

# Fundraising and Development Community - June 23, 2023

## Date and Time:

23 June 2023 - All items on the board  
20:03 (UTC+00:00)

## Facilitator:

Fundraising & Development

## Attendees:

Leslie Wilson, Kaitlin Chester (she/her), Kate Welham, Renée, Mindy (Freight & Salvage), Cassandra Greenberg, keri, AnalyticCoffee Tessitura Community, Elizabeth Darling, Nic, Martha, Sophia Koop - Colorado Ballet, Shannon Teppert, Rose Olea, Elena Forbes, Ngozia, Sara Quevedo, Kelsey Moriarty, Laura White, Janelle Wilson (she/her), Mei, Mary Kay Gundlach, Patty Mills, Taylor, Zoe Metcalf, Mercedes B.

## Summary:

Thank you for everyone who was able to join us! Here is a brief overview of the topics we discussed and notes!

## Actions:

## Learnings:

## Topics discussed:

Special event reservations - what do you do? what do you like (or not) about it?

Votes: 10

Suggested by: Kate Welham

## Comments:

- Fundraising & Development  
Using OneCause, accepting sponsorships and tickets through OneCause. Not great
- Fundraising & Development  
Use Special Activities for upper-level donor events, just with an email or call to RSVP.  
Generate information to the proper account with information needed.

- Fundraising & Development  
Pages functionality in Wordfly, syncs up with a CSI, notes, or special events tab. Only used for events without payment. There is an extra cost associated with this.
- Fundraising & Development  
Greater Giving is another option
- Fundraising & Development  
For our gala we have just used Elevated Events in Tessi, but for special donor events we use JotForm to collect information and are working to determine on how to move the attendance data into the software
- Kate Welham  
TNEW Contributions for a Gala (we use contribution2). Cannibalize ticketing for Raffle, etc.

## How are you organizing prospect research data?

Votes: 9

Suggested by: Janelle Wilson (she/her)

### Comments:

- Fundraising & Development  
Work around for clicking into each notes section
- Fundraising & Development  
Could use documents section
- Fundraising & Development  
Build custom attributes to track specific information, such as interests
- Taylor  
Combination of the documents radio button and plans to track moves management and intel on donors. Also have a wealth engine integration for capacity. - Elena
- Kate Welham  
Documents radio button + custom attributes.

## How are you organizing your contact permissions with communications from Development vs. Marketing?

Votes: 8

Suggested by: Mei

### Comments:

- Fundraising & Development  
Lincoln Center uses attributes for contact permissions, but revisiting and trying to clean it up. Marketing uses Do Not sections on general tab. In V16 are there better solutions for organizations?
- Fundraising & Development  
Those areas for Do Not no longer exist
- Fundraising & Development  
Contact Permission type of Solicit and for newsletter contacts
- Fundraising & Development  
Need key people from each department to determine consistent uses of contact permissions
- Fundraising & Development  
The fewer types the better to provide better clarity
- Fundraising & Development  
Using Contact Point Purposes to track what a constituent really wants to hear about

- Taylor  
Sophia - We share the contract permissions section with Marketing and then use attributes to help highlight if we want certain individuals to not get appeals, etc. that we use when pulling our email lists for marketing  
Likes:1

## How much do you use Recurring Gifts - how do you have it set up on website?

Votes: 7

Suggested by: Elizabeth Darling

### Comments:

- Fundraising & Development  
The way TNEW is right now doesn't work for the donor to set up their own recurring. Has someone paid for customization to allow more autonomy for donor? How are you growing/promoting it?
- Fundraising & Development  
Public Theatre - customization, someone checks a box and every monthly donor has a specific fund (no membership assigned to it). Adds attribute to mark which card to use. Monthly contribution import of those people and monthly report links those credit cards to those pledges.
- Fundraising & Development  
Part of check-out path to opt in to monthly donations
- Fundraising & Development  
Colonial Williamsburg - Large donor giving pool for recurring giving (including yearly renewal). Use custom website, people can make donations and opt-in to monthly donations.
- Kate Welham  
Goodman - we use custom forms on TNEW to ask if they want a one-time or recurring gift. All web gifts go On Account and then the annual fund person books accordingly.
- Fundraising & Development  
Roll out in Tessitura for monthly giving coming?
- Fundraising & Development  
Roll out in Tessitura for monthly giving coming?
- Fundraising & Development  
Recurring campaign set up by fiscal year
- Fundraising & Development  
Channel of monthly donor (and Channel for DAF!)

## streamlining monthly renewals

Votes: 3

Suggested by: Mindy (Freight & Salvage)

### Comments:

- Fundraising & Development  
Currently using extraction to get list, creating appeal for every communication, and using Wordfly to send emails. Is there automation from Wordfly?
- Fundraising & Development  
Dynamic lists and conditional blocks in Wordly to have one email. Still some manual labor, but better automization.
- Fundraising & Development  
Combo of mailed and emailed, inverted number of pieces (now two mailed and four emails)

- Fundraising & Development  
Two email drops a month

How do you segment lapsed donors? Is there a report in tess that can be pulled that does not have to be pulled into a spreadsheet?

Votes: 2

Suggested by: Ngozia

**Comments:**

- Fundraising & Development  
Campaign detail report currently, pull into excel document and match up lapsed donors. Is there a way to automate that?
- Fundraising & Development  
Could pull the information in Analytics, with giving last year and giving this year to show those without current giving.
- Fundraising & Development  
Campaign Comparison Report (for LYBUNTY list)
- Fundraising & Development  
Membership expiration date used to see who is lapsed
- Fundraising & Development  
Move into Analytics rather than excel spreadsheet. Manually plugging in has risk of incorrect things being input.

**Topics voted on but not discussed:**

Capital Campaigns - donors with capital asks and annual? How do you manage with your gift officers?

Votes: 2

Suggested by: Fundraising & Development

**Comments:**

Records maintenance for Corporate accounts - do you/your finance teams have preferences on how to handle corporate mergers between orgs with pledges or previous contributions?

Votes: 2

Suggested by: Martha

**Comments:**

Is anyone working on Endowment? How receptive have donors been? How do you manage vs. annual gifts?

Votes: 1

Suggested by: Kate Welham

**Comments:**

Does anyone have a favorite way to show Board "get/gather" donations besides soft credits?

Votes: 1

Suggested by: Elena Forbes

[Comments:](#)

## Suggested topics with no votes:

For DAFs - how do you enter these as contributions?

Votes: 0

Suggested by: Elizabeth Darling

[Comments:](#)