

Papermill Playhouse currently uses activities tab for events but it doesn't work for tracking donor lounge entry

Eccles theatre - barcode tickets for donor lounge using the attributes, person scanning tickets can redirect non-members/donors (have to manually enter attribute) - uses ticket for performance (doesn't require second ticket). Report after performance to see who came and who didn't

Use constituencies to mark ticket discount benefits, tie to expiration date

Utilize premiums in source code

Corporate Benefits - Non-standard benefits, different to each corp. Use entitlements? It's going away in v16

Tracking benefits in plans, especially for one-offs or custom benefit structures, create step when benefit has been fulfilled. Give Promo Code for tickets when there is a limited number of tickets to be received

Premiums are frustrating, excited for new benefits structure

Often that corp benefits change depending on corporation

Use plans to track donor cards, and then use CSIs to indicate that a donor card was sent

Use plans to set reminders for sending benefits

Use new contributions report to track upgrades

Digital membership cards can self-automate

DAFs make things tricky

During pandemic we turned to digital acknowledgements, but now that we're back in person how are we handling tangible benefits? Could have them pick them up at box office and give a chaser ticket. Some benefits (like parking) have moved to automated so now they have automated tickets which can get validated. Gives you the chance to touch base with donors/members since they need to see you for the pass. Could also use NSCAN to flag when they need to receive a benefit.

Expirations are a good way to get them to renew on time to get the full use of benefits

Putting all of the donor receivables in an app.

Might want to restructure benefits if they don't make sense anymore.

Using special activities to track benefits. Can use to track donor benefit of hosting events in spaces

Member base skews older, prefers paper items vs. virtual. Have emailed acks/tax receipts been successful during the pandemic? Helpful to give the option of requesting physical receipt.

For higher level gifts where there are more personal touches can break up who sends/signs the emailed letter to allow for more personalization options.

Differentiate between the letter and the tax receipt to allow personalization. Maybe have triggered email that is just tax receipt up to a certain level?

Using dynamic lists in list manager, tie to scheduled report to send letters. At time of donation donor can choose whether they want mailed/emailed acknowledgements.

V16 has automatic emailed acknowledgements capabilities, but there isn't much flexibility. Could set it up to send a thank you, and then follow up with a tax receipt/letter to allow for more control. Also need to keep in mind how this affects gift adjustments!

Thankview can be used to send video thank you messages to donors, but you should be able to automate that through Wordfly/Prospect 2 as well