DONOR ENGAGEMENT

Major Giving in EveryAction

Bonterra™

Meet your Trainer...

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Training Specialist

Donor Engagement

EveryAction

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Agenda

1. Grant Management Overview
2. Planned Giving Overview
3. Moves Management Action Plans
4. The Major Giving Portfolio

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Grant Management

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Grant Management Overview

Within EveryAction, our grant tools allow you to:

- Track the status of the grant
- Record which actions are required next
- Remind you of follow-ups with grantmakers
- Add your deliverables so your entire plan is in one place
- Monitor progress against your fundraising budget by tracking income projected and received

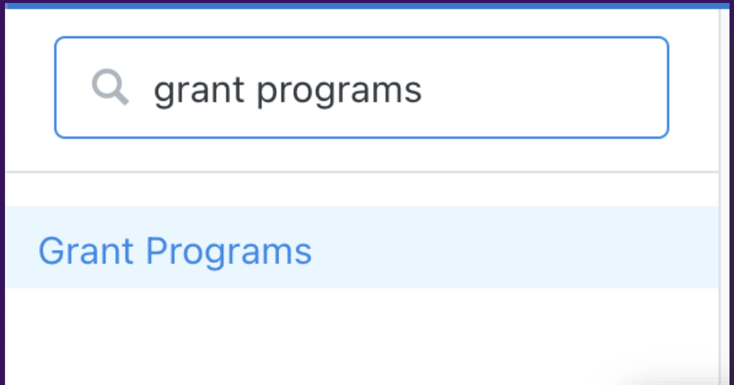
This way, it is possible to monitor the entire solicitation cycle from the first identification of a potential funder to final stewardship of a grant award by creating a **Grant Plan.**

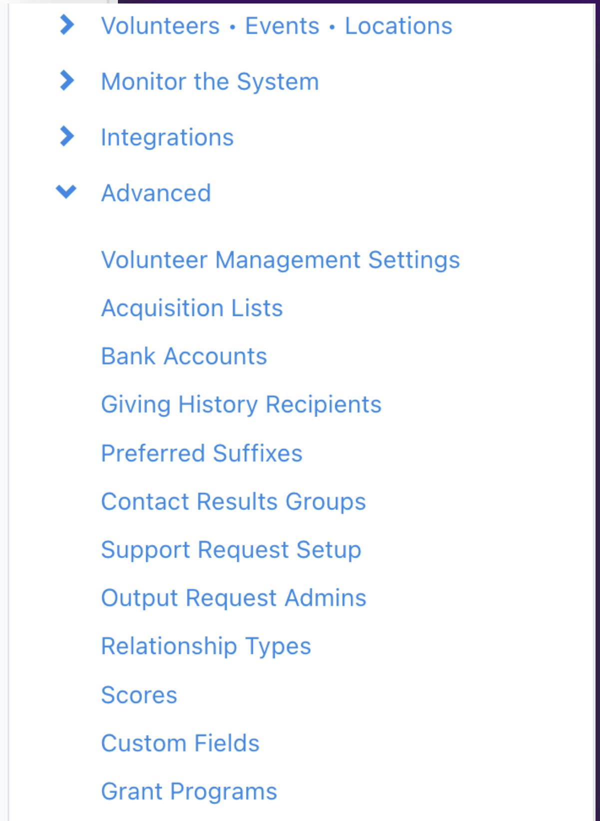
Creating Grants on Records

A significant note to make is that **grants can only be recorded on organizational records.**

This is intentional, specifically to signify that a company/foundation/organization has provided a statement of intent or letter to fund your mission.

The first step in creating grants within EveryAction is to access the **Grant Programs** menu, which can be found under the Search for a Page tool, or under the **Administrative Menu > Advanced > Grant Programs**



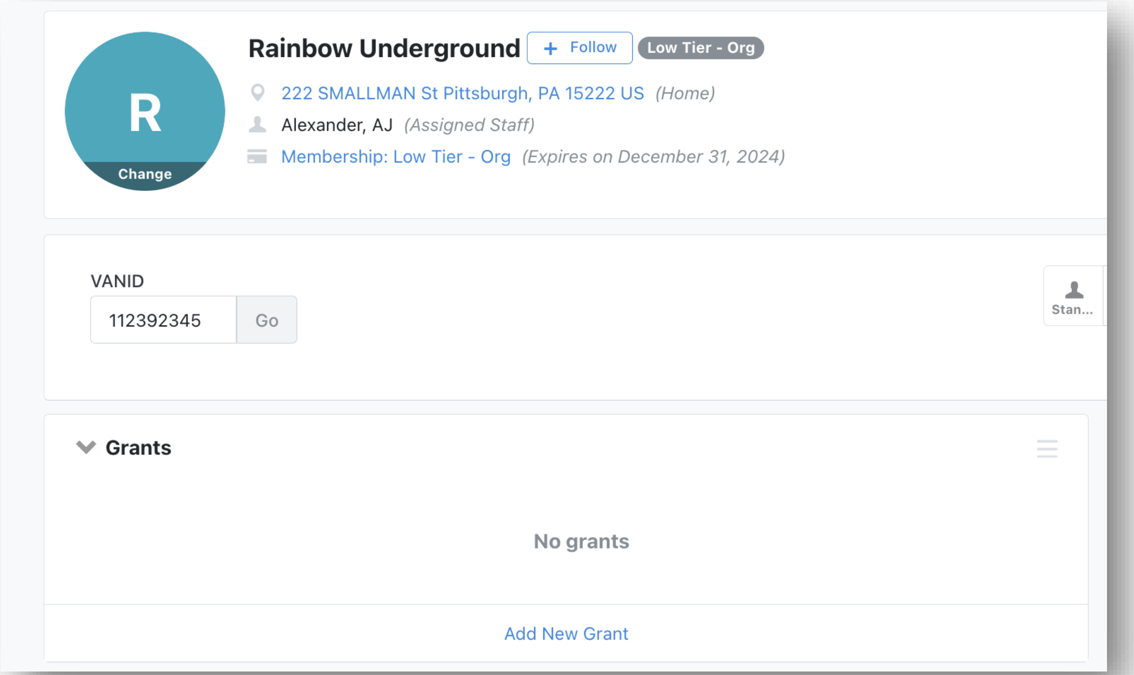


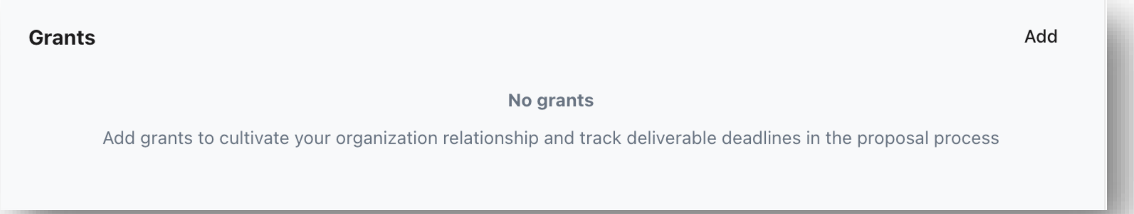
Grant Creation Tools

Creating Grant Records

Once a letter of intent or other form of request has been received from a particular organization and a Grant Program has been configured in EveryAction, grants can then be added to contact records.

In the All Details view, there will be a specific drawer within Organizations to allow grant creation, whereas this section is shown in the “Financial” tab on the Contact Record view, then choose to **“Add” or “Add New Grant”.**



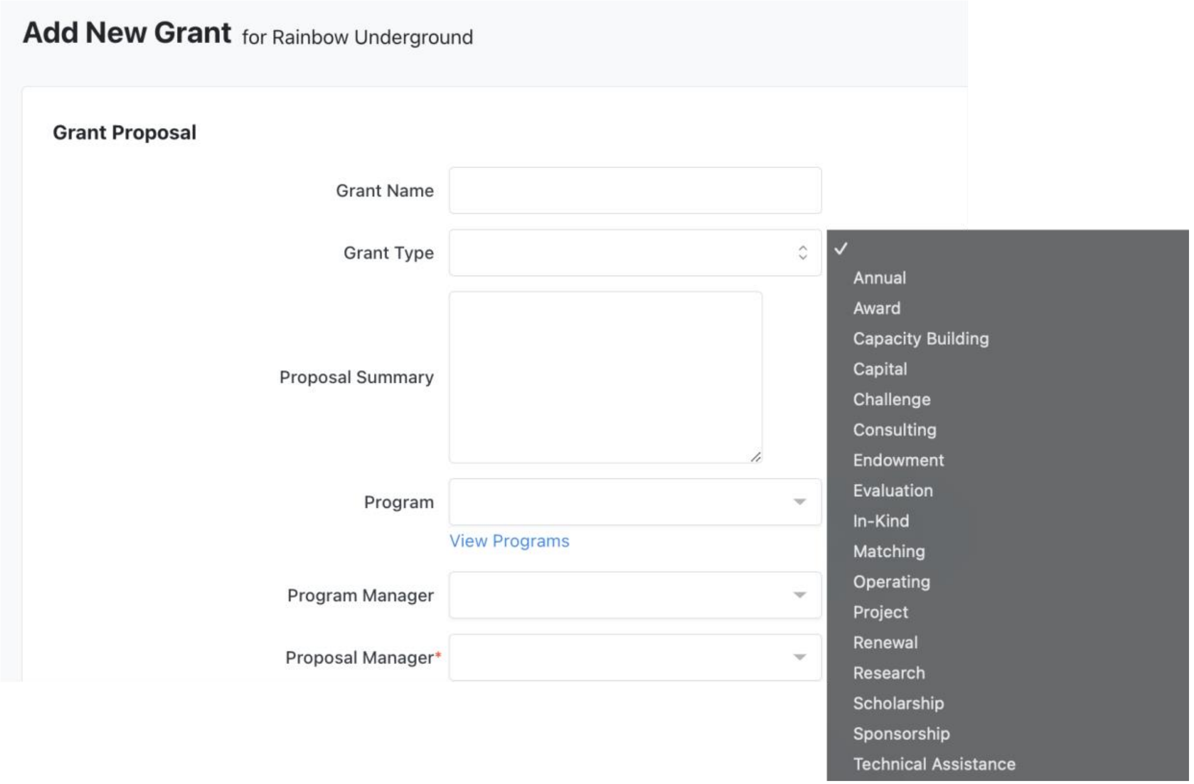


Creating Grants (continued)

In creating a grant, you can assign:

- A name
- A specific Grant Type (pre-configured in EA)
- A proposal summary
- A Grant Program
- A program manager
- An assigned Proposal Manager (required)
    - The grant **must be** assigned to an EA User for management.

Additional fields like secondary staff, requested and projected amounts, as well as award dates can be assigned through this first step.

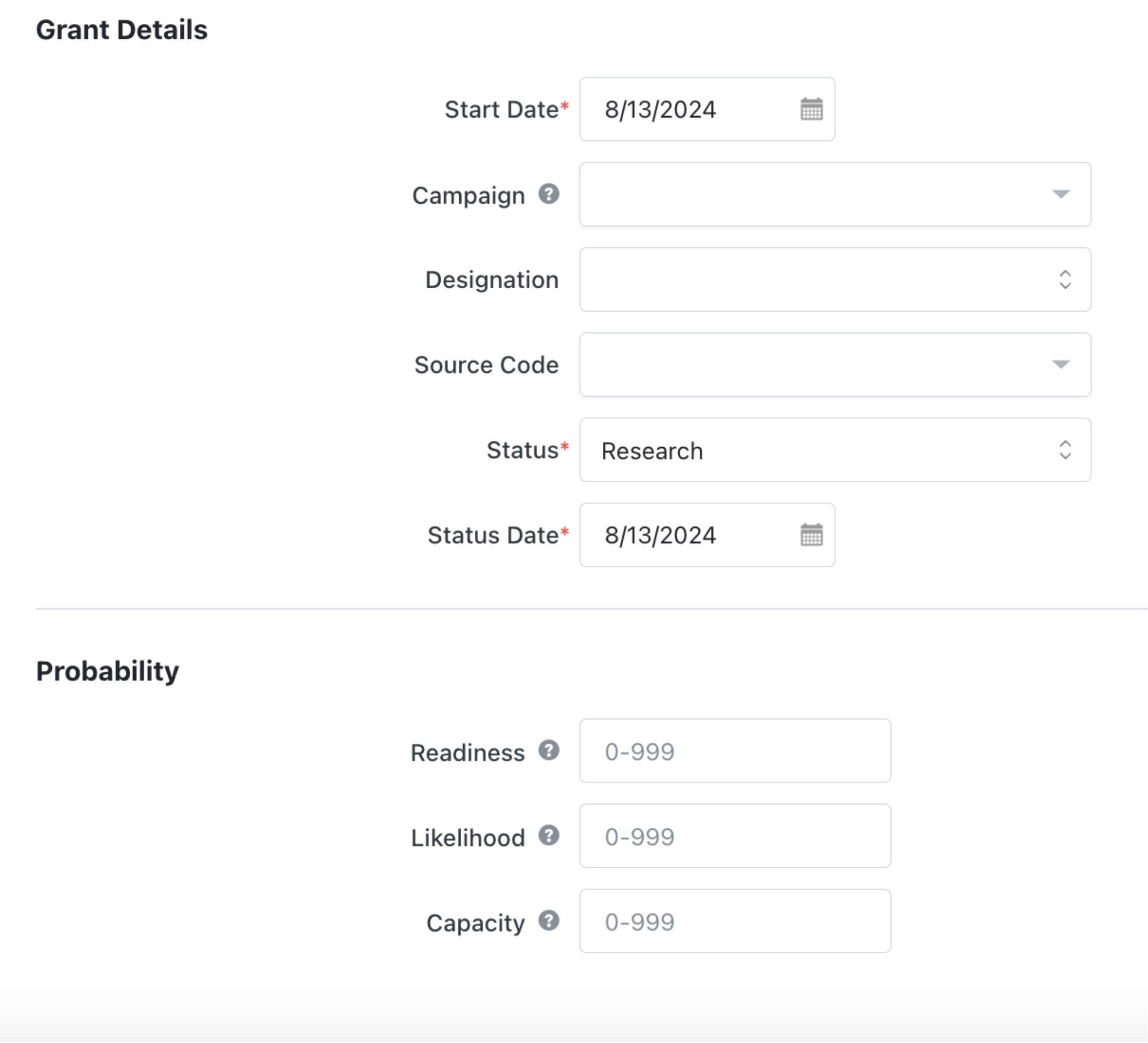


Grant Details

Like any other financial tracking tool in EveryAction, grant tracking will allow assignment of specific campaigns and source codes, as well as what the expected designation the incoming funds will be allocated to.

Fields such as Start Date, Status, and Status Date are required in this section. Based on the communications with your grantor, the Statuses should reflect whereabouts the grant is in terms of intent to stewardship.

The probability of delivery can also be estimated on a scale of your choosing but is not required for submission. These probabilities can, however, assist in reporting and reviewing all submitted grant proposals in perpetuity.



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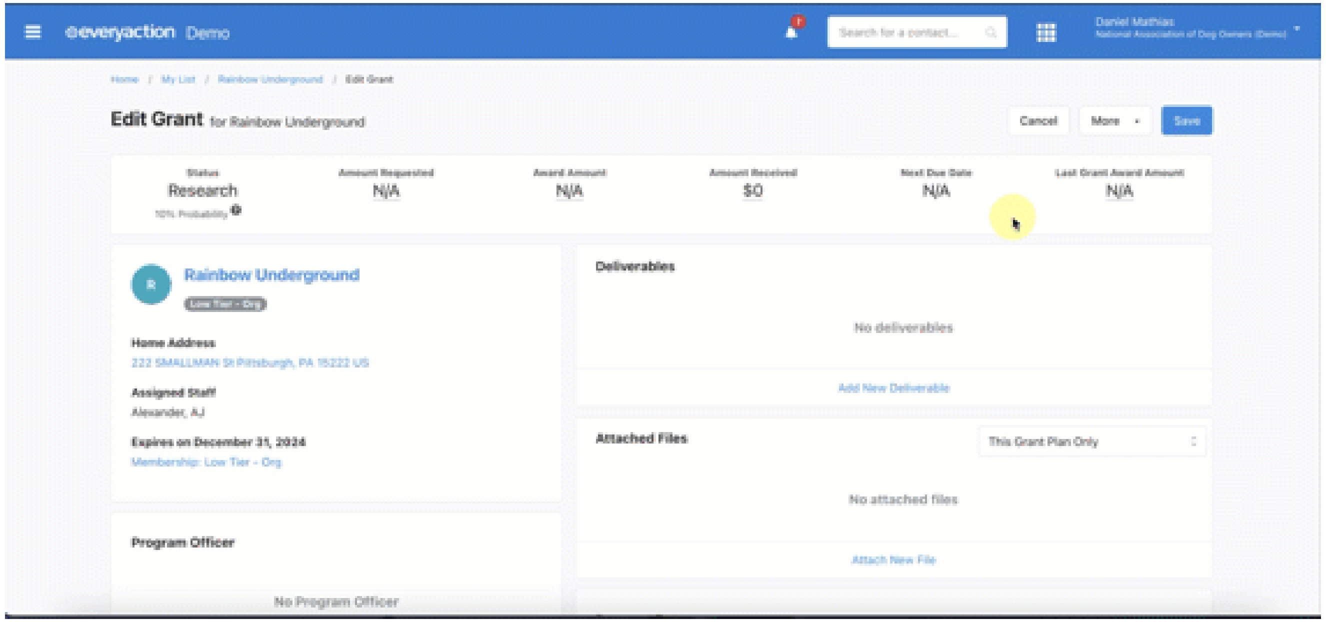
The Edit Grant Screen

After the initial details of a grant are entered, and the grant is saved, the **Edit Grant** screen will be displayed.

This page will give a full overview of the Organization and its contacts, as well as assigned staff, and any related contact fields regarding the grant fulfillment process.

This overview includes a snapshot view including details like fulfillment probability, due dates, requested amounts, and award amounts.



Building to Awards

Within the Edit Grant screen, we have multiple subheadings dedicated to each process involved in Grant stewardship.

Deliverables

Within Deliverables, we're able to keep track of all the deadlines for materials that you've agreed to send to the grantor.

When you **Add New Deliverable**, you can create a follow-up record with the due date for that piece.

You can then attach your draft letter or proposal to the follow-up or upload your final copy once the follow-up is completed.

Historical Outreach Tracking

Between the segments for:

- Attached Files
- Notes
- Follow Ups
- Contact History

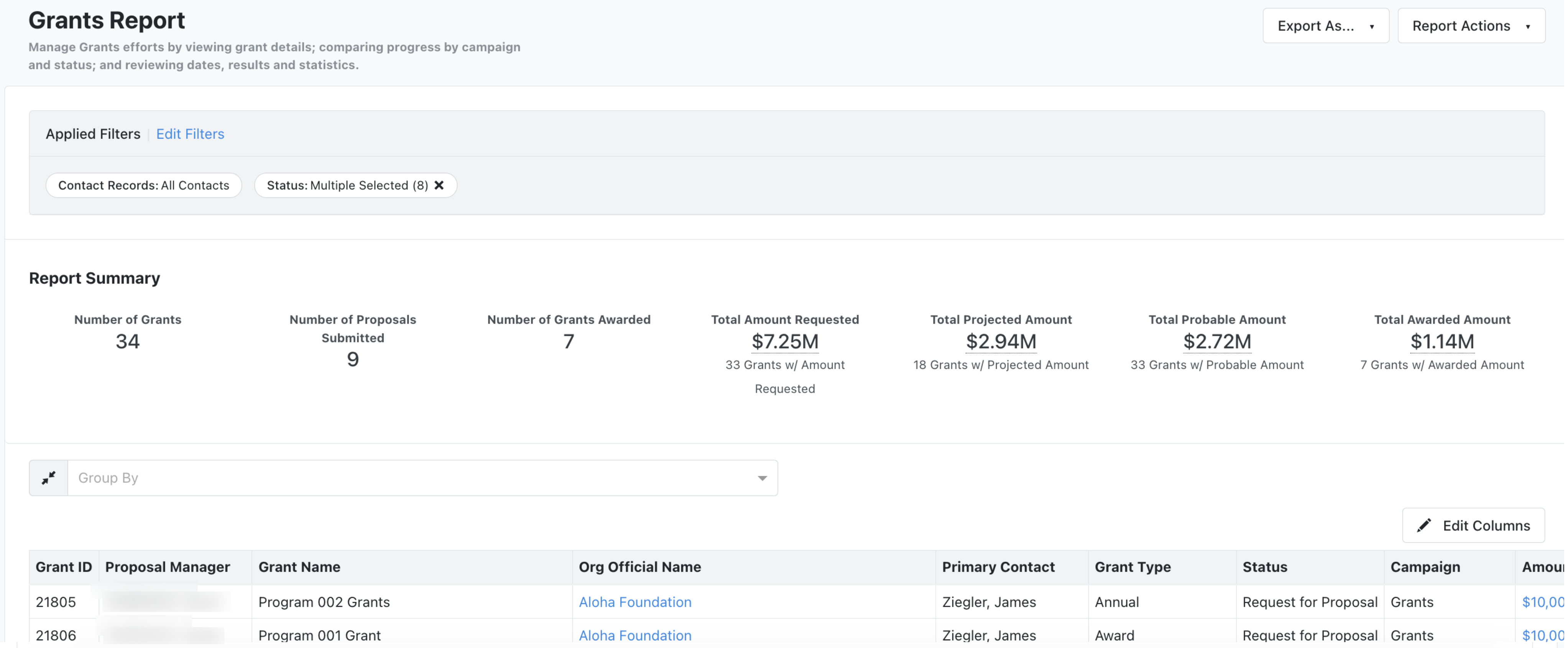
This allows you to provide a full start-to-finish overview of what steps were taken in communicating with the grantor in terms of what was done internally as well as what was received externally, all of which can be reported on.

Payment Details

From the Edit screen, a historical record of payment dates can be seen for the grant in review, and one or more Pledges can also be linked to your grant as well.

The Grants Report

As with other reports in EveryAction, the Grants report is presented by default showing the entire catalogue of grants stored within the database currently, but can be customized, saved, and scheduled for ease of use for any Proposal Managers that may need regular updates on particular grant statuses.



Planned Giving

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Planning now for future growth

Planned Giving allows you to manage an individual's entire gift planning process from start to finish, including:

- Marketing planned giving opportunities
- Tracking information requests from supporters
- Managing every stage of cultivation
- Building a history (and details) of communications to the supporter,

Tasks can be given to yourself or other **Planned Giving** officers for follow-up and will allow you to stay up-to-date on all the details that need to be tracked and managed once a planned gift has been established.

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Types of Planned Giving

There are four Types of Planned Gifts you can manage in EveryAction:

Bequests - direct contributions to your organization and are the most common type of Planned Gift. These contributions can come from:

- Wills
- Bequeathed Assets
- Retirement Fund Remainders
- Life Insurance

Trusts **-** assets that are managed as part of an external trust, rather than being given directly to your organization.

There are four **Trust Types**:
- Unitrust
- Annuity Trust
- Remainder Trust
- Charitable Lead Trust

There are five **Trust Categories**:
- Unitrust
- Regular Trust
- Net Income Trust
- Net Income Trust with Make-Up
- Charitable Remainder Trust

Charitable Gift Annuities - gifts made to your organization in return for fixed income payments over time with a tax deduction granted at the time of the gift. Usually, your organization then receives the remaining value of the asset upon the death of the donor.

A **Pooled Income Fund** **-** a trust that is established and maintained by a public charity. The pooled income fund receives contributions from individual donors that are commingled for investment purposes within the fund.

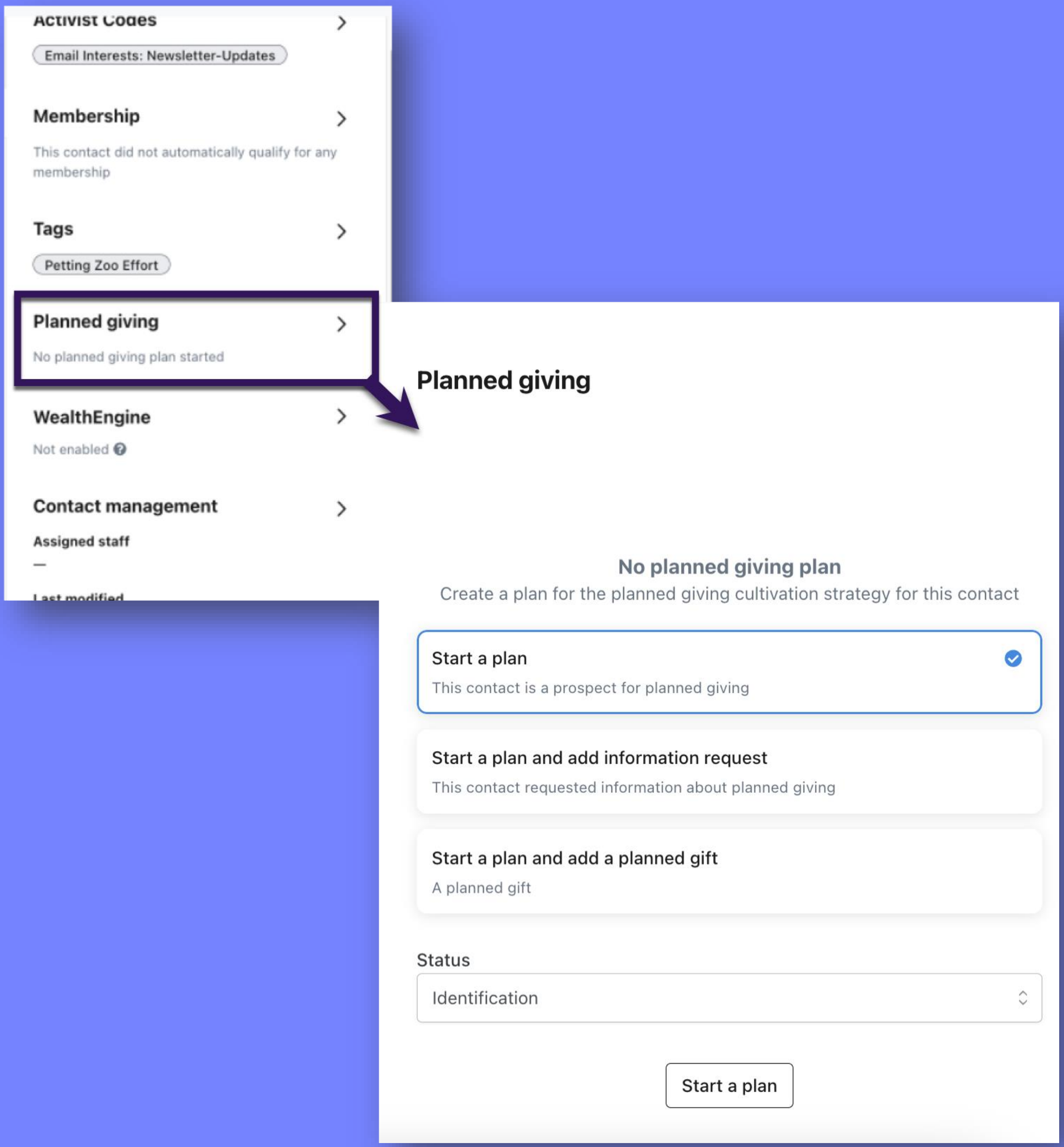
Configuring a Planned Gift

As a preface, the **Planned Giving** section on the contact record is *only* available in Contact Record View currently.

At the right side of the screen, we'll be able to click the carat next to **Planned Giving** to open our side panel and starting our plan.

We'll be given options to:

- Start A Plan
  - This is the most basic plan, for prospects
- Start A Plan And Add Information Request
  - This indicates a contact has reached out directly about engaging in planned giving with you.
- Start A Plan and Add A Gift
  - This is a full initiation of a gift to you.



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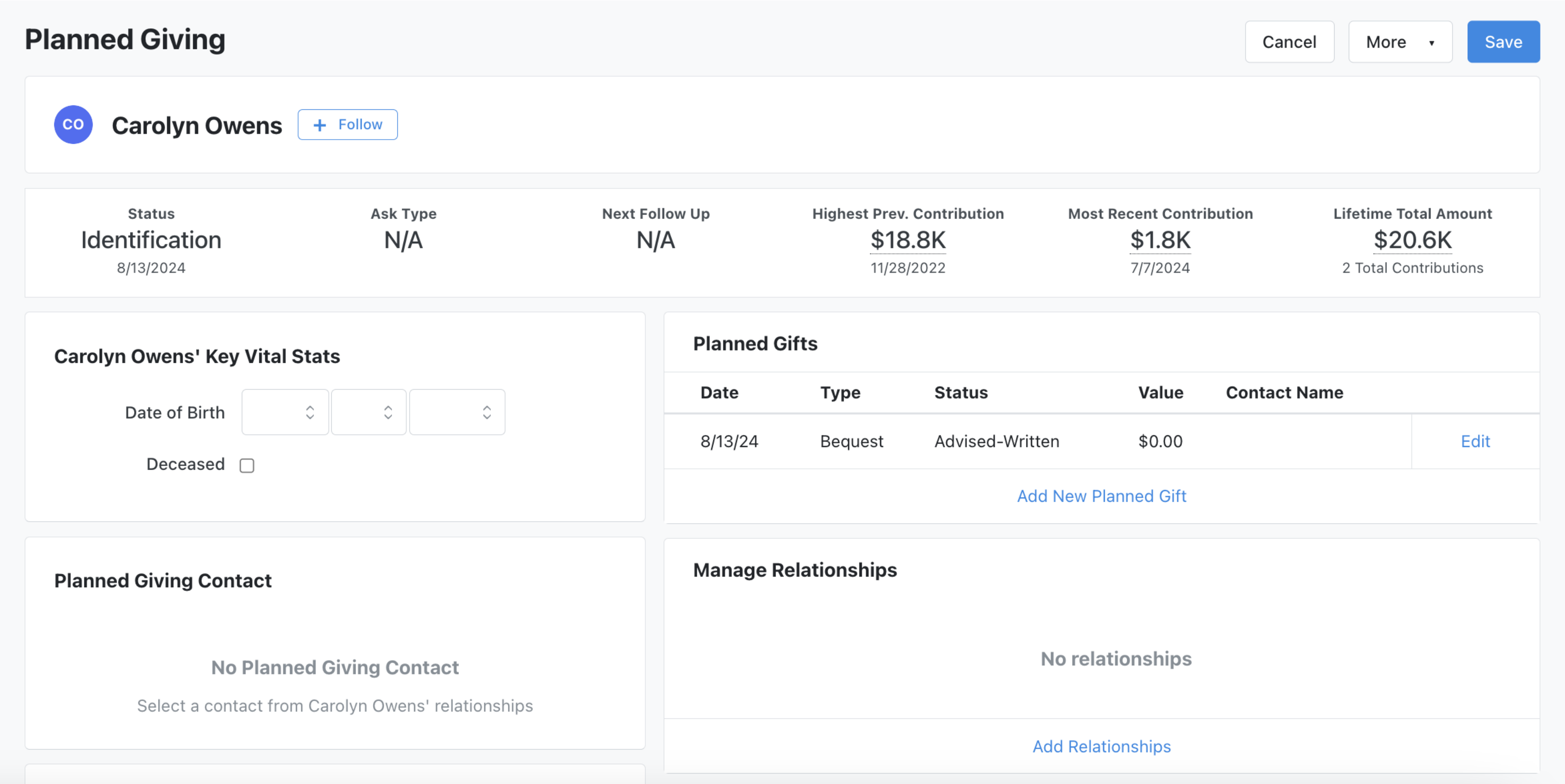
The Planned Giving dashboard

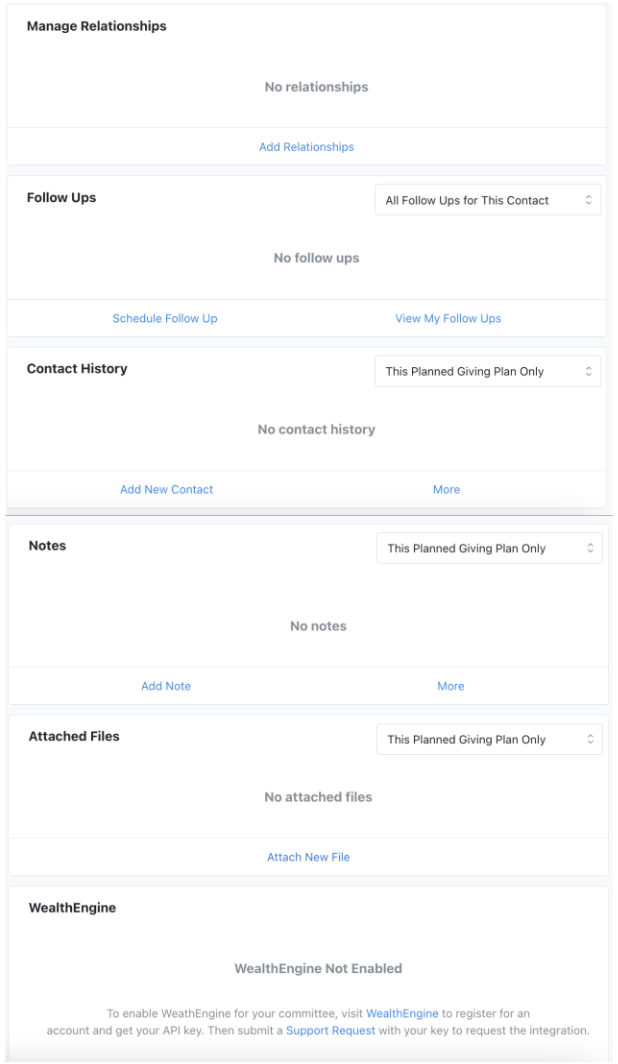
Like creating Grants, the Planned Giving dashboard is meant to act as a hub for all details of an individual's plan to support your organization much further down the road.



The Planned Giving dashboard (cont'd)

Within the sections for Planned Giving Contact, Manage Relationships, Contact History, and Activist Codes, we can establish a deeper understanding of who our contact is, who may be acting as their power of attorney/executor, as well as their contribution and WealthEngine data (if enabled).

This tool also allows for all Notes, Files, and Follow Ups to be centrally housed, meaning our dashboard can act as a full picture of the interactions made with the contributing contact.



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Adding Bequests

When configuring bequests, we'll need details specific to:

- The date of the bequest
- Its current status
  - Advised Written
  - Advised Verbal
  - In Probate
  - Matured
  - Completed
- The amount of the bequest and its source value, whether specified in a will or if it is a percentage of the estate's value.
- Assets included in the will, if provided
- An assigned internal staff member for this bequest
- A contact for the deceased

Additional details such as beneficiaries, existing contributions to be linked to the bequest, intended distribution details, and documentation may also be added.

Adding Trusts

When configuring trusts, we'll need details specific to:

- The type of trust
- An IRS Trust ID
- The trust category
- Status
- Status Date
- Principal
- Trust Terms
- Estimated Maturity
- Payout Type, Terms and Start Date
- Assigned Staff
- Trust Contact

Contributions within EveryAction, distribution details, trust values (based on market and maturity date), as well as attachments and beneficiaries can also be linked to trust gifts as well.

Adding Gift Annuity

Similar to trusts, we'll need details specific to:

- Gift Annuity Type
- Status & Status Date
- Gift Amount & Date
- Inception Date
- First Payment Date
- Rate
- Assets, listed
- Reserve & Liability
- Assigned Staff
- CGA Contact

Contributions within EveryAction, distribution details, notes on the annuity, as well as attachments and beneficiaries can also be linked to these records as well.

Adding Pooled Income Funds

Finally, for Pooled Income Funds, we'll need details specific to:

- The Fund Type
- Status & Status Date
- Total Contribution Amount
- Units Held & Total Units in Fund
- Term
- Payment Frequency & Start Date
- Assigned Staff
- Fund Managing Contact

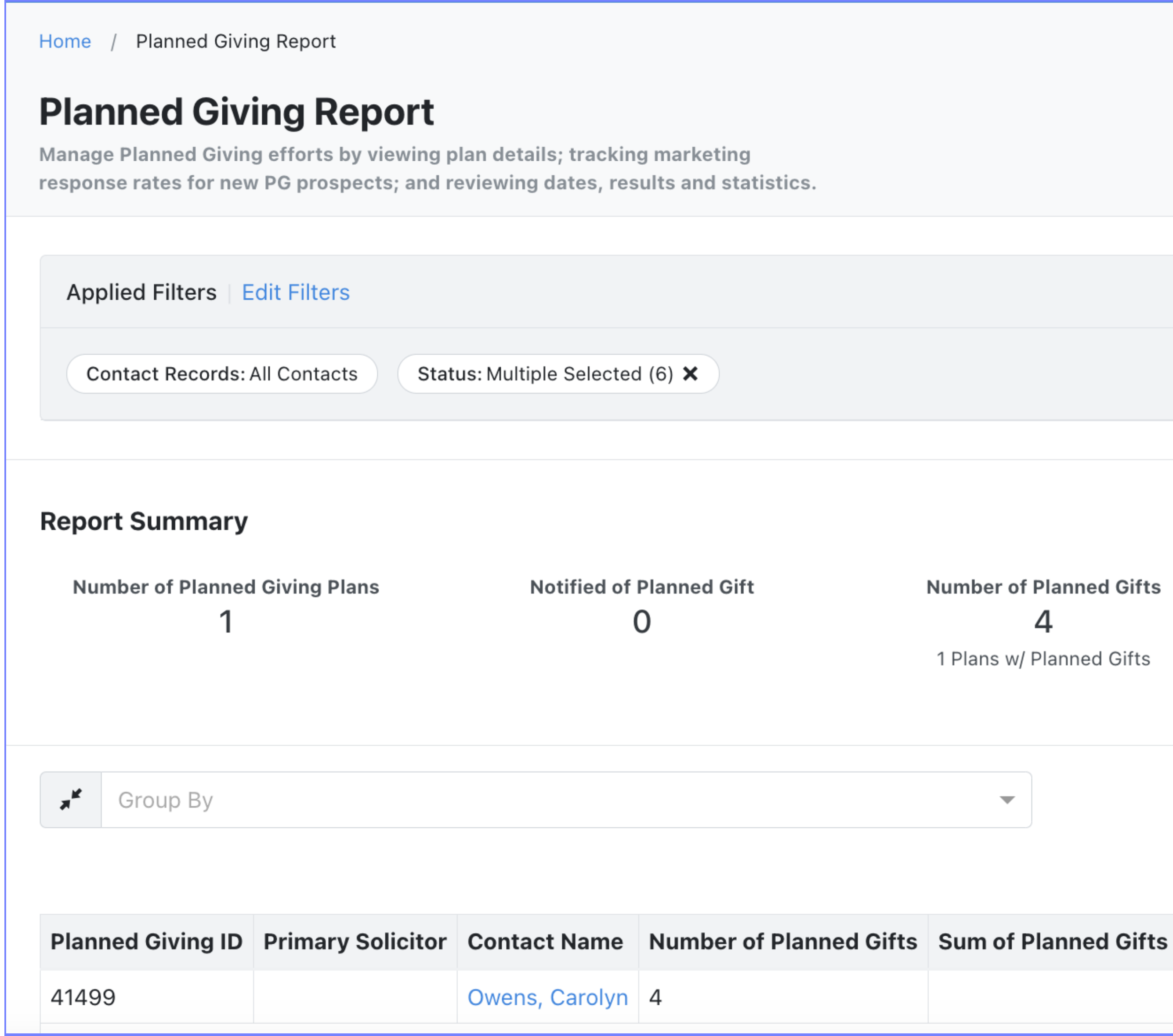
And as with other Planned Giving, existing contributions, distribution details, notes, attachments and beneficiaries can also be linked to these records.

The Planned Giving Report

As Planned Giving is considered a centralized function in EveryAction, each plan can contain multiple gifts.

When running the Planned Giving Report, it is expected that the results would be shown as aggregate totals *per plan*, meaning that if a contact has several gifts under the same plan, we will only be shown a grand total and sum of those gifts under an individual plan.

However, links within this report (under the Status field) will allow you to enter the planned gift to review all pertinent details.



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Moves Management Action Plans

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Appreciating the Journey

When soliciting contacts to go above and beyond to become major donors, having a full history of all interactions and strategies used along the way can be an important asset to any organization for subsequent asks.

The **Moves Management Action Plans** (MMAPS) within EveryAction are meant to track every waypoint or milestone of your journey to ferry your most philanthropic donors toward being the pillars of your fundraising efforts.

Playing Steps Ahead

With Moves Management acting as:

- Identification of fundraising goals
- A progress tracker towards an ask
- A follow up scheduler
- A historical record of donor outreach
- Centralized financial research file storage
- A free-form notebook

This information can be leveraged as a playbook, once honed, to either repeat asks from existing donors or to acclimate new prospects to become major donors for future campaigns.

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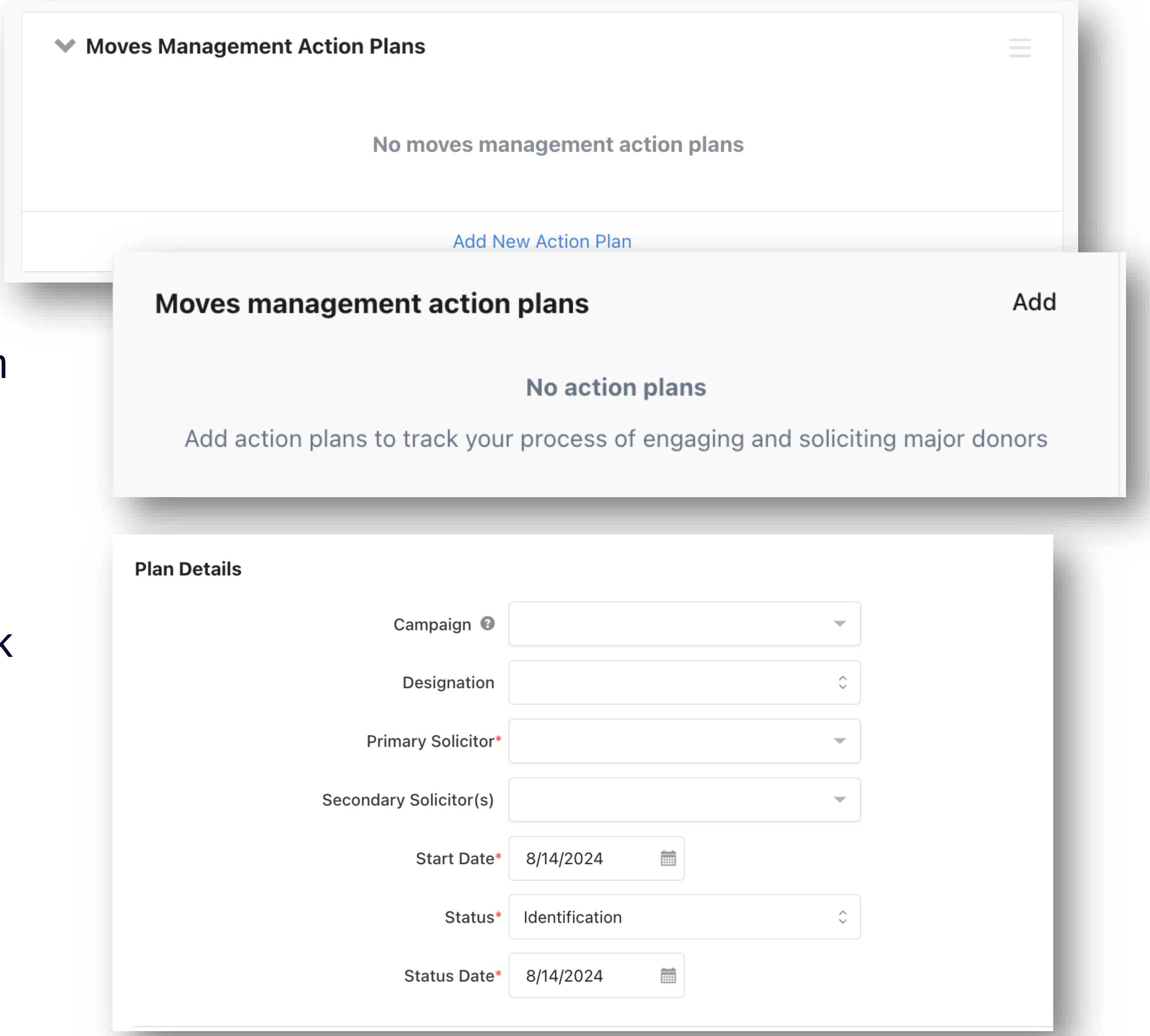
Adding New Action Plans

From within the All Details view, locate the **Moves Management Action Plans** drawer. In the Contact Record view, you may navigate to the center panel, select *Financial* from the tabs, and **Moves Management Action Plans** will be listed at the bottom of the screen.

As this is meant to act as a tracker to full donation stewardship, it is necessary to include the name of the assigned user who will act as the Primary Solicitor on this ask, as well as the phase or stage at which the ask should be initiated under your **Plan Details**.

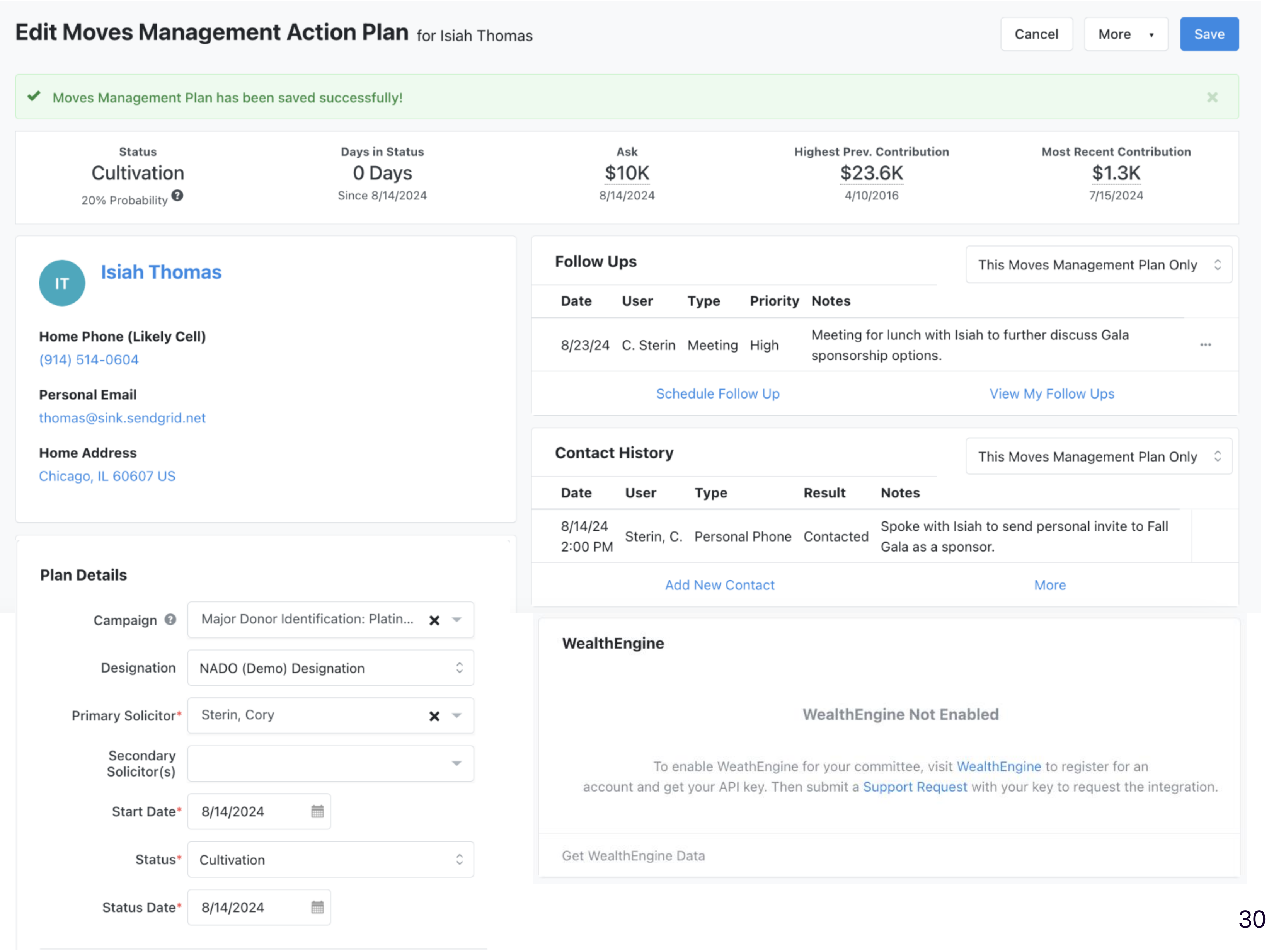


The Action Plan details screen

Like the other major giving tools, our MMAP details screen will provide a full overview of **Status, Days in Status, Entered Ask Amount, Highest Previous Contribution,** and **Most Recent Contribution** amount.

Details on the specific phase of action can be adjusted as a contact is moved through the cultivation process.

If your current package includes an integration with **WealthEngine**, it is also possible to pull those details into the MMAP detail screen.



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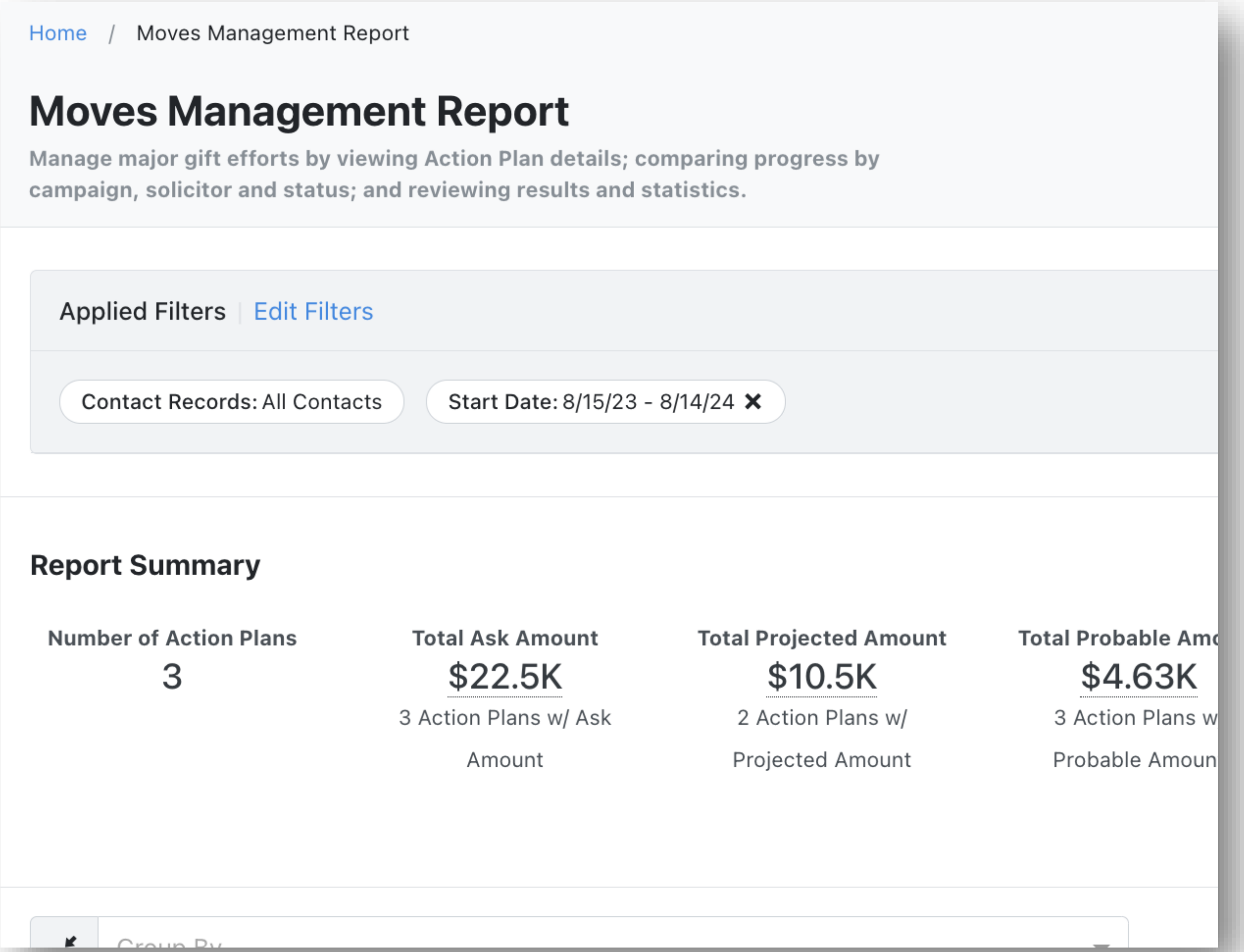
Moves Management Reporting

Within the Moves Management Report, users can be provided with summarized totals for all current actions, including Projected vs. Probable Amounts, Average Days in Plan, Average Days in Current Status, and more.

This report can be customized to include specific output regarding the last committed move on an action plan as well, meaning that solicitors may choose to schedule reports at regular intervals to keep in closer touch with sticky Contacts.

It is also possible to create lists and searches on those within Moves Management to ensure that they can be communicated with via email or SMS messaging as needed.



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The Major Giving Portfolio

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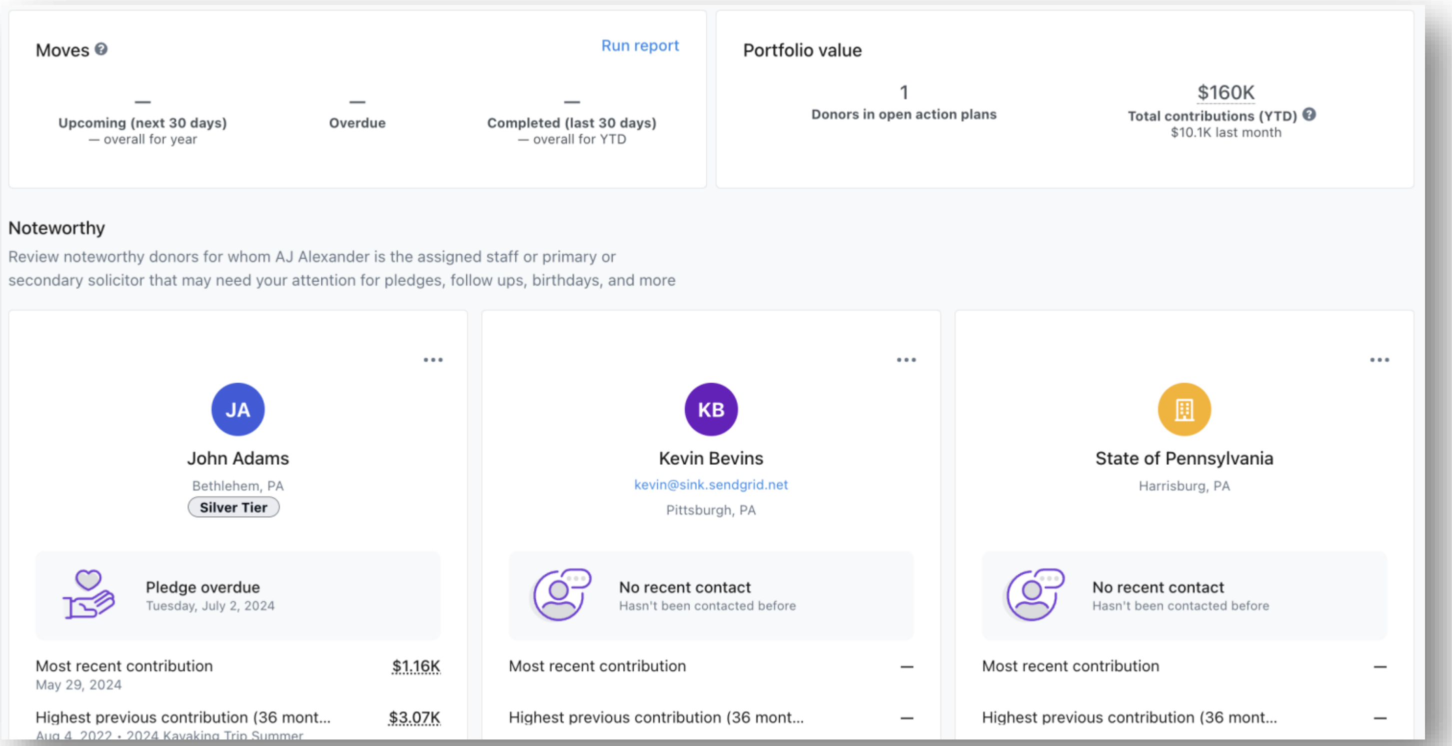
The Cultivate Tab

Once MMAPS have been established, the Major Giving Portfolio will act as the compass to guide all action efforts to bring your donor prospects into the Major Donor fold.

The **Cultivate** tab will display Donor Cards for any Contacts of the Portfolio Owner if they've been listed as the [Assigned Staff]() on any Contact record.

The "…" at the top right of these cards can be clicked to allow for specific edits to be made on active Action Plans, to schedule Follow Ups for the contact, to Add Notes on that particular person, or to dismiss the selected contact card for 7 days.



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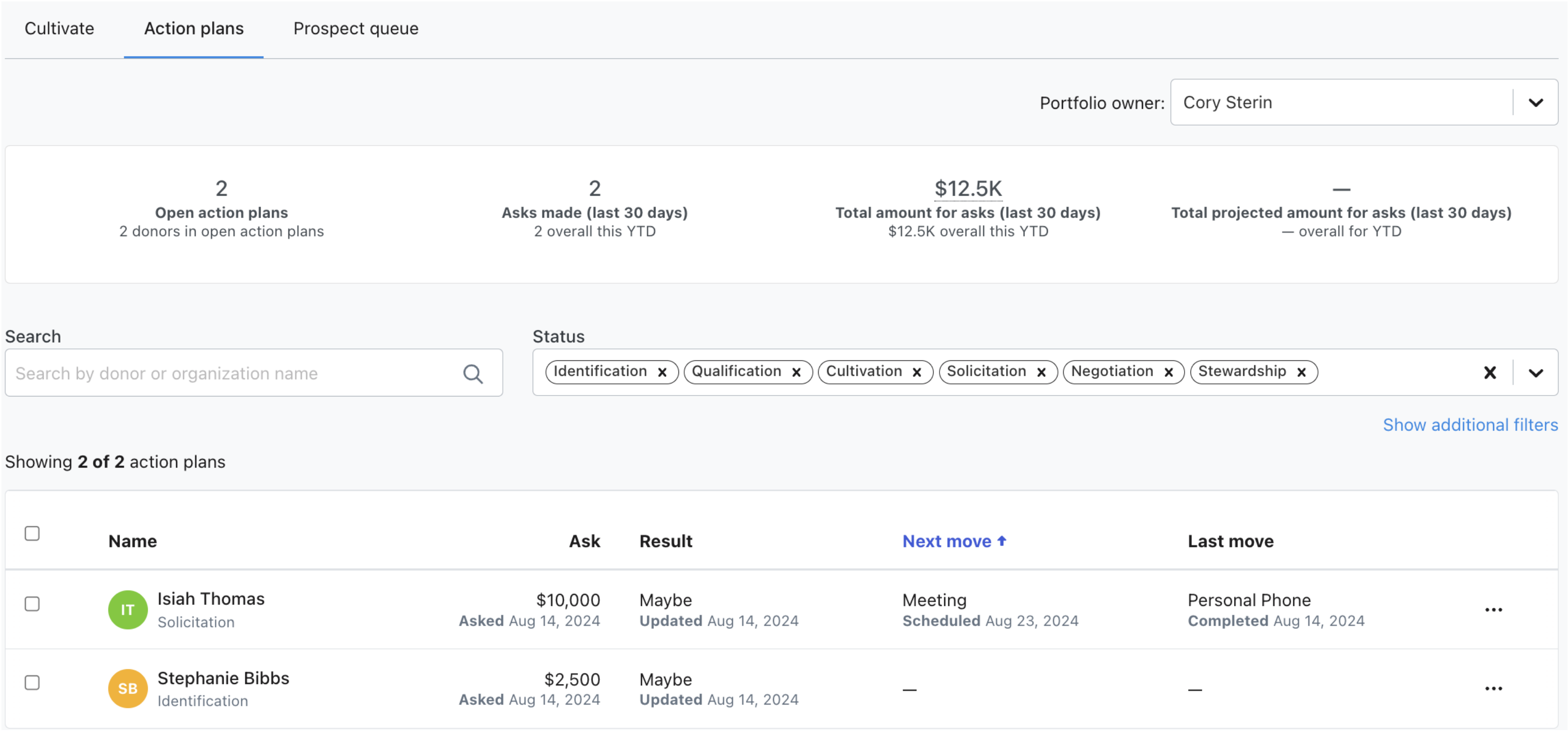
The Action Plans Tab

The Action Plans Tab will provide an overview summary of the current number of Open Plans that the selected Portfolio Owner has, as well as how many Asks have been made, the Total Ask Amount, and Projected Amount for Asks in the last 30 days.

From the report shown, users may configure their own filters for the returned plans. They can also select the checkboxes at the left of each plan/contact to make appropriate changes.

The Ellipsis at the right allows for actions like:

- Sending email
- Adding notes
- Scheduling follow up
- Completing moves
- Adding new pledges

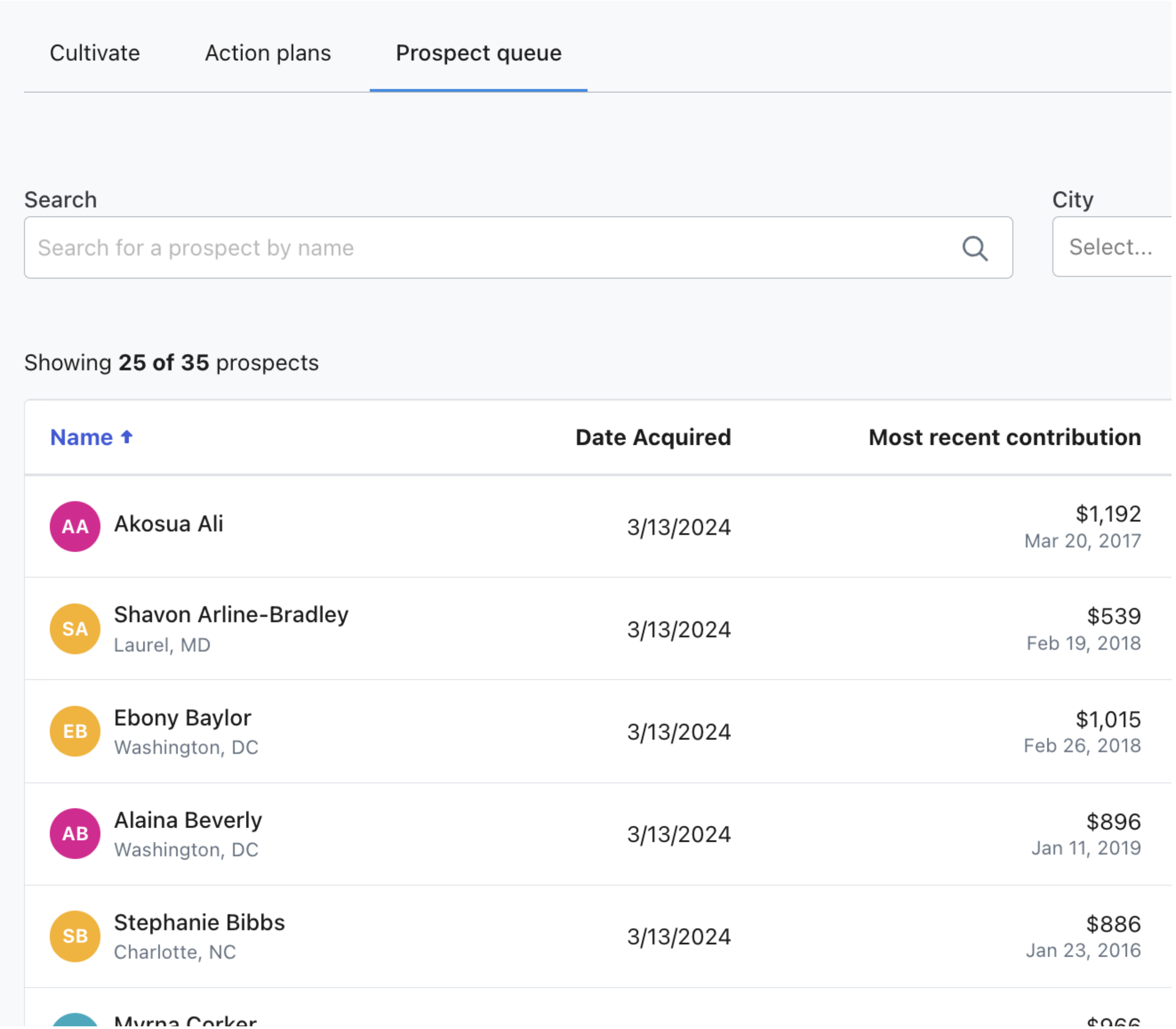


The Prospect Queue Tab

The **Prospect queue** is designed to function much like a virtual prospect review meeting.

Using a saved search of potential high value donors, any user working on major prospects will be able to:

- View the list of interesting contacts (updated nightly)
- Identify prospects that need more research
- Assign specific staff members to work with that prospect
- Initiate the next step in the cultivation process with an email or follow-up



Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

Knowledge Base Articles

- How to Use the Major Giving Portfolio
- Moves Management: Before You Begin
- EA Feature Webinar: Moves Management
- EA Feature Webinar: Could Moves Management Be Working Harder For You?
- EA Feature Webinar: Grants Management
- Managing Grants and Grant Plans
- Planned Giving: A Guide to Legacy Giving
- EA Feature Webinar: Planned Giving

Additional Training

•Bonterra Academy: https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup

- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy

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Feedback & Training Survey

Please fill out our 1-minute survey that appears after the webinar.

Thank You for Attending!

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