CRM User Forum

September 24, 2019
WELCOME

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• Don Day
Objectives

- Scouting Gives & appeal setup
- Donor challenge grants
- Tweaking your BSAFR
- Review Future year activities.
  - Creating appeals
  - Creating special events
  - Correct inbound channel usage
  - Mapping special events for 2020
Scouting Gives

• Note – if a donor has agreed to pay the fees, this is still part of his/her donation
CRM Events to Scouting Gives Sync/Setup

- **CRM**
  - Appeal Setup
  - Event Setup
    - Designations
    - Appeal
    - Registration Options
  - Designation Mapping

- **Scouting Gives**
  - There may be a few minutes lag between setting the event up in CRM and having the information ready for Scouting Gives
  - Drop downs will populate with information created in CRM.
Create Appeal in CRM

Follow directions in the CRM user guide to create an event appeal. All monies in CRM must be connected to an appeal. The designation tab must be completed with at least the main designation. Sub-designation are not available until you have your designation event mapping completed.
Creating an Event in CRM

Proceed to the Events functional area in CRM and click “Add new” and use the “Event” button to begin to create a new event.
Fill in the information on the event form. Ensure that you select “Event allows designation on fees” and “Event is an auction”. You do not need to use the auction side of the event. However, if you fail to select either option, neither option can be added after you click save.
Before you create your Scouting Gives event, you need to complete the rest of your event set up in CRM. You need to add the appeal, designations and options that people will use to register with.
Add Appeal to Event

The appeal added here will be available to select when creating your Scouting Gives event.
Add Designations to Event

Add the main designation to the event. Before you process revenue against event registration, you need to fill out and submit your event designation mapping worksheet. Once completed, you can then add the other sub-designations. 4250 is important because without it your transactions will not split properly to the correct GL accounts. Default the one you want the majority of your event revenue to process to. In this example, the main designation will process to account 4201. The default will be available to select in Scouting Gives
We have two options below. The next slide will show how they are created. These will be available to select in Scouting Gives during event creation.
Below are two event registration options. The registration type is “sponsorship”. This event defaults to 4201. The name will default to “sponsorship”. You can change this to what you would like it to be. The registration count is 8 because the event will seat 8 people at a table. If this was a golf foursome, it would be 4 for the 4 golfers. The registration fee is what the sponsorship costs the donor. The cost for the event is the benefits the donor will receive. In the benefits section, we add our benefit description and the quantity which matches the number associated with the table seating. The unit value needs to be $0. Clear it and make it $0. The benefits drive to account 4250 and are captured in the cost field not the total value field.
Scouting Gives Event Creation

Log into Scouting Gives. Once in the system, you will need to proceed to the event module which is found on the left-hand side panel. This is where you will create new events. Click the “Create New Event” button to open the event creation form. This form has 4 sections.
Fill in the Event Creation Form

In the first section, you will fill in the blanks about the event and select an image. The Appeal and Designation are selected from a drop-down list. This list comes from CRM. If your appeal and designation were not selected on your event within CRM, they will not show up here, and you will not be able to correctly set up your event in Scouting Gives.
On this page of creation, select how you want your web page to look by selecting a template.
Adding Event Options (Registration Types)

On this page, select the payment method and the registration types you want to display to the registrant. First select the CRM Type, which is the option you created in CRM for your event. You can rename it for display on your web registration form in the Display Name. The quantity should match the quantity on your CRM Option. These are both tables of 8. The price will populate from the CRM option.
Fill in the personal message field and watch it populate into the confirmation email that is to the right. Once done, click “publish” to have it active.
How Event Registrations Process in CRM

• Two batches are created when a registrant uses the online form:
  – A registration batch will be created and come into CRM to be reviewed and committed, thus placing the registration on the event.
  – A payment batch follows with the actual contribution. These need to be applied to the registration created and committed into CRM in the first batch received.
Donor Challenge Grants
Donor Challenge Grants

• New feature in CRM
• Allows a council to track gifts that are received to match a challenge from another donor.
• Example
  – XYZ Company says they would like to give you $100,000 to your endowment but would like for you to have 10 additional donors give $10,000 each before they will send you the check.
Where to find the new feature?

Found under the function area of Fundraising.
Creating the Challenge

After viewing the presentation the user guide will refresh your memory of what each of the numbers are instructing to place in the blanks.
Designations will look for what gifts feed the Donor Challenge and where the final gift from the external sponsor goes. 90% of the time these will be the same. When the challenge is updated it will search your revenue for gifts that are attached to this designation to bring into the challenge.
When you update the challenge it brings in gifts that meet the criteria. You have to approve these.

Approved gifts move to the Matched Funds tab. This process also creates a Donor Challenge Claim which will be used during batch entry with the external sponsor's gift.
Processing the Challengers Contribution

This provides an example of the Challengers gift being processed and attached to the Donor Challenge Claims.
What do I need to do this?

• The user guide titled *Donor Challenge Creation and Use* is posted on MyBSA under CRM User Guides.
• Your system admin needs to add the role BSA Major Giving Add/Edit to your set of roles if you do not have it.
Tweaking BSAFR
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”
Tweaking BSAFR

- 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
Tweaking BSAFR

• 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
Consider using conventional BSA structure

• Council
  – Executive Board chair
  – Special Gifts chair
  – Leadership chair

• District
  – Family chair
  – Community chair
Thinking ahead to Next Year
Next Year Setup

• Creating appeals
• Creating special events
Creating An Appeal

- Marketing and Communications – Add an Appeal
Add an Appeal
Assign Designation & Prior Appeal (if one)
Year-end & New Year Batches

• Gifts for next year need to be placed into the system using Future Year (FY) inbound channels
• Events need to be tweaked for Future Year (FY) and current year at Jan 2 before additional registrations are added.
• Payment for Prior Year (PY) pledges should use PY inbound channels.
Next Forum

October 23, 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.

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

www.scouting.org/financeimpact
Questions & Answers