:

- When was this donation given? 1/6/2008
- To which campaign should this donation be attributed? Annual Campaign 2007
- From which appeal did this donation result? Year-End Appeal Ltr 2007
- Who was responsible for soliciting this donation?
- To what is this donation directed or restricted?
- To which Honorarium/Memorial was this donation given?
- Does this donor want to give this gift anonymously?  Yes  No

An "Additional Notes" field is located at the bottom of the form.

5. Use your campaign and appeal values in reports and SmartLists to analyze the results of your efforts. For more information, see the Reports and SmartLists sections of the GiftWorks Manual.

- To see the results of your overall campaign effort, go to the Donation History by Campaign report. You can get there by clicking the Reports button at the top of the GiftWorks window, then clicking on View Donation Reports. In the report, filter donations based on the campaign value. In this example, use "Annual Campaign 2007." You will see the total amount received as a result of all appeals encompassed by this campaign, without regard to the date of the donations.

### Report Choices

**DONATION HISTORY BY CAMPAIGN - REPORT CHOICES**

Make the following choices for the report and click OK.

SmartList Filter:

Date Range:

From:

To:

Campaign:

**GiftWorks - Sample Database**

File Help Send Us Feedback...

Back Forward Home Donors Donations SmartLists Mailings Reports Settings Help

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**REPORTS**

**RELATED ACTIONS**

Change Report Style

Customize Report

Print

Print Preview

Export List

**MORE REPORTS**

Donor Reports

Donation Reports

### Donation History by Campaign

Source: All Donations SmartList, Dates: 2/6/2007 through 1/30/2008

Donor	Actual Amount	Gift Date	Campaign
☑ Donation History by Campaign :			
☑ Campaign : Annual Campaign 2007			
March, Jane	\$750.00	2/6/2007	Annual Campaign 2007
Lynn, Marcus & Bridgett	\$200.00	3/21/2007	Annual Campaign 2007
Tyler, Shawn	\$1,000.00	4/13/2007	Annual Campaign 2007
Gwynn, Fred	\$75.00	5/20/2007	Annual Campaign 2007
Berardi, Shella	\$100.00	6/19/2007	Annual Campaign 2007
Batinich, Dave	\$1,000.00	10/16/2007	Annual Campaign 2007
Lederer, Jack	\$500.00	10/20/2007	Annual Campaign 2007
Barber, Harry	\$125.00	11/13/2007	Annual Campaign 2007
Aliota, Mark	\$50.00	12/1/2007	Annual Campaign 2007
Feed The Nations	\$2,000.00	12/19/2007	Annual Campaign 2007
Tyler, Shawn	\$100.00	12/20/2007	Annual Campaign 2007
Saunders, Gretchen	\$600.00	12/20/2007	Annual Campaign 2007
Mills, Jennifer	\$800.00	12/20/2007	Annual Campaign 2007
Arm, Mark	\$200.00	12/20/2007	Annual Campaign 2007
Houston, Paul	\$200.00	12/21/2007	Annual Campaign 2007
Cresta Corporation	\$200.00	12/21/2007	Annual Campaign 2007
Van Hoooven, Jason	\$600.00	12/21/2007	Annual Campaign 2007
Save Our Families Foundation	\$600.00	12/21/2007	Annual Campaign 2007
Arm, Mark	\$500.00	1/6/2008	Annual Campaign 2007
Schaller, Karen and Kurt	\$500.00	1/10/2008	Annual Campaign 2007
Schaller, Karen and Kurt	\$100.00	1/30/2008	Annual Campaign 2007
Schaller, Karen and Kurt	\$50.00	1/30/2008	Annual Campaign 2007
<b>22</b>		<b>\$10,250.00</b>	

Find Donor:

Campaign:  SmartList Filter:

Date Range:

Online

- To see the results of individual appeals, go to the Donation History by Appeal report. You can get there by clicking the Reports button at the top of the GiftWorks window, then clicking on View Donation Reports. In the report, filter donations based on the appeals. In this example, use Newsletter August 2007 and Year-End Appeal Letter 2007. Compare the totals raised by each effort without regard to the date of the donations.

The screenshot shows a dialog box titled "Report Choices" with a close button (X) in the top right corner. The main title is "DONATION HISTORY BY APPEAL - REPORT CHOICES". Below the title, it says "Make the following choices for the report and click OK." There are five dropdown menus: "SmartList Filter" set to "All Donations", "Date Range" set to "All Dates", "From:" (empty), "To:" (empty), and "Appeal" set to "Year-End Appeal Ltr 2007".

- To look at donor giving cycles and cash flow, filter using both the campaign and the dates of the donations. Using the campaign assures that you are looking only at donations to that campaign. A specified date range can show you the proportion of the total money received in the calendar or fiscal year you made the effort, and the proportion that arrived later.

You can do the same with appeals by using an appeal in conjunction with a date range.

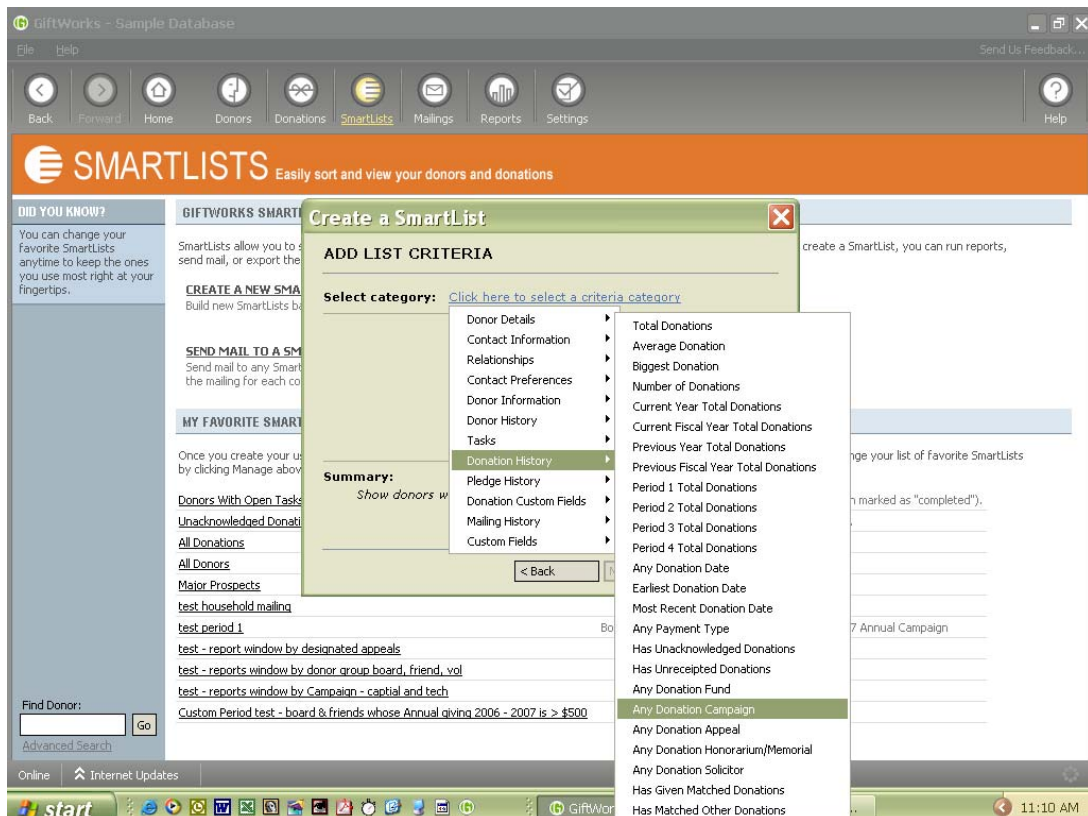
The screenshot shows a dialog box titled "Report Choices" with a close button (X) in the top right corner. The main title is "DONATION HISTORY BY CAMPAIGN - REPORT CHOICES". Below the title, it says "Make the following choices for the report and click OK." There are five dropdown menus: "SmartList Filter" set to "All Donations", "Date Range" set to "Current Year", "From:" set to "1/1/2008", "To:" set to "12/31/2008", and "Campaign" set to "Annual Campaign 2007".

## SCENARIO 2

You want to solicit LYBUNT donors (those who gave Last Year But Unfortunately Not This year) for your Annual Campaign 2008, and want to ensure that you don't miss donors who made their Annual Campaign 2007 contribution in January of 2008. Here's what you can do:

**Important Tip:** Donors who gave to your organization last year but have not yet given this year represent a significant opportunity: they've already expressed support of your organization with their previous gift. Encouraging them to renew their support has a relatively high chance of success.

1. Plan your appeal, being sure to include some way for the person who enters the gifts into GiftWorks to identify the appeal that resulted in the gift. This may be a code at the bottom of the return envelope or card, or some other way of visually connecting the donation to a certain appeal. Otherwise, you will not capture the information necessary to compare the effectiveness of your appeals.
2. The campaign Annual Campaign 2008 may already have been created and used by now, but you need to create the appeal value for this mailing. An example might be "Annual 2008 LYBUNT Letter."
3. Build a list of donors to receive this appeal.
  - In SmartLists, build a list based on donors who gave to the Annual Campaign 2007 but have not given to the Annual Campaign 2008. Add a **Show** criteria for the Annual Campaign 2007, and a **Don't Show** criteria for Annual Campaign 2008 (see the images below). For more information on building SmartLists, see the SmartLists section of the GiftWorks Manual.



GiftWorks - Sample Database

File Help Send Us Feedback...

Back Forward Home Donors Donations SmartLists Mailings Reports Settings Help

## SMARTLISTS

**DID YOU KNOW?**  
After you create a new SmartList, GiftWorks will continue to maintain that SmartList as you add new donors and donations that match the criteria you set.

**RELATED ACTIONS**  
Turn Balloon Help Off

**DEFINE YOUR SMARTLIST**

Here is your SmartList so far. Add and remove criteria to refine your list results.

Show Don't Show Options

[Add Criteria Set](#) Set 1) Show donors whose: donation campaign is 'Annual Campaign 2007' [Refine](#) | [Remove](#)

Results: 18 Donors [Customize](#)

Display Name	Address	City, State	Phone
Allota, Mark	585 Bryant Street	San Francisco, CA	
Arm, Mark	1471 Bancroft Ave,	Berkeley, CA	
Barber, Harry	1000 Van Ness Ave.	San Francisco, CA	(415) 673-7900
Batinich, Dave	730 Ellis Street	San Francisco, CA	(415) 567-8787
Berardi, Sheila	1675 Howard Street	San Francisco, CA	(415) 863-9000
Cresta Corporation	74 Arch Street	San Francisco, CA	(415) 623-9823
Feed The Nations	74 Wolmant Street	San Francisco, CA	(415) 864-9836

Find Donor:   [Advanced Search](#)

Online [Internet Updates](#)

GiftWorks - Sample Database

File Help Send Us Feedback...

Back Forward Home Donors Donations SmartLists Mailings Reports Settings Help

## SMARTLISTS

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After you create a new SmartList, GiftWorks will continue to maintain that SmartList as you add new donors and donations that match the criteria you set.

**RELATED ACTIONS**  
Turn Balloon Help Off

**DEFINE YOUR SMARTLIST**

Here is your SmartList so far. Add and remove criteria to refine your list results.

Show **Don't Show** Options

[Add Criteria Set](#) Set 1) Don't show donors whose: donation campaign is 'Annual Campaign 2008' [Refine](#) | [Remove](#)

Results: 16 Donors [Customize](#)

Display Name	Address	City, State	Phone
Allota, Mark	585 Bryant Street	San Francisco, CA	
Arm, Mark	1471 Bancroft Ave,	Berkeley, CA	
Batinich, Dave	730 Ellis Street	San Francisco, CA	(415) 567-8787
Cresta Corporation	74 Arch Street	San Francisco, CA	(415) 623-9823
Feed The Nations	74 Wolmant Street	San Francisco, CA	(415) 864-9836
Gwynn, Fred	74 12th Street	San Francisco, CA	(415) 776-6875
Houston, Paul	320 10th Street	San Francisco, CA	(415) 861-0921

Find Donor:   [Advanced Search](#)

Online [Internet Updates](#)

4. Generate your mailing for the appeal using this SmartList, and be sure to record the mailing giving it the same name that you gave to the appeal (Annual 2008 LYBUNT Letter). For more information on mailings, see the Mailings section of the GiftWorks Manual.

## **Conclusion**

By planning your campaigns and appeals and using consistent names and data-entry practices, you will enable yourself to track a wealth of information in GiftWorks. You can compare recurring campaigns year after year, and you can learn over time which appeals are most effective. GiftWorks SmartLists and reports give you the insight into your organization's donation history that you need to constantly improve your efforts.

GiftWorks provides the right tools—all you need to do is track your campaigns and appeals as they go out and your donations as they come in. Using this information to fine tune your development efforts can result in a significant increase in giving.