CRM User Forum

June 19, 2019
WELCOME

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Objectives

- Introduction to the Membership Functional Area
- Changes in Account 4501
- The Addition of Account 4502
- Special Event Revenue Entry
- BSAFR tune ups
Membership Functional Area

• What is this function used for?
• Roles needed to access this functional area?
  – BSA Membership View Only
  – BSA Membership Add/Edit
• Job Aids
Membership Functional Area Use

• Allow for tracking
• Allows for targeting
• Membership examples
  – Camp Staff
  – Council Specific Associations
## Current Use in CRM

### Membership programs

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Site</th>
<th>Allow multiples</th>
<th>Is active</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAA Annual</td>
<td>Ma-Ka-Ja-Wan Alumni Association</td>
<td>Northeast Illinois Council</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>MAA Lifetime</td>
<td>Ma-Ka-Ja-Wan Alumni Association</td>
<td>Northeast Illinois Council</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Tasks
- Member search
- Enter membership dues
- Print membership cards
- Add a membership program
- Membership contribution process
- Add a membership

### Configuration
- Add-ons
- Membership promotions
- Benefits catalog
- Reason codes

### Reports
- Active membership
- Benefits list
- Membership activity
- Membership actuals
- Membership appeals
- Membership conversion
- Membership count
- Membership projected revenue
- Membership renewal
- Membership dues revenue
- Membership dues statistics comparison
When a membership is added the individual receives a new constituency, the membership tile will contain info and the membership tab becomes available.
This is the membership information detail. You can add additional information about this membership here.
# Sample Report – Year over Year

## Membership Actuals

### Membership Programs: All Membership Programs

<table>
<thead>
<tr>
<th></th>
<th>1/1/2018 - 12/31/2018</th>
<th>1/1/2019 - 12/31/2019</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contributed Revenue</td>
<td>Earned Revenue</td>
<td>Transactions</td>
</tr>
<tr>
<td>MAA Annual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal for Program</td>
<td>$40.00</td>
<td>$0.00</td>
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<tr>
<td>Annual Member</td>
<td>$40.00</td>
<td>$0.00</td>
<td>2</td>
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<tr>
<td>Student Member</td>
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<td>$0.00</td>
<td>1</td>
</tr>
<tr>
<td>MAA Lifetime</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal for Program</td>
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<td>$0.00</td>
<td>2</td>
</tr>
<tr>
<td>Lifetime</td>
<td>$402.58</td>
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<tr>
<td>Total</td>
<td>$442.58</td>
<td>$0.00</td>
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</tr>
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</table>
Account 4501 – Other Direct Contributions

• Normally used with Endowment – Perm Restricted
• GL Generation Tool has been updated
  – 4501 will now work with Temp Restricted and Unrestricted in fund 3
• Examples of this type of support are:
  – Time-sensitive contribution with restrictions
Account 4502 – Other Direct Purpose

- Used to record money that is giving directly to a council but has a purpose associated.
- GL generation tool has been updated to allow for this account.
- Examples of this type of support are:
  - Foundation Grant for special Scouting programs
  - Capital grant for camp building, office, tables, etc
Special Event Revenue

- Sub-Designations are used on Event Registrations and are attached to the Event Designation tab.
- Payments attached to an Event Registration use sub-designation.
- Payments not attached to an event registration should use:
  - Inbound Channel = Special Event Fundraising
  - Revenue Category = Event – Sponsorship, Event – Participant/Ticket, Event – Advertising etc.
Special Event Revenue

- Event – Fees is always used with an additional designation so that you split the gift between a contribution account and the fees account which is the amount of benefit the person is receiving.
You default the designation where the highest percent of your registration monies will go. In the example above, it is the council default which will be Sponsorships 4201. The other sub-designation are added to the event.

To the right is a registration option. The cost is the benefits that the participant will receive. This will write to fees (Account 4250). If you place a dollar amount in the cost it is defaulted to write to fees. Sub-designation drive this. Fees are never defaulted. The receipt amount is the charitable gift amount.
This is an event registration. You can see that it picked up the default designation when used. The amount of $1,430 is going to Sponsorship - 4201. The remainder will always go to fees – 4250. This will be $1,570 which is the difference between the balance and the receipt amount which is the charitable contribution.
Event Batch Entry

The batch to use when entering money on an event registration is the **LC Cash/Check Payment Donation Batch**. It forces you to add an appeal, giving category and structure to the gift. These do not come from the event registration.

Line #1 represents the payment of $3000 being applied to the Event Registration application.

Line #2 represents a sponsorship being added without using the event function first to create a registration. Please note, we are using the main designation and not a sub-designation. The inbound channel is Special Event Fundraising and the revenue category which selects our account of 4201 is Event-Sponsorship. If I want to split this go to the revenue tab and click apply to split.

If you put a pledge in for an event, use the main designation on the pledge. Split the payment when it comes in. Sub-designations will not accept prior year payments.

These come from event registration
In the apply window, you would add the additional sub-designation to split the gift. This is done in the lower part of the window.

Once completed, Line #2 of the batch changes. The Application is now multiple and you see the Designation as split. You do need to manually change the receipt amount to the charitable contribution amount.
BSAFR

• A customization to CRM for Local Councils
• After conversion, your Annual Campaign “FOS” history was reviewed and put into this format
• The process looked at revenue and workers and created “committees”
BSAFR Tune-up

• This is the best time of the year to review your BSAFR setup
• Run query – LXXX BSAFR Groups
• Review Output
• Determine if group names need changes
BSAFR Tune-up

• Cleanup which can be done by Member Care
  – Switching group from one structure to another
  – Changing giving category of group
  – Change parent group
  – Change reporting level – unit, district, subdistrict, council
  – Changing revenue history
Add BSAFR Group (committee)
Add a committee
Be sure to complete
Modifying BSAFR

![BSAFR Constituent Group Editor](image)

- **Group public name:**
- **Is BSAFR group:** Yes
- **Solicit for BSAFR:** Yes
- **BSA structure for revenue:** SV Traditional
- **Giving category for revenue:** Family Division
- **BSAFR solicitor current:** Post 0888 Lincoln - 324 (164808)
- **BSAFR presenter current:**
- **BSAFR reporting parent group:** Salt Valley - Family Division - 50
- **BSAFR reporting level:** Unit

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Next Forum

July 17, 2019
10:00 am & 2:00 pm CST
Council Fund Development

Council Fund Development is comprised of volunteers & staff with proven track records of raising operating, capital, and endowment councils of all sizes and demographic makeup. The team assists local councils with all phases of fundraising planning and execution and volunteer training, campaign planning, feasibility studies, and campaign discipline coaching.

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Capital
Major Gifts & Endowment

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Donor Research
FOS Planning Kit
Sample Grant Proposals

www.scouting.org/financeimpact
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