

# Development & Salsa CRM Procedure Manual

Last Updated June 23, 2021 by Deven Warvel

# Table of Contents

Standards2	2
Reports2	2
Monthly Reports	2
The Endowment Campaign for Educator Excellence?	3
Finance Reconciliation	3
Strategic Scorecard	3
Ad Hoc Reports?	3
Gifts 24	1
Cash/Check Gifts24	1
Credit Card Gifts 24	1
Recurring Gifts 24	1
Recurring Payments24	1
Pledge24	1
Pledge Payments 24	1
Gifts in Kind 24	1
Dayton Foundation Gifts 24	1
Endowments 24	1
Scholarships	5
Campaigns, Funds, and Appeals 26	3
Campaigns	3
Funds27	7
Appeals27	7
Donor Acknowledgement Letters 28	3

# Standards

- Always search for duplicates before entering a new constituent. This is one of the most important standards set forth.
- Enter ALL provided information available for each constituent.
- Do not abbreviate an organization name except when part of the formal business name. (For example, &, Inc. or Co.)
- Salsa addresses are verified and validated by Smarty Streets, therefore addresses must be entered according to their standards (<u>https://smartystreets.com/articles/standardization-and-validation</u>). Smarty Streets adheres to USPS standards:
  - Abbreviate street suffixes without punctuation (Rd, St, Ave, Cir, Blvd, etc).
  - All directionals (South, West, Northeast, etc.) whether preceding or following a street name, are to be entered as abbreviations in capital letters without punctuation. (Example: 123 NW Anywhere St)
  - When entering an apartment number or suite number, put it at the end of the first address line (Example: 123 NW Anywhere St #203).
  - PO Boxes should be entered without periods (Example: PO Box 123).
  - Any questions about address entry can be found on the USPS website <u>https://pe.usps.com/text/pub28/welcome.htm</u>.
- Always fix a record with an error.
- Always include the area code when entering a phone number.
- The more information you can enter in a record the better.
- If you are unsure of how to do something, please reference this manual or contact the Development Associate.

# Reports

Reports are an important tool to track the progress of the development department as well as to continually check for potential mistakes. Salsa provides several reporting options including prebuilt reports and customizable advanced queries. For the purpose of regularly scheduled reports, advanced queries are primarily used.

#### **Monthly Reports**

#### The Endowment Campaign for Educator Excellence

#### **Finance Reconciliation**

#### Strategic Scorecard

The Strategic Scorecard provides an overall view of Muse Machine. Used internally by staff and confidentially by the Board of Trustees (BoT), the scorecard is updated by program areas, finance, and development. Development is often asked to update the scorecard multiple times throughout the month.

The scorecard is located at \Muse Shared\Reports-Dashboard for Committee-Board\20XX-20XX. Within the appropriate year folder, there is a Previous Versions folder. The naming standard for the Strategic Scorecard is 2018-19 Muse Machine Strategic Scorecard\_20190807-v2, with "-v2" being added only if there is more than one version made on the same day. As the scorecard is updated the name of the file should be updated using the naming standard and the previous version should be moved into the Previous Versions folder.

#### **Scorecard Process**

The Strategic Scorecard has been formatted to allow for autofill options to help to eliminate data entry errors. Development has a tab dedicated to each section with built-in pivot tables to help with data analysis.

- **Dev- Grants** tab contains all information for current fiscal year grants.
  - Run the Salsa Advanced Query Annual Grants
    - Go to Reports→Queries→Advanced Query Wizard

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## • Choose the Annual Grants query

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- The raw data that comes out of Salsa will need to be manipulated.
  - Move data in Fund Name2 into the Fund Name column.
  - In the Donation Amount Column *Convert to Number*
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh both pivot tables.
- Ensure that the Summary data table total matches the All Grants pivot table total.
- **Dev- Sponsorships** tab contains all information for current fiscal year sponsorships.
  - Run the Salsa Advanced Query Annual Sponsorships
    - Go to Reports→Queries→Advanced Query Wizard

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•	٩	The Mary H. Kittredge Fund	The Mary H. Kittredge Fund		2019-2020 Annual	Summer Institute	
1	٩	Centerville Noon Optimist Club	Centerville Noon Optimist Club		2019-2020 Annual	Secondary Special Projects	
•	٩	Hartzell Propeller, Inc.	Hartzell Propeller, Inc.		2019-2020 Annual		Secondary Prog
1	٩	Cargill, Inc.	Cargill, Inc.		2019-2020 Annual	Preschool & Elementary Programs	
1	٩	The Schiewetz Foundation	The Schiewetz Foundation		2019-2020 Annual	Student Performance	
1	٩	Dr. & Mrs. Robert Goldenberg	Goldenberg	Debby	2019-2020 Annual		Secondary Prog
1	٩	Dr. & Mrs. Robert Goldenberg	Goldenberg	Debby	2019-2020 Annual	Secondary Programs	
1	٩	Jackie Lockwood	Lockwood	Jackie	2019-2020 Annual	Summer Institute	
1	٩	Anonymous	Kunesh	Sarah	2019-2020 Annual	Secondary Programs	
1	٩	Anonymous	Campbell Zopf	Mary	2019-2020 Annual	Secondary Programs	
1	٩	Zenith Advisory Group Jay A. Grandfield, CRPC Investment Advisor	Zenith Advisory Group		2019-2020 Annual		Secondary Prog 🖕
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- The raw data that comes out of Salsa will need to be manipulated.
  - Move data in Fund Name2 into the Fund Name column.
  - In the Donation Amount Column Convert to Number
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh both pivot tables.
- Ensure that the Summary data table total matches the All Sponsorships pivot table total.
- **Dev- Circle of Friends** tab contains all information for all gifts related to the Circle of Friends campaign.
  - Run the Salsa Advanced Query Circle of Friends
    - Go to Reports→Queries→Advanced Query Wizard

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## • Choose the Circle of Friends query

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1	🔍 Albert & Susan Asebrook	Asebrook	Albert	Circle of Friends		Secondary Programs	2018 CoF	2017-08-21	1,250.00	Pled ^
1	🔍 Mary Campbell Zopf	Campbell Zopf	Mary	Circle of Friends		Secondary Programs	2018 CoF	2017-08-21	1,250.00	Pled
1	Anonymous	Giering	John	Circle of Friends		Secondary Programs	2018 CoF	2017-08-21	1,250.00	Pled
1	🔍 Franz & Margaret Hoge	Hoge	Franz	Circle of Friends	Secondary Programs		2018 CoF	2017-09-06	1,250.00	Don
1	🔍 Janet Graul	Graul	Janet	Circle of Friends	Secondary Programs		2018 CoF	2017-09-15	1,250.00	Don
1	🔍 James Dicke	Crown Equipment Corporation		Circle of Friends	Secondary Programs		2021 CoF	2017-10-12	1,250.00	Don
1	🔍 Herbert L. Lemaster	Lemaster	Herbert	Circle of Friends		Secondary Programs	2018 CoF	2017-11-10	1,250.00	Pled
1	🔍 Dr. Christopher Danis	Danis	Christopher	Circle of Friends	Secondary Programs		2018 CoF	2017-11-16	1,250.00	Don
1	🔍 Marsha & Stephen Goldberg	Goldberg	Stephen	Circle of Friends	Secondary Programs		2018 CoF	2017-12-06	1,250.00	Don
1	🔍 Albert & Susan Asebrook	Asebrook	Albert	Circle of Friends	Secondary Programs		2018 CoF	2017-12-31	1,250.00	Don
1	🔍 Marsha & Stephen Goldberg	Goldberg	Stephen	Circle of Friends	Secondary Programs		2020 CoF	2017-12-31	1,250.00	Don
1	Monica Snow	Snow	Monica	Circle of Friends		Secondary Programs	2018 CoF	2018-01-14	1,250.00	Pled
1	Monica Snow	Snow	Monica	Circle of Friends	Secondary Programs		2018 CoF	2018-01-14	1,250.00	Don
1	🔍 Herbert L. Lemaster	Lemaster	Herbert	Circle of Friends	Secondary Programs		2018 CoF	2018-01-29	1,250.00	Don
1	Anonymous	Giering	John	Circle of Friends	Secondary Programs		2018 CoF	2018-03-24	1,000.00	Don
	Anonymous	Giering	John	Circle of Friends		Secondary Programs	2019 CoF	2017-08-21	1,250.00	Pled
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- The raw data that comes out of Salsa will need to be manipulated.
  - In the Donation Amount Column Convert to Number
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.
- **Dev- Unrestricted** tab contains all information for current fiscal year unrestricted gifts.
  - Run the Salsa Advanced Query Annual Unrestricted Individual Giving
    - Go to Reports→Queries→Advanced Query Wizard

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## • Choose the Annual Unrestricted Individual Giving query

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🗹 🔍 Robert & Jean Beecher	Beecher	Jean	2019-2020 Annual	Unrestricted		2019 MM41819 A	
🗹 🔍 Mary Campbell Zopf	Campbell Zopf	Mary	2019-2020 Annual	Unrestricted		In Memory Of	
🗹 🔍 Drs. Margaret Dunn & William Spohn	Spohn	William	2019-2020 Annual	Unrestricted		2019 MM41819 A	
🗹 🔍 Lawrence J. Litscher	Litscher	Lawrence	2019-2020 Annual	Unrestricted		2019 MM41819 A	
🗹 🔍 John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718	
🗹 🔍 Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718	
🗹 🔍 Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718	
🗹 🔍 Tom & Cindy Clark	Clark	Thomas	2019-2020 Annual	Unrestricted		2019 MM41819 A	-
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- The raw data that comes out of Salsa will need to be manipulated.
  - In the Donation Amount Column *Convert to Number*
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment or Recurring Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot tables
- Ensure that the color coding is applied appropriately, and the Summary data table total matches the pivot table total.
- **Dev- Restricted** tab contains all information for current fiscal year individual gifts restricted to a particular program area.
  - o Run the Salsa Advanced Query Annual Restricted Individual Giving
    - Go to Reports→Queries→Advanced Query Wizard

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ID 2397 2479 2394 2393 2391	Created         Updated           08/07/2019         03/03/202           08/27/2019         03/03/202           08/05/2019         03/03/202           08/05/2019         03/03/202           08/05/2019         03/03/202           08/05/2019         03/03/202	Author     DWarvel     DWarvel     DWarvel     DWarvel     DWarvel     DWarvel	<b>Type</b> Donation Donation Donation Donation	Show Last Run Mar 3, 2020, 11:48:35 AM Mar 3, 2020, 11:42:38 AM Mar 3, 2020, 11:25:34 AM Mar 3, 2020, 11:12:43 AM	<ul> <li>To v entries</li> <li>Smart Group</li> </ul>	Description Annual Restricted Individual Giving Annual Unrestricted Individual Giving Circle of Friends Annual Sponsorships Annual Grants	Annual Restricted Individual Giving
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- Click Next
- After the results have populated, click Convert to Spreadsheet

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- <b>4</b>	₽				Step 3:	Preview, Exclude,	and Modify Data.				
		List As Name	La	storOrgName	First Name	Campaign Name	Fund Name	Fund Name	Appeal Name	Re	
	1	🔍 Stefan & Sharon Neumeister	Ne	aumeister !	Stefan	2019-2020 Annual	Preschool & Elementary Programs		Unsolicited		
	1	🔍 Tom & Cindy Clark	Cla	ark	Thomas	2019-2020 Annual	Student Performance		2019 MM41819 A		
	1	🔍 Tim & Susie Brabender	Bra	abender -	Timothy	2019-2020 Annual	Student Performance		Personal Ask		
	1	🔍 Tra & Susan Thomsen	Th	iomsen l	Ira	2019-2020 Annual		Student Performance	Angel Tickets		
	1	🔍 PJ & Amy Wagner	Wa	agner /	Amy	2019-2020 Annual	Student Performance		Angel Tickets		
	1	Rosemany Asebrook	As	ebrook I	Rosemary	2019-2020 Annual	Student Performance		Angel Tickets		
	1	Alison Walker	Wa	alker /	Alison	2019-2020 Annual	Student Performance		Angel Tickets		
	1	🔍 Angie Wirick	Wi	irick /	Angie	2019-2020 Annual	Student Performance		Angel Tickets		
	1	🔍 Daniel Hoge	Ho	xge l	Daniel	2019-2020 Annual	Student Performance		Angel Tickets		
	1	🔍 Andy Wade	Wa	ade )	Andy	2019-2020 Annual	Student Performance		Angel Tickets		
	1	🔍 Martha & Dale Shields	Sh	iields I	Martha	2019-2020 Annual		Student Performance	Unsolicited		
	1	🔍 Martha & Dale Shields	Sh	iields I	Martha	2019-2020 Annual	Student Performance		Unsolicited		
	1	🔍 Dave & Stephanie Dickerson	Die	ckerson I	Dave	2019-2020 Annual	Student Performance		Angel Tickets		
	1	Paul Rogers	Ro	igers I	Paul	2019-2020 Annual	Student Performance		Angel Tickets		
	1	🔍 Martha & Dale Shields	Sh	iields I	Martha	2019-2020 Annual	Student Performance		Unsolicited		
	1	🔍 Mary Campbell Zopf	Ca	impbell Zopf 🛛 I	Mary	2019-2020 Annual	Student Performance		Angel Tickets		
	1	🔍 Rosalie Catalano & Paul Ginst	ourg Ca	italano I	Rosalie	2019-2020 Annual	Student Performance		Angel Tickets	<b>.</b>	
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- The raw data that comes out of Salsa will need to be manipulated.
  - Move data in Fund Name2 into the Fund Name column.
  - In the Donation Amount Column Convert to Number
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh both pivot tables.
- Dev- Social & Show tab contains all information for current fiscal year Social & Show gifts and event fees.
  - Run the Salsa Advanced Query All Annual Social & Show Gifts
    - Go to Reports→Queries→Advanced Query Wizard



Choose the All Annual Social & Show Gifts query

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2397	08/07/201	9 03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:50:35 AM		Annual Restricted Individual Giving 🔓	Annual Social & Show Gifts
2479	08/27/201	9 03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:42:38 AM		Annual Unrestricted Individual Giving	
2394	08/05/201	9 03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:35:34 AM		Circle of Friends	
2393	08/05/201	9 03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:24:29 AM		Annual Sponsorships	
2391	08/05/201	9 03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:12:43 AM		Annual Grants	
2533	09/26/201	9 03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:58:37 PM		Current and Previous Year Unrestricte	ed Individual Giving- for Dashboard
2395	08/05/201	9 03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:42:33 PM		Endowment Campaign for Educator E	xcellence Gifts
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2705	12/10/201	9 02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:43:19 AM	4	Annual Benefit Dinner	
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• Check that the Fund Items Fund ID and Pledge Fund Items Fund ID is for the appropriate year. If the year needs to be changed, double click each and choose the appropriate year.



- Click Next
- After the results have populated, click Convert to Spreadsheet

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Campaign Name Fund 1 Special Events 2020 5 Special Events 2020 5	Name         Fund Name           Social & Show         -           Social & Show         -	Appeal Name Social Sponsor- GOL Social Sponsor- GOL Social Sponsor- BRO Social Sponsor- BRO
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- The raw data that comes out of Salsa will need to be manipulated.
  - In the Donation Amount Column Convert to Number
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.
- **Dev- Benefit Dinner** tab contains all information for current fiscal year Social & Show gifts and event fees.
  - o Run the Salsa Advanced Query Annual Benefit Dinner
    - Go to Reports→Queries→Advanced Query Wizard

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## • Choose the Annual Benefit Dinner query

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2396	08/06/2019 03/03/202	0 DWarvel	Donation	Mar 3, 2020, 11:57:33 AM	4	All Annual Social & Show Gift Annual Benefit Din	ner
2397	08/07/2019 03/03/202	0 DWarvel	Donation	Mar 3, 2020, 11:50:35 AM	4	Annual Restricted Individual Giving	
2479	08/27/2019 03/03/202	0 DWarvel	Donation	Mar 3, 2020, 11:42:38 AM	4	Annual Unrestricted Individual Giving	
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2393	08/05/2019 03/03/202	to Dyvarver	Donation	Mar 3, 2020, 11:24:29 AM	4	Annual Sponsorships	
2393 2391	08/05/2019 03/03/202 08/05/2019 03/03/202	0 DWarvel	Donation	Mar 3, 2020, 11:24:29 AM Mar 3, 2020, 11:12:43 AM	1	Annual Sponsorships Annual Grants	
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 Check that the Fund Items Fund ID and Pledge Fund Items Fund ID is for the appropriate year. If the year needs to be changed, double click each and choose the appropriate year.



- Click Next
- After the results have populated, click Convert to Spreadsheet

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1	ACCO Brands	ACCO Brands		Special Events		2020 Benefit Dinner	BD Sponsor	
	St. Ron Anderson and Robb Sloan Anderson	Anderson	Ronald	Special Events	2020 Benefit Dinner		BD Silver Tkt	
1	🔍 Dr. Ron Anderson and Robb Sloan Anderson	Anderson	Ronald	Special Events	2020 Benefit Dinner		BD Silver Tkt	
1	🔍 Bill & Sonnie Kasch	Kasch	Sonnie	Special Events	2020 Benefit Dinner		BD Silver Tkt	
1	🔍 Anonymous	Campbell Zopf	Mary	Special Events	2020 Benefit Dinner		BD Sponsor	
1	🔍 Pam Houk	Houk	Pam	Special Events	2020 Benefit Dinner		BD Gold Tkt	
1	🔍 Steven & Paula Reed in Honor of Susan & Bud Zupp	Reed	Steven	Special Events	2020 Benefit Dinner		BD Gift	
1	🔍 Doug & Ann Almoney	Almoney	Аппе	Special Events	2020 Benefit Dinner		BD Silver Tkt	
1	🔍 Mark & Marilyn Dues	Dues	Marilyn	Special Events	2020 Benefit Dinner		BD Silver Tkt	
1	🔍 Meagan Geeting in Honor of Bud & Susan Zupp	Geeting	Meagan	Special Events	2020 Benefit Dinner		BD Gift	
-	🔍 Virginia & Edman Gray	Gray	Edman	Special Events	2020 Benefit Dinner		BD Gold Tkt	
1	🔍 Julia D. Hobart	Hobart	Julia	Special Events	2020 Benefit Dinner		BD Gold Tkt	
	🔍 Darren McGarvey & Darrell Bickley	McGarvey	Darren	Special Events	2020 Benefit Dinner		BD Silver Tkt	
1	🔍 Thom & Penni Meyer	Meyer	Thomas	Special Events	2020 Benefit Dinner		BD Platinum Tk	-

- The raw data that comes out of Salsa will need to be manipulated.
  - In the Donation Amount Column *Convert to Number*
  - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.

Ad Hoc Reports?

## Gifts

Cash/Check Gifts

**Credit Card Gifts** 

**Recurring Gifts** 

**Recurring Payments** 

Pledge

Pledge Payments

**Gifts in Kind** 

**Dayton Foundation Gifts** 

#### Endowments

An endowment is an invested gift that grows over time by accruing interest. There are three types of gifts related to endowments:

- donations given to establish an endowment,
- donations given towards an established endowment, and
- distributions from an established endowment.

While endowments are recorded within the development database they are reported on separately, regardless of how the endowment distributions are to be utilized.

**Donations given to establish an endowment or towards an established endowment** are not specific to a year. When they are entered into Salsa they are entered within the constituent record of whom made the donation under the campaign of Endowment (see <u>Campaigns</u>). The fund to be used will match the name of the endowment (e.g., Suzy and Pino Bassani Endowment Fund). The appeal will change based on how/why the donation was made (see <u>Appeals</u>).

**Endowment distributions** are specific to a year. When they are entered into Salsa they are entered within the constituent record of the name of the endowment (e.g., Suzy and Pino Bassani Endowment Fund) under the campaign of Endowment (see <u>Campaigns</u>). The fund will reflect the area in which the gift is to be designated (see <u>Funds</u>). The appeal will be 20XX Endowment Distributions based on the year in which the gift is to be used (see <u>Appeals</u>).

## Scholarships

There are three types of gifts related to scholarships:

- donations given to establish a scholarship,
- donations given towards an established scholarship, and
- distributions from an established scholarship.

While scholarships are recorded within the development database they are reported on separately, regardless of how the scholarship distributions are to be utilized.

**Donations given to establish a scholarship or towards an established scholarship** are not specific to a year. When they are entered into Salsa they are entered within the constituent record of whom made the donation under the campaign of Scholarship (see <u>Campaigns</u>). The fund to be used will match the name of the scholarship (e.g., Vanderbeek Scholarship Fund). The appeal will change based on how/why the donation was made (see <u>Appeals</u>).

**Scholarship distributions** are specific to a year. When they are entered into Salsa they are entered within the constituent record of the name of the scholarship (i.e. Vanderbeek Scholarship Fund) under the campaign of Scholarships (see <u>Campaigns</u>). The fund used will match the name of the scholarship (e.g., Vanderbeek Scholarship Fund). The appeal will be 20XX Scholarship Distributions based on the year in which the gift is to be used (see <u>Appeals</u>).

# **Campaigns, Funds, and Appeals**

Campaigns, funds, and appeals allow the organization to categorize gifts in a meaningful way, permitting data to be easily analyzed and accessed. Muse Machine utilizes each of these categorizations in specific ways. **Each gift requires a campaign, fund, and appeal**. If you have a question as to the proper designation of a gift, consult the procedures manual or contact the Director of Development.

## Campaigns

Campaigns are the large umbrella under which gifts are organized, representing the **overall objective for fundraising**. There is little variation in the use and number of campaigns. Each year a new annual campaign is to be created.

Name	Description
2019-2020 Annual	Gifts made towards FY 2019-20 and
	not attributed to a specific campaign
	effort. Generally encompasses all
	gifts, grants, and sponsorships used to
	help cover programmatic and
	operational expenses while more
	targeted campaigns focus on specific
	projects and causes.
Circle of Friends	Gifts made in response to campaign
	efforts to generate annual funding for
	four Dayton area middle schools.
Endowment	Donations given to establish an
	endowment or towards an established
	endowment.
The Endowment Campaign for	Gifts made in response to campaign
Educator Excellence	efforts to generate funds for teacher
	programs and trainings.
Scholarship	Donations given to establish a
	scholarship or towards an established
	scholarship.
Special Events	Gifts given in connection with a
	special event (i.e. Benefit Dinner,
	Social & Show, and other small
	community events).

## Funds

Funds are the way in which the organization designates the financial purpose of the gift—it tells where the gift will be used and/or how the money will be spent. **Each gift requires a fund**. If you have a question as to what fund should be assigned to a gift contact the Director of Development.

Name	Description
2020 Benefit Dinner	Gifts given in connection with the 2020
	Benefit Dinner.
2020 Social & Show	Gifts given in connection with the 2020
	Social & Show.
ATTS	Gifts made in support of Advanced
	Teacher Training Seminar (ATTS).
Preschool & Elementary Programs	Gifts made in support of preschool
	and elementary programs.
Secondary Programs	Gifts made in support of secondary
	programs.
Secondary Special Projects	Gifts made to special projects and
	performances (i.e. Feet Speak!,
	Making Art, Engaging Community).
Student Performance	Gifts made in support of student
	performances (i.e. winter musical and
	summer concert).
Summer Institute	Gifts made in support of the Summer
	Institute.
Unrestricted	Gifts made to general operating (i.e.
	not designated to a specific program
	area or special event).
Suzy and Pino Bassani Endowment	Gifts made towards the Suzy and Pino
Fund (one example)	Bassani Endowment Fund.
Vanderbeek Scholarship Fund (one	Gifts made towards the Vanderbeek
example)	Scholarship Fund.

## Appeals

Appeals are the way in which the organization designates the source of the gift. Why is the donor giving? There is great variation in the use and number of appeals. Most reporting needs are based upon the appeal, so it is important to designate the correct appeal. Each event or appeal to the community will require a new appeal.

Name
2020 Circle of Friends
2020 Endowment Distribution
2020 MM31920 A
2020 Scholarship Distribution
BD Gift
BD Gold Tkt
BD Platinum Tkt
BD Silver Tkt
BD Sponsor
Board Giving
Company Payroll Deduction
Grant Application
In Honor of
In Memory of
Online Donation
Percentage of Sales
Personal Ask
Social
Social & Show
Social Gift
Sponsorship Proposal
Unsolicited

## **Donor Acknowledgement Letters**