

CRM User Forum

June 19, 2019



Prepared. For Life.™

WELCOME

Cornelia Ellis

John Kuehn

Don Day



Prepared. For Life.™

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

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ **Memberships ▾** Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Treasury ▾ Web ▾ Analysis ▾ Adminis

Membership programs

Membership programs (2) [+ Add](#) [Filters](#) [More ▾](#)

Name	Description	Site	Allow multiples	Is active
MAA Annual	Ma-Ka-Ja-Wan Alumni Association	Northeast Illinois Council	No	Yes
MAA Lifetime	Ma-Ka-Ja-Wan Alumni Associatio...	Northeast Illinois Council	No	Yes

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

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts

Recent searches

- Transaction search

Recently accessed

- Membership programs
- L129 Historical Alumni Records Import - Import
- Batch Entry
- Import
- 3/24/2019 Payment: \$25.00 - Jessica Osorio
- Revenue History
- 2/22/2019 Payment: \$50.00 - Patricia A. Lample
- Patricia A. Lample
- Revenue History
- 3/24/2019 Payment: \$50.00 - Patricia A.





Michael M. Creagh

Individual Lookup ID: **8-17399501**

Constituencies: Eagle Loyal donor **Member**

Personal Information



Michael M Creagh
Nickname:
Maiden:

Contact Information

Primary phone
+001 (618) 234-9111 (Home)
Primary email
mike.creagh@gmail.com (Home Email...)

Addresses

2021 Parkside Ct
Grapevine, TX 76051-8002
Home (Current)

Primary Relationships

Spouse
Debby Creagh
Household
Michael Creagh and Debby Creagh
Primary business

Memberships

MAA Lifetime
Michael M. Creagh
ID: 8-10000041 Status: Active
Expiration:
Level: Lifetime
Member since: 3/20/2017

Show less

When a membership is added the individual receives a new constituency, the membership tile will contain info and the membership tab becomes available.

- Summary
- Contact
- Personal Info
- Relationships
- Revenue
- Memberships**
- Education
- Documentation and Interactions
- Communications
- History
- Attribution

Memberships Add Filters [Calendar icon]

MAA Lifetime - Michael M. Creagh - 8-10000041

Lifetime

\$201.29

Active

Members
Michael M. Creagh

Lookup ID
8-17399501

Edit members

Lifetime member
Balance: \$0.00
Paid in full as of: 3/20/2017
Total payments made: 1

- + Add interaction
- + Issue member card
- Other tasks





Michael M. Creagh
MAA Lifetime - 8-10000041

This is the membership information detail. You can add additional information about this membership here.

Lifetime

\$201.29

Active

Members
 Michael M. Creagh

Lookup ID
 8-17399501

Lifetime member
 Balance: \$0.00
 Paid in full as of: 3/20/2017
 Total payments made: 1

- [+ Add interaction](#)
- [+ Issue member card](#)
- [Other tasks ▾](#)

[Edit members](#)

Primary member [2](#)

Michael M. Creagh
 2021 Parkside Ct
 Grapevine, TX 76051-8002 (Home)
 +001 (618) 234-9111 (Home)
 mike.creagh@gmail.com
[Contact information](#)

Additional details [2](#)

Constituencies:
[Loyal donor](#) [Eagle](#) [Member](#)
[more...](#)
[Communication preferences](#)

Lifetime information [2](#)

Total membership amount:
 \$201.29 - 1 transaction
 Last renewal:
 Never

Other memberships [2](#)

No other memberships
[Add a membership](#)

Member cards (0) [+](#) [Issue new card](#) [2](#) [More ▾](#)

Member	Name on card	Expiration date

Comments (0) [2](#) [More ▾](#)

Note	Date	Comments

Add-ons (0) [Filters](#) [2](#) [More ▾](#)

Date	Active	Cancelled	Name	Total

Recent member activities [2](#) [More ▾](#)

Activity	Date	Description

Benefits and sent items [2](#) [More ▾](#)

Item	Date	Name



Prepared. For Life.™

Sample Report – Year over Year

Membership Actuals

Membership Programs: All Membership Programs

	1/1/2018 - 12/31/2018				1/1/2019 - 12/31/2019				Variance			
	Contributed Revenue	Earned Revenue	Transactions	Average	Contributed Revenue	Earned Revenue	Transactions	Average	Contributed	Earned	Transactions	
☐ MAA Annual	Subtotal for Program:	<u>\$40.00</u>	\$0.00	3	\$13.33	<u>\$20.00</u>	\$0.00	3	\$6.67	(50.00%)	0.00%	0.00%
	Annual Member	<u>\$40.00</u>	\$0.00	2	\$20.00	<u>\$20.00</u>	\$0.00	2	\$10.00	(50.00%)	0.00%	0.00%
	Student Member	\$0.00	\$0.00	1	\$0.00	\$0.00	\$0.00	1	\$0.00	0.00%	0.00%	0.00%
☐ MAA Lifetime	Subtotal for Program:	<u>\$402.58</u>	\$0.00	2	\$201.29	\$0.00	<u>\$402.58</u>	1	\$402.58	(100.00%)	0.00%	(50.00%)
	Lifetime	<u>\$402.58</u>	\$0.00	2	\$201.29	\$0.00	<u>\$402.58</u>	1	\$402.58	(100.00%)	0.00%	(50.00%)
	Total:	<u>\$442.58</u>	\$0.00	5	\$88.52	<u>\$20.00</u>	\$402.58	4	\$105.65	(95.48%)	0.00%	(20.00%)

6/18/2019

Prepared by: BLACKBAUDHOST\L1295vcAcct4096

Page 1 of 1



Prepared. For Life.™

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.



Event Entry

Registrations Tasks/Coordinators Speakers Expenses Options Invitations Designations Appeals Documentation Job

Designations (5) Edit More ▾

Designation	Default
02803661 Distinguish Citizens Dinner - Operating	<input checked="" type="checkbox"/>
02803661 Distinguish Citizens Dinner - Operating \ 02803661-2761 Distinguish Citizens Dinner - Operating (Sales Tax)	<input type="checkbox"/>
02803661 Distinguish Citizens Dinner - Operating \ 02803661-4202 Distinguish Citizens Dinner - Operating (Ticket)	<input type="checkbox"/>
02803661 Distinguish Citizens Dinner - Operating \ 02803661-4204 Distinguish Citizens Dinner - Operating (Advertising)	<input type="checkbox"/>
02803661 Distinguish Citizens Dinner - Operating \ 02803661-4250 Distinguish Citizens Dinner - Operating (Fees)	<input type="checkbox"/>

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 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.

Edit registration option

General

Registration type: Sponsorship (Default)

Name:

Registration count:

Registration fee:

Cost:

Benefits

Benefit	Quantity	Unit value	Total value	Details
Meal082	10	\$0.00	\$0.00	
*				

Benefits total value: \$0.00

Receipt amount:

Help Save Cancel



Event Entry



Event: (028) DC19 Distinguished Citizen Dinner

Frank Yoke - Event Registrant



1001 Davis St
San Leandro, CA 94577-1514
+001 (510) 577-9242
frank.yoke@scouting.org

Registrant ID: evreg-10052451
Type: Preregistration
Status: Registered
No. of guests: 9

Total registration fees: \$3,000.00
Total paid: \$0.00
Balance: \$3,000.00
Total receipt amount: \$1,430.00

Payment history:

Registrations Benefits Lodging and Travel Restrictions **Designations** Attributes

Designations (1) Edit More ▾

Name	Amount
02803661 Distinguish Citizens Dinner - Operating	\$1,430.00

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.



Prepared. For Life.™

Event Batch Entry

These come from event registration

	Constituent	Lookup ID	Amount	Receipt...	Date	GL post date	Revenue type	Application	Appeal	Designation	Inbound channel	Revenue category
1	Frank Yoke	8-13960788	\$3,000.00	\$1,430.00	6/18/2019	6/18/2019	Payment	(028) DC19 Distinguished Citizen Dinn...	(028) DC19 Distinguished Citiz...		Special Event Fundraising	
2	Frank Yoke	8-13960788	\$3,000.00	\$3,000.00	6/18/2019	6/18/2019	Payment	Donation	(028) DC19 Distinguished Citiz...	02803661 Distinguish Citize...	Special Event Fundraising	Event - Sponsorship

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.



Apply to commitments for Frank Yoke

Payment amount: Apply by: Amount Percent
 Unapplied amount: \$0.00

Search:

Date due: From: To:

+ Add Edit Load commitments Auto apply Apply to row

Application	Constituent	Description	Balance	Date due	Amount due	Applied amount	Applied p

Page 1 of 1 Displaying records 1 - 1 of 1

Additional applications	Applied amount	Applied percent	Designation	Other type	Opportu...	Revenue...	Campaig...
Donation	\$1,430.00	47.67	02803661 Distinguish Citizens Dinn...			Event - S...	
Donation	\$1,570.00	52.33	02803661-4250 Distinguish Citizens...			Event - S...	

Help

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.

	Constituent	Lookup ID	Amount	Receipt...	Date	GL post date	Revenue type	Application	Appeal	Designation	Inbound channel	Revenue category
1	Frank Yoke	8-13960788	\$3,000.00	\$1,430.00	6/18/2019	6/18/2019	Payment	(028) DC19 Distinguished Citizen Dinn...	(028) DC19 Distinguished Citiz...		Special Event Fundraising	
2	Frank Yoke	8-13960788	\$3,000.00	\$1,430.00	6/18/2019	6/18/2019	Payment	<multiple>	(028) DC19 Distinguished Citiz...	<split>	Special Event Fundraising	

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

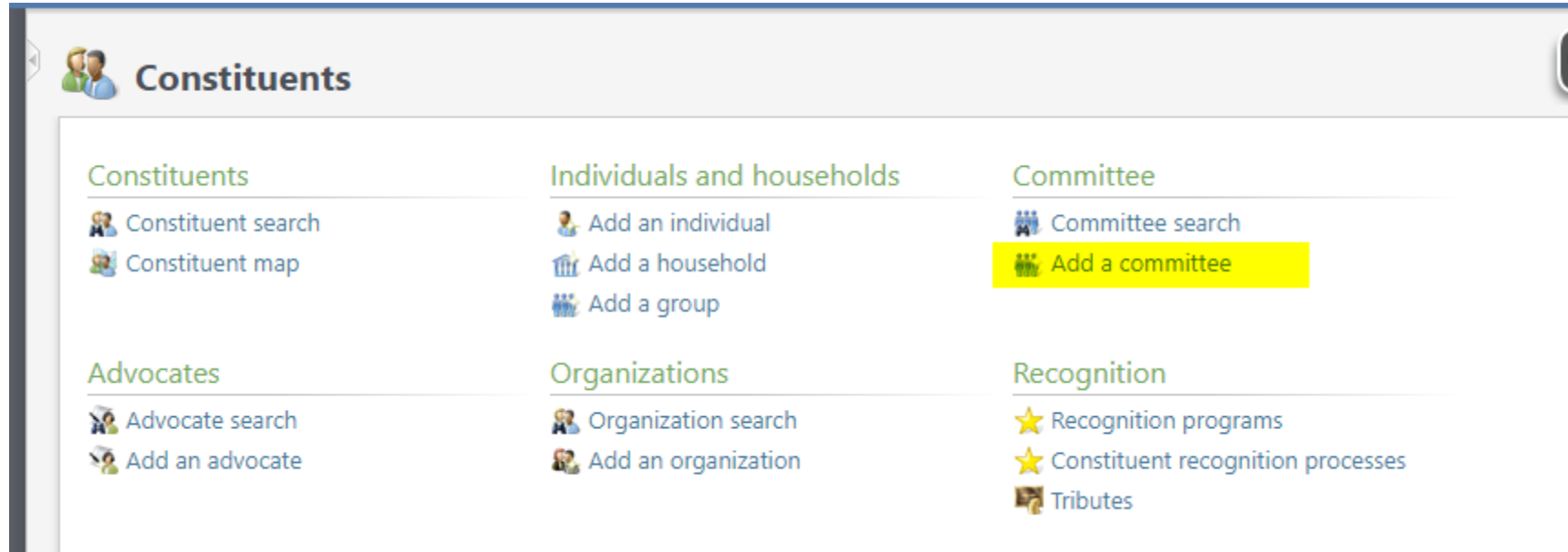


BSAFR Tune-up

- 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)



The screenshot displays the 'Constituents' management interface. The main heading is 'Constituents' with a navigation arrow on the left. The interface is organized into a grid of categories and actions:

- Constituents**
 - Constituent search
 - Constituent map
- Individuals and households**
 - Add an individual
 - Add a household
 - Add a group
- Committee**
 - Committee search
 - Add a committee** (highlighted in yellow)
- Advocates**
 - Advocate search
 - Add an advocate
- Organizations**
 - Organization search
 - Add an organization
- Recognition**
 - Recognition programs
 - Constituent recognition processes
 - Tributes



Add a committee

Add a committee

Details Members

Name:

Description:

Group type:

- Group gives anonymously
- Can coordinate events
- Can solicit revenue and set fundraising goals
- Can set committee goals

Member data:

- Consolidate member data as of
- Consolidate all member data

Primary contact:

Primary contact information

Address type:

Country:

Address:

City:

State: Omit from validation

ZIP:

Do not send mail to this address

Reason:

Phone type:

Phone number:

Do not call this phone number

Reason:

Email type:

Email address:

Do not send email to this address

Website:

Information source:

Group Attributes

Group Public Name:

FOS Note:



Be sure to complete

Add a committee [Close]

Details Members

Name:

Description:

Group type:

- Group gives anonymously
- Can coordinate events
- Can solicit revenue and set fundraising goals
- Can set committee goals

Member data:

- Consolidate member data as of [Calendar]
- Consolidate all member data

Primary contact: [Search]

Primary contact information



Modifying BSAFR

Edit BSAFR constituent group [X]

Group public name:	<input type="text"/>
Is BSAFR group:	Yes [v]
Solicit for BSAFR:	Yes [v]
BSA structure for revenue:	SV Traditional [v]
Giving category for revenue:	Family Division [v]
BSAFR solicitor current:	Post 0888 Lincoln - 324 (164808) [m]
BSAFR presenter current:	<input type="text"/> [m]
BSAFR reporting parent group:	Salt Valley - Family Division - 50 [m]
BSAFR reporting level:	Unit [v]

[Save] [Cancel]



Next Forum

July 17, 2019

10:00 am & 2:00 pm CST





Council Support

- Strategic Performance Office
- Contact Strategic Performance
- Council Assessments
- Council Board Resources
- Council Business Practices
- Council Fiscal Management and Training
- Journey to Excellence
- Financial Services
- Back Office Business Solutions
- Council Financial Management
- Council Fund Development** 1
- Council Financial Training

Home > Council Support > Financial Services > Council Fund Development

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.

- Operating
- Capital
- Major Gifts & Endowment
- CRM Resources** 2
- Best Practices
- Document Library
- Donor Research
- FOS Planning Kit
- Sample Grant Proposals

www.scouting.org/financeimpact



Questions & Answers



Prepared. For Life.™