GiftWorks®

Donor Management with GiftWorks

The Big Picture

With GiftWorks, you can store a large amount of information about each of your donors. In addition to basics like names, addresses, and phone numbers, you can store and track salutations and addressee information, an actual photograph of donors, contact preferences, employment and organization information, plus membership, gift matching, and group information.

And if there's information that's important to your organization but doesn't fit into any available fields, GiftWorks lets you create multiple custom fields.

Add to that the donation information you can store, tasks, mailing history, volunteer profiles and job history, and you'll see that GiftWorks offers you a very rich picture of every donor.

A Closer Look

In GiftWorks, each person, organization, or household entered is considered a donor. Even if they have not given to your organization yet, or if they've given only their time, they are considered donors. You may call them members, prospects, supporters, or constituents. In GiftWorks, they are donors.

GiftWorks does let you differentiate donor types, however. You can do so by applying one of three donor profiles to a donor record: donor with no profile, donor with an organization profile, and donor with a household profile.

A donor with no profile is the most common donor type. These donors can be an individual, organization, or household. If the donor is an individual, or if you deal with the donor as a single unit (whether it's a large corporation or a household), and you don't need to track information about its specific members or employees, you can enter it into GiftWorks as a donor, without applying a profile.

A donor with an organization profile is the donor type if the donor is an organization and you have multiple contacts for that organization or you want to track information about multiple employees of that organization.

Organization Donor
CRESTA CORPORATION
Golf Classic Sponsor

A donor with a household profile is a donor for whom you want to track separate information about one or more members. If you want, you can also create a donor with no profile to track one of the household members whose information you need to track separately. You might want to do this if one of the household members is a board member, for example.

Household Donor
LAUER, CRAIG AND POLLY
Major Prospects

Affiliate Donors
All donor types can be designated as affiliate donors, either when you are adding a donor, or any time you are viewing a donor. This designation lets you enter and track information about a donor and to relate them to other donors, while excluding the record from SmartLists, most reports, and mailings unless you explicitly indicate that you want to include affiliates.

An affiliate donor includes all standard donor fields, including donor groups and custom fields, but it cannot include donations. To add donations to an affiliate, you must remove the affiliate designation.

Affiliate donors might be related to a household donor, a spouse related to a donor without a household profile, or additional business contacts related to an organizational donor.

Donor - Affiliate
BLACK, BRIAN
Volunteer

Scenarios

SCENARIO 1: THE SINGLE DONOR

John R. Smith, Jr.—a single person (he may be partnered or married, but you do not know or need to track his partner or spouse). All information for John will be tracked in one donor record.

The Steps:
1. Adding a new donor
   a) You can add a donor from any location in GiftWorks by selecting the Donors or Home icon at the top of the screen. Then click Add a Donor in the left menu.
   b) In the Add a Donor window, select the radio button beside Donor, enter Mr. John R. Smith Jr., and click Next.
      ➢ GiftWorks will attempt to divide the name into its component parts (prefix, first, middle, last, and suffix). If any field is incorrect, correct it before proceeding. GiftWorks also creates a display name based on your default setting (see the Settings section of the GiftWorks Manual for more information). The display name is used throughout GiftWorks to display and sort donors, so you will typically want to use "last, first" as your display name format for individual donors. This will order them by last name when they are sorted by display name.

      ➢ If you know where John works, and want to track that information, also enter the company name in the organization field. This will not create an additional donor for that organization, and it will not add an organization profile to John. It simply tracks this information in John's donor information.
      ➢ Click Next.
      ➢ If there is already a donor in GiftWorks whose name closely matches the one you're entering, GiftWorks will indicate that similar donors have been found. Choose whether to cancel adding the new donor and edit the existing one, or to continue adding the new donor if different from the existing one.

➢ The mailing information fields (formal and informal addressee names and salutations) will be filled by default based on the information from the previous window. Make edits using the dropdown options, or type in your preferred versions. The salutations and addressees are what you use when sending communications to the donor, so be sure they reflect how you want to address the donor.
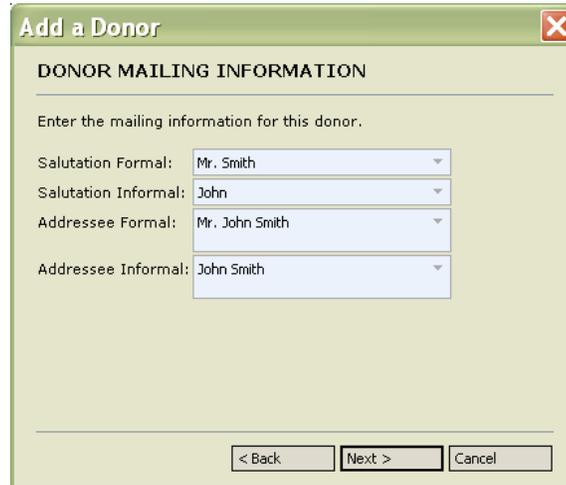
Add a Donor

DONOR MAILING INFORMATION

Enter the mailing information for this donor.

Salutation Formal:	Mr. Smith
Salutation Informal:	John
Addressee Formal:	Mr. John Smith
Addressee Informal:	John Smith

[< Back] [Next >] [Cancel]

➢ Click Next.
➢ Address and contact information fields include:
  ▪ Two address lines
    Many times you only need the first line to include all information pertinent to postal delivery. For example:
        Line 1:   22 Main St Apt 4
    The second line is only needed when there is additional address information not critical to postal delivery, or when there is an internal mail code at the destination. For example:
        Line 1:   Billings Center
        Line 2:   236 Main St Ste 8 (critical postal delivery info on line 2)

        Line 1:   DST5555
        Line 2:   412 Main St

        Line 1:   ABC Company (a work address for an individual donor, if you want to include the business name)
        Line 2:   412 Main St

- City, state, ZIP, and country fields for which you can set default entries (See the Settings section of the GiftWorks manual for details on creating default values in Settings.) If your nonprofit is based in the United States, and you want to save space on labels and envelopes, it is not necessary to fill the country field. You can set your default to be blank and then manually choose a country value as needed for non-US addresses.

- A primary phone field for which you can choose a default of either:
  - Restrict to US phone numbers—restricts numbers as you enter them to the format of (717) 555-1212 x101, but allows you to type the numbers without spaces, brackets, or dashes.
  - Allow phone numbers in any format—desirable for international phone numbers. The option has no restrictions, but requires that you manually enter spaces, dashes, and other characters.
  - If you have the default set to US phone numbers, you can override that setting when entering a phone number by clicking the down arrow on the right side of the phone entry box and selecting "Relax U.S. phone mask," as shown above. You can also access and change the default phone number settings. Changing the default setting will require the administrative password if you have one set.
- A primary email address
- Click Next.

➢ Add your donor to groups, if applicable, by checking the box beside the values. (See the GiftWorks Manual for details on Donor Groups.) Be sure to review the list to uncheck any default entries that are not valid for this donor.

➢ Click Next.
➢ Add your donor to mailing lists, if applicable.
➢ Click Next.
➢ Review your donor information for accuracy and proceed with one of the links at the bottom of the window to finish adding this donor:

Add another donor: lets you add another donor without entering additional information to this donor.
Add more details to this donor: lets you add all additional information for this donor.
Add a donation for this donor: lets you go directly to the Add a Donation window.

In Add more details to this donor you can enter multiple addresses for a donor.
➢ **STANDARD** One address must be designated as the donor mailing address and will be used as the mailing address for mailings sent from GiftWorks and will also be shown in SmartLists and Reports. You can also select a 2nd and 3rd address for this donor.

➢ **PREMIUM** You can enter multiple addresses for each donor and include a Seasonal Address.

You may need to enter multiple addresses for donors who reside at different addresses during the year and who want to receive mailings at their different addresses throughout the year.

A Seasonal Address is an address for a donor who resides at that address for a specified, active time period every year.

GiftWorks manages donor addresses by updating the current mailing address for donors with active seasonal addresses every time you sign in to GiftWorks. Your mailing addresses will always be current when you need to send a mailing with GiftWorks.

SCENARIO 2: HOUSEHOLD

Peter and Lisa Johnson—a married couple that donates to your nonprofit, but neither has involvement with your organization that needs to be tracked separately.
or
Janet Miller and Frank Jones—a couple with different last names, but no involvement that requires separate donor information. They could be married or not. You can use any combination of prefixes (Ms., Mrs., or Mr.) for their names. GiftWorks will attempt to divide the names into their component parts, but you can edit any of the name, addressee, and salutation fields to adequately address the couple.
or
Wendy Brown and Amy Stone—another couple with different last names that you want to have in one donor record. If the name fields do not meet your needs, edit the results.

In this scenario, regardless of last name or gender, all information for the couple and all donations from them are tracked as one donor. Choosing a household profile indicates that the donor information represents more than one person. (If the couple wants you to keep their giving separate, or if you need to track their information separately, refer to scenario 4.)

The Steps:
See scenario 1 for additional details on the basic process of adding a donor. The following scenario builds on the basic details.

1. In the Add a Donor window, select the radio button beside Donor with household profile. Enter Peter and Lisa Johnson, and click Next.
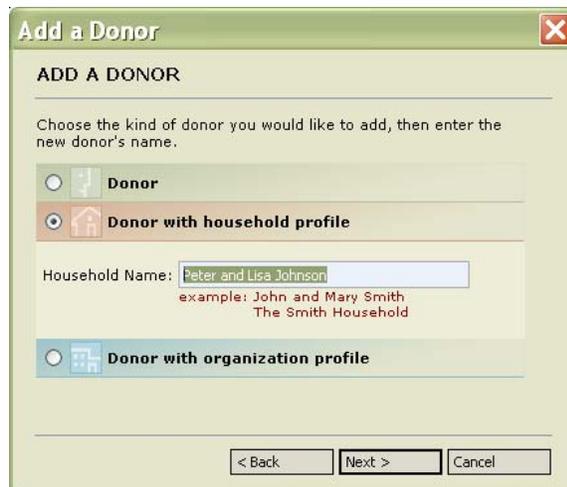
a) Edit the default display name if necessary, and click Next.
b) Review and make necessary edits to the mailing information for properly addressing the couple (formal and informal addressee names and salutations), and click Next.
c) To finish the initial entry of the donor, continue through the process of entering contact information, groups (remember to watch for default entries), and mailing lists.
2. At the end of the Add a Donor process, click Add more details to this donor to add more information to their record (see the list of additional information in scenario 1).

SCENARIO 3: Household with Related Individual Member Records (a Family)

The Black Family (James and Susan Black)—has several members who are involved in different ways with your organization.
James Black—a board member.
Susan Black—a member of the press whom you want to keep informed of your activities.
Brian Black (James and Susan's son)—a volunteer.
Jessica Black (James and Susan's daughter)—not currently involved but you want to track the entire family.

In this scenario, there should be:
Donor with a household profile—one donor record for the whole family to:
- ➤ Provide a way to send a single mailing to the entire family (or to the parents). The household record can be assigned to mailing lists and groups, and provides all other basic donor fields for tracking data.
- ➤ Track all donations from the family, including the board member.

Three affiliate donor records—one for each member of the family as necessary to:
- ➤ Track the family members' unique connections with your organization without having them automatically show in donor counts, SmartLists, or reports. (If you determine you need to track gifts in one of these individual family member records, the affiliate donor designation can be removed from that donor.)

Although affiliate donors are not automatically included in SmartLists, you can choose to include them when creating a SmartList. You can use that SmartList to send mailings or create reports.
If you add affiliate donors to a mailing list, they are included when you choose to send mail to that list. (See the SmartLists section of the GiftWorks Manual for details on building SmartLists). Either process can be followed to include Susan in your communications with the press, or to include Brian in a mailing to volunteers.

The Steps:
See scenario 1 for additional details on the basic process of adding a donor. This scenario builds on the basic details.

1. Add a donor with a household profile.
   a) In the Add a Donor window, select the radio button beside Donor with household profile and enter either "The Black Family" or "James and Susan Black" (depending on how you want to find and internally report on the family). This example will use The Black Family.
   b) Modify the default display name to "Black Family, The" to make it easier to locate them in a sorted list
   c) Continue to the mailing information window and adjust the salutations and addressee fields as appropriate for this family. An example might be:
   Salutation Formal: Mr. and Mrs. Black
   Salutation Informal: James, Susan, Brian, and Jessica
   Addressee Formal: Mr. and Mrs. James Black and Family
   Informal Addressee: The Black Family
   d) Continue adding the household to any groups or mailing lists that are applicable to the whole family (not to the individual members).

EDIT A DONOR

Edit or add information below. When you are finished, click Save at the bottom of the page to save your changes. If you click Cancel, your changes will not be saved.

Household Donor
BLACK FAMILY, THE   Change Profile

CONTACT INFORMATION

Display Name:	Black Family, The

	Prefix	First	Middle	Last	Suffix	Nickname
Name:		James, Susan		Black		

Organization:	

	Formal	Informal
Salutation:	Mr. and Mrs. Black	James, Susan, Brian, and Jessica
Addressee:	Mr. and Mrs. James Black and Family	The Black Family

Description:	
Website:	
Gender:	Unknown Marital Status: Unknown
Donor Picture:	Select picture

Addresses

Address Name	Address	Mailing Address
Home Address	PO Box 111, Bangor, ME 04402	⊙

Save   Cancel

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   e) Be sure to click Save at the bottom of the window when you are done adding more details.

  2. Add affiliate donor records for James, Susan, and Brian
    a) When viewing The Black Family, click the relationships tab, then click Add Household Members under Family Relationships

b) On the Add Household Members screen, enter the information for each of the affiliate donors you are creating.

Entering them using this method automatically creates the affiliate donors and relates them to the household.

c) Click Next and GiftWorks will check to make sure that none of the donors you are adding is a duplicate, then click Finish.

d) You can now see the new affiliate donors and household members listed under family relationships. Click the linked name of any of the household members to go to that member's affiliate donor information. From there, you can click Edit Donor at the bottom of the screen to add any necessary information to each.
  ➤ Review and add additional information pertinent to James as a board member. Remember, you can mail or otherwise contact him through this donor. Click Save.
  ➤ Susan should be added to the Press group.
  ➤ Brian should be added to the Volunteers group.
  ➤ Since it may not be necessary to track individual information about Jessica or to communicate with her (other than as part of the household), you do not need to enter her as an affiliate donor. You can always add her later if it becomes necessary to track some of her information separately.

SCENARIO 4: TWO DONORS WITH A HOUSEHOLD RELATIONSHIP (NOT A HOUSEHOLD PROFILE)

Eric White and William Page—a couple whose information you need to track separately, and who you want to mail separately.

In this scenario, each person's individual record will hold all information and donations pertinent to that person. The household relationship serves only to inform you that they are a couple, or belong to the same household.

The Steps:
See scenario 1 for additional details on the basic process of adding a donor. This scenario builds on the basic details.

1. Add a donor with no profile for Eric.
2. Add a separate donor (also with no profile) for William.
3. Create a household relationship between the two donors to indicate that they live in the same household.
   a) While you are still in William's donor record, select the tab for Relationships.
   b) In the Related Actions menu, select Add a Relationship.
   c) In the Define Relationships window, select the Household Relationship link.
   d) Search your database to select Eric so you can relate him to William.
   e) Use the dropdown lists to choose the relationship role for each person. In this case, the role might be partner for both donors. You can also enter a note about the relationship. (See the Settings section of the GiftWorks Manual for details on adding and editing relationship roles.)
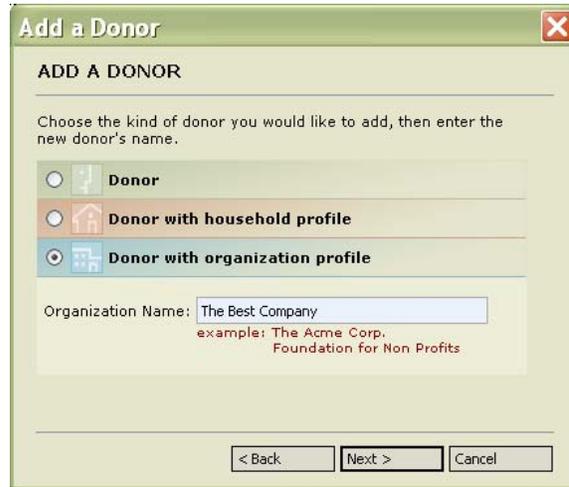
SCENARIO 5: DONOR WITH A RELATED AFFILIATE DONOR RECORD FOR THE SPOUSE

Melissa Jameson—a volunteer.
Robert Jameson—her husband, who is connected to other people or businesses within your community, but not active with your organization. You want to track some information on Robert, but you do not count him as a donor and don't want to include him in the volunteer-related mail you send to Melissa.

In this scenario, Melissa should be a donor with no profile, which will contain all her information and any donations. Robert should be an affiliate donor, which can be linked to his employer and other associates using relationships, and Melissa and John will be linked through a household relationship (not as part of a donor with a household profile where both people are in the same donor record).

The Steps:
See scenario 1 for additional details on the basic process of adding a donor. This scenario builds on the basic details.

1. Add a donor with no profile for Melissa with all pertinent information, including adding her to the Volunteer group.
2. Add an affiliate donor for Robert.
    a) In the Add a Donor window, select the radio button beside donor, enter Robert Jameson, and click Next.
    b) In the second window, where you review name and display name, check the box for affiliate donor.
    c) Continue as you would for a donor record.
3. Create a household relationship to link the two donors and indicate they live in the same household.
    a) In the newly created affiliate donor record for Robert, select the tab for Relationships.
    b) In the Related Actions menu, select Add a Relationship.
    c) In the Define Relationships window, select the Household Relationship link.
    d) Search your database to find Melissa so you can relate it to Robert's.
    e) Use the dropdown lists to choose the relationship role for each person. You can also enter a note about the relationship. (See the Settings section of the GiftWorks Manual for details on adding and editing relationship roles.)

SCENARIO 6: THE ORGANIZATION

The Best Company—a business in your community. Your primary contact is the President, Janet Jones.

In this scenario, you will use a donor with an organization profile and track all information about the business, including the primary contact, and all business donations in one donor.

The Steps:
See scenario 1 for additional details on the basic process of adding a donor. This scenario builds on the basic details.

1. In the Add a Donor window, select the radio button beside donor with an organization profile
   a) Enter The Best Company, then click Next.

   b) Edit the default display name for better sorting: Best Company, The
   c) Use the name fields to enter Janet Jones or Ms. Janet Jones, then click Next.

d) Review and make necessary edits to the mailing information for properly addressing the business and contact person. The dropdown lists provide variations for the addressee fields that place the contact person's name before the business name (if you give prominence to the person) or after it (if you only need an attention line). You can also type in enter any other value.

e) To finish the initial entry of the donor, continue through the process of entering contact information, groups (remember to watch for default entries), and mailing lists.

f) In the Next Steps window, choose to Add more details to this donor and scroll down to:

- ➢ Enter the job title of the primary contact person.
- ➢ Enter the donor category (business) to be sure you can segment your different types of organizations.

SCENARIO 7: DONORS OR AFFILIATE DONORS RELATED TO AN ORGANIZATION PROFILE

John R. Smith, Jr.—the single donor from scenario 1 is Vice President of The Best Company.
Robert Jameson—the husband with an affiliate donor designation from scenario 5 is Chief Operating Officer of The Best Company.

In this scenario, you will create work relationships among some existing donors.

The Steps:

1. Find The Best Company.
2. Select the Relationships tab, then select Add a Relationship from the Related Action menu.
   a) Click the Work Relationship link.
   b) Search for Smith, select John R. Smith, Jr., then click Next.
   c) From the dropdown lists, select the role of Employer for The Best Company, and Employee for Mr. Smith. Then click Save.
3. In the Related Actions menu, select Add a Relationship and repeat the steps above to also create a work relationship for Robert Jameson. You now have relationships in the organization record for each of the employees. These links will open the associated donors.
4. Click on the link for John R. Smith, Jr. to open his donor information.
   a) Click the Edit Donor button at the bottom of the screen, scroll down, and enter his job title. Then click Save.
   b) Look under the display name at the top of the donor information. Note that the job title does not show.
   c) Click the Edit Donor button again, enter The Best Company in the organization field (just under the name fields), then click Save. (In this case, you do not want to include The Best Company in the addressee fields, because this is not the business donor—it is instead the personal information for John R. Smith, Jr. and you only want to see where he works.)

d) Look under the display name again. With the organization field filled, you can see both the employer name and his title.

e) Select the Relationships tab. In addition to the link to The Best Company, links to other co-workers show as well (like Robert Jameson).

5. Click the link for Robert Jameson to open his record and follow the steps above to add his job title and employer information.

Best Practices

Be Consistent. Consistency will help you to create solid data and accurate results.

Create Your Own Manual. Define how your organization wants to use the features in GiftWorks. Provide specifics on how and when you will use households, affiliate donors, groups, mailing lists, mailing history, etc. This document can help to ensure consistency over time and staff changes.

Choose a Consistent Display Name Format. You should choose a default format for your organization and make sure it is used consistently for effective sorting in SmartLists and Reports. For example, do you want to be able to sort based on last name (Smith, John) or first name (John Smith)?

Always Enter a Value in the Donor Category Field. Doing so ensures that you can adequately segment your donors. Among the benefits are:

- When applying for grants, the grantor may request data on the total amount given by foundations versus businesses, individuals, etc. If you have consistently tracked donor categories, you will be able to include and sort this field in a donation-based report. You will also be able to build a SmartList of donors in a particular category.
- In a capital campaign, a report of all donations could include and sort on the category field to show how much of the total was given by each category of donor.

Establish Naming Conventions. Create naming conventions for the values that you add to lists, such as campaigns and appeals. If you begin those values with similar words or abbreviations, and follow a pattern, it will be easier to sort and use those lists. Examples include:

Campaigns ………….. ………………………………	Annual Campaign 2007
	Annual Campaign 2008
Appeals…………………………………………………	Golf Player Flyer 2008
	Golf Sponsor Letter 2008
Funds………………… …………………………………	Restricted for Programming
	Restricted for Endowment
Donor Groups ………… ………………………………	Golf Player 2007
	Golf Player 2008
	Board Current
	Board Former
Mailing History ………. Name of Mailing ………….	Invitation to Smith Party 2007
	Invitation to Gala 2008

Enter Board Member Donations Consistently. This practice also applies to other groups or segments of donors. Because you may need to track your board as individual members of a household (with an individual donor or affiliate donor record; for more detail, see Scenario 3), you need a consistent plan for entering board member donations. Consider entering all donations in the household profile, but use the appeal of a gift or pledge to indicate that it was a board donation (as applicable). Among the reasons for doing so are:

- If you enter specific board donations in the board member's individual donor record, but have other contributions from the family in the household profile, you will not be able to access the family's total giving in reports or SmartLists. So if you build a SmartList to send mail to all donors of a certain giving level, you will not get the correct amount for the family.
- If you enter all of the household's donations in the board member's individual donor record, you could get the total giving for the family, but the total specific to the board member might be inflated. You would also only have his or her name represented in internal reports, and any mailing based on giving might only be addressed to the board member, not to the family.

- If all donations are in the household's donor record, with appeal values indicating board solicitations, you can mail to the family based on total giving. You can also access the amount attributable to the board by basing your SmartList or report on the appeals that include reference to the board. Examples of appeals might be "Annual Appeal Fall 2007 Board" or "Personal Ask Board."

Conclusion

One of the core functions of GiftWorks is to help you enter and track information about your donors. Maintaining your donors in a logical structure will make it easier for you to get the information you need out of GiftWorks in the form of SmartLists, mailings, and reports.

By following the ideas laid out in this guide, you will be able to properly maintain the structure of your donors, including households and organizations, and all of the relationships among those donors.