Sumac

Simply Sophisticated

Application Notes

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Sumac Documentation

Sumac is described in three books:

Sumac Users Guide	Use Sumac on a day-to-day basis.
Sumac Administrator Manual	Install Sumac. Set up system-wide lists and options settings that affect all users. Create document templates. Configure and trouble-shoot email.
Sumac Application Notes	Use Sumac to accomplish major tasks in your organization.

You should be familiar with the Users Guide before reading either the Administrator Manual or the Application Notes.

Introduction

This manual describes how to use Sumac to perform a variety of projects and tasks.

Campaigns

Whenever you plan COMMUNICATION with CONTACTS that is out of the ordinary – i.e. is not a routine and probably widely distributed newsletter, financial report, or event announcement – you should consider creating a Sumac CAMPAIGN. Here are some examples of COMMUNICATIONS of this nature:

- annual renewal drive
- raising funds for a special project, perhaps a capital project
- a drive to renew lapsed donors
- a special seasonal telephone solicitation.

Here are some reasons for creating a Sumac CAMPAIGN:

- the CONTACTS included in and excluded from the solicitation, and why they were included or excluded, are explicitly documented in a CAMPAIGN
- CAMPAIGNS support sophisticated segmentation of the CONTACTS being solicited, so you can readily define and manage narrower and more focused appeals
- DONATIONS received as a consequence of the CAMPAIGN can be explicitly related to the CAMPAIGN, enabling a future assessment of the success of the CAMPAIGN.

When constructing a CAMPAIGN, start with the Campaign Wizard to create the basic framework of your CAMPAIGN, then refine and add as required. The Campaign Wizard (see the *Sumac Users Guide*) provides a convenient way to quickly:

- define the universe – the overall group of CONTACTS who will be solicited by the CAMPAIGN (e.g. last year's donors)
- specify which CONTACTS should be omitted from this universe (e.g. deceased CONTACTS)
- segment the resulting list of CONTACTS so that each can be sent a different package (e.g. one package for donors under $500, one for donors over $500)

Details about the operation of the Campaign Wizard can be found in the *Sumac Users Guide*. For complete and specialized control over the operation of the CAMPAIGN, you may also want to learn about Search Builder in the *Sumac Users Guide*.

Here is a basic comparison that shows how you might construct a CAMPAIGN, on the one hand using the functionality of regular searches and reports, and on the other hand using the enhanced functionality of CAMPAIGNS.

Task	*Doing it Without Campaigns*	*Campaign Approach*
Decide the CONTACTS who are the overall target (the universe) of the CAMPAIGN	In the CONTACTS list, perform multiple searches, and'ing and or'ing the results to get the desired list. Generate a file of CONTACT IDs. Alternatively or in combination, generate reports. Export the reports to created CONTACT ID files. Combine the various ID files to assemble a single file of CONTACT IDs who are the target of the CAMPAIGN.	Define search criteria for identifying the desired CONTACTS. You do not need to create and manage files of IDs since the lists of IDs are handled internally within the CAMPAIGN itself.
Exclude certain CONTACTS (e.g. deceased) from the CAMPAIGN	Perform searches for the CONTACTS to be excluded. Remove them from the list of CONTACTS being included.	Explicitly state which CONTACTS are to be excluded. Sumac identifies them and removes them from the universe.

Task	*Doing it Without Campaigns*	*Campaign Approach*
Segment the CONTACTS to receive different packages of COMMUNICATIONS.	Use CONTACTS list searches or reports to break the list of CONTACTS into groups (perhaps by giving levels in specific time periods). Save the IDs of each group of CONTACTS into separate files.	Specify the criteria for determining which CONTACTS will receive which packages. CAMPAIGNS can automatically ensure that (a) all CONTACTS in the universe are either excluded by an exclusion condition or included in a package, and (b) no CONTACT is accidentally listed to receive multiple packages.

Packages sent out in the context of a CAMPAIGN can be identified by package codes. DONATIONS that respond to a particular package code can then be linked to the corresponding CAMPAIGN.

Fundraising Management

Sumac supports day-to-day fundraising activities including donor renewals and cultivation, direct mail and telephone CAMPAIGNS. It also supports major gifts and unique campaigns. Analysis reports help you structure your CAMPAIGNS, target your requests and track your results.

Identify Prospective Donors

Sumac's Prospect Ratings feature enables you to examine every CONTACT'S relationship with your organization. It examines things like DONATIONS, expressed interests, event attendance, ability to make donations, and known planned gifts.

It then calculates a rating and percentile for every CONTACT. This allows you to rapidly identify CONTACTS that should receive extra attention in future donor cultivation activities.

Cultivate Donors

Your organization may obtain new prospects many different ways: special events, board contacts, your website, or contests. You may wish to implement a cultivation strategy, perhaps sending your new CONTACTS newsletters or an invitation to a cultivation event, or implement a special welcome package providing detailed information about your activities and community of supports and then, of course, a request to donate.

- ✔ Create a CAMPAIGN for managing the solicitation (see *Campaigns* on page 6).
- ✔ Use the *Contacts – never donated* report or other searches and conditions to identify your prospects.
- ✔ Ensure that all COMMUNICATIONS are recorded and that any DONATIONS received as a result of the CAMPAIGN are recorded as being for the CAMPAIGN. This enables you, in future, to track the comparative success of different CAMPAIGNS.

Sumac Reminders enables you to use and action plan – a checklist of action items – in following up with each individual new contact. This enables you to keep track of many at once, ensuring consistent results.

Renew Lapsed Donors

Buried in every donor base are lapsed donors – those who gave in the past but have not given recently. Perhaps resources were not available in the past to renew their DONATIONS effectively. Sumac can help you find those lapsed donors. Through reports on CONTACTS' DONATION and COMMUNICATION history, you can develop an effective renewal strategy.

The *Donors – lapsed (LYBUNT, SYBUNT)*[1] report provides you with a list of CONTACTS who donated previously, but have not donated during a user-specified period. This report provides an excellent starting point, from recent to long past lapsed donors, for your research.

- ✔ Run a *Donors – lapsed (LYBUNT, SYBUNT)* report to find out who has not donated in the past year. Save the report to a file, for further analysis.
- ✔ Open the report in a spreadsheet program. Sort by the date of the CONTACT'S last DONATION, to find the most recently lapsed donors. Alternatively, sort by amount to determine the largest lapsed donors, so you can particularly focus on them.

Sumac also provides two, three, and ten year donation summaries. Look at them to see which donors are increasing, decreasing, stopping, or resuming donations.

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[1] Last Year BUt Not This year, Some Year BUt Not This year

For further information on managing lapsed donors, see *Remove Unneeded Contact Records* on page 19.

Renewal Campaign – Direct Mail

Whether you renew your donors once or four times per year, Sumac supports your CAMPAIGNS list segmentation and helps you track CAMPAIGN results.

The following example demonstrates how you might manage your annual donor renewal CAMPAIGN.

- ✔ Create a new CAMPAIGN, e.g. *2005 Annual Renewal* (see *Campaigns* on page 6).
- ✔ Define the universe of CONTACTS for the CAMPAIGN in one of these basic ways:
  - Use the Campaign Wizard to identify the universe of CONTACTS to be solicited during a CAMPAIGN.
  - When you create the CAMPAIGN, define its universe using a Search Builder search. Search Builder supports many types of searches; some search criteria that might be useful include made a donation to a specific campaign, made a donation in a date range, or a search on any CONTACT field (e.g. the renewal date).
  - Choose a report which lists the target group of CONTACTS (e.g. the *Donations - by campaign (one campaign)* report, or the *Contacts - by renewal date* report). Send the report to a file. The reports contain CONTACT IDs in their first column, and can be used as a source of CONTACT IDs for generating merged documents from document templates.
- ✔ Create a document template (see *Sumac Administrator Manual*) for generating the letters that will be sent to CONTACTS as part of this renewal campaign.
- ✔ Create a folder to hold all the letters that are going to be created using the document template.
- ✔ If you have identified the universe of CONTACTS by means of a report file, then produce the letters and labels using these steps.
  - Show the CONTACTS list.
  - Click the Mail Merge button. A dialog box asks you which CONTACTS you wish to report about. Click the IDs File button. Choose the report file, since it provides the list of CONTACTS for whom letters will be generated. Then choose the document template prepared earlier.
  - Save the letters into the folder created earlier.
  - Now generate labels for the envelopes to be mailed, or print directly on the envelopes. At the same time, automatically save COMMUNICATION records to the database. Still in the list of CONTACTS, click the Labels/Envelopes button. A dialog box asks you which CONTACTS you wish to report about. Click the IDs File button. Choose the report file, since it provides the list of CONTACTS for whom labels will be printed. In subsequent dialogs, specify the format of the labels or envelopes and indicate that you want to save COMMUNICATION records to the database for each label that is printed.
- ✔ If you have identified the universe of CONTACTS by means of a Search Builder search defined as part of the CAMPAIGN, then produce the letters and labels using these steps.
  - Show the CAMPAIGNS list.
  - Click to choose the CAMPAIGN for which you are generating letters and labels. Make sure that the CAMPAIGN is of type Package.
  - Click the Identify Contacts button so that Sumac searches and identifies the number of CONTACTS to receive the mailing. Click Finalize to indicate that the CAMPAIGN's list of CONTACTS should be frozen at this moment.

- Click the Mail Merge button to generate the letters. Click the Labels/Envelopes button to print labels or envelopes and save COMMUNICATION records to the database for each label that is printed.

✔ Process DONATIONS received in response to the mailing. Be sure to note the CAMPAIGN on each DONATION. Assigning a package code to each mailing, and printing the package code on the donor response card, speeds up the process of matching a DONATION to a CAMPAIGN.

✔ To find out how much money was raised and who donated to the renewal CAMPAIGN, use the *Donations - by campaign (one campaign)* report. Alternatively, in the DONATIONS list, search for all DONATIONS to the CAMPAIGN then select the DONATIONS and the status bar at the bottom of the DONATIONS list shows the total.

✔ Use the *Campaign - communications and donations (summary)* report to determine which CONTACTS were mailed but did not donate to the CAMPAIGN.

Renewal Campaign – Direct Mail – Export Contacts to Mailing House

Using a third party mailing house service may save you time and money, not only on the mail CAMPAIGN, but also because it can provide you with updated address information:

- identifying bad addresses
- providing new address information for CONTACTS that have moved
- filling in incomplete addresses.

Here are the steps for doing mailings with a mailing house.

✔ Build a list of CONTACTS using Campaign Wizard, CONTACTS list search tools, Search Builder searches, or reports (see *Renewal Campaign – Direct Mail* on page 9).

✔ In the CONTACTS list, export the fields required by the mailing house into a text file. Note that when you do this, you should:

- export Preferred values (e.g. export Pref City instead of Residence City or Business City) to ensure that the correct address is used, and
- export Virtual Salutation and Virtual Recipient fields so that even if a CONTACT'S salutation or recipient field is empty, Sumac will create an appropriate salutation based on your preferences.

When the mailing house returns the corrected information:

✔ Bad Addresses: Click the Moved checkbox for the CONTACT to move the bad address into the CONTACT'S note field, and delete address information from those fields. De-select COMMUNICATION types that would use the address. Try to get a new address for the CONTACT.

✔ Updated Information: Import corrected CONTACT information, being sure to only update existing CONTACT records rather than creating new ones. The Import command is described in the *Sumac Administrator Manual*.

✔ New Information: Import CONTACT information as update only. Caution: if the CONTACT'S new address contains less information (e.g. no apt number, no Street B), those fields may have to be cleared manually or cleared using the appropriate choices in the Import dialog. The Import command is described in the *Sumac Administrator Manual*.

Customize Your Direct Mail Ask

One of the most effective ways of obtaining increased gifts from donor renewals is to make a specific ask that reflects the donor's giving history and outlines the benefits offered at the increased gift level. Sumac document templates can be used to automate the creation of customized asks for renewal mailings. For detailed instructions, see *Create Document Templates* in the *Sumac Administrator Manual.*

Telephone Campaign

You may choose to incorporate a telephone CAMPAIGN into your renewal strategy, either as a front-line renewal CAMPAIGN for your entire donor base, or for just a segment of your CONTACTS list. You might also choose to implement a telephone CAMPAIGN in subsequent rounds of a follow-up CAMPAIGN to renew lapsed donors.

Here are steps you might follow to perform a donor renewal CAMPAIGN by telephone. The steps are quite similar to those for a direct mail CAMPAIGN (see *Renewal Campaign – Direct Mail* on page 9).

- ✔ Create a new CAMPAIGN, e.g. 2005 Annual Renewal (see *Campaigns* on page 6).
- ✔ Identify donors who renewed in response to your last annual CAMPAIGN:
  - Generate the *Donations - by campaign* report, to report on last year's CAMPAIGN *or* search in the DONATIONS list to find all the donations for a campaign
  - Send the report to a file *or*, from the DONATIONS list, export donor CONTACT IDs to a file. The reports contain CONTACT IDs in their first column, and will be treated as a source of CONTACT IDs for generating merged documents from document templates.
  - Alternatively, if you track renewal dates for your CONTACTS, select the *Contacts - by renewal date* report, and send it to a file, or search in the CONTACTS list for the appropriate renewal dates and export the CONTACT IDs to a file.
- ✔ Produce a CONTACTS list to provide to the people who will be making the phone calls:
  - Open the CONTACTS list. Search to produce a list of the CONTACTS in the report file produced in the previous step.
  - Export this list of CONTACTS to a file, including whatever fields your phone solicitors want. Alternatively, the Info Summary report (available directly from the CONTACTS list Report menu) is particularly useful since it includes phone numbers and also recent donation history. As another alternative, search to find the relevant CONTACTS in the CONTACTS list, and then use the Export or Print button to print the appropriate columns.
- ✔ Conduct the telephone CAMPAIGN.
- ✔ Record all telephone COMMUNICATIONS, being sure to associate them with the CAMPAIGN.
  - Have telephone staff use Sumac, and directly record their COMMUNICATIONS.
  - Alternatively, phone activity can be put into a tab-delimited text file or spreadsheet and then imported into Sumac's database using the Import command. The file should contain at least these columns: CONTACT ID or name, date of the COMMUNICATION, COMMUNICATION type, CAMPAIGN, and notes about the COMMUNICATION.
- ✔ Process DONATIONS received in response to the mailing. Be sure to note the CAMPAIGN on each DONATION.
- ✔ To find out how much money was raised and who donated to the renewal CAMPAIGN, use the *Donations - by campaign* report.
- ✔ Use the *Campaign - communications and donations* report to determine which CONTACTS were phoned but did not donate to the CAMPAIGN.

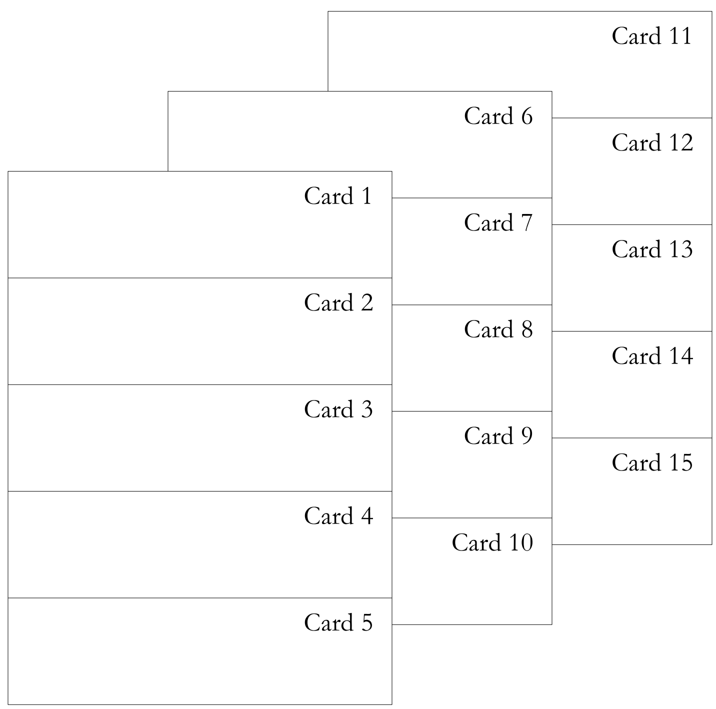
Door-to-Door Solicitation

If your organization performs door-to-door solicitations, it is most helpful if canvassers have good information about the residents of the places they canvas.

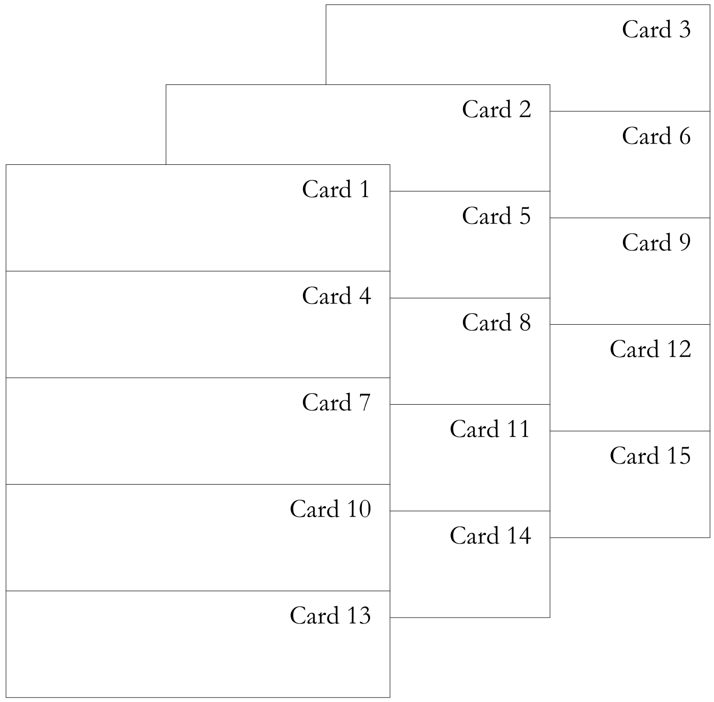
The Info Summary report, available directly from the CONTACTS list, is designed to provide the information needed by a door-to-door canvasser. It provides name and address information, as well as recent donation history and COMMUNICATION preferences.

To prepare information cards about CONTACTS in a particular geographical area:

- ✔ Show the CONTACTS list.
- ✔ Generate a list for each canvasser.
  - Search to find a list of CONTACTS for each canvasser. A search by postal code is a good way to find CONTACTS in a particular area.
  - Display each CONTACT's street address in the CONTACTS list. Click the title of the street address column. Sumac sorts by street, and within each street it sorts by numbers on the street. This groups CONTACTS by street, probably most convenient for canvassers.
- ✔ If you do not want to print information cards for all the CONTACTS showing in the list, select the subset to be printed.
- ✔ Choose Info Summary from the Report menu in the CONTACTS list. This asks if you want to alter the print order for convenience of cutting.
- ✔ Here is what this question means. If you are printing many Info Summary cards, you may intend to cut them and give a pile of cards to one or more solicitors. If you do not change the order, then info summary cards are printed five per page with the first five on the first page, the next five on the next page, and so on. If you change the order, then Sumac prints the first cards in the first position on subsequent pages, then moves down a position on the page and prints the next cards in that position. Here are some illustrations:
  - If you do not change the print order, three pages of cards would be printed like this:



- If you *do* change the print order, the same 15 cards print on three pages like this:



✔ Once you have answered the question about print order, Sumac prints a summary card for each selected CONTACT.

Move Donors Up The Donor Pyramid

Your organization wants to increase the gifts from existing donors; in other words, move donors *up* the donor pyramid. There are a number of clues to look for in your donor base to identify donors that may be moved up to higher levels by making informed, targeted asks.

Sumac's Prospect Rating feature helps greatly in identifying the CONTACTS who are most likely to donate. In addition, several reports can help you identify your best prospects. For example:

- *Donations - in date range*: This report identifies donors who have given frequently and recently.
- *Donations - in date and amount ranges*: This report identifies CONTACTS who have given in a particular time period and in a particular dollar range. Use this report to identify candidates for a monthly donor program.
- *Donations - first time donors*. This report identifies new and one-time donors from your list of CONTACTS. You may wish to:
  - quickly follow up recent DONATIONS with a second, targeted request;
  - alert your board about these new donors in case they can spot a connection; and
  - put the CONTACT on a program of COMMUNICATIONS designed to move the CONTACT to a higher level – moves management.
- *Donors - returning donors*. This report identifies donors who stopped giving and then resumed giving later. Special follow-up, much like for first time donors, is appropriate.
- *Donations - compare two time periods*, *Donations - compare three time periods*, *Donations - compare 10 years*. These reporst compare donations from individual donors in multiple time periods. They show variances which enable you to identify emerging donors (those whose donations are increasing) as well as donor slippage (donations declining over time). Experiment with a variety of time

periods and note where you find interesting variance. Follow up by reviewing individual DONATIONS. Often a donor who has consistently given the same or a slightly increasing amount is a good candidate for moving up the pyramid.

Once you have identified some CONTACTS appropriate for a moves management program, Sumac Reminders provides action plans that let you plan and track a program of targeted COMMUNICATIONS to implement moves management.

Monthly Giving

A monthly giving program often produces higher levels of DONATIONS from the participating CONTACTS. Sumac can help you identify long time consistent donors who make ideal candidates for monthly giving.

Run the *Donations – compare 10 years* report. It shows consistent givers, as well as indicating trends for each donor.

Once you have identified CONTACTS, and they have agreed to participate in the monthly giving program, use Sumac Pledges to efficiently manage your monthly donor program. This can be combined with Sumac Payment Processing to enable very efficient creation of payment records and automate processing of credit cards.

Major Gifts

Every organization has CONTACTS with the potential to make significant gifts. The key to a successful major gifts programs lies in the ability to identify prospects and implement a timely cultivation strategy. Sumac provides you with the tools to track the appropriate background information for your CONTACTS and identify your best major gifts prospects.

Identify Major Gifts Prospects

Sumac's Prospect Rating feature helps greatly in identifying the CONTACTS who are most likely to donate. In addition, Sumac provides a number of reports that will help you to identify major gifts prospects:

- Use the *Donations – in date and amount ranges* report to identify CONTACTS who have given significantly and recently.
- Use the *Donations – compare two time periods* report, *Donations – compare three time periods* report, or the *Donations – compare 10 years* report to identify CONTACTS who have increased their level of giving significantly.
- Scan your *Donations – first time donors* report for significant first time DONATIONS.
- Use *Donations – in date range* to scan cumulative giving.
- Show all DONATIONS in the DONATIONS list, sorted by the CONTACTS' last names can help you identify frequent donors.

Moves Management

Once you have identified major gift prospects, develop and implement a plan to cultivate them. This plan is sometimes referred to as *moves management.* It involves constructing a list of detailed stewardship activities and COMMUNICATIONS for each prospect.

Use Sumac Reminders to schedule, assign and track activities such as special invitations to upcoming events, calls to request meetings, and other COMMUNICATIONS. The action plans capability of Sumac Reminders is particularly useful for implementing moves management.

Reporting

Sumac provides several reports that can help track fundraising gains against your periodic and year end targets.

- CAMPAIGN reports produce summary or detailed information about individual CAMPAIGNS. You can also compare the results of two CAMPAIGNS (perhaps last year's renewal CAMPAIGN and this year's renewal CAMPAIGN).
- DONATION reports provide many different ways to consider your progress:
  - by CAMPAIGN
  - by event
  - by time period: compare two or three time periods, perhaps the first quarter of this and last year.
- PLEDGE reports enable you to assess your success in collecting on PLEDGES. These reports also enable you to forecast future revenue based on pledged DONATIONS.

Marketing Management

Special Events

First create a list of CONTACTS to invite to the event. Here are some ways to find the list of appropriate CONTACTS:

- Use Search Builder searches. Once you have found the relevant CONTACTS, use the Export button in the CONTACTS list to save their IDs to a file. Some types of searches to consider:
  - Contact desires a type of outbound communication – the contact wants to be invited to events)
  - Contact made a communication with a specific source code – if you use communication source codes to indicate an origin relevant to or interest in the next event
  - Received a type of communication for a specific event – if the communication type is "attended an event", and the event is the last similar event, this very specific search may yield an excellent list of invitees
  - Made a donation for an event, of a certain amount – a history of making donations to previous events makes a contact appropriate for the next event
  - Made a donation in a date range – if the contact expressed an interest in your organization in a relevant time period, then he should be invited to the next event
- Use reports. Export the report results to a file, and use the file as an IDs file. Some reports to consider:
  - *Contact – associated with an event*
  - *Donations – by event*
  - *Donations – in date [and amount] ranges*
- If you send newsletters or other recurring COMMUNICATIONS to all CONTACTS, then the list of recipients of the newsletter(s) may be the appropriate list to invite to the event. In the CONTACTS list, search by Outbound Communication preferences, then use the Export button to save CONTACT IDs to a file.
- If your organization tracks CONTACT types, you may want to ensure that certain types of CONTACTS (e.g. VIPs and funders) are invited to the event. In the CONTACTS list, search by Contact Type, then use the Export button to save their IDs to a file.

Once you have created your invitation list for your special event, the next step is to generate COMMUNICATIONS and send them to the chosen CONTACTS.

- ✔ Paper Mail
  - Show the CONTACTS list.
  - Use the Mail Merge button to create a letter for each CONTACT. Indicate that the CONTACTS come from an IDs File, and choose the file of CONTACT IDs that you generated above.
  - Use the Labels/Envelopes button to print a mailing label or envelope for each CONTACT. Indicate that the CONTACTS come from an IDs File, and choose the file of CONTACT IDs that you generated above. As part of the label printing process, when prompted, tell Sumac to save a COMMUNICATION record to indicate that each CONTACT was invited to the event.
- ✔ Email
  - Show the list of CONTACTS. Do an IDs File search and choose the file of CONTACT IDs that you generated above.
  - Use the Send Email button to send an email to each chosen CONTACT.

- As part of the email process, when prompted, tell Sumac to save a COMMUNICATION record to indicate that each CONTACT was invited to the event.

Newsletters and Other Recurring Communications

Sumac makes it very easy to send newsletters and other regular COMMUNICATIONS to your CONTACTS.

First, the Sumac Administrator should set up a COMMUNICATION type for each of the periodic outbound COMMUNICATIONS. It may be convenient to define two COMMUNICATION types for a newsletter that can be sent out in either paper format or electronic format. Alternatively, you can specify media preferences for each CONTACT and combine the media preference with the content preference.

Next, you must ensure that the record for each CONTACT indicates which outbound COMMUNICATIONS the CONTACT wants to receive. The Sumac Administrator can also specify whether a newly-created CONTACT should automatically receive all (or no, or only some) outbound types of COMMUNICATIONS which may make it easier to enter new CONTACTS and to send COMMUNICATIONS.

Once these set-up activities are done, and you have identified the types of COMMUNICATIONS desired by each CONTACT, you can send paper mail or email COMMUNICATIONS as described above (see *Special Events* on page 16).

> Hint: If you have a list of CONTACTS that should receive a particular type of COMMUNICATION, you can update the CONTACTS' records by importing COMMUNICATION type information or using the Set Values button to set the COMMUNICATION types in the appropriate CONTACT records. The Import command is discussed in the *Sumac Administrator Manual*, and the Set Values button is discussed in the *Sumac Users Guide*.

Media Relations

Sumac can support your media relations tasks through its CONTACT management tools. The scheduling features in Sumac Reminders and the integrated email features of Sumac Email are particularly helpful.

Separate Database?

If your organization carries out media relations activities on a frequent basis to a large number of media contacts, perhaps for events or advocacy work, then you might find it worthwhile to set up a separate database for your media contacts (for information on how to configure Sumac to work with multiple databases, see the *Sumac Administrator Manual*).

Why you might want a separate media CONTACT database:

- media CONTACTS are mostly organizations, not individuals
- the CONTACT types can be more specific to types of media organizations
- COMMUNICATIONS with the media and with donors differ.

Why you might *not* want a separate media CONTACT database:

- most COMMUNICATIONS to media are also sent to other types of CONTACTS
- having multiple databases complicates operations (though not much)
- there are not many media CONTACTS in your database.

If you decide to implement a separate database for media CONTACTS, such a database would typically have different CONTACT types from a regular donor database.

Duplicate Contacts

Routine Maintenance

Maintaining clean and current data is central to CONTACT management. Sumac provides:

- data entry forms that enforce the entry of mandatory fields and standardize the format of data in other fields
- tools for identifying and removing duplicate CONTACTS.

For more information, see *Get and Keep Clean Data* in the *Sumac Users Guide*.

You should regularly, perhaps quarterly, go through the steps identified in *Get and Keep Clean Data* in the *Sumac Users Guide*. Look for duplicate CONTACT entries in your Sumac database, and remove duplicates by merging them, and all their related information, together.

Import Lists of Contacts

You are importing a list of CONTACTS. Perhaps they were entered in a spreadsheet, or come from an external ticketing or donation management system.

Be careful that the new incoming CONTACTS are not already in your Sumac database. Here are ways to minimize this problem:

- Note that as CONTACTS are added to the database, they are assigned IDs in ascending order. This enables you to distinguish new, possibly duplicate, CONTACTS from ones that were already in your database.
- Before you import the data, use Import Workspace (see the *Sumac Users Guide*) to determine whether any of the incoming CONTACTS are already in the database. If they are, do not add them again.
- Use the Check Names button in the Import dialog to determine if any of the incoming contacts are already in the database.
- After a large import of new CONTACTS, go through the steps for finding and removing duplicate CONTACTS from your database. These are described in *Get and Keep Clean Data* in the *Sumac Users Guide*.

Remove Unneeded Contact Records

Removal Warning

Beware that removing a CONTACT from the Sumac database removes the CONTACT and also removes all the data related to that CONTACT. This includes COMMUNICATIONS, DONATIONS and PAYMENTS, REMINDERS, PLEDGES, auction information, funding requests and programs, SUBMISSIONS, PROPOSALS, MEMBERSHIP records, TICKET ORDERS, and TASK information.

If you need to keep any of this information, do not remove the contact.

Remove Unnecessary Contact Records

From time to time, your organization should identify and remove non-active CONTACTS from your Sumac database, and thereby save money on mailings.

Sumac can help you track non-donors and lapsed donors, assisting you in deciding when to remove a CONTACT from the database.

Remove Non-Donors?

Use the *Contacts - never donated* report to identify CONTACTS that have never donated. If you choose to implement a donor cultivation program, your Sumac database contains CONTACTS who have never donated but are being solicited with a series of timed and targeted requests and appropriate follow-up strategies. Be careful that you do not remove non-donors who are being solicited in this way.

Remove Lapsed Donors?

Use the *Donations - lapsed donors* report to identify CONTACTS that have not donated recently. You may choose to implement a lapsed donor management program: solicit donors who have not given recently, with a series of timed and targeted requests and appropriate follow-up strategies.

Track your donors for frequency, recency, and size of donation. You may decide to remove CONTACTS who haven't donated in a certain period of time.

Consider using a CONTACT'S inactivity as an opportunity to find out why the CONTACT has not given recently, or perhaps to convey how important their gift is along with a reminder that they have not given recently.

Deciding to Remove Contacts

When these non-donor or lapsed donor CONTACTS have been solicited with no results, you might send a mailing that reminds them of their inactivity. Send these mailings first class, in order to obtain address correction and mailing forwarding information back from the post office. If the CONTACT responds at all positively, keep it active and cultivate renewals.

You may want to send several reminder letters before letting failure to respond trigger removal of a CONTACT.

Removing Contacts

Eventually, after several unsuccessful attempts to renew donors' interest, you may decide to remove CONTACTS from the database.

There are two different ways to remove a CONTACT.

- One is to leave the CONTACT'S information in the database, but turn off all COMMUNICATION types chosen for the CONTACT, so that it will no longer be contacted. This reduces the cost of mailings, and also preserves information (e.g.

COMMUNICATION records) about your attempts to communicate with the CONTACT.

- The other approach is to delete the CONTACT from the database altogether. This is rarely a good approach, because it deletes not only the CONTACT but all the records (e.g. COMMUNICATIONS, DONATIONS and PAYMENTS, REMINDERS, PLEDGES, AUCTION INFORMATION, FUNDING REQUESTS AND PROGRAMS, SUBMISSIONS, PROPOSALS, MEMBERSHIP RECORDS, TICKET ORDERS, and TASK INFORMATION) associated with that record, thereby eliminating useful historical information.

Donations

Enter Donations

When entering DONATION information into Sumac, you need to deal with two issues:

- get the data into the Sumac database, and
- ensure that the data, as entered, corresponds to your source documents.

Entering Donation Data

Source documentation about DONATIONS should be handled meticulously, whether it is in electronic form (a file of DONATIONS recorded elsewhere), or paper documents.

Ensure that you enter each DONATION once. Make sure you don't miss any of them, whether from a file or paper documents. Ensure that the number of DONATIONS coming in and the number actually put into Sumac are the same.

Ensure that you don't enter a DONATION twice. Check them off as you go. Ensure that no co-worker has already enter the DONATIONS from a file or pile of paper into Sumac.

The actual entry process depends on the source of the information being entered: whether it is from paper documents (e.g. cheques received in the mail) or from an electronic file generated elsewhere (e.g. a list of donors from a web site).

Paper Source Documents

In the DONATIONS list, click the New button, and enter each DONATION. Note that the Copy Last button usually saves a lot of time in manually entering similar details.

Alternatively, use the CONTACTS list to enter the DONATIONS. This gives you the opportunity to check that Sumac's CONTACT address information is current according to the incoming DONATION documents.

Electronic File Source

First, choose the Import Workspace command from the Utilities menu in the Sumac Console. Open the electronic file of source data. Use functions in the Import Workspace to validate dates, CAMPAIGNS, DONATION types and purposes, events, accounts, payment types, currency amounts, and CONTACT IDs or names. If Import Workspace finds problems, fix them before proceeding to the next step.

Once the data is known to be clean and correct, use the Import command to import the DONATIONS into Sumac.

Validating Donation Data

Usually you enter DONATIONS in batches:

- all the DONATIONS received in the paper mail today or this week
- a file of DONATIONS made by means of an online contribution system over the last day or week.

Sumac provides various ways to ensure that all the DONATIONS in a batch were correctly entered into Sumac:

Status Line

Below the buttons in the DONATIONS list, there is a status line. It shows the total number and value of DONATIONS in the list. If you click to select some DONATIONS, the status line shows their total number and value too.

If you enter a batch of paper documents, this total count and value of the DONATIONS entered should match the incoming documents.

Reports

When you click the Reports button in the Sumac Console, you can expand the *Donations – reconciliation* category to see that Sumac can provide several variations on reports about DONATIONS by account, payment type, purpose, and receipt number.

Choose the most appropriate report(s) for your needs, and generate them. Ensure that the report totals correspond to those in your source documents.

Donor Recognition

Donors appreciate being recognized for their DONATIONS. Sumac's *Donors – donor roll* report instantly generates a donor roll report, which can group donors by categories (which you define). This report makes it particularly easy to include a donor report in monthly or quarterly newsletters. The donor roll report, and how to specify its categories, is described in the *Reports* chapter in the *Sumac Users Guide*.

Email Receipts

Sumac can generate donation receipts as PDF documents. These documents satisfy the tax authorities with respect to being sufficiently unchangeable by the donor. If you generate PDF receipts, then Sumac can automatically email them to the appropriate CONTACTS. See the Email Receipts button in the *Donations* chapter in the *Sumac Users Guide*.

Memberships

Email A Newsletter To Members

This procedure provides the steps for sending a newsletter to your members and to some CONTACTS related to your members. It assumes that you have set up the newsletter as a COMMUNICATION type, and that the CONTACT records for the members and their related parties indicate the newsletter as a desired outbound COMMUNICATION.

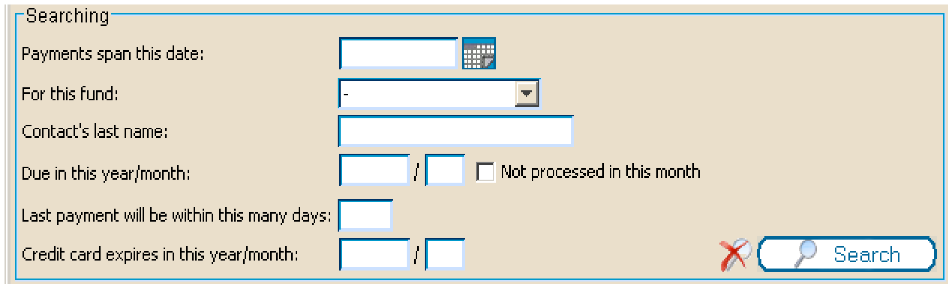
- ✔ Open the MEMBERSHIPS list.
- ✔ Search to find the members who are to receive the newsletter:
  - Choose the newsletter from the Desired Communication Types drop-down menu.
  - In the *Members current on this date* field, specify the date for which a MEMBERSHIP record must be current in order to receive the publication.
  - Click *Allow for grace days*, if appropriate.
  - If you want to send a different newsletter for different languages, then choose the language from the drop-down menu.
  - Click Search to find the target MEMBERSHIP records.
  - Now you have a list of the members who should get the newsletter, perhaps in one language variant.
- ✔ Click the Send Email button.
- ✔ You are asked if you want to send to only the members, or to CONTACTS related to the members receiving the email. Make the appropriate choice. Note that Sumac uses the setting of the Desired Communication Types drop-down menu to ensure that the related CONTACTS want to receive the specified type of COMMUNICATION.
- ✔ If you chose to send to related CONTACTS, then you are also asked to specify the relationships which should cause a CONTACT to receive the newsletter. In this window, you select the relationships by dragging them from the left-hand list to the right.
- ✔ The next dialog is the standard dialog for setting up and sending emails. Fill it in appropriately and click Send.
- ✔ Then you are asked if you want to save COMMUNICATION records for each CONTACT who is sent the newsletter. If you do, then fill in the fields for the COMMUNICATION record and click Yes. Otherwise, click No.

At this point, the emails are generated and transmitted and, if you chose to do so, COMMUNICATION records are saved for each email that is sent.

Pledges

A pledge is a promise to make a series of payments – donations – in the future.

Here are the searching options available in the Pledge list. As described below, some of these should be used on a regular basis to manage pledges.



Here are the tasks that should be done regularly, probably at least monthly:

Credit Card Expiry

Enter the year and month for next month in the *Credit card expires in this year/month* fields, and click Search. This shows you pledges whose credit card information is about to expire.

Use the Export or Print button to create a list of the contacts. Phone each of them and get updated credit card information and put this new credit card information in the pledge record.

Pledge Expiry

Enter a number of days – perhaps 60 – in the *Last payment will be within this many days* field, and click Search. This shows a list of pledges that are about to expire.

Use the Export or Print button to create a list of the contacts.

Phone each contact and confirm that he or she is willing to extend the pledge:

- If the contact agrees to extend the pledge on the same terms, then the pledge record can be manually edited, entering the new Last Payment Date.
- If the contact agrees to extend the pledge but changes the terms, then a new pledge record, with dates picking up from where the old one leaves off, should be created to reflect the new terms of the pledge.

Collect Pledged Amounts

At the start of each month, enter the year and month for the current month in the *Due in this year/month* fields. If some pledge payments dues this month may have been collected already, click *Not processed in this month*. Click Search. Now you have a list of pledges for which you need to obtain payments this month.

Perform whatever actions are necessary to collect a payment based on each of the pledges: cash a cheque, put a charge through on a credit card, etc.

In the pledges list, choose the pledges that have been collected, then click the Make Payments button. This button causes Sumac to create a donation record (with the current date) and, if the Sumac Administrator has indicated it should do so, a payment record for each of the selected pledges.

If you use Sumac's automated payment processing capability, then you can click the Payments button in the Sumac Console. Click to search for unprocessed payments. Then click the Process button to process them.

– End of Manual –