



Raising the Bar with Connect-FR

2014 DDI User Group Meeting
April 22-23, 2014



Serving those who serve others



Show of Hands:

Who believes fundraising is always evolving?



Share:

What changes are you seeing in your major Donors?





Top Ten Trends for Major Donors

- ❑ Donors are wary of trusting us.
- ❑ The Boomers are becoming the #1 donor population.
- ❑ Older ladies are THE major donor demographic.
- ❑ Donors want Donor-Centered communications.
- ❑ Major donors who volunteer give more. Much more.



Top Ten Trends for Major Donors

- ❑ Major donors are all over social media.
- ❑ Major donors look at their gifts as investments. They want to see impact and ROI.
- ❑ Major donors are assured when they see the financials and the numbers.
- ❑ Like most of us, donors are feeling overwhelmed, jaded, and even bored.
- ❑ Major donors love a Big Idea.

Fired UP Fundraising, <http://www.gailperry.com/2013/04/top-10-trends-how-major-donors-are-changing-and-what-to-do-about-it/>

Share:

Have you seen any of these trends?
Agree/Disagree?



Share:

What are some trends you are seeing in the industry?





5 Key Fundraising Trends from 2013

- ❑ Overall charitable giving grew 4.9% in 2013, while online giving grew 13.5%.
- ❑ Online giving accounted for 6.4% of all charitable giving in 2013.
- ❑ Large organizations had the greatest increase in overall charitable giving in 2013, while small organizations had the greatest increase in online giving during 2013.



5 Key Fundraising Trends from 2013

- ❑ International affairs organizations had the greatest increase in overall charitable giving in 2013, while faith-based organizations had the greatest increase in online giving in 2013.
- ❑ More than one-third (33.6%) of overall charitable giving happens in the last three months of the year, with the highest percentage (17.5%) coming in December.

Share:

Have you seen any of these trends?
Agree/Disagree?



DDI-Connect Can Help!



Track Your Gifts Better

Ln #	Amount	PTYP	P5SRC	DC1	DC2	Description	Stat
1.	963,852.25						New

Amount: 963,852.25 Gift? Segment:

Promo type:

Promo src:

Desig 1:

Desig 2:

G/L account:

Fund:

Appeal:

In kind: Qty: 0

Designation Use in receipt letter

OK Undo

Utilize the Gift Tracking Fields to their fullest!

- ✓ Promo Type
- ✓ Promo Src
- ✓ Desig 1
- ✓ Desig 2

Automate Your Gift Splits - Coming June of 2014!

The screenshot shows a software application window titled "Regional Gift Distribution Maintenance". The interface includes a menu on the left, a toolbar at the top, a main data table, and a detailed view of a specific gift split.

Menu:

- Main Menu
 - Name/Address System
 - Extract Module
 - Project Management
 - Process Management
 - Financial Services
 - Health Policy
 - Merge System
 - Fixed Assets
 - FundWriter
 - Daily Cash Processing
 - Accounts Payable
 - Connect-FR
 - Gift Entry
 - Gift Search
 - Misc. Revenue Entry
 - Tribute Type Setup
 - Planned Giving
 - Campaigns & Appeals
 - Named Funds
 - Pledges & Recurring Gifts
 - FR System Setup
 - General System Setup
 - Promotion Cross-Referen
 - Letter Maintenance
 - Donor Segment Setup
 - Regional Gift Distr. Setup**
 - Connect-FR Reports
 - CheckWriter
 - Accounts Receivable
 - Processing
 - User Documentation
 - IRS Reporting System

Toolbar: New, Edit, Delete, Save, Undo, View, Exit

Regional Gift Distribution Maintenance Table:

Presbytery	Gift Split #	Description	Start Date	Expire Date
BOI	38907	Boise Basic Mission Support (25/75%)	02/28/2014	
NEV	38914	Nevada Split that Pat Made	02/28/2014	

Gift Split Details Table:

Line #	Percent	Presbytery	Not Used	Category	Project Cd
1	25.0000%	01		02	
2	75.0000%	01		03	

Gift Split Details:

- Gift Split #: 38907
- Presbytery: Presbytery of Boise
- Description: Boise Basic Mission Support (25/75%)
- Start date: 02/28/2014
- Expire date:

Automate Your Gift Splits - Coming June of 2014!

Template Setup
Gift Splits

Ln #	Percent	PRES	NU	CAT	PROJ	Description	Stat
1.	25.0000%	01		02			
2.	75.0000%	01		03			

Percent: 25.0000% Gift?

Presbytery: 01 Cong. Giving - Boise

Not Used: Designation

Category: 02 Basic Mission Support - General Assembly

Project Cd:

G/L account: 100-000-2000060 MTS Payable - GA & Other

Fund:

Appeal:

Automate Your Gift Splits - Coming June of 2014!

The screenshot displays a software interface for gift management. The main window is titled 'Gift Entry' and contains fields for PIN (550137), Master ID (000001226), Gift # (0), Gift date, Gift year, G/L tran date, and Fisc. year. A master ID detail box shows the name Peyton Manning and address 123 Broncos Colts Ln, Boise, ID 46062.

A dialog box titled 'Select type of gift to process' is open, showing a table with the following data:

Type	Next Pmt	Date	PRES	CAT	PROJ	Description
Gift Split		02/28/2014				Boise Basic Mission Support (25/75%)

A red arrow points from the 'Gift Split' row in this dialog to the 'Line Items' table in the 'Gift Setup' window. The 'Gift Setup' window has tabs for 'Gift Setup' and 'Line Items'. The 'Line Items' table contains the following data:

Ln #	Amount	PRES	NU	CAT	PROJ	Description
1.	250.00	01		02		
2.	750.00	01		03		

Below the table, the 'Amount' is 750.00, with a checked 'Gift?' box and a 'Segment:' field. Other fields include 'Presbytery: 01', 'Cong. Giving - Boise', 'Not Used:', 'Category: 03', 'Basic Mission Support - Synod/Presbytery', 'Project Cd:', 'G/L account: 100-001-4001010', 'Cong. Giving - Boise', 'Fund:', and 'Appeal:'.

Streamline Data Entry - Coming June of 2014!

Promo type Cross-Reference Maintenance

Cross reference:

Promo type	Country	Program	Segment List
AABD			43250,80,2,465
AAL8			43000,80,2,412
ABBD			43250,80,2,465
ACBD			43250,80,2,465
ADBD			43250,80,2,465
AGAN			43000,80,2,420
AGBY			43000,80,2,420
AGC9			43000,80,2,420
AGCA			43000,80,2,420
AGCB			42000,80,2,420
AGCD			43000,80,2,420
AGCG			43000,80,2,420
AGGI			43000,80,2,420
AGHM			43000,80,2,420

Promo type: AGGI The Gift, Inc.

Country:

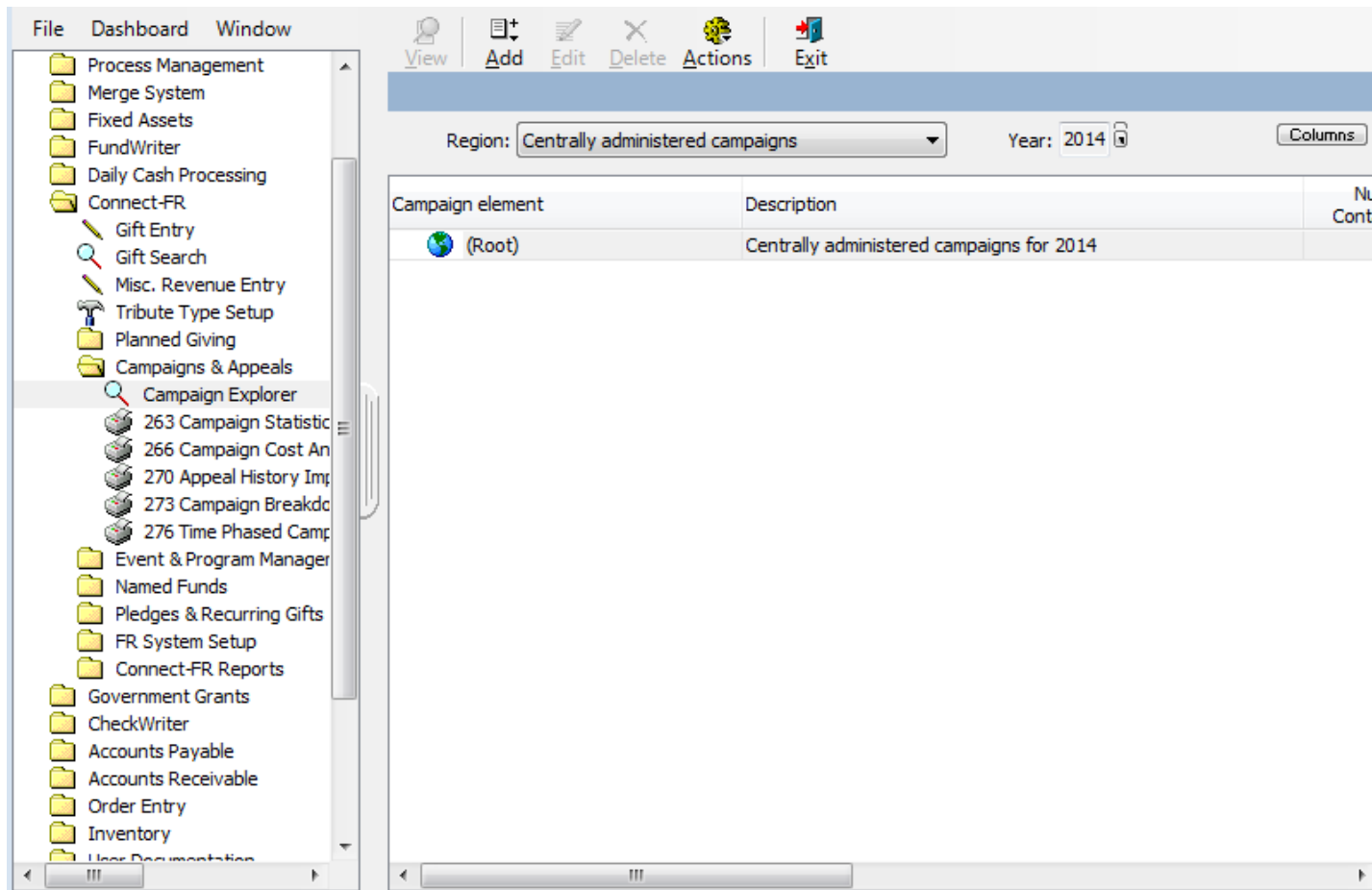
Program:

Segment format: GL,Office,Restriction,Funding source

Segment values: 43000,80,2,420

- ✓ Automate GL assignment more precise.
- ✓ Cut Down on Data Entry Error.

Campaigns and Appeals




Use campaigns and appeals to track cost/effectiveness of your fundraising effort.


Campaigns and Appeals

Appeal Setup



Appeal Setup Packages Grid Statistics


Appeal ID:  Status: _____


Campaign ID: _____


Region:  Centrally administered appeals


Title:

Dates:  thru:  Prior appeal ID:

Approach: 

Promo type: 

Country: 

Program: 

Purpose:

Theme	Audience	Statistics
<input type="checkbox"/> Human Rights and Social Justice	<input type="checkbox"/> CWS Staff	Total cost: 24.50
<input type="checkbox"/> Indigenous Knowledge	<input type="checkbox"/> Lapsed donors	Contacted: 91
<input type="checkbox"/> Networking	<input checked="" type="checkbox"/> Major donors	Responses: _____
<input type="checkbox"/> Peace	<input type="checkbox"/> Organization/Church	Amount: 24,055.00
<input type="checkbox"/> Tools	<input type="checkbox"/> Religion leaders	Count: 10
	<input type="checkbox"/> Rented lists	

Campaigns and Appeals

Appeal Grid

Appeal Setup | **Packages** | **Grid** | **Statistics**

Appeal ID: ST201201 January 2012 Mailing to STWD

#	Package	3rd Party List	Description	List Codes	Contacted	Cost
5	A1		\$1,000 - + : 0 - 6 Months 1 gift	R.1A*	24	6.46
6	A1		\$1,000 - + : 0 - 6 Months 2 gifts	R.2A*	8	2.15
7	A1		\$1,000 - + : 0 - 6 Months 3+ gifts	R.3A*	6	1.62
8	A1		\$ 500-999 : 0 - 6 Months 1 gift	R.1B*	2	0.54
9	A1		\$500-999 : 0 - 6 Months 2 gifts	R.2B*	0	0.00
10	A1		\$500-999 : 0 - 6 Months 3+ gifts	R.3B*	0	0.00

Line #: 5 Description: \$1,000 - + : 0 - 6 Months 1 gift
 Package: A1 3rd Party list:
 List codes: R.1A*
 Allow editing of # contacted and cost

# Contacted: 24	Cost: 6.46
# Responses: 2	Revenue: 2,500.00
Response rate: 8.33 %	Net revenue: 2,493.54
Cost per contact: 0.2692	Cost per \$ raised: 0.0026
Average response: 1,250.00	Yield per 1,000: 104,166.67
Median response: 500.00	Net Yield per 1,000: 103,897.50

4/21/2014 | FY: 2013 | Reg: ALL CAPS

Campaigns and Appeals

Appeal Grid Updates

- Extracts

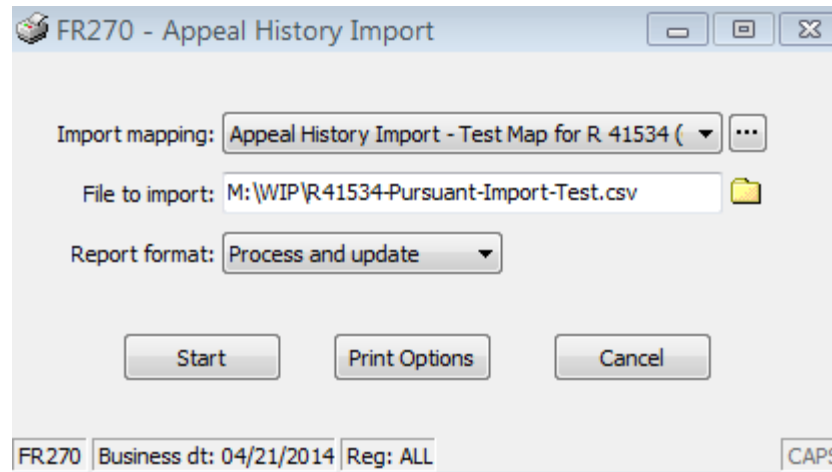
The screenshot shows the 'Adj STWD' application window. The menu bar includes 'File', 'Window', and 'Help'. Below the menu bar are icons for 'New', 'Save', and 'Exit'. The main toolbar contains icons for 'File', 'Name', 'Address', 'Donor/Gift', 'Other forms', 'Reports', 'Outputs', and 'View Results'. The 'Output format' is set to 'Data file', and a 'Start' button is visible. The 'Data file' section contains the following options:

- File format: Comma delimited, Tab delimited, Fixed length
- File name: []
- Include field names on first line
- Include donor fields
- Include spouses (living)
- Include additional donor fields and statistics
- Output in uppercase
- Expand name fields
- Expand address fields
- Sort by: Master ID / PIN
- Salutation options: Formal preferred, Informal preferred, Formal always, Informal always
- Max field width: 30 characters
- Appeal ID: AH201206 (highlighted with a red box)
- List code: []
- Package: []
- Random select records

Campaigns and Appeals

Appeal Grid Updates

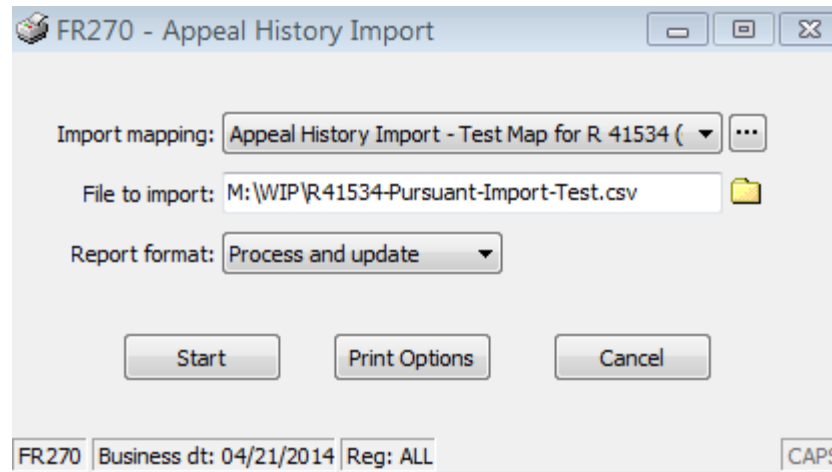
- FR270 – Appeal History Import



Campaigns and Appeals

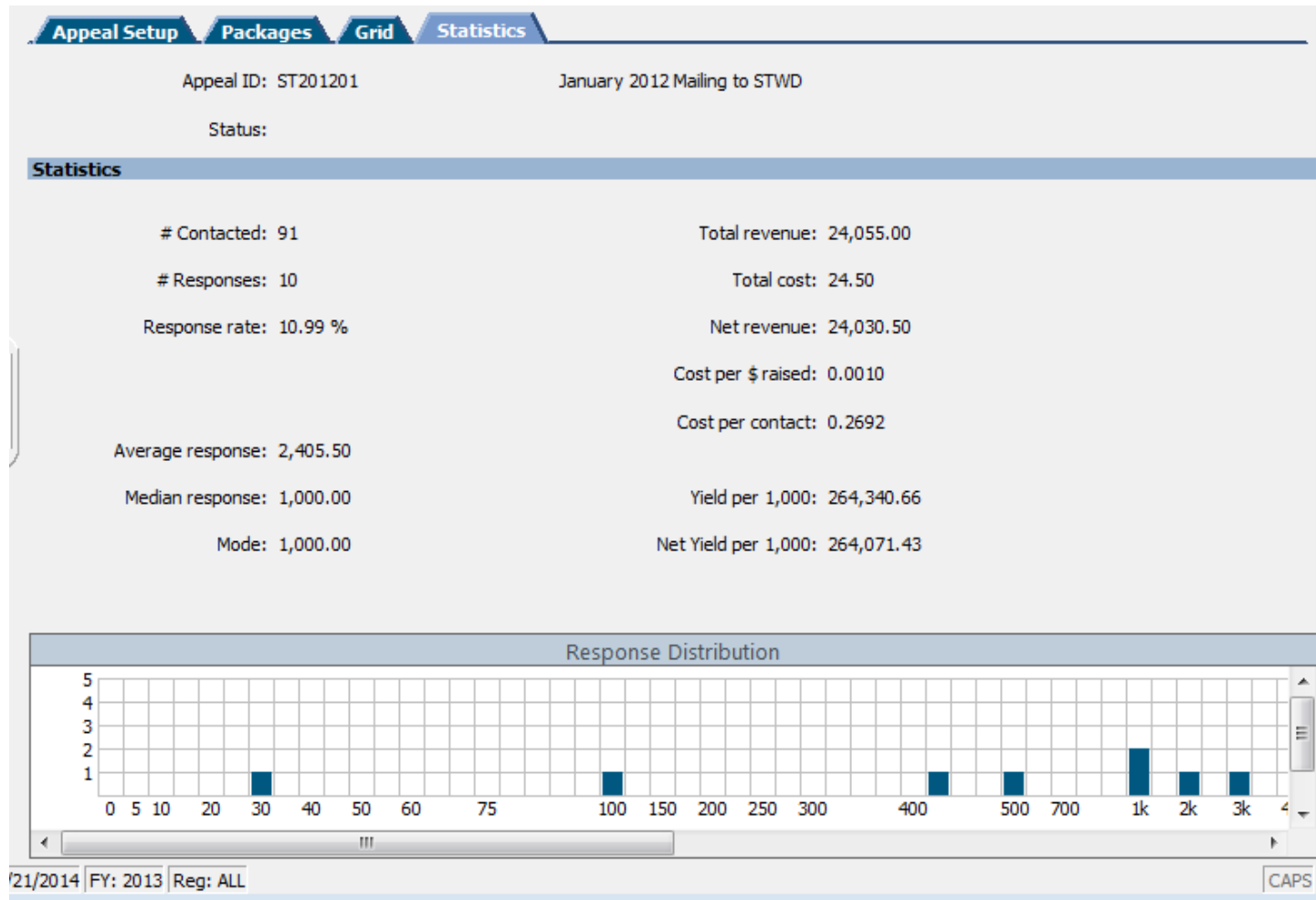
Appeal Grid Updates

- FR270 – Appeal History Import



Campaigns and Appeals

Appeal Statistics



Campaigns and Appeals

Campaign Reports

- FR263 – Campaign Statistics

DDI Demo for Fund Raising
07/11/2012 9:47:31 AM EDT
FR263

Campaign Statistics Report

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Campaigns for 2012 – All packages combined

Sgmt	Description	Total Returns	Total Sent	% Return	Total Revenue	Cost	Net Revenue	Average Gift	Median Gift	% Largest Gift	% First Gift	Activ. Ratio	Renew. Ratio	Avg. # Gifts/Yr	% Mult. Gifts/Yr	Cost/% Raised	Yield/K	Net Yield/K	Cost/Piece	
H3GH	Rec. gift: 0-9	1	34	2.94%	2	0	2	2	2	0.00%	0.00%	0.00%	100.00%	0	0.00%	0.00	59	59	0.00	
	Lrg. gift: 0-9 Months : 25-36 (1+ gifts) Tot gifts: 1																			
H3HH	Rec. gift: 0-9	3	413	0.73%	18	0	18	6	5	0.00%	0.00%	0.00%	100.00%	0	0.00%	0.00	44	44	0.00	
	Other Sources (Blank segment code)	1	1	100.00%	50	0	50	50	50	0.00%	0.00%	0.00%	0.00%	0	0.00%	0.00	50,000	50,000	0.00	
	TOTAL	1,400	39,008	3.59%	184,603	0	184,603	132	90	0.00%	0.00%	0.00%	100.00%	0	1.58%	0.00	4,732	4,732	0.00	

- FR266 – Cost Analysis

07/11/2012 10:51 AM EDT
FR266

DDI Demo for Fund Raising
Campaign Cost Analysis
01/01/2012 thru 04/02/2012

Page 1

Appeals: STEST1

Appeal	Description	Pieces Sent	Pieces Return	Return Pct	Revenue	Cost	Net Revenue	Revenue Per Piece Return	Cost Per Piece Sent	Revenue Per Thousand	Net Revenue Per Thousand
STEST1	Sheila is testing	500	3	0.60%	6,550.00	4,325.96	2,224.04	2,183.33	8.65	13,100.00	4,448.08
	TOTAL	500	3	0.60%	6,550.00	4,325.96	2,224.04	2,183.33	8.65	13,100.00	4,448.08

***** END OF REPORT *****

Campaigns and Appeals

Name/Address

- Appeal Mailing History

Software interface showing contact information for Dr. Denise Kelly Ayers. The 'Memos' tab is selected, and a dropdown menu is open with 'Mailing history' highlighted. A red arrow points from the 'Mailing history' option to the 'Appeal Mailing History' section below.

Menu options: Mailing history, Edit history, Merge history, Mailmerge history, NA Web Access

Address box: PIN: 8614225, Dr. Denise Kelly Ayers, 288 Parkview, Indianapolis, IN 46204

Date	Contact Type	Record Type	Record ID	Coding	Notes
08/18/2008	Mail	Connect-FR Appeal	703	1488	Congregational Extract Aug 2008
08/15/2008	Mail	Connect-FR Appeal	634		Planned Giving Post Card
07/09/2008	Mail	Connect-FR Appeal	699	1486	Fall 2008 Service Magazine
02/20/2008	Mail	Connect-FR Appeal	667	1445	Service Magazine Spring Edition
07/13/2007	Mail	Connect-FR Appeal	623		Service Magazine Fall Issue
02/16/2007	Mail	Connect-FR Appeal	16		Service Magazine
10/06/2006	Mail	Connect-FR Appeal	60		Annual Report 2006
02/15/2006	Mail	Connect-FR Appeal	59		SERVICE

Donor Segment Review

DDI Demo for Church Extension Funds

File Dashboard Window Admin

New Edit Delete Save Undo Exit

Donor Segment Code Setup

Select a position of the segment code to edit its values:

- Amount of largest single gift (position 1)
- Number of years within which last gift was given (position 2)
- Total number of lifetime gifts (position 3)
- Amount of most recent gift (position 4)

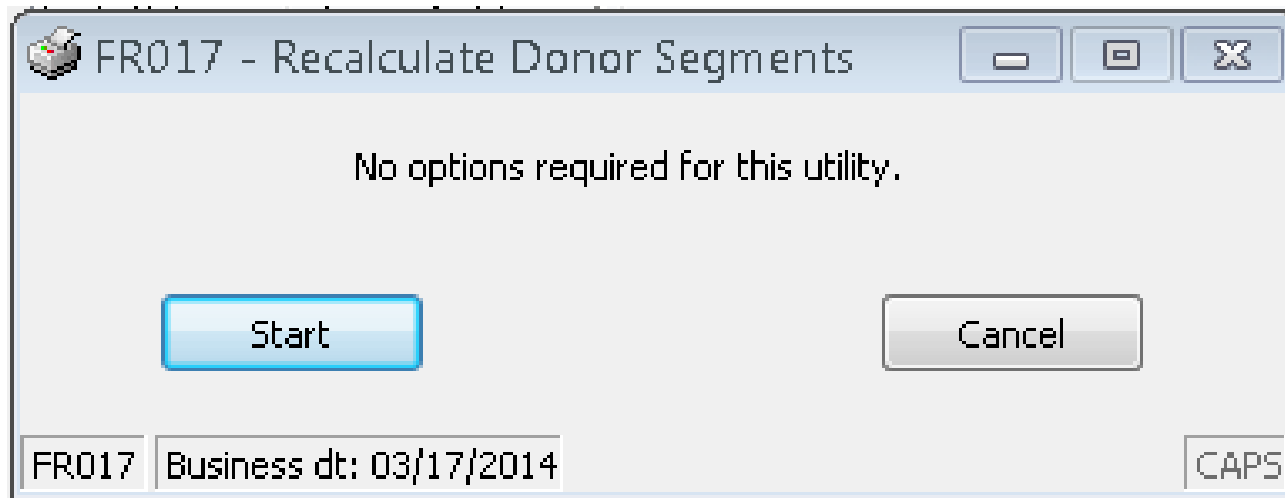
Code Value	Large Amt From /	Large Amt To
M	0	24.99
L	25	49.99
K	50	99.99
J	100	249.99
I	250	499.99
H	500	999.99
G	1,000	2,499.99
F	2,500	4,999.99
E	5,000	9,999.99
D	10,000	24,999.99
C	25,000	49,000.99
B	50,000	99,999.99
A	100,000	Up

Code value: M

Amount of largest gift to date:

From: 0 To: 24

Donor Segment Review



Online Giving Accounts



[HOME](#) [LOGIN](#) [REGISTER](#) [CONTACT US](#)

Welcome to Online Access.

Disciple Data Inc. wants to provide you with the most up-to-date tools to manage your financial resources. To set up your **Online Access**, follow these easy steps:

- ✓ Begin by starting an investment via phone, mail, or fax.
- ✓ Call the DDI office at 317.713.2480 to receive your activation code for **Online Access**.
- ✓ Complete your online registration and login to your **Online Access** account.
- ✓ Keep track of your investments through **Online Access** updates.
- ✓ Open new investments right online when you [login](#) to your account.
- ✓ Enjoy the freedom of your secure **Online Access** account.

Online Access - Easy, flexible and secure!

[Donate now](#) ▶

[VOLUNTEER](#) ▶

Online Giving Accounts



Welcome . . . Peyton Manning

[MY PROFILE](#) [LOGOUT](#)

[WELCOME](#) [ACCOUNTS](#) [STATEMENTS](#) [CONTACT US](#)

Donations for

Date	Description	Amount
09/11/2013	0	\$150.00
09/11/2013	0	\$450.00
01/14/2013	7406000	\$300.00
Total:		\$900.00

Online Giving Accounts - Electronic Receipts/Statements

Account Statements for 2014

Document Number	Statement Date	Description	Account Number	For
34900	01/28/2014	1099 Stmts: 2013 Taxable Year	000010070	Account 000010070
35986	02/07/2014	Loan Pmt Rcpt 02/07/2014	000010123	Loan 3003
35987	02/07/2014	Loan Pmt Rcpt 02/07/2014	000010123	Loan 1008
34423	01/21/2014	Loan Pmt Rcpt 01/21/2014	000010123	Loan 3003
34581	01/28/2014	1099 Stmts: 2013 Taxable Year	000010123	Account 000010123
31202	01/03/2014	Loan Stmts: 12/01/2013 thru 12/31/2013	000010123	Loan 10123,1008
31244	01/03/2014	Loan Stmts: 12/01/2013 thru 12/31/2013	000010123	Loan 10123,3003
32983	01/07/2014	Loan Pmt Rcpt 01/07/2014	000010123	Loan 3003
32984	01/07/2014	Loan Pmt Rcpt 01/07/2014	000010123	Loan 1008
35678	02/03/2014	Loan Stmts: 01/01/2014 thru 01/31/2014	000010123	Loan 10123,1008
35720	02/03/2014	Loan Stmts: 01/01/2014 thru 01/31/2014	000010123	Loan 10123,3003
37184	03/03/2014	Loan Stmts: 02/01/2014 thru 02/28/2014	000010123	Loan 10123,1008
37226	03/03/2014	Loan Stmts: 02/01/2014 thru 02/28/2014	000010123	Loan 10123,3003
37415	03/07/2014	Loan Pmt Rcpt 03/07/2014	000010123	Loan 1008
37416	03/07/2014	Loan Pmt Rcpt 03/07/2014	000010123	Loan 3003
42534	04/07/2014	Loan Pmt Rcpt 04/07/2014	000010123	Loan 1008
42535	04/07/2014	Loan Pmt Rcpt 04/07/2014	000010123	Loan 3003
42989	04/11/2014	Loan Pmt Rcpt 04/11/2014	000010123	Loan 3003
43255	04/16/2014	Loan Pmt Rcpt 04/16/2014	000010123	Loan 3003

Gift Deposit Report - New (FR233)

FR233 - Gift Deposit Report

Date range: thru:

Constituent PIN: (Blank for all)

Promo type:

Desig 1: 04/21/2014 6:16 PM PDT
FR233

Desig 2:

Sort by: Date

Start

FR233 Entity: DCEF Busine

Gift Deposit Report

Page 1

Deposit dates: 10/01/2013 - 10/30/2013
Sorted by Date and PIN

Batch	Date	PIN	Gift#	Church	City	Amount	Check	CAT	Project
3	10/01/2013	676	38162	First Presbyterian Chu	St. Helena	145.83	7956	02	
3	10/01/2013	676	38162	First Presbyterian Chu	St. Helena	437.50	7956	03	
Check Total						583.33			
3	10/01/2013	727	38161	Davis Community Church	Davis	729.17	20044	02	
3	10/01/2013	727	38161	Davis Community Church	Davis	2,187.50	20044	03	
3	10/01/2013	727	38161	Davis Community Church	Davis	250.00	20044	05	507025 Reeder, Jonna - Tajik
3	10/01/2013	727	38161	Davis Community Church	Davis	23.00	20044	12	6200000 PEACEMAKING RECEIPTS
3	10/01/2013	727	38161	Davis Community Church	Davis	11.50	20044	12	6104240 Sacramento Peacemaki
3	10/01/2013	727	38161	Davis Community Church	Davis	417.00	20044	21	9000000 PENTECOST OFFERING -
3	10/01/2013	727	38157	Davis Community Church	Davis	250.00	20031	22	757280 Sacr/Small Church Ass
Check Total						3,868.17			
3	10/01/2013	1385	38158	First Presbyterian Chu	Idaho Falls	421.88	15603	02	
3	10/01/2013	1385	38158	First Presbyterian Chu	Idaho Falls	1,265.62	15603	03	
Check Total						1,687.50			
3	10/01/2013	4449	38160	Stone Church of Willow	San Jose	1,290.00	25208	02	
3	10/01/2013	4449	38160	Stone Church of Willow	San Jose	5,160.00	25208	03	
Check Total						6,450.00			
3	10/01/2013	7044	38165	Pioneer Presbyterian C	Burns	105.95	4890	02	
3	10/01/2013	7044	38165	Pioneer Presbyterian C	Burns	317.88	4890	03	
Check Total						423.83			

DDI Next Generation Discussion



Discussion, Questions, Comments



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