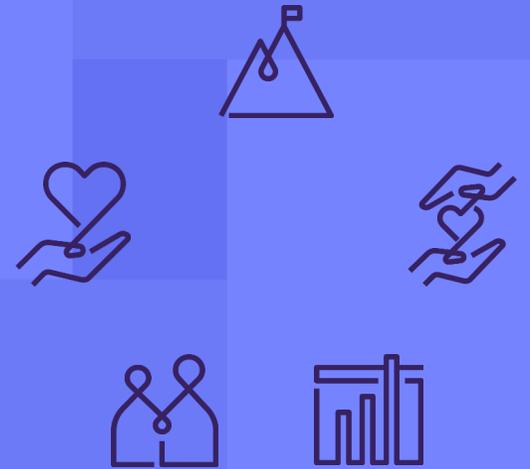


**DONOR ENGAGEMENT**

# Major Donors in EveryAction



# Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



# Agenda

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



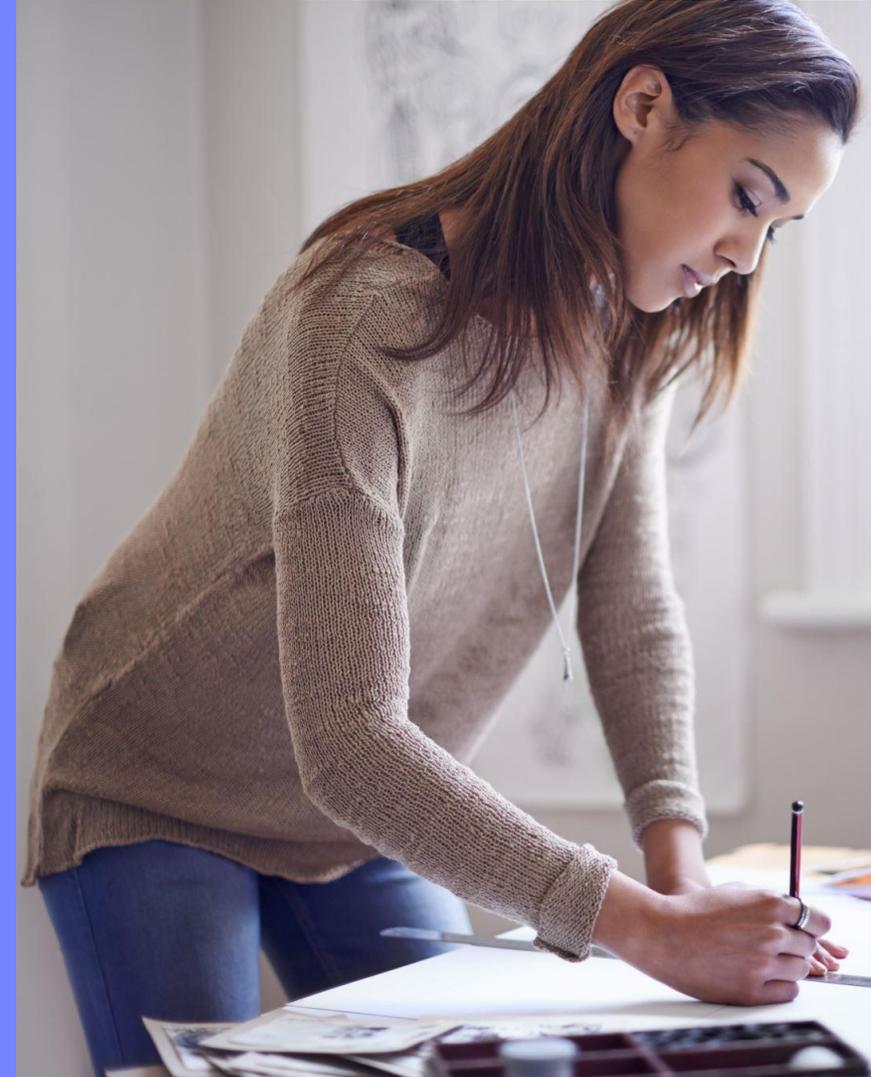
# Grant Management

# 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**.

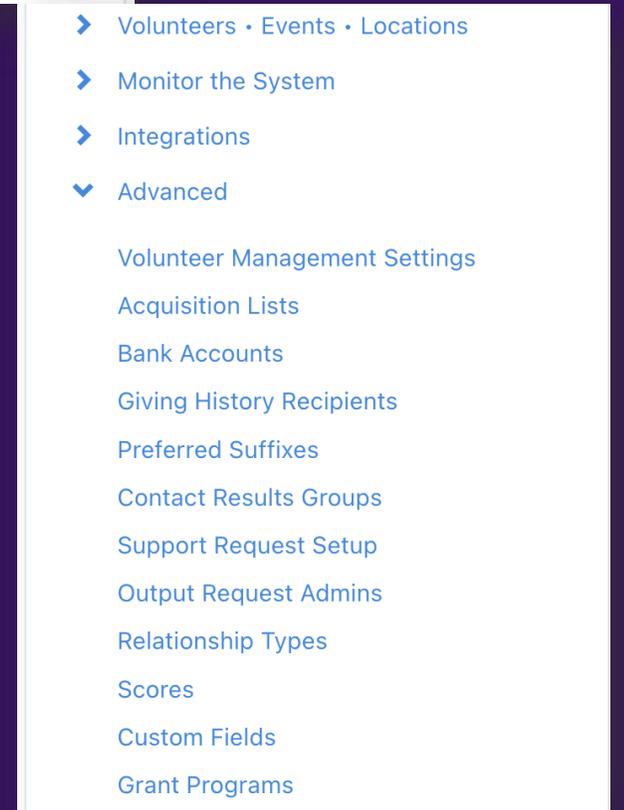
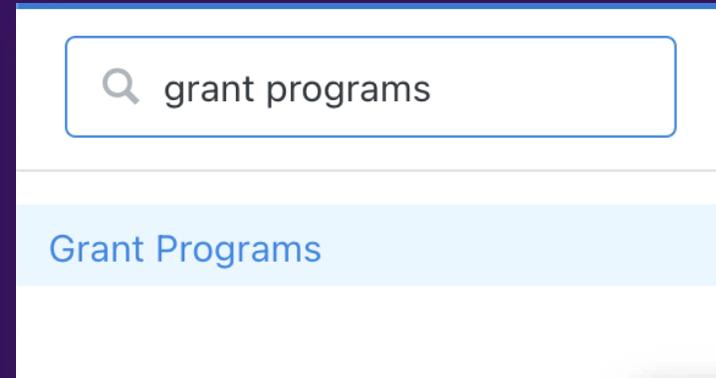


# Creating Grants on Records

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**

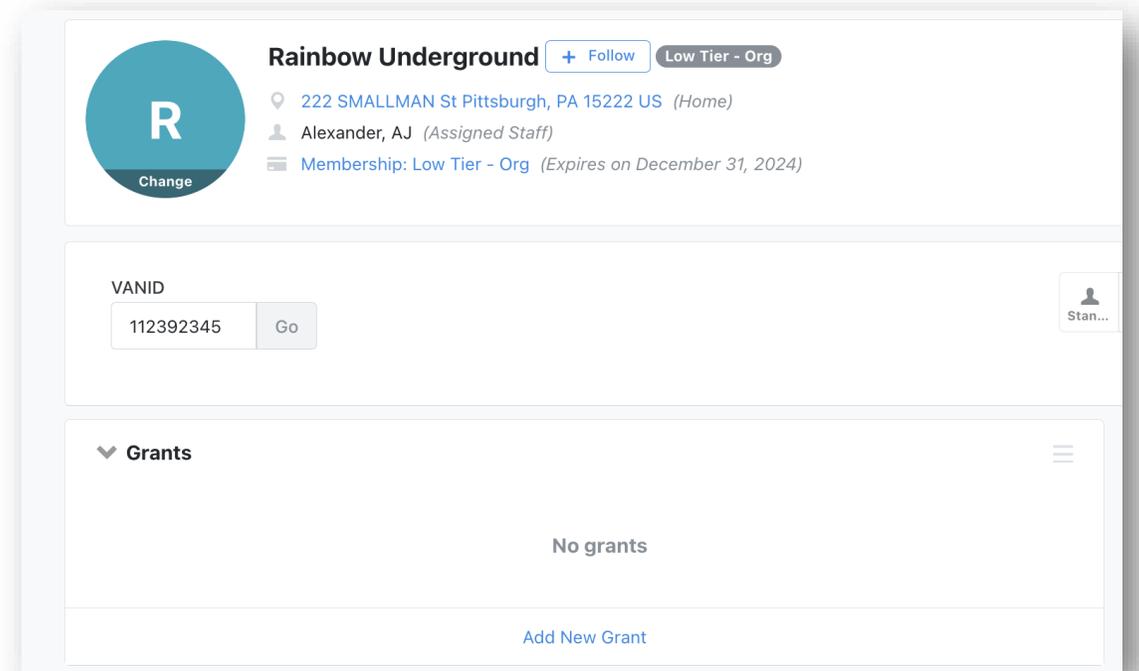


# Grant Creation Tools

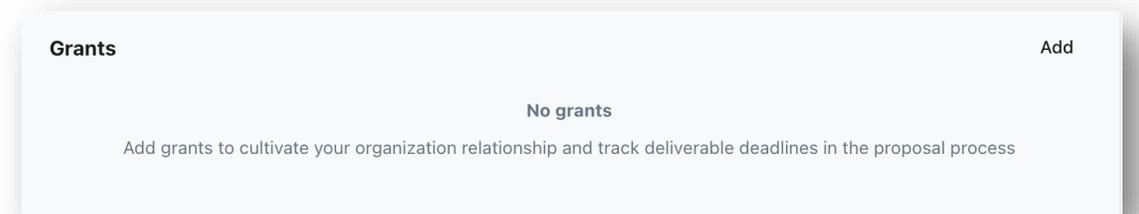
# Creating Grant Records

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”**.



The screenshot displays the profile for "Rainbow Underground". It includes a profile picture with the letter "R", a "Change" button, and a "+ Follow" button. The organization's address is "222 SMALLMAN St Pittsburgh, PA 15222 US (Home)", the assigned staff member is "Alexander, AJ", and the membership is "Low Tier - Org" which expires on December 31, 2024. Below this, there is a search bar for "VANID" with the value "112392345" and a "Go" button. A "Grants" section is shown with a dropdown arrow and a menu icon, displaying "No grants" and an "Add New Grant" link.



This screenshot shows the "Grants" section in the "Financial" tab of a Contact Record view. It features the heading "Grants" and an "Add" button. The content area displays "No grants" and a descriptive text: "Add grants to cultivate your organization relationship and track deliverable deadlines in the proposal process".

# 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.

**Add New Grant** for Rainbow Underground

**Grant Proposal**

Grant Name

Grant Type

Proposal Summary

Program    
[View Programs](#)

Program Manager

Proposal Manager\*

- ✓ Annual
- Award
- Capacity Building
- Capital
- Challenge
- Consulting
- Endowment
- Evaluation
- In-Kind
- Matching
- Operating
- Project
- Renewal
- Research
- Scholarship
- Sponsorship
- Technical Assistance

# 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.

## Grant Details

Start Date*	8/13/2024	
Campaign ?	<input type="text"/>	
Designation	<input type="text"/>	
Source Code	<input type="text"/>	
Status*	Research	
Status Date*	8/13/2024	

## Probability

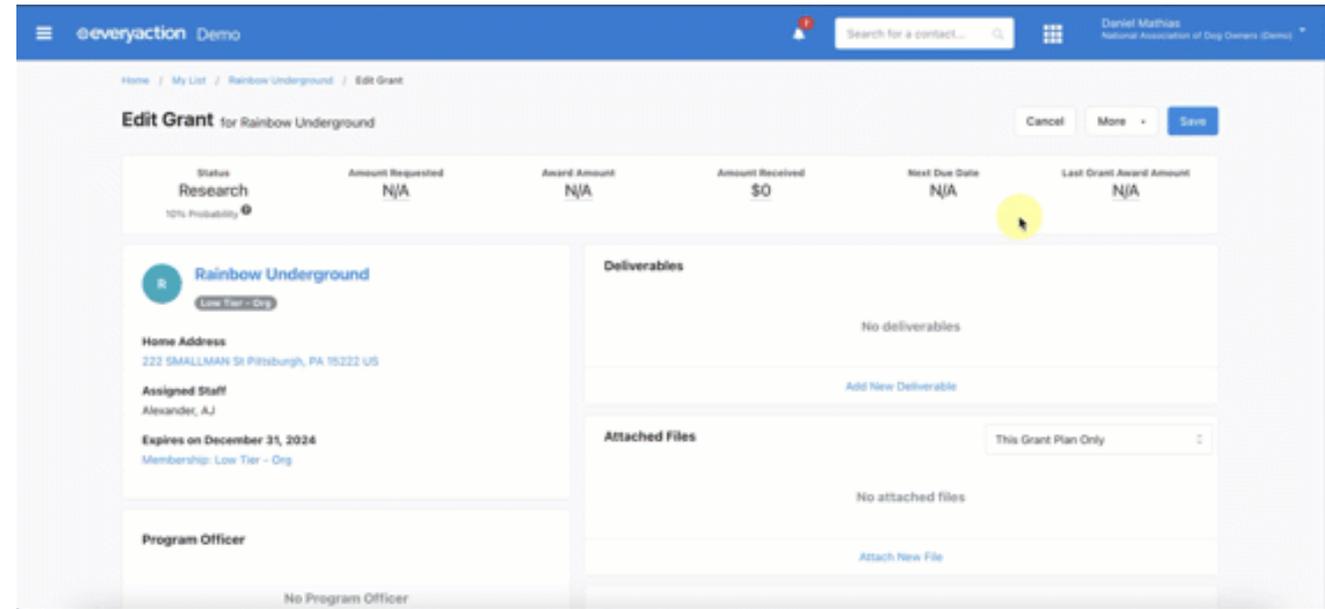
Readiness ?	<input type="text" value="0-999"/>
Likelihood ?	<input type="text" value="0-999"/>
Capacity ?	<input type="text" value="0-999"/>

# 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.

## Grants Report

Manage Grants efforts by viewing grant details; comparing progress by campaign and status; and reviewing dates, results and statistics.

Export As... Report Actions

Applied Filters | [Edit Filters](#)

Contact Records: All Contacts Status: Multiple Selected (8) X

### Report Summary

Number of Grants <b>34</b>	Number of Proposals Submitted <b>9</b>	Number of Grants Awarded <b>7</b>	Total Amount Requested <b>\$7.25M</b> 33 Grants w/ Amount Requested	Total Projected Amount <b>\$2.94M</b> 18 Grants w/ Projected Amount	Total Probable Amount <b>\$2.72M</b> 33 Grants w/ Probable Amount	Total Awarded Amount <b>\$1.14M</b> 7 Grants w/ Awarded Amount
-------------------------------	---	--------------------------------------	---	---	---	--

Group By

Edit Columns

Grant ID	Proposal Manager	Grant Name	Org Official Name	Primary Contact	Grant Type	Status	Campaign	Amount
21805		Program 002 Grants	<a href="#">Aloha Foundation</a>	Ziegler, James	Annual	Request for Proposal	Grants	\$10,00
21806		Program 001 Grant	<a href="#">Aloha Foundation</a>	Ziegler, James	Award	Request for Proposal	Grants	\$10,00

# Planned Giving

# 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.



# 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.

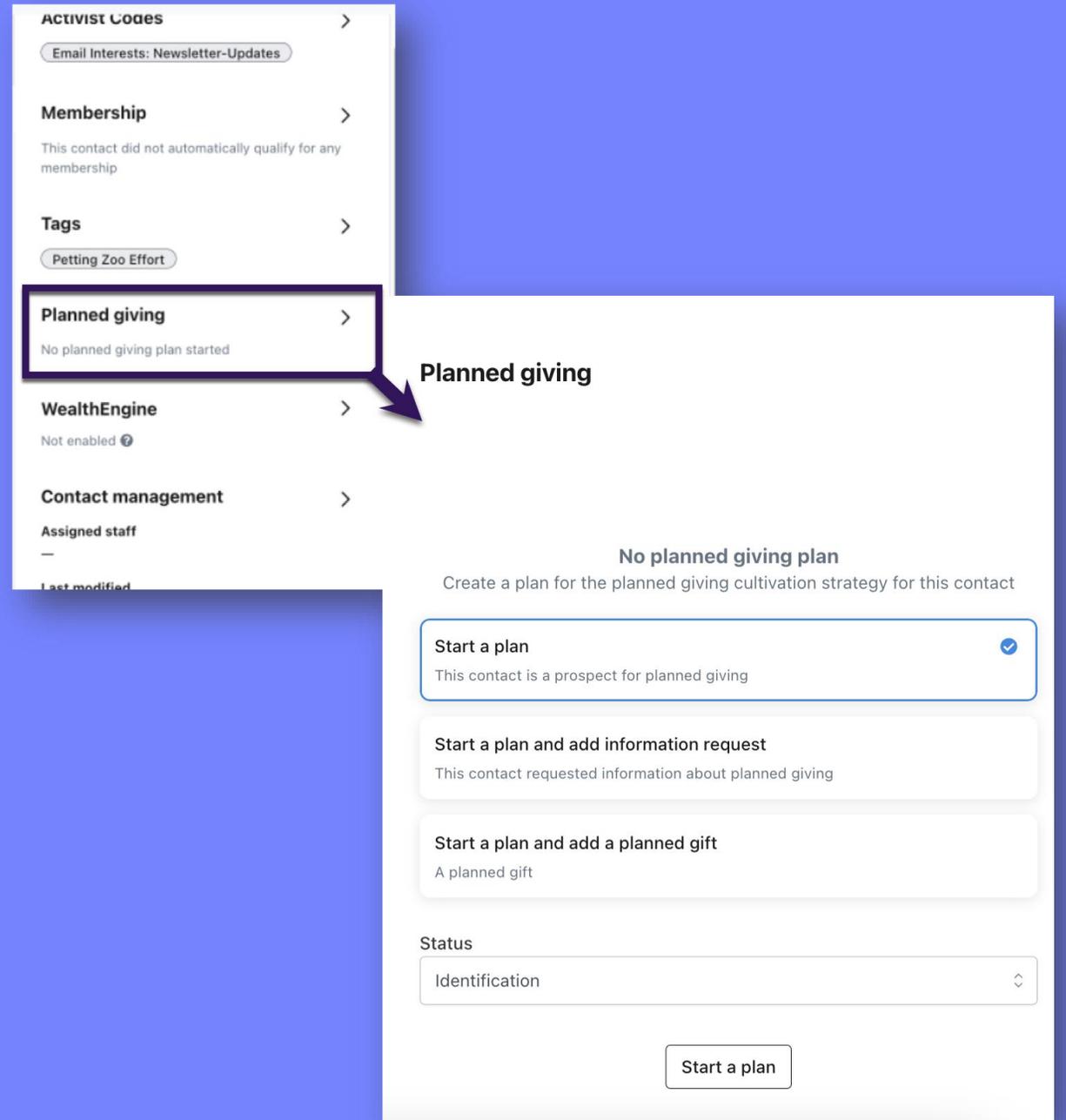
# Configuring a Planned Gift

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.



The screenshot displays the Bonterra CRM interface. On the left, a side panel lists various contact management sections: **ACTIVIST CODES** (with a sub-item 'Email Interests: Newsletter-Updates'), **Membership** (with a note 'This contact did not automatically qualify for any membership'), **Tags** (with a sub-item 'Petting Zoo Effort'), **Planned giving** (highlighted with a red box and a red arrow pointing to the main content area), **WealthEngine** (with a note 'Not enabled'), and **Contact management** (with a sub-item 'Assigned staff').

The main content area, titled **Planned giving**, shows a message: **No planned giving plan** and 'Create a plan for the planned giving cultivation strategy for this contact'. Below this, there are three options to start a plan, each with a blue checkmark icon:

- Start a plan**: This contact is a prospect for planned giving.
- Start a plan and add information request**: This contact requested information about planned giving.
- Start a plan and add a planned gift**: A planned gift.

At the bottom, there is a **Status** dropdown menu set to 'Identification' and a **Start a plan** button.

# 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.

## Planned Giving

[Cancel](#) [More](#) [Save](#)

 **Carolyn Owens** [+ Follow](#)

Status	Ask Type	Next Follow Up	Highest Prev. Contribution	Most Recent Contribution	Lifetime Total Amount
Identification 8/13/2024	N/A	N/A	<b>\$18.8K</b> 11/28/2022	<b>\$1.8K</b> 7/7/2024	<b>\$20.6K</b> 2 Total Contributions

### Carolyn Owens' Key Vital Stats

Date of Birth

Deceased

### Planned Gifts

Date	Type	Status	Value	Contact Name
8/13/24	Bequest	Advised-Written	\$0.00	<a href="#">Edit</a>

[Add New Planned Gift](#)

### Planned Giving Contact

**No Planned Giving Contact**

Select a contact from Carolyn Owens' relationships

### Manage Relationships

**No relationships**

[Add Relationships](#)

# 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.

The screenshot displays a dashboard interface with the following sections:

- Manage Relationships:** Shows "No relationships" with an "Add Relationships" link.
- Follow Ups:** Includes a dropdown menu set to "All Follow Ups for This Contact", "No follow ups", a "Schedule Follow Up" link, and a "View My Follow Ups" link.
- Contact History:** Includes a dropdown menu set to "This Planned Giving Plan Only", "No contact history", an "Add New Contact" link, and a "More" link.
- Notes:** Includes a dropdown menu set to "This Planned Giving Plan Only", "No notes", an "Add Note" link, and a "More" link.
- Attached Files:** Includes a dropdown menu set to "This Planned Giving Plan Only", "No attached files", and an "Attach New File" link.
- WealthEngine:** Shows "WealthEngine Not Enabled" with a note: "To enable WeathEngine for your committee, visit [WealthEngine](#) to register for an account and get your API key. Then submit a [Support Request](#) with your key to request the integration."

# 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.

## Planned Giving Report

Manage Planned Giving efforts by viewing plan details; tracking marketing response rates for new PG prospects; and reviewing dates, results and statistics.

Applied Filters | [Edit Filters](#)

Contact Records: All Contacts

Status: Multiple Selected (6) ✕

### Report Summary

Number of Planned Giving Plans

1

Notified of Planned Gift

0

Number of Planned Gifts

4

1 Plans w/ Planned Gifts



Group By

Planned Giving ID	Primary Solicitor	Contact Name	Number of Planned Gifts	Sum of Planned Gifts
41499		<a href="#">Owens, Carolyn</a>	4	

# Moves Management Action Plans

# 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

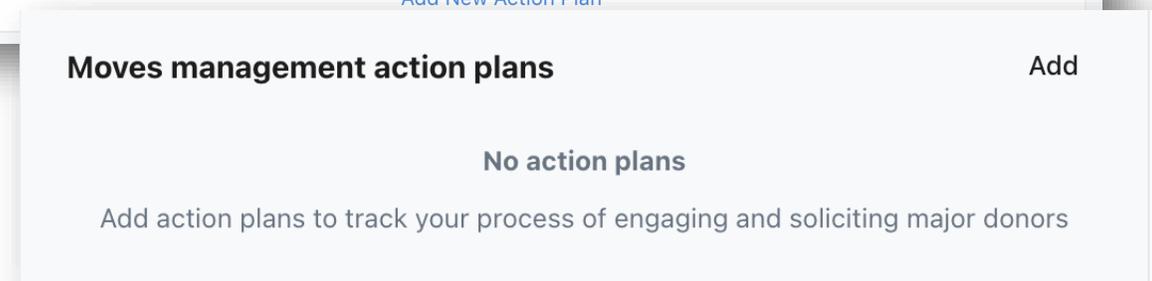
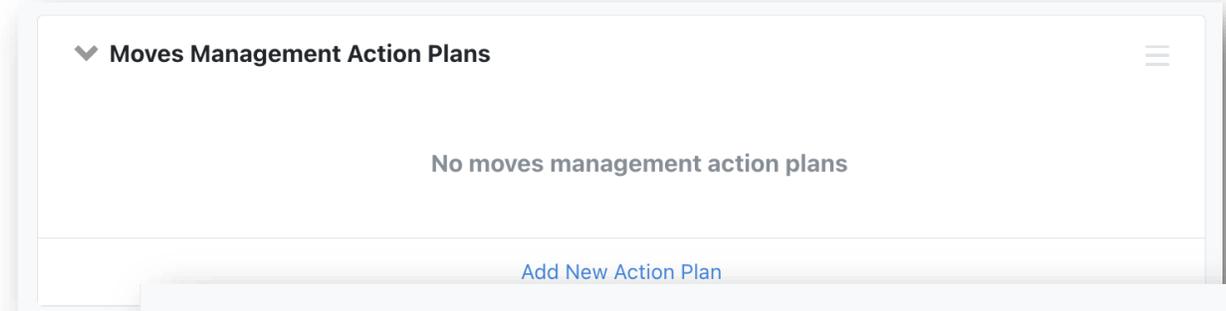
This information can be leveraged as a playbook, once honed, to either repeat asks from existing donors or to acclimate new prospects to become major donors for future campaigns.



# 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**.

A screenshot of a "Plan Details" form. The form contains the following fields:

- Campaign: A dropdown menu.
- Designation: A dropdown menu.
- Primary Solicitor\*: A dropdown menu.
- Secondary Solicitor(s): A dropdown menu.
- Start Date\*: A date field with a calendar icon, showing "8/14/2024".
- Status\*: A dropdown menu, showing "Identification".
- Status Date\*: A date field with a calendar icon, showing "8/14/2024".

# 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.

**Edit Moves Management Action Plan** for Isiah Thomas Cancel More Save

✓ Moves Management Plan has been saved successfully!

Status <b>Cultivation</b> 20% Probability ⓘ	Days in Status <b>0 Days</b> Since 8/14/2024	Ask <b>\$10K</b> 8/14/2024	Highest Prev. Contribution <b>\$23.6K</b> 4/10/2016	Most Recent Contribution <b>\$1.3K</b> 7/15/2024
---	--	----------------------------------	---	--

**Isiah Thomas**  
Home Phone (Likely Cell)  
(914) 514-0604  
Personal Email  
thomas@sink.sendgrid.net  
Home Address  
Chicago, IL 60607 US

**Plan Details**

Campaign ⓘ Major Donor Identification: Platin... ✕ ▾

Designation NADO (Demo) Designation ▾

Primary Solicitor\* Sterin, Cory ✕ ▾

Secondary Solicitor(s) ▾

Start Date\* 8/14/2024 📅

Status\* Cultivation ▾

Status Date\* 8/14/2024 📅

**Follow Ups** This Moves Management Plan Only ▾

Date	User	Type	Priority	Notes
8/23/24	C. Sterin	Meeting	High	Meeting for lunch with Isiah to further discuss Gala sponsorship options. ...

[Schedule Follow Up](#) [View My Follow Ups](#)

**Contact History** This Moves Management Plan Only ▾

Date	User	Type	Result	Notes
8/14/24 2:00 PM	Sterin, C.	Personal Phone	Contacted	Spoke with Isiah to send personal invite to Fall Gala as a sponsor.

[Add New Contact](#) [More](#)

**WealthEngine**

**WealthEngine Not Enabled**

To enable WealthEngine for your committee, visit [WealthEngine](#) to register for an account and get your API key. Then submit a [Support Request](#) with your key to request the integration.

[Get WealthEngine Data](#)

# 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.

Home / Moves Management Report

## Moves Management Report

Manage major gift efforts by viewing Action Plan details; comparing progress by campaign, solicitor and status; and reviewing results and statistics.

Applied Filters | [Edit Filters](#)

Contact Records: All Contacts | Start Date: 8/15/23 - 8/14/24 ✕

### Report Summary

Number of Action Plans	Total Ask Amount	Total Projected Amount	Total Probable Amount
3	\$22.5K	\$10.5K	\$4.63K
	3 Action Plans w/ Ask Amount	2 Action Plans w/ Projected Amount	3 Action Plans w/ Probable Amount

Group By

# The Major Giving Portfolio

# 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.

The screenshot displays the 'Cultivate' tab interface. At the top, there are two summary cards. The left card, titled 'Moves', shows three metrics: 'Upcoming (next 30 days) — overall for year', 'Overdue', and 'Completed (last 30 days) — overall for YTD'. A 'Run report' link is visible. The right card, titled 'Portfolio value', shows '1 Donors in open action plans' and '\$160K Total contributions (YTD) \$10.1K last month'. Below these is a 'Noteworthy' section with a description: 'Review noteworthy donors for whom AJ Alexander is the assigned staff or primary or secondary solicitor that may need your attention for pledges, follow ups, birthdays, and more'. The main area contains three donor cards. The first card is for John Adams (JA), Bethlehem, PA, Silver Tier, with a 'Pledge overdue' alert for Tuesday, July 2, 2024. His most recent contribution is \$1.16K (May 29, 2024) and his highest previous contribution is \$3.07K (Aug 4, 2022 - 2024 Kayaking Trio Summer). The second card is for Kevin Bevins (KB), Pittsburgh, PA, with a 'No recent contact' alert. His most recent and highest previous contributions are both listed as dashes. The third card is for the State of Pennsylvania, Harrisburg, PA, also with a 'No recent contact' alert and dashes for contribution metrics.

# 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 screenshot displays the 'Action plans' tab for a portfolio owner named Cory Sterin. The summary shows 2 open action plans (2 donors), 2 asks made in the last 30 days (2 overall YTD), a total ask amount of \$12.5K (overall YTD), and a total projected amount of \$0 (overall YTD). The interface includes a search bar, filter buttons for status (Identification, Qualification, Cultivation, Solicitation, Negotiation, Stewardship), and a table of 2 action plans.

Name	Ask	Result	Next move ↑	Last move
<input type="checkbox"/> Isiah Thomas Solicitation	\$10,000 Asked Aug 14, 2024	Maybe Updated Aug 14, 2024	Meeting Scheduled Aug 23, 2024	Personal Phone Completed Aug 14, 2024
<input type="checkbox"/> Stephanie Bibbs Identification	\$2,500 Asked Aug 14, 2024	Maybe Updated Aug 14, 2024	—	—

# 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

Cultivate   Action plans   **Prospect queue**

Search City

Showing **25 of 35** prospects

Name ↑	Date Acquired	Most recent contribution
 Akosua Ali	3/13/2024	\$1,192 Mar 20, 2017
 Shavon Arline-Bradley Laurel, MD	3/13/2024	\$539 Feb 19, 2018
 Ebony Baylor Washington, DC	3/13/2024	\$1,015 Feb 26, 2018
 Alaina Beverly Washington, DC	3/13/2024	\$896 Jan 11, 2019
 Stephanie Bibbs Charlotte, NC	3/13/2024	\$886 Jan 23, 2016
 Myrna Corker		\$000

# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto: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



# Feedback & Training Survey

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



Thank You for Attending!

