Benevon Next Step Guide

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Benevon Next Step

eTapestry has partnered with Benevon to provide a database that integrates with the Benevon model. This Next Step database includes fields, queries and reports that enable you to track events. It also guides you through cultivation process. Your Next Step software includes Benevon specific feilds.

Tip: Don't see some of the fields? Contact Support. Support can import the fields so you don't need to create them manually.

Create Accounts in Next Step

It's important to track information about each time you contact individuals in your fundraising process.

Do not use a single account for a husband and wife. Instead, create a separate account for each person and then user the household relationship to indicate that the accounts go together. In this way, you can work with the household as a unit for reporting and mailings.

When each individual has a separate account, you can accurately track attendance at all types of events. Then you can use the Next Step Event Analysis report to review statistics about attendance and donations at the Ask Event.

Defined Fields for Benevon Next Step

eTapestry provides a general import set of user defined fields and system defined fields for your Next Step database. These fields will be used to help track your Point of Entries, Ask Events and Free Feel Good Cultivation Events. They will also be helpful in tracking your next step with your constituents in the cultivation process.

> *Note:* If you do not see any of these fields listed in your database, please contact *eTapestry* support and they will be happy to import them for you.

All of your Benevon user defined fields can be found by going to Manage -> Defined Fields -> User Defined Fields.

This will bring you to the Edit Fields Category screen where you will see four Benevon categories; Benevon Defined Fields, Benevon Mailing and Contact Preferences, Benevon Contact Follow Up Fields and Benevon Treasure Map Interview Questions. You will also see a Base category which is where you can create general defined fields for your database such as account type or volunteer information.

Select these categories to view the fields that *eTapestry* provides for you. All of the fields in these categories can be selected on either the constituent account (see Benevon Defined Fields on the Constituent Account) or on a journal contact (see Benevon Defined Fields on a Journal Contact).

eTapestry also provides you with a few system defined fields. These can be found by going to Manage -> Defined Fields -> System Defined Fields

This will bring you to the system defined field screen. The Benevon fields provided by *eTapestry* can be found by selecting on Contact Method.

This will display all of the Benevon contact values that will be available to you when you are creating your new contacts for constituents.

Benevon Defined Fields on the Constituent Account

Some of the fields seen in the manage section of *eTapestry* can be used by going to a constituent's account and navigating to their Defined Fields tab. Once you select here you should see the defined field categories Benevon Defined Fields and Benevon Mailing and Contact Preferences. You might also see the Base category and any other category you have created for your database.

Benevon Defined Fields

If you select the Benevon Defined Fields category you will see all of the defined fields located in the Manage/User Defined field section that apply to the constituent page. These fields are imported by *eTapestry* and can be used to track the initial contact with the constituent as well as constituent's interest. Clicking on the name of the fields will open up the values that are within each field. In this example, the constituent is a friend of a staff member. We mark this fact in the Benevon Initial Contact field so we can track it later in a query or report.

You may only have one field open at a time. If you have Benevon Initial Contact open and you click on Benevon Constituent Interest, the Benevon Initial Contact will automatically close. The constituent became interested in our organization because of his staff member friend, so we mark this field as well.

When a field is closed you will see the value/values that have been marked and saved in each field.

Mailing and Contact Preferences for Benevon

If you select the Benevon Mailing and Contact Preferences category you will see all of the defined fields located in the Manage/User Defined field section that apply to the constituent page. These fields are imported by *eTapestry* and can be used to track their mailing and contact preferences. All of these fields can be used in queries and reports.

The No Contact field will ensure that you do not offend a constituent with unwanted communication.

The preferred communication method will be helpful when you are doing your follow-ups.

The mailing status can be helpful in mass mailings.

Once these fields are marked and saved you will be able to see the values that have been selected listed out next to each field. If a field does not have a value selected, in this case Mailing Status, you will not see the field listed. If you would like to see the field displayed simply click on the name of the category OR click on Show All Fields from the task box.

Benevon Defined Fields on a Journal Contact

Some of the fields seen in the manage section of *eTapestry* will be used when you create a new contact on the constituent's journal page. Once you select on new contact you will see the defined field categories as well as the contact methods set up by *eTapestry* for your Next Step database.

The first fields you will be using on the contact page are the methods which are set up in the database as System Defined Fields. If you select the drop down next to Method, you will see all of the methods used in contacting your constituents. These options will be covered in detail in the event sections.

On the contact screen, you will also see a defined field category called Benevon Defined Fields. These are the fields located in the Manage/User Defined field section that are imported by *eTapestry*.

In this category you will see Benevon Next Step which is where you will determine, based on the contact you are entering, what your next step is with this constituent. You will also see the Benevon

Follow-Up Done? field which will be used when you begin entering your POE and Ask Events. You will learn how to use this field in the event sections of help. There are a few other fields relating to Point of Entries and Ask Events which will be covered in more detail in those sections of the help.

The contact page also contains the Benevon Treasure Map Questions that you use during your Know Your Donor program.

Giving Level UDF

eTapestry recommends that you create a Transaction User Defined Field to allow you to categorize each gift that your organization receives by Giving Level. Note: Using a Transaction UDF instead of an Account UDF allows you to track changes in membership level over time.

This UDF would allow you to separate gifts into all of the categories called for in the Form for Success. Be sure to have at least one level for each of the following types of gifts:

- Each level of your Multiple-Year Giving Society
- Smaller Multiple-Year Gifts
- Event Sponsor Gifts
- Challenge/Leadership/Major Gifts
- One-time or Single-Year gifts or pledges

For example, suppose an organization has a Multiple-Year Giving Society called the Winners Circle that has three levels: Bronze, Silver and Gold. This organization always arranges a sponsor for each Ask Event, and regularly receives Challenge and Leadership gifts.

The Giving Level UDF that this organization created contained the following values:

Benevon Queries

Queries are created by *eTapestry* for your Next Step database. These queries will make it easy for you to pull information on all of your constituents and events throughout the year. Benevon queries can be accessed by going to Query on the main menu. This will display *eTapestry* base query categories, Benevon query categories and any categories you have created.

As you go through the Next Step help you get more information on what these queries will pull and how to customize them for your database.

Benevon Reports

Reports are created by *eTapestry* for your Next Step database. These reports will make it easy for you to pull information on all of you constituents and events throughout the year. Benevon reports can be accessed by going to Report on the Main menu.

There are two report categories provided by Benevon; Benevon and Benevon Form for Success.

Select on the Benevon category to display custom reports that *eTapestry* has set up for you.

Select on the Benevon Form for Success category to display custom reports related to the completion of your Form for Success.

As you go through the Next Step help you get more information on what these reports will pull and how to customize them for your database.

Benevon Approaches

We recommend you keep track of gifts or pledges for a particular Ask Event by selecting an approach from the "Approach" drop-down box. *eTapestry* has set up your Next Step database with a couple of Approaches that will help you with your gift and pledge entry. To view these approaches you will select on Manage -> Defined Fields -> Approaches.

This will display any approaches you have already set up for your database as well as two Benevon approaches; Benevon Ask Event yyyy/mm and Benevon One-on-One Ask.

If you do not see these fields listed in your database, please contact *eTapestry* support and they will be happy to import them for you.

The Benevon One-on-One Ask will be used in a gift or pledge for any constituents that you had a one-on-one with. The Benevon Ask Event yyyy/mm is simply a template and will not actually be used in your gift and pledge entries, but should be used as guide for creating more specific approaches for your ask events. For instance, if you have your ask event on May 11, 2007, you will need to create a specific approach for that event. To do this you will need to select on Add New Approach from the task box.

Type in the name of your approach. Remember to keep the format that is given in the template. Then select Save.

Your new approach will be listed and can then be used in your pledge and gift entry. You will want to be sure to enter an approach for all of your ask events.

Benevon Relationship Types

eTapestry will provide you with two relationship types for your Next Step database. You can view these by going to Manage -> Defined Fields -> Relationship Types.

This will bring you to the Relationship Types screen where you will see Referred/Referred By and Table Captain/Guest. These two relationship types will be discussed in the POE section and Ask Event section of help.

Essential Story

You can include your Essential Story in your Next Step database by going to Next Step -> Our Mission -> Essential Story from the navigation menu options.

You can type your essential story into the area labeled Write Your Own Here. If you have an active Document Attachment subscription, you can choose to upload your essential story from an existing document.

You will also have the option of viewing the Benevon essential story template as a guide to how you should write your story. This can be viewed by selecting the View Sample Story link in the tasks box.

Visionary Leader Talk

You can include your Visionary Leader Talk in your Next Step database by going to Next Step -> Our Mission -> Visionary Leader Talk from the navigation menu options.

Options for the visionary leader talk creation will be to:

- Type in the visionary leader talk into the text area of the Visionary Leader Talk screen
- Upload a document that has already been created

You will also have the option of viewing the Benevon visionary leader talk template as a guide. This can be viewed by selecting the View Visionary Leader Talk Worksheet link in the tasks box.

Point of Entry

Next Step enables you to manage your Point of Entry events.

Schedule Your Point of Entry

To make it easy to track each of your Point of Entry events, you should record them on your Organization Calendar. Be sure that the Destination field is marked to go to the Organization Calendar and not to your Personal *eTapestry* calendar.

Invite Constituents to a Point of Entry Event

You can use your Next Step database to find constituents who should be invited to your next Point of Entry event.

These accounts can be grouped together into a query, and then invitations can be sent to that group of accounts by utilizing *eTapestry*'s Correspondence feature.

There are two different items in the Benevon Next Step list that indicate that a constituent should be invited to a POE; "Invite to POE – Onsite" and "Invite to POE – Offsite".

For more information on using this information to identify potential POE attendees, see Identifying Constituents Associated with Next Steps.

Record an Invitation to a POE

If you decide to send out a few invitations or invite someone in person to your Point of Entry event, you will want to track this in your Next Step database.

Your first step will be to make sure the invitee is an account in your database. Go to Find Account on the main menu and type in the name of the invitee, then click Find.

If no results are found, you will want to select on the Add New Account button which takes you to the new account screen. For additional help on adding a new account clickhere.

Once the account has been added to your database, the first thing you may want to do is mark some of the Benevon defined fields on the defined field page. For more information on these fields see Benevon Defined Fields on the Constituent Account. To access a constituent's defined field page you must be in that constituent's account and then select the Defined Fields link.

To record the POE invitation you will need to select the Journal link on the constituent's account. This will bring you to the journal page where you will need to select Contact from the Add drop down box.

This will bring you to the new contact screen where you will input the date of the actual invite, type "POE Invitation" in the subject line, and then select Benevon POE Invitation from the Method drop down box. You may also want to put any notes about this invitation in the Note field.

You may also want to track your next step with this constituent in the defined fields section. For example, you may need to send this constituent some additional information so you could check the boxed called "Send Additional Information."

Once you have completed the appropriate fields you can save this contact.

(RSVP) Track Acceptance to a Point of Entry Event

After you have invited people to your Point of Entry event, you should expect to receive some acceptances. Once an acceptance comes in, you will want to add this as another contact on that constituent's journal page.

To do this you will need to look up the account by going to Find Account on the Main menu. Once the account displays you can get to their journal page by right clicking on the dollar sign just underneath the role header and then selecting Journal from the menu that appears.

This will bring you to the journal page where you should see the POE invitation you have already entered. To add the acceptance, select on Contact from the Add drop down box.

On the New Contact screen, enter in the date of the acceptance, type "POE Acceptance" in the subject line and then select Benevon POE Acceptance from the method drop down box.

You can also include any notes for this acceptance and select any defined fields that pertain to this contact. After you have made all of your selections you can save this contact.

Track Attendance for a Point of Entry Event

You have hosted your Point of Entry event and are ready to record the attendance at the event. You will do this by adding a new contact to the Journal of each constituent who attended the event. You can also use the information on the Point of Entry Sign-in Card to update the contact information stored in the Persona tab of the account.

To add a contact for a constituent, start by entering the constituent's name on the Find Account page. If the constituent has an account in Next Step, it will be displayed on the screen.

If the constituent does not yet have an account in the database you will need to add it. Please see the Adding an Account section found here for more information.

Clicking on the constituent name on the Find Account page will open the Home page of the constituent's account. You can compare the contact information on the Point of Entry Sign-in Card with the contents of the Personas tile.

If you need to make updates, click on Personas in the tile to open the Personas page to make your changes. Be sure to save any changes you make. Select Go to Journal in the Task tile, then click Save And. This will take you to the constituent's Journal page.

If no contact information needs to be changed, open the Journal page by clicking on Journal in the account header.

Next, add a new contact to the Journal. Click on the Add drop down box and select Contact from the list.

This will bring you to the New Contact screen. First you will need to input the date of the Point of Entry event. This date is important and will be used later in queries and reports. Next, you will type in the subject of this contact. It is recommended that you type in "POE Attendance/Follow-Up Needed." This will make it easier to identify this journal item on the constituent's journal page. If you are entering this attendance and you have already done a follow-up with the attendee, then you will want to type in "POE Attendance/Follow-Up Complete."

For Method, you will need to select Benevon POE Attendance from the drop down. Finally in the Note section you can input any items you need to remind yourself of.

You also have the option of selecting your Next Step with this account. If you intend to invite this person to an ask event, it is recommended that you select that as you next step in the Benevon Next Step defined field section. This will be helpful later when you are pulling together a list of those accounts that you would like to invite to your Ask Event. You should also track any account that is a possible table captain. This field will be helpful when you are getting ready for your ask event.

After you have filled out your contact information, you will want to save the contact. Before you click the Save And button, you can save yourself some time by selecting one of the options from the pull-down list in the Tasks tile. If the Invited by: field on the Point of Entry Sign-in Card was filled out, you need to record a referral relationship for this constituent, so you may want to select the option Go to Relationships. See the section Setup POE Referral Relationships for information on how to record the referral.

If you are ready to update another constituent's account, you can select Search, which will take you back to the Find Account page.

Be sure to click on Save And before you leave this page, or your changes will be lost!

Create Referral Relationships for POE Attendees

Another important step in tracking your Point of Entry event will be to set up referral relationships of those that attended. It is important to track constituents that have referred someone as well as those constituents that have been referred.

To set up your referral relationship, go to the account that has been referred and select on the Relationships tab.

From here you will need to select on Add a Relationship from the task box.

From the Relationship Type drop down in the Basic Information section, select the relationship type Referred/Referred By. You will also see Relationship Effective From and To fields. This is important to track so that later you can query on referrals that were made for a specific POE event. The From and To date in this section should be the date of the POE event.

In the Choose Accounts section, you will notice that the account you are in right now is the Referred. To select the referred by, you will need to click on the Select Related Account link.

This will bring up a find account screen where you can search for the account that referred the constituent. If you are working from a Point of Entry Sign-In Card, this will be the name on the Invited By: line. Click on the name of the person who referred the constituent to select them into the Referred By value on the relationship.

If there is no account set up yet for the person who made the referral, click on Add Account.

This completes the relationship setup. You will need to save the relationship by clicking the Save And button on the Tasks pane. You can save some time by first selecting the next page you want to see from the pull-down list in the Tasks pane. If you are done updating information in this account, you may want to select Search to return to the Find Account page.

Create a List of Attendance Information for POE

After you have entered your POE attendees you can run a query to view all of those accounts at one time. *eTapestry* has created your queries for you so all you have to do is run them. To start, from the Next Step navigation bar, click Main -> Query -> Benevon Point of Entry.

This will display all queries in the Benevon Point of Entry category. Find the POE Event query. Click the dollar icon to see a list of POE dates and the guests recorded for each one.

This query will display all of the POE events that you have had for your organization.

You can also limit the list to attendees of just one POE event. To do this, go to the Benevon Point of Entry category and select Copy Query from the task box.

This will bring you to the Copy Query: Benevon Point of Entry screen where you will see four sections.

- In section 1, you will select POE Attendees yyyy/mm/dd. This query is a template set up by *eTapestry* that you will customize for your POE.
- In section 2, you will want to select the category where the new query should be found. In this case, we will select "Benevon Point of Entry".
- In section 3, type in POE Attendees yyyy/mm, where yyyy is the year of your POE event and mm is the month.
- Select copy in section 4.

This will bring you back to the Query Category screen. Click on the name of the category you selected in section 2 to see your new query. Before you run this query you will need to make some changes to the template. To do this select on the name of the query.

This will bring you to the query definition screen. Select Dates from the Available Fields drop down, and select Journal Entry Date. Under Journal Entry Date in the Criteria section, input the date of your POE event in both fields.

Select Save And preview to view the results.

This will display all of the attendees to that specific Point of Entry. If you need to print this list out, you can select on Print in the upper left corner of *eTapestry*.

Follow Up with POE Attendees

A few days after your Point of Entry you will want to follow-up with your attendees. You can pull a report from *eTapestry* to get a list of all of those attendees that still need a follow-up. To do this go to Report/Export on the main menu and select the Benevon report category. This will display all of the Benevon reports that *eTapestry* imports for you.

To get a list of your POE attendees that need a follow-up you will need to run the Follow-Up Listing-POE report. To run the report, select Go next to the name of the report.

This will bring you to the report launch screen. On the launch screen, you will need to select your query category and query name. In the first drop-down box select Benevon Follow-Up, which is the name of the category. In the second drop-down box select POE Follow-Up Needed, which is the name of the query.

Leave all of the defaults on the page and then select Submit at the bottom of the screen. This will display all of those accounts that need a follow-up and will also display their address and phone number along with any defined fields you selected on the defined fields page or journal contact.

If you would like to print this report out to use as a check list, you can select Print in the upper left corner of **eTapestry**.

Recording your Follow-Up

Now that you have the report of all the accounts that need a contact you can begin your follow-ups. As you are contacting these attendees you can record this in your Next Step database. You will want to update your POE attendance contact with your follow-up information which you can access directly from this report. Just select on one of the names in your Follow-Up list. This will take you to the Benevon POE Attendance contact entry for that account. Before you do your follow-up you can review the account information.

As you are speaking with the attendee you can make notes in the Benevon Contact Follow Up Fields.

You will also need to change your Subject line to read "POE Attendance/Follow-Up Complete."

Finally, you will want to select Yes from the Benevon Follow-Up Done? drop down.

Then select Save at the bottom of the screen. You can then go back to your report and continue recording your follow-ups.

Ask Event

eTapestry has added several features to Next Step that will help guide you through the process of creating a successful Ask Event.

Timeline for Ask Event

Scheduling the Ask Event Timeline

As soon as your Ask Event has been scheduled, you should create Calendar Items on your Organization Calendar for the tasks on the Benevon Ask Event Timeline. This will help you keep track of the detailed work that leads you to a successful Ask Event. The section Creating the Ask Event Timeline will show you the simple steps to setting up the Ask Event Timeline on your Organization Calendar.

Next Step will come in handy as you complete each of the tasks in the Ask Event Timeline.

Creating the Ask Event Timeline

1. Next Step gives you a quick, streamlined method of updating your Organization Calendar with all of the tasks that have to be done to ensure a successful Ask Event.

2. On the Next Step tab, click Our Ask Event Timelines.

3. To add a new Ask Event Timeline, click on the Add New Ask Event Timeline button. This will open the New Next Step Ask Event Timeline page.

4. Fill out the Ask Event information and click Save. The new Ask Event will appear on the list.

5. Click on the name of the Ask Event to open the Ask Event Timeline, listing all of the tasks related to the successful completion of the Ask Event as calendar items. Each task has been schedule based on the lead time that Benevon recommends for that task before the date of your Ask Event.

6. You can click on any calendar item to view and update details. For example, you can change the date or time, or mark the item as completed. To assign the task to someone on your staff, simply issue an invitation to them for the Calendar Item. This will add the Calendar Item to the assigned person's *eTapestry* calendar. For more information on using Calendar Items, refer to Calendar Items.

7. These calendar items can also be viewed on the Organization Calendar, which can be accessed from the Welcome Page or from the My Organization option under the Manage tab. Reminders of outstanding tasks appear on the Welcome Page.

Invite POE Attendees to an Ask Event

Invite to an Ask Event

Invitations can be created in your Next Step database for your next Ask Event. Most of your invitees have at some point attended a POE event and therefore are probably set up as accounts in your Next Step database. Those accounts can be grouped together in a query and then invitations can be sent to that group of accounts by utilizing **eTapestry**'s Correspondence feature.

To set up your query you will need to determine what field all of your invitees have in common. For example, they may be all of your accounts that attended a POE in 2005. If this is the case you can make a copy of the query template in the Benevon Point of Entry category called "POE Attendees yyyy/mm/dd." Then in your query copy, input your date range of all of your POE's that need to be captured in the query.

You may also be able to create a query based on the Benevon Next Step defined field "Invite to Ask Event." If you recall from the Record Attendance to a POE help section,it is recommended that you select this field during follow-up with a constituent if you intend to invite that constituent to your ask event. If you have selected this field, **eTapestry** has created a query for you that you can copy and customize for your specific time frame. You will need to copy the query in the Benevon Next Step category called "Invite to Ask." Then in your query copy, input your date range of your POE's that need to be captured in the query.

As you can view there are many different ways to get a query of accounts you would like to invite to your POE. Once you have set up your query you can continue to the correspondence section to send your Save the Date cards or invitations. To access the correspondence section, select on Communicate from the navigation bar and select on Create/Send Correspondence.

This will bring you to the Correspondence Categories screen where you will have the option to create an email template or a PDF template to send to your invitees. You may want to use one of the Save the Date HTML layouts that you can find under the Events.Invitations tab when you are creating your template. These layouts can be easily customized to your event and organization. For information on using our correspondence feature, please refer to Creating a Correspondence Template or other topics under the Correspondence help section.

After you have sent your correspondence through **eTapestry** you can then create a mass update of a journal contact to mark each record in the query as receiving an invitation. For more information on setting up this mass update please refer to our topic called Record Invitation to an Ask Event.

List Potential Table Captains

As you are cultivating your constituents you are also entering any contacts you have made with them into your Next Step database. You may have noticed by now that on the contact page you have defined fields set up called Benevon Next Step.

These fields can be used to track your next step with a constituent based on the cultivation level. You will notice that there is a field here called Potential Table Captain. If you wish to keep track of your potential table captains, this is where you will need to select this field. You will select this field as it corresponds to your ask event. So, if someone is a potential table captain for your 2005 ask event and also for your 2006 ask event, you will need to select the field in both years on a contact page. This will allow you to filter out specific years in a query when you are ready to generate your list of potential table captains.

eTapestry has provided you with a query to use to generate your list of potential table captains. To access this query go to Query on the Main menu and select the Benevon Next Step category. You will refer to a query called "Potential Table Captain." Select the preview icon next to the name of this query to generate your list.

You will notice that all of your potential captains will appear in this query for each ask event you have held for your organization. If you need to narrow your search down to a specific year, you can create a copy of the Potential Table Captain query and add the date to the copy.

Record Invitation to an Ask Event

Once you have sent out your Ask Event invitations, you will want to track those invitations that have been sent. There are two ways to track these invitations in your Next Step database. If you have a query set up of all accounts that have been invited to the Ask Event, you can do a mass add to record in Next Step that the invitations went out. If you do not have a query of all of your accounts, but simply have a list of names that you are inviting then you will need to go to each invitees account and add a new contact on their journal page.

Using a Query

If you have a query set up of all the accounts that have been invited to the Ask Event, you can mass add a journal contact of this invitation. To begin your mass update, go to Mass Update on the navigation bar. Select on Journal Updates and Journal Contacts from the drop down menu options.

This will bring you to the Add Journal Contacts page, where a Wizard will guide you through the process. Your first step will be to select your query. This may be a query you have set up or a query set up by *eTapestry*. It must include all of those accounts that are invited to the Ask Event. When you have selected your query, click Next in the Navigation box to go to the next step.

Next, you will enter the date that the invitation was sent. In the subject line type "Ask Event Invitation Sent." You could also type in the name of your specific ask event in place of the words Ask Event. This will make the event more recognizable on the journal page of an account. From the Method drop down menu select Benevon Ask Event Invitation and then type in any notes you would like to make about this contact. After this is complete, click Next in the Navigation box to go to the next step.

On the next screen you have the option of selecting defined fields to be set on the new contacts. When you are finished, click Next in the Navigation box to go to the next step.

This step is where you will verify your criteria.

It is very important that you review this section before submitting your mass update. Verify that you have selected the correct query for this mass update and also verify that the number of accounts for which a journal contact will be created matches the number of accounts in your original query. For additional verification you can also select on the text "The number of Accounts for which a journal contact will be created is:".

This will show you the accounts that will be updated. It is important to verify the accounts because once you select the Add Journal Contacts button, you will not be able to reverse this mass update unless you go into each account and manually make a change.

After you have verified your criteria click Next or Save and Finish in the Navigation pane. A message box will appear asking you to confirm that you want to run the Mass Update right now. You might choose to run it after hours, since updating a large number of accounts may make the system response slow for all users.

Click OK on the message box to start the Mass Update. A message will appear in the Finish pane to let you know your mass update was a success.

From a List of Names

If you do not have a query to generate a mass update you can enter your invitations by going into each invitees account and adding a new contact. To begin, go to the invitees account and navigate to their journal page. From the journal page select on Contact from the Add drop down menu.

This will bring you to the New Contact page. In the subject line type "Ask Event Invitation Sent." You could also type in the name of your specific ask event in place of the words Ask Event. This will make the event more recognizable on the journal page of an account. From the Method drop down menu select Benevon Ask Event Invitation and then type in any notes you would like to make about this contact.

You have the option of selecting defined fields on the invitation as well. Once you have completed the appropriate fields you can save this contact and continue to the next invitees account.

Secondary Invitation Strategy

As you build your Secondary Invitation Strategy, you will be identifying potential Ask Event guests that your staff will be inviting directly, along with potential Underwriters, Sponsors and Challenge Gift constituents.

You can use the Invite to Ask Event query under the Benevon Next Step query category to retrieve the names of all constituents who have "Invite to Ask Event" selected on their Benevon Next Step field. Refer to the help topics Invite to an Ask Event and Identifying Constituents Associated with Next Steps for more information on this topic.

The *eTapestry* Standard Report Recognition According to Gift Amounts can be used to give you a list of constituents who have given large gifts to your organization in the past. This report can give you a starting point in identifying potential Underwriters, Sponsors and Challenge Gift constituents. For more information on using this report, refer to the Recognition Reports topic.

Once you have made your list of invitees, create a new contact for each invitee as explained in the section Record Invitation to an Ask Event. If any invitees do not already have a constituent record in Next Step, you will first have to create a constituent record for them as described in the chapter here under the online help section Accounts.

(RSVP) Track Acceptance for an Ask Event

After you and your Table Captains have issued invitations to your Ask Event, you should expect to receive some acceptances. Once an acceptance comes in, whether directly or on a Table Captain list, you will want to add this as another contact on that constituent's journal page.

To do this you will need to look up the account by going to Find Account on the Main menu. Once the account displays you can get to the journal page by right clicking on the constituent role icon just underneath the role header and then selecting Journal from the menu that appears.

This will bring you to the journal page where you should view the Ask Event invitation you have already entered. To add the acceptance, select on Contact from the Add drop down box.

On the New Contact screen, enter in the date of the acceptance, type in "Ask Event yyyy/mm Acceptance" in the subject line where "yyyy" is the year of the ask event and "mm" is the month of the event. Then select Benevon Ask Event Acceptance from the method drop down box.

You will also need to track a few defined field for the ask event. You should view Benevon Ask Events and Benevon Ask Event Table Number. Here you will need to select if this person is a captain or a guest

and you will also need to input their table number. These fields will be used later to pull a list of table assignments. This will be covered in the Track Tables, Table Captains and Guests help section.

Select any other defined fields that pertain to this contact. After you have made all of you selections you can save this contact.

Track Tables, Table Captains, and Guests

Table Captain Recruitment

When you start recruiting Table Captains, you can use the Potential Table Captain query to list constituents who have expressed an interest in becoming a Table Captain (refer to List Potential Table Captains). You will want to mark the records of constituents who agree to be Table Captains as described in the section Record Acceptance to an Ask Event.

Table Captain Lists

Later in the process, you will receive Table Captain Lists that need to be recorded in Next Step. If any of the individuals identified on the Table Captain Lists do not have constituent records in Next Step, you should create a constituent record for him or her by following the instructions found here.

You should record which constituents plan to attend the Ask Event as described in the section Record Acceptance to an Ask Event. This is also a good time to build the Table Captain/Guest relationship as described in the Next Step help section Link Table Captains and Guests. This relationship is necessary to the proper functioning of the Next Step Event Analysis report.

You will also want to update the records of those listed on the back of the Table Captain list that cannot attend the Ask Event but want a follow-up contact of some sort. Create a new contact for those constituents as explained in the section Record Invitation to an Ask Event. Be sure to update the Benevon Next Step field according to the follow-up contact desired.

Ask Event Seating Plan

You can use the Table Assignments report as a starting point for your Ask Event Seating Plan. For more information on the Table Assignments report, refer to the help section Track Tables, Table Captains, and Guests. If you update Next Step as you make any necessary adjustments to the table assignments, you will be able to modify the Table Assignments report to use as a merge file to create your Ask Event Name Tags.

Track Tables, Table Captains, and Guests

After all of your acceptances have come in and have been entered according to the steps in the Record Acceptance to an Ask Event help section, you can pull your table assignment report. This report will show you who is attending the Ask Event, if they are a Table Captain or a Guest, and what table they will be sitting at.

Before you can run the report, you will first need to copy and customize the Ask Event Accepted query to use in the report. This query can be found in the Benevon Ask Event query category, and it will need to be customized to include the specific date range of ask event acceptances.

After you have created your query, you can then go to Report/Export on the Main menu. This will bring you to the Report/Export Categories page. Select the Benevon category. In this category, you should view a report definition called "Table Assignments." This is the report you will need to run. To run the report click the Go button next to the name of the report.

This will bring you to the Launch Table Assignments page. The first thing you will need to select on this page is the query you created from above. In the first query drop-down box select "Benevon Ask Events." In the second query drop-down box select your customized "Ask Event Accepted" query.

Go to the bottom of the launch page and select Submit to display your results to the screen.

❯ To print out the table assignments

Follow the directions above to display the "Table Assignments" report. Then, select the Print option in the upper left corner of your Next Step database.

Link Table Captains and Guests

Once you determine who your table captains are you will want to link them with their guests. You will link a Table Captain and guest by assigning the Table Captain/Guest relationship to each.

❯ To assign a Table Captain/Guest relationship

Search for the Table Captain's account by going to the Find Account screen. Once the name displays, you can right-click the constituent role icon next to their name and select "Relationships."

The "Relationship" page for the account appears and all relationships are listed. From this page select "Add a Relationship."

From the "Relationship Type" drop down menu, select the relationship type "Table Captain/Guest."

Next fill in the Relationship Effective From and To fields. For a Table Captain/Guest relationship, these dates are simply used to specify which Ask Event the relationship was set up for. Type the date of the Ask Event in both the From field and the To field.

Notice that, by default, the constituent listed is designated as the "Table Captain." If you have started with the guest rather than the Table Captain, be sure to change this appropriately. Click "Select Related Account" and find the person who is the guest at the Table Captain's table. Click their name from the listing.

Note: Keep track of this relationship for a particular Ask Event by putting the date of the Ask Event in the "Relationship Effective from" date box.

After you have filled out these sections you can select Save from the task box and continue setting up your relationships for your ask event.

❯ Printing out the Table Captain Guest List

You can use the Relationship Reporting feature of *eTapestry* to create a Table Captain Guest List report.

Create Name Tags for an Ask Event

You can modify the Table Assignments report to create a merge file to use in generating the name tags for your Ask Event. For example, you might remove all of the columns except Name, Table

Number and Captain/Guest, and add Short Salutation. For information on customizing **eTapestry** reports, refer to the Report section.

Track the Results of an Ask Event

At the conclusion of your Ask Event, you will have a stack of pledge cards that contain information that you want to enter into Next Step as quickly as possible. Each card returned represents someone who attended the event. You should follow the instructions in help section Record Attendance at an Ask Event to store that information in Next Step. If the attendee indicated on the pledge card that they have ideas to share, be sure to select the Other Contact Needed option on the Benevon Next Step field. You should also create a Journal Entry for any gift that was indicated on the pledge card (refer to help sections Record an Ask Event Multi-Year Pledge and Record a One Time Ask Event Gift).

You may also have one or two name tags left over, indicating people who accepted the invitation to the event but did not attend. You will want to save the name tags to use in the Recommended Follow-Up Process, but you can also use them here to determine whether anyone attended the Ask Event but did not turn in a pledge card.

To do this, start by running the Table Assignments report as described in the section Track Tables, Table Captains, and Guests. This will give you a complete list of those who accepted their invitation to the Ask Event. Check off the names from the pledge cards and left-over name tags. Any unchecked name represents a person who did not turn in their pledge card; you should create a Contact for each of those constituents to record the fact that they attended the event (refer to Record Attendance at an Ask Event). You will want to keep a list of these constituents to use in the Benevon Recommended Follow-Up Strategy, as well.

Track Attendance for an Ask Event

You have hosted your Ask Event and are ready to record the attendance at the event. To do this go to the attendee's journal page on their constituent account. Select on Contact from the Add drop down box.

This will bring you to the New Contact screen. First you will need to input the date of the Ask Event. This date is important and will be used later in queries and reports. Next, you will type in the subject of this contact. It is recommended that you type in "Ask Event Attendance/Follow-Up Needed." This helps when you go to view this journal item on the constituent's journal page. If you are entering this attendance and you have already done a follow-up with the attendee, then you will want to type in "Ask Event Attendance/Follow-Up Complete."

For Method, you will need to select "Benevon Ask Event Attendance" from the drop down. Finally in the Note section you can input any reminders or other information useful to your team.

If you have already done your follow up with this constituent, you should select the Next Step with this account in the Benevon Next Step UDF. For example, if you intend to invite this person to a Free Feel Good Cultivation Event, it is recommended that you check the box labeled "Invite to FFGCE". This will be helpful later when you are pulling together a list of those accounts that you would like to invite to your FFGCE. You can check as many boxes as needed to track your next steps with this constituent.

After you have filled out your contact information, select save from the task box.

List of Ask Event Attendees

To view a list of your Ask Event attendees, you will run a query that looks for the journal contacts which record Ask Event attendance and displays them.

Create a List of Attendees for an Ask Event

From the Main menu select Query. The Query Categories page appears and all query categories are listed. From here, select the query category called Benevon Ask Events.

This will take you to the Benevon Ask Events category where you should view a query called Ask Event. Click on the preview icon next to the name of the query to view a list of Ask Event dates and the guests recorded for each one.

If you wish to view a specific Ask Event attendee list, you will need to copy and customize the Ask Event query. To do this, go the Benevon Ask Events category and select Copy Query from the task box.

This will bring you to the Copy Query: Benevon Ask Event screen where you will view four sections. In section 1, you will select Ask Event. This query is a template set up by *eTapestry* that you will customize for your Ask Event.

In section 2, you will want to select Benevon Ask Events so that the new query is created in the correct category.

In step 3, type in Ask Event yyyy/mm, where yyyy is the year of your Ask Event and mm is the month. Then, select copy in section 4.

This will bring you back to the Query Category screen where you will want to select on Benevon Ask Events where you will view your new query. Before you run this query you will need to make some changes to the template. To do this select on the name of the query.

This will bring you to the query definition screen.

Select Dates from the Available Fields drop down and then select Journal Entry Date.

Under Journal Entry Date in the Criteria area input the date of your Ask event in both fields and then select Save and preview.

This will display all of the attendees to that specific Ask Event. If you need to print this list out, you can select on Print in the upper left corner of *eTapestry*.

Track a Multi-Year Pledge from an Ask Event

An Ask Event pledge will be entered in the same way as regular pledges, with the addition of steps needed to identify these pledges as coming from a particular Ask Event.

Before you begin your pledge entry there are two steps you will want complete. The first is to print out your table captain and guest list. This can be generated by following the steps outlined in the Track Tables, Table Captains and Guests help section. The other step is to create an approach to identify which ask event brought in the pledge.

To set up your approach, go to Manage on the Main menu. Select Defined Fields and Approaches from the drop down menu.

Select on Approaches and you will be brought to the Approaches screen. From here select on Add New Approach from the task box.

Name your approach "Benevon Ask Event yyyy/mm" where "yyyy" is the year of your ask event and "mm" is the month of your ask event. Make any notes if needed and then select Save.

You are now ready to enter in your new pledges. To begin, search for the account on the Find Account page. Once the account displays, you can click on the "Gift/Pledge" icon Image:gifticon.gif on the far right of the screen next to the Quick Add dropdown. This will bring you to the New Gift/Pledge screen. From here you will enter in all of the pledge information following these steps:

- In the date field type in the date of the Ask Event.

- Enter the amount pledged in the "Pledged Amount" field. This will be the total of their multi-year gifts. For example, a constituent pledging at the $1000/year for five years level will have a pledge of $5000.

- If the first pledge payment was made at the Ask Event, enter the amount in the "Received Amount" field.

- Select your fund from the "Fund" drop-down box.

- Click the "Approach" drop-down box and select your unique approach for your Ask Event that you created in the above help.

- If the first pledge payment was made at the Ask Event, select the gift type from the "Gift Type" drop-down box and fill in the relevant fields.

- Use your organization's User Defined Field to identify the Giving Level for this pledge. To do this, select User Defined Fields to view a list of available fields, then select the one that your organization uses to track Giving Level. Refer to the Additional Defined Fields section of the Next Step help document for more information.

- Your next step will be to create a pledge schedule for this pledge. To do this select on Pledge Information and click the Create Pledge Schedule link.

- This will bring you to the "Pledge Payment Schedule."

- For "Frequency" keep Annually (1) selected.

- For "First Installment Date" enter in the date of which the first pledge payment will be due.

- For "Installment Amount" enter in the amount that will be paid each year. In this example where the constituent pledged $5000 to be paid over 5 years, we will need to type in $1000 for the installment amount.

- Then select Save.

- This will bring you back to the Pledge page. If you select on the Pledge Information you will now view your pledge schedule for the next five years.

If you are in the record of a Guest of the ask event, you may at this point want to soft credit this constituent's Table Captain. This will allow you to get a total for that Table Captain and a total for the table. To soft credit the table captain, click on "Soft Credit" at the bottom of the Pledge/Gift screen.

Click the "Select" option next to Recipient. Find and select the table captain's account. Their name will then appear next to Recipient.

Enter in the amount you are going to soft credit to the table captain and enter in any notes.

Click the Save option on the bottom of the pledge screen. This completes the data entry for this constituent's multi-year pledge.

Track a Gift from a One-Time Ask Event

A one time Ask Event gift refers to any gift which does not fall into the Multi-Year Giving pledge levels. Enter these gifts in the same way as non-Ask Event gift payments, with the addition of steps needed to identify these payments as coming from a particular Ask Event.

Before you begin your gift entry there are two steps you will want complete. The first is to print our your table captain and guest list. This can be generated by following the steps outlined in the Track Tables, Table Captains and Guests help section. The other step is to create an approach to identify which ask event brought in the gift.

To set up your approach, go to Manage on the Main menu. Select Defined Fields and Approaches from the drop down menu.

Select on Approaches and you will be brought to the Approaches screen. From here select on Add New Approach from the task box.

Name your approach "Benevon Ask Event yyyy/mm" where "yyyy" is the year of your ask event and "mm" is the month of your ask event. Make any notes if needed and then select Save.

You are now ready to enter in your new gift. To begin, search for the account on the Find Account page. Once the account displays, you can click on the "Gift/Pledge" icon Image:gifticon.gif on the far right of the screen next to the Quick Add dropdown. This will bring you to the New Gift/Pledge screen. From here you will enter in all of the gift information following these steps:

When the "New Gift/Pledge" page appears, add the gift information.

- Type the date of the Ask Event in the date field.
- Enter the amount given in the "Received Amount" field.
- Select your fund from the "Fund" drop-down box.
- Click the "Approach" drop-down box and select your unique approach for your Ask Event. If you have not set this approach you can add it directly from the gift page by selecting the "Add New..." option.
- Select the gift type from the "Gift Type" drop-down box and fill in the relevant fields.

Use your organization's User Defined Field to identify the Giving Level for this pledge. To do this, select User Defined Fields to view a list of available fields, then select the one that your organization uses to track Giving Level. Refer to the Additional Defined Fields section of the Next Step help document for more information.

If you are in the record of a Guest of the ask event, you may at this point want to soft credit this constituent's Table Captain. This will allow you to get a total for that Table Captain and a total for the table. To soft credit the table captain, click on "Soft Credit" at the bottom of the Pledge/Gift screen.

Click the "Select" option next to Recipient. Find and select the table captain's account. Their name will then appear next to Recipient.

Enter in the amount you are going to soft credit to the table captain and enter in any notes.

Click the Save option on the bottom of the pledge screen. This completes the data entry for this constituent's one time ask event gift.

Follow Up after an Ask Event

As soon as your Ask Event is over, your Ask Event Follow-Up begins.

You can pull a report from **eTapestry** to get a list of all of those attendees that still need a follow-up. To do this go to Report/Export on the Main menu.

Select the Benevon report category.

To get a list of your Ask Event attendees that need a follow-up you will need to run the Follow-Up Listing-Ask Event report. To run the report, select Go next to the name of the report.

This will bring you to the report launch screen. On the launch screen, you will need to select your query category and query name. In the first drop-down box select Benevon Follow-Up, which is the name of the category. In the second drop-down box select Ask Event Follow-Up Needed, which is the name of the query.

Leave all of the defaults on the page and then select Submit at the bottom of the screen. This will display all of those accounts that need a follow-up and will also display their address and phone number along with any defined fields you selected on the defined fields page or journal contact.

If you would like to print this report out to use as a check list, you can select Print in the upper left corner of **eTapestry**.

Recording your Follow-Up

Now that you have the report of all the accounts that need a contact you can begin your follow-ups. As you are contacting these attendees you can record this in your Next Step database. You will want to update your Ask Event attendance contact with your follow-up information which you can access directly from this report. Just select on one of the names in your Follow-Up list. This will take you to the Benevon Ask Event Attendance contact entry for that account. Before you do your follow-up you can review the account information.

As you are speaking with the attendee you can make notes in the Benevon Contact Follow-Up Fields.

When you are finished, you should update the Benevon Next Step field to record the next steps with this constituent, and set the Benevon Follow-Up Done? field to "Yes".

Finally, you will want to change your Subject line to read "Ask Event Attendance/Follow-Up Complete."

Then select Save from the task box. You can then use the Back button to go back to your report and continue recording your follow-ups.

Ask Event Follow-Up

Next Step reporting will make it easy for you to identify the groups that you need to contact to follow the Benevon Recommended Follow-Up Strategy.

Once you have entered the pledge card information into Next Step, you can follow the directions under Follow-Up After an Ask Event to create a checklist of all the people who attended the Ask Event. You can further organize your follow-up calls by creating separate queries to retrieve lists of Table Captains, Multiple Year Donors, people with other thoughts to share, and all Ask Event donors. For

more information on creating custom queries in *eTapestry*, refer to the Queries section of the Next Step online help.

As you make your follow-up calls, you should record your notes in the Benevon Contact Follow-Up fields, as described in the Follow-Up After an Ask Event help section.

Track a One-on-One Ask

You met with a constituent to hold a One-on-One Ask and you are now ready to record this in your Next Step database. A One-on-One Ask should be entered much like you record attendance at an Ask Event. So, to start you will go to the constituent's journal page on their account and select on Contact from the Add drop down box.

This will bring you to the New Contact screen. First you will need to input the date of the One-on-One Ask. This date is important and will be used later in queries and reports. Next, you will type in the subject of this contact. It is recommended that you type in "One-on-One Ask Event/Follow-Up Needed." This helps when you go to view this journal item on the constituent's journal page. If you are entering this attendance and you have already done a follow-up with the attendee, then you will want to type in "One-on-One Ask Event/Follow-Up Complete."

For Method, you will need to select Benevon One-on-One Ask Event from the drop down. Finally in the Note section you can input any items you need to remind yourself of for the follow-up call or meeting.

You also have the option of selecting your Next Step with this account. For example, if you intend to invite this person to a Free Feel Good Cultivation Event, it is recommended that you select that as you next step in the Benevon Next Step defined field section. This will be helpful later when you are pulling together a list of those accounts that you would like to invite to your FFGCE.

After you have filled out your contact information, select save from the task bar.

Track a Gift or Pledge from a One-on-One Ask

A One on One Ask frequently results in a donation of some type.

To record the receipt of a multi-year pledge, follow the instructions in the section Record an Ask Event Multi-Year Pledge, with the exception that the Approach should be set to "Benevon One on One Ask", instead of the Ask Event Approach.

To record a One-Time gift or single year pledge, follow the instructions in the section Record a One Time Ask Event Gift above, again setting the Approach to "Benevon One on One Ask", instead of the Ask Event Approach.

Free Feel Good Cultivation Event

Invite Attendees to an FFGCE

You can use your Next Step database to find constituents who should be invited to your next Free Feel Good Cultivation Event event. These accounts can be grouped together into a query, and then invitations can be sent to that group of accounts by utilizing *eTapestry*'s Correspondence feature.

The item in the Benevon Next Step list that indicates that a constituent should be invited to a FFGCE is called "Invite to FFGCE". You can create a query based on this Benevon Next Step value by copying the query template called "Invite to FFGCE" in the Benevon Next Step category. For more information on how to modify this query to identify potential FFGCE attendees, see the help section Identifying Constituents Associated with Next Steps.

Once you have set your query up you can continue to the correspondence section to send your invitations. To access the correspondence section, select on Communicate from the navigation bar and select on Create/Send Correspondence.

This will bring you to the Correspondence Categories screen where you will have the option to create an email template or a PDF template to send to your invitees. For additional information on using our correspondence feature, please see the Correspondence section of the online help.

After you have sent your correspondence through *eTapestry* you can then create a mass update of a journal contact to mark each record in the query as receiving an invitation. For more information on setting up this mass update, view the Contacts topic in the Mass Update section of the Next Step online help.

Record Invitation to FFGCE

Once you have sent out your FFGCE invitations, you will want to track those invitations that have been sent. There are two ways to track this invitation in your Next Step database. If you have a query set up of all accounts that have been invited to the FFGCE, you can mass add this invitation. If you do not have a query of all of your accounts, but simply have a list of names that you are inviting then you will need to go to each invitees account and add a new contact on their journal page.

If you have a query set up of all the accounts that have been invited to the FFGCE, you can mass add a journal contact of this invitation. To begin your mass update, go to Mass Update on the navigation bar. Select on Journal Updates and Journal Contacts from the drop down menu options.

This will bring you to the Add Journal Contacts page. Your first step will be to select your query. This may be a query you have set up or a query set up by *eTapestry*. It will include all of those accounts that are invited to the FFGCE.

Next, you will enter the date that the invitation was sent. In the subject line type "FFGCE Invitation Sent." You could also type in the name of your specific event in place of the words FFGCE. This will

make the event more recognizable on the journal page of an account. From the Method drop down menu select Benevon FFGCE Invitation and then type in any notes you would like to make about this contact. After this is complete, select Preview from the task box.

On the next screen you have the option of selecting defined fields for the contact and then if you scroll down to section 4, this is where you will verify your criteria. It is very important that you review this section before submitting your mass update. Verify that you have selected the correct query for this mass update and also verify that the number of accounts for which a journal contact will be created matches the number of accounts in your original query. For additional verification you can also select on the text "The number of Accounts for which a journal contact will be created is:".

This will show you the accounts that will be updated. It is important to verify the accounts because once you select the Add Journal Contacts button, you will not be able to reverse this mass update unless you go into each account and manually make a change.

After you have verified your criteria select Add Journal Contacts and you will be brought to a confirmation screen to let you know your mass update was a success.

If you do not have a query to generate a mass update you can enter your invitations by going into each invitees account and adding a new contact. To begin, go to the invitees account and navigate to their journal page. From the journal page select on Contact from the Add drop down menu.

This will bring you to the New Contact page. In the subject line type "FFGCE Invitation Sent." You could also type in the name of your specific event in place of the words FFGCE. This will make the event more recognizable on the journal page of an account. From the Method drop down menu select Benevon FFGCE Invitation and then type in any notes you would like to make about this contact.

You have the option of selecting defined fields on the invitation as well. Once you have completed the appropriate fields you can save this contact and continue to the next invitees account.

(RSVP) Track Acceptance for an FFGCE

After you have sent out invitations to your FFGCE, you should expect to receive some acceptances. Once an acceptance comes in, you will want to add this as another contact on that constituent's journal page.

To do this you will need to look up the account by going to Find Account on the Main menu. Once the account displays you can get to their journal page by right clicking on the constituent role icon just underneath the role header and then selecting Journal from the menu that appears.

This will bring you to the journal page where you should see the FFGCE invitation you have already entered. To add the acceptance, select on Contact from the Add drop down box.

On the New Contact screen, enter in the date of the acceptance, type "FFGCE Acceptance" in the subject line and then select Benevon FFGCE Acceptance from the method drop down box.

You can also include any notes for this acceptance and select any defined fields that pertain to this contact. After you have made all of you selections you can save this contact.

Track Attendance for an FFGCE

You have hosted your FFGCE and are ready to record the attendance at the event. To do this go to the attendees journal page on their constituent account. Select on Contact from the Add drop down box.

This will bring you to the New Contact screen. First you will need to input the date of the FFGCE. This date is important and will be used later in queries and reports. Next, you will type in the subject of this contact. It is recommended that you type in "FFGCE Attendance/Follow-Up Needed." This helps when you go to view this journal item on the constituent's journal page. If you are entering this attendance and you have already done a follow-up with the attendee, then you will want to type in "FFGCE Attendance/Follow-Up Complete."

For Method, you will need to select Benevon FFGCE Attendance from the drop down. Finally in the Note section you can input any items you need to remind yourself of.

You also have the option of selecting your Next Step with this account in the defined field section. After you have filled out your contact information, select save at the bottom of the screen. You can continue to record your event attendance.

Create a List of FFGCE Attendees

To view a list of your FFGCE attendees, you will run a query that looks for the journal contacts which record FFGCE attendance and displays them.

To list FFGCE attendees

From the Main menu select Query. The Query Categories page appears and all query categories are listed. From here, select the query category called Benevon Free Feel Good Cultivation Event.

This will take you to the Benevon Free Feel Good Cultivation Event category where you should see a query called FFGCE Attendees. Click on the preview icon next to the name of the query to see a list of FFGCE dates and the guests recorded for each one.

This query will display all of the FFGCE events that you have had for your organization and will also list all of the attendees for each event. You can also view attendees to just one FFGCE event. To do this, go to the Benevon Free Feel Good Cultivation Event category and select Copy Query from the task box.

This will bring you to the Copy Query screen where you will see four sections. In section 1, you will select FFGCE Attendees. This query is a template set up by *eTapestry* that you will customize for your FFGCE.

In section 2, you will want to select Benevon Free Feel Good Cultivation Event so that the new query is created in the correct category.

In step 3, type in FFGCE Attendees yyyy/mm, where yyyy is the year of your FFGCE event and mm is the month. Then, select copy in section 4.

This will bring you back to the Query Category screen where you will want to select the Benevon Free Feel Good Cultivation Event where you will see your new query. Before you run this query you will need to make some changes to the template. To do this select on the name of the query.

This will bring you to the query definition screen.

Select on Dates from the Available Fields drop down, and then select Journal Entry Date.

Under Journal Entry Date, in the Criteria section, input the date of your FFGCE event in both fields and then select Save and preview.

This will display all of the attendees to that specific Free Feel Good Cultivation Event. If you need to print this list out, you can select on Print in the upper left corner of *eTapestry*.

Follow Up after a FFGCE

A few days after your Free Feel Good Cultivation Event you will want to follow-up with your attendees. You can pull a report from *eTapestry* to get a list of all of those attendees that still need a follow-up. To do this go to Report/Export on the main menu.

Select the Benevon report category. This will display all of the Benevon reports that *eTapestry* imports for you.

To get a list of your FFGCE attendees that need a follow-up you will need to run the Follow-Up Listing-FFGCE report. To run the report, select Go next to the name of the report.

This will bring you to the report launch screen. On the launch screen, you will need to select your query category and query name. In the first drop-down box select Benevon Follow-Up, which is the name of the category. In the second drop-down box select FFGCE Follow-Up Needed, which is the name of the query.

Leave all of the defaults on the page and then select Submit at the bottom of the screen. This will display all of those accounts that need a follow-up and will also display their address and phone number along with any defined fields you selected on the defined fields page or journal contact.

If you would like to print this report out to use as a check list, you can select Print in the upper left corner of *eTapestry*.

Recording your Follow Up

Now that you have the report of all the accounts that need a contact you can begin your follow-ups. As you are contacting these attendees you can record this in your Next Step database. You will want to update your FFGCE attendance contact with your follow-up information which you can access directly from this report. Just select on one of the names in your Follow-Up list. This will take you to the Benevon FFGCE Attendance contact entry for that account. Before you do your follow-up you can review the account information.

As you are speaking with the attendee you can make notes in the Benevon Contact Follow Up Fields.

You will also need to change your Subject line to read "FFGCE Attendance/Follow-Up Complete."

Finally, you will want to select Yes from the Benevon Follow-Up Done? drop down.

Then select Save at the bottom of the screen. You can then go back to your report and continue recording your follow-ups.

Next Step Event Analysis Report

The Next Step version of **eTapestry** provides you with a special report to retrieve information about the results of your Ask Event. This special report can be accessed by clicking on Report/Export, Special Report and is found under the heading Next Step.

Next Step Event Analysis Report
All Accounts

Displaying 1 - 19 of 19

Table Captain	Account Type	# Invited to Ask Event	# Attended Ask Event	% Attended Ask Event	# Attended Ask Event who went to a previous POE	# of People who Gave from the Ask Event	% of People who Gave from the Ask Event	% of People who Gave at the Ask Event and attended a previous POE	Total Raised	Total Pledged	Total Gifted	Total Received
Totals		**0**	**0**	**0.00%**	**0**	**0**	**0.00%**	**0.00%**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Jackson Browne		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Megan Carnes		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Megan Carnes		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Katie Collins		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Pepper Collins		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Pam Dechert		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Susan Ingram		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Michael Jackson		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Cooper Lamb		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Katie Lamb		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Steve Lamb		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Owen Leo		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
John Marshall		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Stevie Nix		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Jacob Pharoa		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Joseph Pharoah		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
Frank Smith		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00
The Excellence		0	0	0.00%	0	0	0.00%	0.00%	$0.00	$0.00	$0.00	$0.00

Report Help

- **Table Captain** - This field will list the names of the table captains from your ask event. This is also a link to a detail report which lists specific details about each guest for the table captain that is selected.
- **Account Type** - This field will display the type of account that the table captain is labeled as.
- **# Invited to Ask Event** - This field will display the number of people that were invited to the ask event for each table captain.
- **# Attended Ask Event** - This field will display the number of people that attended the ask event.

- **% Attended Ask Event** - This field will calculate the percentage of people who attended for each table captain based on the number of people who were invited and the number of people who actually attended.

- **# Attended Ask Event who went to a previous POE** - This field will display the number of people who attended the ask event who have also attended a POE for each table captain.

- **# of People who Gave from the Ask Event** - This field will display the number of people who gave at the ask event for each table captain.

- **% of People who Gave from the Ask Event** - This field will display the percentage of people who gave at the ask event based on the number that attended and the number that gave.

- **% of People who Gave at the Ask Event and attended a previous POE** - This field will display the percentage of people who gave at the ask event who have also attended a prior POE.

- **Total Raised** - This field will display the total amount raised for each table captain.

- **Total Pledged** - This field will display the total amount pledged for each table captain.

- **Total Gifted** - This field will display the total amount gifted for each table captain.

- **Total Received** - This field will display the total amount received for each table captain.

If you track your events in the following manner, then the Next Step Event Analysis Report will work for you!

- Set-up approaches for each Benevon Ask Event (i.e. If you have an Ask Event in November, you set up an approach titled 2005/11 so you are able to mark in gifts/pledges from this Ask Event with this Approach). See Benevon Approaches for more information on this topic.

- Set-up table captain relationships (Table Captain/Guest) on each table captain account and track a specified start and end date. See Link Table Captains and Guests for more information on this topic.

- Event invitations/acceptance and attendance are all recorded on accounts as journal contacts with the appropriate contact method.

- Gifts and Pledges are recorded with the specific event approach. See Record an Ask Event Multi-Year Pledge and Record a One Time Ask Event Gift for more information.

To run your Next Step Event Analysis report, you must first follow the instructions in the section Setting up the Query.

When your query is ready, follow the instructions in the section Setting up the Report to put it all together and run the report.

NSEA report

To run the Next Step Event Analysis report:

1. First set up your Next Step Event Analysis query in the Query Category you made to store Form for Success queries. Click here for information on setting up the query: Setting up the Query
2. Then run the report against your updated query to get the statistics for your Ask Event. For more information on running the report, see Setting up the Report

The following are the standard options for executing the Next Step Event Analysis report.

Relationship Type: Table Captain/Guest

Contact Method of Ask Event Invitation: Benevon Ask Event Invitation

Contact Method of Ask Event Attendance: Benevon Ask Event Attendance

Contact Method of POE Attendance: Benevon POE Attendance

Approach: Approach created for this Ask Event

Event Contact Date Range: Date range between this Ask Event and the last one

The Event Contact Date Range is used to limit the report to invitation and attendance contacts associated with the current Ask Event.

Note: Note: If you track a contact for Ask Event Acceptance rather than Ask Event Invitation, you can get the results you want by selecting "Benevon Ask Event Acceptance" in the Contact Method of Ask Event Invitation. If your organization holds more than one Ask Event during the year, you will need to run the NSEA report for each of those Ask Events separately, and then add the values together.

Multiple year giving society sample query

For information about how to create a query, refer to Queries.

The sample query is based on a Multiple Year Giving Society with three levels:

- Bronze - $1,000/year for 5 years
- Silver - $5,000/year for 5 years
- Gold - $10,000/year for 5 years

When you add a gift, use a transaction user-defined field called Giving Level to indicate the level to which the gift applies.

Select all Multiple Year Giving Society members:

1. For the **Data Return Type**, select **All Household Accounts**. This ensures that all members of a household that have given a Multiple Year Giving Society gift are included in the results.

2. Under **Available Fields**, select **Defined Fields**.

3. Select **Transaction UDF**. The transaction defined fields appear under Criteria.

4. Click **Giving Level UDF** and then select the values associated with the Multiple Year Giving Society levels.

5. To be a current member of the Multiple Year Giving Society, a constituent must have made a gift at one of the levels within the last five years. Limit the query to only include current members.

    a. Under **Available Fields**, select **Date**.

    b. Select **Journal Entry Date**. The Journal Entry Date field appears under Criteria.

    c. In the **Start Date** field, enter a date that is 5 years prior to the beginning of the Form for Success date range.

    d. In the **End Date** field, enter a date which is a few weeks or a month after the end date of the Form for Success date range. This ensures that Ask Event gifts which arrived the Ask Event are included.

    e. To run the query, click **Preview** under Tasks section and then click **Save And**.

Organization Calendar

Managing Tasks Using the Organization Calendar

You can use the Organization Calendar as a common location where all of your Next Step users can keep track of important events and deadlines for your organization.

› View the Organization Calendar

The Organization Calendar tile is displayed on the Welcome page.

When you open the tile, you will see all Active calendar items that are due today. This tells you what was scheduled for today that has not yet been done. You can click on the calendar item on the right side of the tile to open the Organization Journal to see more detail about the task or event.

To see all of the items that were scheduled for today, put a check in the check box for Show Completed Items.

Notice that the completed items are displayed in blue, while the incomplete items are displayed in red.

To find tasks that are behind schedule, put a check in the check box for Show incomplete items through today. Next Step will display a list of all calendar items that were due in the past, but have not yet been marked as being complete.

Organization Calendar items can also be viewed on the Organization Journal. The Organization Journal can be opened from the Welcome page, or from the My Organization account found on the Manage tab.

Invite Attendees

When you invite an account to your Calendar item, you are placing a copy of the Calendar item into that individual account's journal. The Calendar Item will also appear on the My Calendar tile of the Welcome screen for any attendees who are Next Step users.

You can use the Invite Accounts section to record actual invitations to a meeting. You can also use this feature to assign a Calendar Item representing a task that is to be completed.

For example, suppose you have a Calendar Item entitled "Send Thank You Notes for 2007 Ask Event Gifts". You could "invite" to this Calendar item all of the accounts who made a donation at the Ask Event. The Calendar Item would then appear in the Journal for each of the "invited" accounts.

The quick and easy way to associate a group of accounts with a Calendar Item is to use the Invite Accounts from Query feature. In this example, you would use a query to pull all accounts that have Pledge or Gift journal entries with the Approach associated with the Ask Event.

Mark Calendar Items Complete

Marking Calendar Items as complete is a great way to keep the Organization Calendar focused on outstanding tasks.

When the event or task represented by a Calendar Item has been finished, open the calendar item in the Organization Calendar and set the Calendar Item Status to Completed.

The Calendar Item will no longer appear on the Organization Calendar tile of the Welcome page. You can still review the details of the Calendar Item on the Organization Journal, though.

The Calendar Item will also show up as being completed on the Journal of each attendee. This makes it easy to see from the constituent perspective whether or not tasks associated with that constituent have been completed. In the example above, when the Send Thank You Notes for 2007 Ask Event Gifts Calendar Item is marked complete on the Organization Calendar, it will show as complete in the Journal of every account that was associated with the task.

Create Calendar Item for Next Steps

When your Annual Recognition/Cultivation Plan is complete, you should create Calendar Items on the Organization calendar for all of the items on the Cultivation Plan including the Ask Event, each FFGCE and each POE. See Managing Tasks Using the Organization Calendar and the Adding a Calendar Item topic in the help section for more information on how to set this up. You can create Calendar Items for the entire Ask Event timeline with one step by following the instructions under Creating the Ask Event Timeline

At this time you should also create Calendar Items on the Organization Calendar for the tasks related to the Benevon Next Step values. The following table lists the Benevon Next Step tasks, along with a possible schedule for each.

Add a Calendar Item

To place a new calendar item on the Organization Calendar, click on the link Launch My Organization Journal on the My Org Calendar tile of the Welcome page. This will open the Journal page for the Organization.

To create a new Calendar Item, select Calendar Item on the pull-down menu for the Add field. For additional information on this topic, see the section Adding a Calendar Item under Calendar.

Note that, unlike the usual Journal page, the Organization journal only contains Journal Entries of type Contact, Note and Calendar Item.

When you click on Calendar Item, a new Calendar Item Journal Entry will open up. Fill out the Title, Priority, Date and Time fields. Make sure the Destination is set to "Add item to My Organization calendar".

If this is a recurring item, like a regular weekly meeting, click the radio button next to Yes under the Recurring Item section. This will bring up fields where you can set the recurrence pattern.

Identify Constituents Associated with Next Steps

Overview

When a Calendar Item for a Next Step comes due, you can use queries from the Benevon Next Step query category to help identify the constituents who must be contacted as part of this step. The specific query related to each Next Step is identified in the section for that step below.

eTapestry makes it easy to send information to a list of constituents selected by a query. The Next Step Help provides ample information on how to use these *eTapestry* features.

You can also use the Mass Update function in *eTapestry* to reset the Next Step values for all of the selected constituents in one simple step.

Some of the Next Steps like "Other Contact Needed", "Set Another Call" or "Set Personal Visit" require a more individual response based on the information stored in the Notes section of the contact. For these Next Steps, you can open the contact record for each constituent by clicking on that contact in the query results. While the contact is open, you can read the Notes and determine how best to set up the next contact, then you can manually un-select the Next Step value that brought you to this Contact.

Process

1. To summarize, the process to be followed when each Next Step calendar item comes due is as follows:

2. Make a copy of the specified query template which pulls all constituents who have the specific Next Step checked on their Benevon Next Step list, and rename it to include the date it was created.

3. Modify the copied query based on the specific Next Step you are working on.

   - In most cases, simply change the Type from "Dynamic" to "Static". When you make that change, the query will not pick up data on constituents who are marked after the first time that query was executed. This will make sure that you do not accidentally un-check the Next Step value on constituents who are marked after the query is pulled.

   - For the Next Step "Potential Table Captain", you should modify the copied query to select only contacts that have been created since the date when you last pulled this list. If you don't recall that date exactly, you can guess that it was done about six months before your last Ask Event. This is necessary because the Potential Table Captain information is used in creating the Form for Success, and is therefore not removed when you are done identifying potential Table Captains.

4. Use the copied query as a checklist of constituents to be contacted, or as input to the export or correspondence that you use for contacting constituents for the specified Next Step.

5. Except for the "Potential Table Captain" Next Step, you will remove the specified Next Step from the Benevon Next Step list for all of the constituents who have been contacted or referred for this step. In most cases, you will accomplish this by using the copied query in a mass-update to unselect the specified Next Step from the Benevon Next Step list on the contacts returned by the query. In other cases, you will update the Next Step field during one-on-one follow-up with the constituent.

Invite to Ask Event

Invite to Ask Event is selected on the Benevon Next Step list during Follow-Up with the constituent. After the invitation is sent, the selection should be removed from the Benevon Next Step list.

When to use it: Invite to Ask Event Calendar Item comes due

Query Template to Start With: Benevon Next Step/Invite to Ask Event

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Invite to Board Meeting

Invite to Board Meeting is selected on the Benevon Next Step list during Follow-Up with the constituent. After the invitation is sent, the selection should be removed from the Benevon Next Step list.

When to use it: Invite to Board Meeting Calendar Item comes due

Query Template to Start With: Benevon Next Step/Invite to Board Meeting

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Invite to FFGCE

Invite to FFGCE is selected on the Benevon Next Step list during Follow-Up with the constituent. After the invitation is sent, the selection should be removed from the Benevon Next Step list.

When to use it: Invite to FFGCE Calendar Item comes due

Query Template to Start With: Benevon Next Step/Invite to FFGCE

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Invite to Other Special Event

Invite to Other Special Event is selected on the Benevon Next Step list during Follow-Up with the constituent. After the invitation is sent, the selection should be removed from the Benevon Next Step list.

When to use it: Invite to Other Special Event Calendar Item comes due

Query Template to Start With: Benevon Next Step/Invite to Other Special Event

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Invite to POE

Invite to POE – Onsite

Invite to POE – Onsite is selected on the Benevon Next Step list during Follow-Up with the constituent, or when a New Constituent Record is created as part of a referral from another constituent. After the invitation is sent, the selection should be removed from the Benevon Next Step list.

When to use it: Invite to POE - Onsite Calendar Item comes due

Query Template to Start With: Benevon Next Step/Invite to POE-Onsite

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Invite to POE – Offsite

Invite to POE – Offsite is selected on the Benevon Next Step list during Follow-Up with the constituent, or when a New Constituent Record is created as part of a referral from another constituent. After the invitation is sent, the selection should be removed from the Benevon Next Step list.

When to use it: Invite to POE - Offsite Calendar Item comes due

Query Template to Start With: Benevon Next Step/Invite to POE-Offsite

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Other Contact Needed (Go to Notes)

Other Contact Needed (go to Notes) is selected on the Benevon Next Step list during Follow-Up with the constituent. It is removed manually from the Benevon Next Step list when the contact is open to allow review of the information in the Notes

When to use it: Other Contact Needed (go to Notes) Calendar Item comes due

Query Template to Start With: Benevon Next Step/Other Contact Needed (go to Notes)

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: For each constituent, open the contact from the query and read the notes to determine the type of contact needed. Uncheck the Other Contact Needed (go to Notes) selection in the Benevon Next Step field, and reset other fields as needed. Schedule the next contact as a separate item

Identify Potential Table Captains

Potential Table Captain is selected on the Benevon Next Step list during Follow-Up with the constituent. It is never reset, but is left on the Benevon Next Step list so that potential Table Captains can be identified on the Form for Success report. More information on identifying constituents associated with this next step can be found in the chapter List Potential Table Captains in the Ask Event section of Next Step Help.

When to use it: Identify Potential Table Captains Calendar Item comes due

Query Template to Start With: Benevon Next Step/Identify Potential Table Captains

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Do not unselect – this information is used in the Form for Success!

Refer to the Table Captain

Refer to Table Captain is selected on the Benevon Next Step list during Follow-Up with the constituent. After the referral has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Refer to Table Captain Calendar Item comes due

Query Template to Start With: Benevon Next Step/Refer to Table Captain

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Refer to the Volunteer Coordinator

Refer to Volunteer Coordinator is selected on the Benevon Next Step list during Follow-Up with the constituent. After the referral has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Refer to Volunteer Coordinator Calendar Item comes due

Query Template to Start With: Benevon Next Step/Refer to Volunteer Coordinator

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Send Additional Information

Send Additional Information is selected on the Benevon Next Step list during Follow-Up with the constituent. After the referral has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Send Additional Information Calendar Item comes due

Query Template to Start With: Benevon Next Step/Send Additional Information

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Send Personal Note

Send Personal Note is selected on the Benevon Next Step list during Follow-Up with the constituent. After the referral has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Send Personal Note Calendar Item comes due

Query Template to Start With: Benevon Next Step/Send Personal Note

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: For each constituent, open the contact from the query and read the notes to determine the type of contact needed. Uncheck the Send Personal Note selection in the Benevon Next Step field, and reset other fields as needed. Schedule the next contact as a separate item

Calendar: Send Receipt

Send Receipt is selected on the Benevon Next Step list during Follow-Up with the constituent. After the receipt has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Send Receipt Calendar Item comes due

Query Template to Start With: Benevon Next Step/Send Receipt

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Calendar: Send Thank You

Send Thank You is selected on the Benevon Next Step list during Follow-Up with the constituent. After the receipt has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Send Thank You Calendar Item comes due

Query Template to Start With: Benevon Next Step/Send Thank You

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Send Volunteer Orientation Information

Send Volunteer Orientation Information is selected on the Benevon Next Step list during Follow-Up with the constituent. After the receipt has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Send Volunteer Orientation Information Calendar Item comes due

Query Template to Start With: Benevon Next Step/Send Volunteer Orientation Information

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: Use mass-update based on the copied query to unselect the Next Step

Set Another Call

Set Another Call (assign it to XX and set call date) is selected on the Benevon Next Step list during Follow-Up with the constituent. After the receipt has been sent, the selection should be removed from the Benevon Next Step list.

When to use it: Set Another Call (Assign it to XX and set call date) Calendar Item comes due

Query Template to Start With: Benevon Next Step/Set Another Call

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: For each constituent, determine who will make the next call. Place a calendar item for the call in that user's Calendar. Manually remove the Set Another Call selection from the Benevon Next Step field.

Set Personal Visit

Set Personal Visit is selected on the Benevon Next Step list during Follow-Up with the constituent. It is removed manually from the Benevon Next Step list after the personal visit has been set up.

When to use it: Set Personal Visit Calendar Item comes due

Query Template to Start With: Benevon Next Step/Set Personal Visit

How to Modify the Query Template: Change "Dynamic" to "Static"

When You Are Done: For each constituent, schedule the personal visit with an assigned user. Place a calendar item for the visit on the assigned user's calendar. Uncheck the Set Personal Visit selection in the Benevon Next Step field.

Measuring Success

Benevon provides several instruments to help you measure your fundraising progress. You can use Next Step to gather much of the data that you need to fill out these forms - making your Benevon reporting experience easier and less time-consuming.

Form for Success (FFS)

Preparation

> 1) Set up Query Category

When you start the process of retrieving information from Next Step to complete your Form for Success, we recommend that you set up a new Query Category to store the queries that you will be customizing specifically for this year's Form for Success. If you do this, you will be able to rerun the queries at a later time, and should expect to get the same results.

Note: If you are not yet familiar with the processes involved in customizing queries in *eTapestry*, now would be a great time to check out the on-line training and help that come with Next Step. For in-person assistance, contact the training group at eTapestry.

> 2) Create Multiple-Year Giving Society Member Queries

To complete the Form for Success, you will need to create two Multiple-Year Giving Society Member Queries, one for this year (after the Ask Event) and one for last year. The only difference between these queries will be the date range that you select.

Identifying the correct date range

A constituent is considered to be a member of the Multiple-Year Giving Society at a given date if he or she has given a Multiple-Year Giving Society pledge within the previous five years.

Since most organizations receive most of their Multiple-Year Giving Society donations at the Ask Event, we recommend that you use the date of the Ask Event as the end of your year.

To get the date range for This Year's Multiple-Year Giving Society query, calculate the date 5 years prior to the beginning of the Form for Success date range as the Start Date. To be sure to capture any Ask Event gifts that may have been recorded after this year's Ask Event, you may want to add a few weeks or a month to the end date of the Form for Success date range to get the End Date.

Creating the Query

To create the query, open the Form for Success Query Category that you created in step 1) and select New Query on the Tasks pane.

Modify the new query as follows:

a. Select All Household Accounts in the Data Return Type field. This will make sure that all members of a household that have given a Multiple-Year Giving Society gift are included in the

results.

b. Select Defined Fields from the pull-down list in the Available Fields section. This will cause the list of Defined Fields to appear beneath the pull-down box.

c. Click on Transaction UDF on the list of Defined Fields. This will cause the transaction defined fields to appear on the Criteria section of the page.

d. Click the name of the field you use to identify which gifts are associated with the Multiple-Year Giving Society. Select all of the values associated with the Multiple-Year Giving Society levels.

e. Select Date from the pull-down list in the Available Fields section. This will cause the list of available Dates to appear beneath the pull-down box.

f. Click on Journal Entry Date on the list of Dates. This will cause the Journal Entry Date field to appear on the Criteria section of the page.

g. Enter the Start Date and End Date that you calculated for this query into the Journal Entry Date range.

Select Preview from the pull-down menu on the Tasks pane, and click the Save And button to run the query.

The number of Multiple-Year constituent accounts identified by the query will be displayed at the top of the query results. Keep track of the number of constituents for each query – you will use that information to calculate several values on the Form for Success.

❯ 3) Create Query of All Ask Event Gifts

Start by making a copy of the query template Benevon Ask Events/ Ask Event yyyy/mm Gifts in the Query Category you made to store this information.

Modify the copy as follows:

a. In the Criteria section, check the Approach used to designate your Ask Event. Be sure to uncheck the default option "Benevon Ask Event yyyy/mm".

b. Limit the results to Gifts and Pledges (not payments) by selecting the Journal option in the Available Fields pull-down and selecting Journal Entry Types. In the Criteria section, select all Gift and Pledge types that you use, but do not select Payment.

Select Preview from the pull-down on the Tasks section, and click on Save And to run the query. The number of constituents at this Ask Event will appear at the top of the query results.

❯ 4) Create Query of All Ask Event Donors

Start by making a copy of the Ask Event Gift query that you created in step 3) in the Query Category you made to store this information.

Change the Data Return Type to All Household Accounts. This will ensure that all members of a donating household are included in the list.

Select Preview from the pull-down on the Tasks section, and click on Save And to run the query. The number of donors at this Ask Event will appear at the top of the query results.

I. Point of Entry Events

a. Total Number of POEs your organization has held since the Ask Event FFS POE Guests

b. Total Number of Ambassadors that brought ten people to a POE in the last 12 months. (This information can be found by running the Ambassador/POE Attendee Report, included in all Next

Step databases created after September 2011. If your database does not contain this query, please contact your account executive to discuss a using a data service to create this query.)

c. Total number of actual POE guests prior to the Ask Event FFS POE Guests

> **Additional Helpful Information**

- Have you had a minimum of 1 POE per month?

- Number of POE guests your organization has each month FFS POE Guests

- Number and Percent of POE Guests who referred others to a POE FFS POE Referrals

- Number of months between most recent workshop and most recent Ask Event

- Total Number of POEs held between Ask Events FFS POE Guests

II. Follow-Up

a. Number and percent of guests who received Follow-Up Calls (or received phone messages) FFS Follow-Up

b. Do you have a sustainable tracking system used by everyone in the process to track all donor contacts?

> **Additional Helpful Information**

- Average Number of days within which Follow-Up Calls are made after a POE FFS Follow-Up

III. Ask Event Guests

a. Total actual Ask Event attendees FFS Ask Event Guests

b. Number and percent of Ask Event guests who had attended prior POEs FFS Ask Event Guests

> **Additional Helpful Information**

- Number and percent of expected guests who failed to attend Ask Event FFS Ask Event Guests

IV. Ask Event Table Captains

a. Percent of Table Captains who have served as Ambassadors in the year prior to the Ask Event. (To find this information, run a compound query to find the cross over between the Table Captain Query, found in the Benevon Initial Contact category, and the Number of Ambassadors Query, found in the New Benevon Queries category. If your database does not contain this query, please contact your account executive to discuss a using a data service to create this query.)

b. Number and percent of Table Captains who were staff members FFS Table Captain Staff

> **Additional Helpful Information**

- Starting number/Final number of Table Captains and percent attrition FFS Table Captain Attrition

- Number and percent of Table Captains who attended a POE FFS Table Captain POE

- Number and percent of Table Captains who became Multiple Year Giving Society Members for the first time, or increased their existing pledge or renewed for five more years FFS Table Captain Donations

V. Ask Event Results (consolidated for this year)

a. Number and percent of guests who made a financial contribution at Ask Event FFS Ask Event Pledges
b. Number and percent of first time donors to the organization FFS First Time Donors
c. Average gift from a guest who had attended a prior POE FFS Average Gift-Prior POE
d. Average gift from a guest who had not attended a prior POE FFS Average Gift-No POE
e. Multiple-Year Giving Society Members
   e.i-e.iv. Ask Event Donations by Giving Level
   e.v. Total number and percent of new first-time Multiple Year Giving Society Members (excluding leadership/challenge gift) FFS First Time MYGS Members
f. Number, percent and total amount of all other gifts of < $1,000 x 5 years (including pledges) FFS Other Gifts
g. SUBTOTAL OF ALL ASK EVENT $ RAISED (sum of $ values in V.e. and V.f.)

VI. Ask Event Sponsorship/Leadership/Challenge Gifts

a. Dollar amount of event sponsorship FFS Sponsorship
b. Dollar amount of challenge/leadership gift(s) pledged or received related to Ask Event (not previously counted in Ask Event results) FFS Major Gifts
c. SUBTOTAL DOLLAR AMOUNT OF SPONSORSHIP AND MAJOR GIFTS (sum of values in VI.a. and VI.b.)

VII. Overall Ask Event Results

a. Total dollars raised related to Ask Event (sum of V.g. and VI.c. above)

VIII. Major Gifts/Capital/Endowment

a. $ amount of major gifts pledged or received (not previously counted in Ask Event Results) FFS Major Donations
b. $ amount of capital gifts pledged or received (not previously counted in Ask Event Results) FFS Capital Donations
c. $ amount of endowment gifts pledged or received (not previously counted in Ask Event Results) FFS Endowment Donations
d. Subtotal: (sum of VIII.a-c. above)

IX. TOTAL $ RAISED FROM USE OF BENEVON MODEL THIS YEAR

(Sum of VII.a. and VIII.d above)

a. Number and Percent increase in total dollars raised from individuals over the last year.

X. Cultivation

a. Number of Free Feel-Good Cultivation Events you have each year
b. Number and percent of Multiple-Year Giving Society Members who attended at least one Free Feel-Good Cultivation Event last year FFS FFGCE Attendance
c. Number of in-person or phone cultivation contacts you had with each Multiple-Year Giving Society Member last year FFS MYGSD Contacts
d. Do you have an annual cultivation/recognition plan that is being followed?

XI. Team and Board

a. Do you have a targeted, measurable definition of sustainable funding you are aiming for?
b. Have you added at least one board champion each year?
c. Number of Non-staff members added to your team this year?
d. Number of team members who have left the team this year
e. Number and percent of board members who give money to the organization FFS Board Donations

    f. Number and percent of board members in the Multiple-Year Giving Society FFS Board MYGSD

    g. Are all your board members and new staff members trained in this model?

› Additional Helpful Information

- Do you have a strong leadership team trained and coached in the next level of implementation each year?

- Do you have full support of the executive director?

- Do you have a succession plan to ensure the team will continue to implement the plan even as leadership changes?

XII. What else besides money did this process bring you?

    a. Board recommitted to the mission?
    b. Increased board passion and participation in the larger plan for sustainable funding?
    c. Staff recommitted to the mission?
    d. Increased community visibility?
    e. Other

› Other Additional Helpful Information

- Number and percent of pledges paid off on time or early FFS Paid Off Pledges

- Number and percent of Multiple-Year Giving Society Members who paid off pledge early this year FFS MYGSD Early Payoff

- Number and percent of Multiple-Year Giving Society Members who increase/extend pledge FFS MYGSD Upgrade

- Number and percent of last year's Multiple-Year Giving Society Members who became this-year Table Captains FFS Last Year's MYGSD

- Number and percent of last year's Multiple-Year Giving Society Members invited to this year's Ask Event FFS Last Year's MYGSD

- Number and percent of last year's Multiple-Year Giving Society Members who attended this years Ask Event FFS Last Year's MYGSD

Sustainable Funding Scorecard

The Sustainable Funding Scorecard is a tool used as part of Benevon coaching to identify where your processes are strong, and where they require additional support.

You can use Next Step to gather the statistical information that you need to answer many of the questions on the Sustainable Funding Scorecard. In fact, once you have completed the Form for Success and have run the Next Step Event Analysis report for your Ask Event, you will have that information right at your fingertips.

Note: To determine whether the size of the Challenge or Leadership gift is increasing at each Ask Event, you will need to compare the Form for Success results over time.

Plan for Sustainable Funding

The Plan for Sustainable Funding displays the cumulative effects of fundraising on the long-term viability of your organization. This is a report that you will craft over many years, each year building on the information already collected in the previous years.

You can use Next Step to gather the information that you need to complete Part One of this document, the Annual Income section.

Ask Event Summary (Guests)

Line 1: Total Guests an Ask Event

The total number of guests who attended the Ask Event for each year can be pulled from Field III.a. of the Form for Success that you filled out for that year. Alternatively, you can run the Next Step Event Analysis report to get this information for each Ask Event. You will have to run the Next Step Event Analysis report multiple times - once for each Ask Event. Be sure to enter the total number of guests under the appropriate year on the Plan for Sustainable Funding.

Lines 2-4: New Multiple-Year Giving Society Members

Lines 2, 3, and 4 of the Annual Income section of the Plan for Sustainable Funding contain the number of new members at each level of your Multiple-Year Giving Society. The Donor Renewal Rates report will give you a breakdown by year of the number of new donors. In order to restrict the results to a specific level of the Multiple-Year Giving Society, you will launch the Donor Renewal Rates report based on a query that retrieves only donors at that level. DRR REPORT REQUIRES PURCHASE OF EXECUTIVE REPORTS.

Line 5: Total New Multiple-Year Giving Society Members

Calculate the Total New Multiple-Year Giving Society Members for each year by adding up the values from lines 2 through 4 that appear in the column for the same year.

Line 6: Total Cumulative Multiple-Year Giving Society Members

Calculate the Total Cumulative New Multiple-Year Giving Society Members for each year by adding the value in line 5 for this year to the value in line 6 for the previous year. For the first year, the value in line 6 will be the same as the value in line 5

Ask Event Summary ($ in thousands)

Line 7: Total Multiple-Year Pledges from This Year's Ask Event

To retrieve the total number of Multiple-Year Pledges from a specific Ask Event, modify the query Benevon Form for Success/Ask Event Multi-Year to use the Approach specific to the desired Ask Event, and to limit the Giving Levels to your Multiple-Year giving levels.

Income: Multiple –Year and Single-Year Giving Summary ($ in thousands)

Lines 8 - 12: Multiple-Year Giving Society Summary by Year

Use the modified version of query Benevon Form for Success/Ask Event Multi-Year that you created for line 7 as input to the Donor Cash Projection report. In the criteria tile, set Number of Years to the value that you need to complete the form for the current year.

To update last year's estimates of previous year donations, modify the query above to use the Approach specific to the Ask Event during previous years and use that as input to the Donor Cash Projection report.

Line 13: Total Multiple-Year Giving Society Pledges (≥ $1K x 5)

Calculate the Total Multiple-Year Giving Society Pledges (≥ $1K x 5) for each year by adding up the values from lines 8 through 12 in the column for the same year.

Line 14: Other Multiple-Year Pledges (< $1K x 5)

Create a query to select all Journal Entries having the Approach for that year's Ask Event and Giving Level equal to whatever Giving Level you use to specify multiple-year pledges that are too small to be part of the Multiple-Year Giving Society.

Line 15: Single Year Ask Event Gifts

Create a query to select all Journal Entries having the Approach for that year's Ask Event and Giving Level equal to whatever Giving Level you use to specify Single Year Ask Event Gifts.

Line 16: Challenge/Leadership/Major Gifts

The total number of Challenge/Leadership/Major Gifts for each year can be pulled from Field VI.b. of the Form for Success that you filled out for that year. Alternatively, you can obtain this information by creating a query to select all Journal Entries having Date during the given year and Giving Levels equal to whatever Giving Levels you use to specify Challenge, Leadership and Major Gifts.

Line 17: Total Pledges/Gifts Received from Ask Events

Calculate the Total Pledges/Gifts Received from Ask Events for each year by adding up the values from lines 13 through 16 in the column for the same year.

Income: Other Sources ($ in thousands)

Line 18: Annual Direct Mail Campaign

Create a query to select all Journal Entries having Date during the given year and Approach equal to whatever Approach you use to specify Direct Mail Campaign.

Line 19: Special Events

Create a query to select all Journal Entries having Date during the given year and Approach equal to whatever Approach you use to specify Special Events.

Line 20: Grants (Corporate, Foundation, United Way)

Create a query to select all Journal Entries having Date during the given year and Approach(s) equal to whatever Approaches you use to specify Grants.

Line 21: Total – Other Fundraising Sources

Calculate the Total of Other Fundraising Sources for each year by adding up the values from lines 18 through 20 in the column for the same year.

Line 22: Total Current-Year Unrestricted Funds Received (including pledges paid this year)

Create queries that capture the journal entries for each year to be tracked on the report. If the report years correspond to calendar years or fiscal years, you can simply use the queries under the Constituent Journal Entry date category to select the appropriate journal entries for the last five years. Then run the Fund Activity Report against each of those queries to retrieve the total received amount for that year, broken down by fund.

Treasure Map Interviews

The Treasure Map Interview is an important part of the Benevon Know Thy Donor program. As you conduct a Treasure Map Interview, you will want to capture the responses provided by the constituent in Next Step, so that you and others in your organization can refer to them in the future.

When you start the Treasure Map Interview with a constituent, you should also start a new Contact in the constituent's journal. We suggest that you enter a title for this Contact that will make it obvious that this is a Treasure Map Interview, for example "Treasure Map Interview'. Make sure that the date is set to the date of the interview.

If any constituents do not already have an account in Next Step, you will need to create one. For more information on creating a new account see the topic Adding an Account under the online help section Accounts.

When you create a new Contact, you will see a list of User Defined Field tiles under the main contact tile.

Click on the one labeled Benevon Treasure Map Interview Questions to see a list of all of the Treasure Map Interview questions recommended by Benevon.

Click on the question as you ask it. A field will open up for you to enter the constituent's response.

You can use the Notes field on the top tile to contain any constituent comments or other information that is not related to one of the Treasure Map Interview questions.

When the interview is over, be sure to save the Contact record!

Next Ten Asks

The Next Ten Asks report (also called Next Steps to a Yes) is an important tool to help Benevon clients develop strong relationships with potential major donors. It is quite easy and convenient to use Next Step to track the information that goes into those reports, and to generate the reports themselves as needed. Just be sure to follow these steps.

1: Identify People to Ask

The first activity in the Next Ten Asks procedure is identifying the prospects that will be approached about making a major gift to the organization.

When these individuals have been identified, update Next Step as follows:

a. Make sure that there are constituent accounts in Next Step for each of the prospects. If there are not, create the missing accounts.
b. Create a Custom Account Query in the Benevon Next Steps to a Yes query category that links the prospects to this round of the Next Ten Asks process. This will allow you to easily identify these individuals as a group.

2: Determine How to Approach Each Constituent

Once the Next Ten Asks prospects have been named, you must identify the first contact that the organization plans to make with each of them to help bring him or her to decide to make a major gift. You should store this planned contact in Next Step.

For each identified contact, create a new Contact in the prospect's Next Step journal.

Be sure to follow these guidelines:

a. The date for each contact should be set to roughly the date you intend to perform the contact. You can always go back and re-schedule!
b. The contact method for each of these Contacts must be set to the value 'Benevon Next Steps to a Yes'
c. Fill out the Benevon UDF "Number of Next Step" to place the step in the correct order within the approach process.

d. If this is the first Next Steps to a Yes contact that you have added to this account, fill out the Benevon UDF Asking For ($ Amount) with the amount of the gift that you ultimately want to ask this prospect for. Note: If you enter the amount requested on all steps, the amount will be added too many times into the Total Amount Requested value that appears at the top of the report.

Don't forget to save the Contact when you are done.

3: Follow the Plan

As each identified contact is completed, update the Journal Notes for that Contact with any pertinent information. Then you must identify the next contact that you will make with that prospect and add a new Contact in the prospect's Next Step journal for that contact. Be sure to follow the first three guidelines above.

4: Generate the Next Ten Asks Report

To generate a printable copy of the current information in the Next 10 Asks format, all you have to do is follow these steps:

a. Open the query category Benevon Next Steps to a Yes
b. Make a copy of the query template Next Steps to a Yes for the current year. The new query might be named YYYY Next Steps to a Yes.
c. Modify the copied query to pull information from the Custom Account Query you created in step 1b), instead of from Base:All Constituents. The modified query will retrieve all of the steps that you have recorded for all of your prospects.
d. Open the Benevon report category, and run the report Next Ten Asks against the query from step 4c) above to format the information into a printable report. If you haven't already done so, you can save a few steps next time by checking the box 'Remember the query you choose for the next time you run this report?'

Select the delivery options that you want. When you select delivery option 'Display Report to Screen', you only have to double-click on an item on the report to open and update that contact record. Then click Submit, or Schedule for Off-Hours if you prefer.

Table Captain Guest List

You can use the Relationship Reporting feature of ***eTapestry*** to create a Table Captain Guest List report.

FFS POE Guests

To retrieve the number of POEs and POE attendees per month:

1. First make a copy of the query template Benevon Form for Success-> Events by Date Range in the Query Category you made to store this information.

2. Then modify the copied query to select items in the date range that you are tracking on your Form for Success. Make sure that the Benevon Point of Entry selection is "POE Event".

   When you run the modified query, the number of POE events on the list will appear at the top of the query results. This is the value that goes into field I.e.

3. To calculate the average number of POEs your organization has per month, divide the number of

POE events from step 2) by the number of months in the date range you are tracking on your Form for Success. This is the value that goes into field I.a.

4. Next make a copy of the query Benevon Point of Entry->POE Attendees yyyy/mm/dd in the Query Category you made to store this information.

5. Then modify the copied query to select items in the date range that you are tracking on your Form for Success. Make sure that the Starting Criteria are set to the query Benevon Point of Entry->POE Event. Select Preview on the pull-down in the Tasks tile and click on Save And to run the query.

6. The total number of guests attending POEs during the selected time period will appear at the top of the query results. This is the value that goes into field I.f.

7. To calculate the average number of POE guests per month, divide the total number of guests from step 6) by the number of months in the date range you are tracking on your Form for Success. This is the value that goes into field I.b.

FFS POE Referrals

To retrieve the number and percent of POE guests who referred other constituents:

1. Make a copy of the query template Benevon Form for Success ->POE Guests who Refer Others in the Query Category you made to store this information.

2. Modify the copied query to run against the query you created in step 6) to get a list of all POE guests that referred others to a POE. To limit the referrals to a specific time period, make sure that the Start and End dates are set up correctly for your report. Save the query and run it by selecting Preview on the pull down menu in the Tasks tile, and then clicking on the Save And button.

   When you run this query, the number of accounts that it identifies will be displayed at the top of the query results page. This is the value that goes in the # column for I.c.

3. The percent is calculated by dividing the number of accounts returned in step 11) by the total number of POE attendees returned in step 9). This is the value that goes in the % column for I.c.

FFS Table Captain Staff

The number of Table Captains who are on your staff may be a number that you can come up with outside Next Step. However, if you have been tracking this using the Staff checkbox in the Benevon Initial Contact UDF on the Defined Fields tab of the user account, then you can get this number using a query.

To extract a list of Table Captains who are staff members:

1. First create an Account query that lists all of your staff members. If you are using the standard UDF Benevon Initial Contact to track staff membership, you can use the query Benevon Initial Contact/Staff.

2. Then make a copy of the query template Benevon Ask Events/ Ask Event Table Captains in the

Query Category you made to store this information.

3. Modify the copied query as follows:

   a. Change the Starting Criteria from Base/All Journal Entries to the staff member query that you created in step 8).

   b. Update the Criteria section to use the date of your Ask Event in all four date fields.

   c. Select Preview from the pull-down in the Task section, then click Save And.

   d. The number of Table Captains who are staff members will be displayed on the top of the query output. This is the value for the # portion of field IV.c.

4. The percent is calculated by dividing the number of accounts returned in step 10) by the Final Number of Table Captains that you recorded in step IV.a and calculated in step 4) of FFS Table Captain Attrition. This is the value for the % portion of field IV.c.

FFS Table Captain Attrition

To extract information on Table Captain attrition, you will need to start by determining the starting number of Table Captains for this year's Ask Event.

1. This may be a number that you can come up with outside Next Step. However, if you have been tracking this on follow-up Contacts using the Potential Table Captain checkbox in the Benevon Next Step UDF, then you can get this number using a query.

2. First make a copy of the query template Benevon Ask Events/Ask Event Potential Table Captains in the Query Category you made to store this information.

3. Then modify the copied query to select items in the date range that you are tracking on your Form for Success. Select Date from the pull-down menu in the Available Fields section, Select Journal Entry Date in the list of dates.

   Fill in the appropriate dates in the Criteria section, then select Preview on the pull-down in the Task section and click on Save And.

   When you run this query, the number of potential Table Captains will be displayed at the top of the query results page.

   This is the value for the Starting # portion of field IV.a.

4. The number of actual Table Captains appears at the top of the summary page of the Next Step Event Analysis Report. Refer to FFS Ask Event Guests for more information on running this report. This is the value for the Final # portion of field IV.a.

5. The percent attrition is calculated by subtracting the number of accounts returned in step 3) from the number of accounts returned in step 2), and then dividing the difference by the number of accounts returned in step 2). This is the value for the % attrition portion of field IV.a

FFS Table Captain POE

To extract a list of Table Captains who attended a POE:

1. Make a copy of the query template Benevon Ask Events/ Ask Event Table Captains in the Query Category you made to store this information.
2. Then modify the copied query as follows:
   - Change the Starting Criteria from Base/All Journal Entries to the POE Attendance query you created in step 9) of FFS POE Referrals.
   - In the Criteria section, be sure to enter the date of the Ask Event into all four date fields!
   - Select Preview in the pull-down list in the Tasks section, and click on Save And. The number of Table Captains who attended a POE during the selected date range will be displayed on the top of the query output. This is the value for the # portion of field IV.b.
3. The percent is calculated by dividing the result from step 7) by the Final Number of Table Captains from step 4) of FFS Table Captain Attrition. This is the value for the % portion of field IV.b.

FFS Ask Event Guests

The Next Step Event Analysis (NSEA) report provides information on Ask Event Guests and Table Captains. It is found in the Standard Reports list. For information on how to run the NSEA report, click here NSEA Report

Field III.a.

This field is populated with the total value of # Attended Ask Event on the summary page of the Next Step Event Analysis report.

Field III.b.

The # portion of this field is populated with the total value of # Attended Ask Event who went to a previous POE on the summary page of the Next Step Event Analysis report.

The % portion of this field is populated with the total value of % Attended Ask Event who went to a previous POE on the summary page of the Next Step Event Analysis report.

Field III.c.

1. To calculate the # portion of this field, subtract the total values of # Attended Ask Event from # Invited to Ask Event on the summary page of the Next Step Event Analysis report.
2. To calculate the % portion of this field, divide the value calculated in step 1) by the total value of # Invited to Ask Event.

FFS Ask Event Pledges

The Next Step Event Analysis (NSEA) report provides information on Ask Event Pledges. It is found in the Standard Reports list. For information on how to run the NSEA report, click here NSEA Report

The # portion of this field is populated with the total value of # of People who Gave from the Ask Event on the summary page of the Next Step Event Analysis report. This is the value to be stored in the # portion of field V.a.

The % portion of this field is populated with the total value of % of People who Gave from the Ask Event on the summary page of the Next Step Event Analysis report. This is the value to be stored in the % portion of field V.a.

FFS First Time Donors

To identify the first time donors at your Ask Event, you will first need to find out which constituents made donations prior to the Ask Event:

1) To do this, make a copy of the query template Benevon Form for Success/ Donors by Date Range in the Query Category you made to store this information.

2) Then modify the copy to find all accounts with donations prior to the date of your Ask Event as follows:

- If you use Households to track your giving, be sure to change the Data Return Type to All Household Accounts. This will ensure that all household members are counted.

- In the Journal Entry Date portion of the Criteria field, set the End Date to the date before the Ask Event, and leave the Start Date blank. If you received gifts for the Ask Event prior to the actual date, use an End Date that is prior to the first of those gifts.

This will give you a list of all constituents who made donations prior to the Ask Event.

Next, you will need to get a list of all constituents who gave a gift at or for the Ask Event. These pledges and gifts should all have their Approach set to the approach you created to designate this Ask Event.

3) To do this, make a copy of the query template Benevon Ask Events/ Ask Event yyyy/mm Gifts in the Query Category you made to store this information.

4) Modify the copy as follows:

- Change the Data Return Type to All Household Accounts, to make sure that all househhold members are retrieved.

- In the Criteria section, select the Approach used to designate your Ask Event. Be sure to uncheck the default option "Benevon Ask Event yyyy/mm".

Limit the results to Gifts and Pledges (not payments) by selecting the Journal option in the Available Fields pull-down and selecting Journal Entry Types.

In the Criteria section, select all Gift and Pledge types that you use, but do not select Payment.

Select Preview from the pull-down on the Tasks section, and click on Save And to run the query.

Finally, you will use a compound query to subtract the constituents who made a previous donation from the list of donations given at the Ask Event. For more information on using compound queries in Next Step, refer to Category:Query.

5) To do this, make a copy of the compound query template Benevon Form for Success/ First Time Donors by Date in the Query Category you made to store this information.

6) Modify the copy to subtract the Previous Donor query created in step 2) from the Ask Event Donor query created in step 4). To do this, confirm that the Subtract box is clicked, and put the name of the query created in step 4 in the top box, and the name of the query created in step 5 in the bottom box.

The number of first time donors at the Ask Event will be displayed at the top of the query results. This is the value for the # portion of field V.b.

7) The percent is calculated by dividing the number of first time donors identified in step 6) by the total number of Ask Event attendees recorded in field III.a of the Form for Success. This is the value for the % portion of field V.b.

FFS Average Gift Prior POE

To retrieve a list of donations from Ask Event guests who have attended a previous POE:

8) First make a copy of the query template

Benevon Form for Success/Gifts from POE Attendees

in the Query Category you made to store this information.

9) Modify the copy to find the constituents who have both given at the Ask Event and attended a POE during the desired date range. To do this, make sure that the Intersection box is checked, and enter the name of the query of Ask Event Donors created in step 4) of FFS First Time Donors as Query 1 and the query of POE Attendees created in step 6) of FFS POE Referrals as Query 2.

Select Preview from the pull-down list on the Tasks section, and click on Save And. This will return the list of attendees at the Ask Event who had attended a previous POE. The count of these attendees will appear at the top of the query results.

10) Then run the report

Benevon Form for Success-> Gift List

against your updated query from step 9) to get a list of all donations at the Ask Event from constituents who attended a prior POE.

From the query results page, select Run Report on the This Query tile. This will open the Report Category selection page.

Click on the Benevon Form for Success Category to open it.

Click on the green arrow next to the Gift List report to open its launch page. The query that you just created should appear in the Query section.

Scroll down on the launch page and click Submit to run the report.

The total amount given at the Ask Event by the selected constituents will appear on the top of the report.

11) You can determine the average donation from a guest who attended a prior POE by dividing the total amount given from step 10) by the number of guests from step 9). This is the value to be entered in field V.c.

FFS Average Gift Prior No POE

To list the donations from Ask Event guests who did not attend a previous POE:

12) Make a copy of the compound query template

Benevon Form for Success/Gifts from non-POE Attendees

in the Query Category you made to store this information.

13) Modify the copy to find attendees at the Ask Event who had not attended a previous POE. To do this, make sure the Subtract option is selected, and enter the query of Ask Event Donors created in step 4) of FFS First Time Donors as Query 1 and the query of POE Attendees created in step 6) of FFS POE Referrals as Query 2. This will return the list of attendees at the Ask Event who had not attended a previous POE.

14) Select Preview from the pull-down list on the Task pane, then click Save And. This will display the query results. The number of gifts from non-POE Attendees will appear at the top of the query.

Then click on the Run Report button on the This Query tile to open the list of Report Categories.

Click on the Benevon Form for Success category, and then on the report Gift List.

This will open the Gift List report Launch page, with the name of the query from step 13) already filled in.

To run the report, click on Submit.

15) To determine the average value of the donations given by constituents who did not attend a prior POE, divide the total Donation from the top of the report that you ran in step 16) by the number of constituents from the query that you ran in step 13). This is the value to be entered in field V.d.

FFS First Time MYGS Members

First-Time Multiple-Year Giving Society Attendees at the Ask Event

To identify Multiple-Year Giving Society Members who attended your Ask event and made their first Multiple-Year Giving Society pledge:

1) Create a new query in the Query Category that you made to store this information.

To create the query, open the Form for Success Query Category that you created in step 1) and select New Query on the Tasks pane.

2) Modify the new query as follows:

- To limit the results to first-time donors, change the Starting Criteria from Base/All Journal Entries to the First-Time Donor query you created in step 6) of FFS_First_Time_DonorsFFS_First_Time_Donors.

- To further limit the results to people who made Multiple-Year Giving Society pledges at the event:

a) Select All Household Accounts in the Data Return Type field. This will make sure that all members of a household that have given a Multiple-Year Giving Society gift are included in the results.

b) Select Defined Fields from the pull-down list in the Available Fields section. This will cause the list of Defined Fields to appear beneath the pull-down box.

c) Click on Transaction UDF on the list of Defined Fields. This will cause the transaction defined fields to appear on the Criteria section of the page.

d) Click the name of the field you use to identify which gifts are associated with the Multiple-Year Giving Society. Select all of the values associated with the Multiple-Year Giving Society levels.

Select Preview in the Tasks pane, then click on Save And... to run the query.

The number of Ask Event attendees who are first-time donors to the Multiple Year Giving Society will appear at the top of the query results. This is the # value to be entered in field V.e.v.

3) To calculate the percent, divide the value in field V.e.v. by the number of attendees at the Ask Event recorded in III.a. This is the % value to be entered in field V.e.v.

FFS MYGSD Contacts

To determine the number of cultivation contacts you have made with Multiple-Year Giving Society Members:

4) Make a copy of the query template

Benevon Form for Success / Cultivation Contacts

in the Query Category you made to store this information.

5) Modify the copied query as follows:

- Change the Starting Criteria from Base/All Constituentrs to the query of current Multiple-Year Giving Society Members that you created in step 12) of FFS Table Captain Donations.
- Enter the date range that you are tracking on your Form for Success in the Journal Entry Date range.
- Select all Contact Method values that you use to represent telephone or in-person constituent contacts.

The number of cultivation contacts with Multiple-Year members will appear at the top of the query results.

6) To calculate an average number of contacts per member, divide the number of contacts from step 5) above by the total number of Multiple-Year Members found in step 13) of FFS Table Captain Donations. This is the value to be stored in field VIII.c.

FFS Last Year's MYGSD

Last Year's Multiple-Year Giving Society Members

To find last year's Multiple-Year Giving Society Members, you will want to list all constituents who gave a Multiple-Year Giving Society donation between six years ago and one year ago.

To do this:

1) First make a copy of the Multiple Year Giving Society query that you made in step 12) of FFS Table Captain Donations in the query category that you created for this purpose.

2) Change the Journal Entry date range in the Criteria section of the query back one year.

Select Preview from the pull-down list on the Tasks pane, and click Save And to run the query.

The number of members who were in the Multiple-Year Giving Society last year will appear at the top of the query results.

Table Captains

To identify last year's Multiple-Year Giving Society members who became Table Captains this year:

3) Make a copy of the query

Benevon Ask Events/Ask Event Table Captains

in the query category that you created to store this information.

4) Modify the copy as follows:

- Change the Starting Criteria from Base/All Constituents to the query of last year's Multiple-Year Giving Society Member query that you created in step 2) above.

- Put the date of the Ask Event in all four date fields in the Criteria section.

Select Preview in the pull-down list on the Tasks pane and click Save And to run the query. The number of accounts found will appear at the top of the query results. This is the # value to be stored in field IX.d.

5) To calculate the percent, divide the number of Last Year's Multiple-Year Giving Society Members who became table captains found in step 4) by the total number of Last Year's Multiple-Year Giving Society members found in step 2). This is the % value to be stored in field IX.d.

Ask Event Invitations

To identify last year's Multiple-Year Giving Society members who were invited to this year's Ask Event:

6) Make a copy of the query

Benevon Ask Events/Ask Event Invitations

in the query category that you created to store this information.

7) Modify the copy as follows:

- Change the Starting Criteria from Base/All Constituents to the query of last year's Multiple-Year Giving Society Member query that you created in step 2) above. This will limit the results to members of last year's Multiple-Year Giving Society.

- Select Commonly Used Fields on the Available Fields pull-down list, and click on Journal Entry Date.

- In the Criteria section of the query, enter the date range that you are tracking on your Form for Success. This will limit the results to invitations issued for this year's Ask Event.

Select Preview in the pull-down list on the Tasks pane and click Save And to run the query. The number of accounts found will appear at the top of the query results. This is the # value to be stored in field IX.e.

8) To calculate the percent, divide the number of Last Year's Multiple-Year Giving Society Members who were invited to this year's Ask Event found in step 7) by the total number of Last Year's Multiple-Year Giving Society Members found in step 2). This is the % value to be stored in field IX.e.

Ask Event Attendees

To identify last year's Multiple-Year Giving Society members who attended this year's Ask Event:

9) Make a copy of the query

Benevon Ask Events/Ask Event Attendees

in the query category that you created to store this information.

10) Modify the copy as follows:

- Change the Starting Criteria from Base/All Constituents to the query of last year's Multiple-Year Giving Society Member query that you created in step 2) above. This will limit the results to members of last year's Multiple-Year Giving Society.
- Select Commonly Used Fields on the Available Fields pull-down list, and click on Journal Entry Date.
- In the Criteria section of the query, enter the date range that you are tracking on your Form for Success. This will limit the results to invitations issued for this year's Ask Event.

Select Preview in the pull-down list on the Tasks pane and click Save And to run the query. The number of accounts found will appear at the top of the query results. This is the # value to be stored in field IX.f.

5) To calculate the percent, divide the number of Last Year's Multiple-Year Giving Society Members who were invited to this year's Ask Event found in step 7) by the total number of Last Year's Multiple-Year Giving Society Members found in step 2). This is the % value to be stored in field IX.f.

FFS MYGSD Early Payoff

1) Create a new query in the category you have created for this information.

Modify the new query as follows:

- Change the Starting Criteria to the Multiple-Year Giving Society member query that you created in step 12) of FFS Table Captain Donations.
- On the Available Fields section, select Commonly Used Fields, then click on Individual Transaction Pledge Balance.
- In the Criteria section, set the comparison operator to Equal To and the value to 0.00.

This will pull up the list of current Multiple-Year Giving Society members who have paid off all of their current pledges. The number of these accounts will appear at the top of the query results. This is the # value to be stored in IX.b.

2) To calculate the percent, divide the number in IX.b. by the number of Multiple Year Giving Society members from step 12) of FFS Table Captain Donations. This is the % value to be stored in field IX.b.

FFS Paid Off Pledges

To determine what current pledges have been paid off on time or early, we first identify current pledges. A current pledge is one that has been made in the last five years, since there would still be an outstanding payment for a pledge of $1,000 for 5 years made at the Ask Event five years ago that has not been paid early.

1) Make a copy of the query template

Benevon Form for Success / Pledges by Date Range

in the Query Category you made to store this information.

2) Modify the copied query to select events during the desired date range, which in this case is the five years prior to the date of the most recent Ask Event.

Select Preview from the pull-down list on the Tasks tile, and click on Save And to run the query.

3) If you are using Split Pledges, be sure that the option "Collapse Gift/Pledge Splits" is checked in the Gift List report. Otherwise the report will return the number of pledge splits instead of the number of pledges.

To do this, open the report category Benevon Form for Success and click on the name of the report.

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This will bring you to the report definition. Make sure the "Collapse Gift/Pledge Splits" option is checked. If it is not, click on the box to select the option.

4) Run the report

Benevon Form for Success/Gift List

against the query you created in step 2).

The number of pledges made during that time will appear at the bottom of the report.

Save this number – you will need it again in step 7).

5) Create a new query in the Query Category you made to store this information. Modify the query as follows:

- Change the Data Return Type to Journal Entries
- Change the Starting Criteria from Base/All Constituents to the query you created in step 2).
- Select Commonly Used Fields from the Additional Fields pull-down, and click on Individual Transaction Pledge Arrears in the list of fields. In the Criteria section, select Equal To from the pull-down list of comparisons, and type 0.00 in the comparison field. Leave the As Of date blank.

Select Preview from the pull-down list on the Tasks tile, and click on Save And to run the query.

6) Run the report Benevon Form for Success/Gift List against the query you created in step 5).

The number of pledges made during that time that have been paid off early or on-time will appear at the bottom of the report.

This is the # value to be stored in field IX.a.

7) To calculate the percent, divide the number of paid off pledges in IX.a. by the total number of pledges found in step 4). This is the % value to be stored in field IX.a.

FFS Board MYGSD

To find the number of Board Members who are also members of the Multiple Year Giving Society:

1) Create a new Compound Query in the Query Category that you created for Form for Success.

- Make sure the Intersect option is checked
- Put the Multiple-Year Giving Society query that you created in step 12) of FFS Table Captain Donations into Query 1.
- Put the Board Member query that you created in step 2) of FFS Board Donations into Query 2.

Select Preview from the pull-down list on the Tasks pane, and click Save And to run the query.

The number of Board Members who are members of the Multiple-Year Giving Society will appear at the top of the query results. This is the # value to be stored in field X.f.

2) To calculate the percent, divide the number of Board Members in the Multiple-Year Giving Society from step 1) by the total number of Board Members found in step 2) of FFS Board Donations. This is the % value to be stored in field X.f.

FFS Major Donations

You may have a method of tracking major donations outside of *eTapestry*. If you do track these donations in *eTapestry*, you can use the following approach to retrieve the information for the report.

Start by creating a query to return major gifts that are not associated with the Ask Event.

1) First, create a new query in the Query Category you created to store this information.

Modify the new query as follows:

   a. Change the Data Return Type to Journal Entries
   b. Select Defined Fields on the pull-down list of the Additional Fields tile. Click on Approach, and select the approach "Benevon One on One Ask", and any other values that you use to categorize gifts that are given outside the Ask Event process.
   c. Select Commonly Used Fields in the pull-down list on the Available Fields tile, and click on Journal Entry Date. In the Criteria tile, enter the date range that you are tracking on the Form for Success.
   d. Select Defined Fields in the pull-down list on the Available Fields tile, and click on User Defined Field: Transaction. In the Criteria tile, enter the date range that you are tracking on the Form for Success.

Select Preview from the pull-down list on the Tasks pane, then click on Save And to run the query.

2) To find the total amount raised for the Sponsorship Giving Level, run the report Benevon Form for Success/Gift List against the query created in step 1).

The total amount raised will appear at the top of the report. This is the value to be recorded in VIII.a.

FFS Capital Donations

You may have a method of tracking Capital donations outside of *eTapestry*. If you do track these donations in *eTapestry*, you are probably using the Campaign field to identify Capital donations. If so, you can use the following approach to retrieve the information for the report.

Start by creating a query to return Capital donations that were not counted in the Ask Event totals.

1) First, create a new query in the Query Category you created to store this information.

Modify the new query as follows:

   a. Change the Data Return Type to Journal Entries
   b. Select Defined Fields on the pull-down list of the Additional Fields tile. Click on Approach, and select the approach "Benevon One on One Ask", and any other values that you use to categorize gifts that are given outside the Ask Event process.

    c. Select Commonly Used Fields in the pull-down list on the Available Fields tile, and click on Journal Entry Date. In the Criteria tile, enter the date range that you are tracking on the Form for Success.

    d. Select Commonly Used Fields in the pull-down list on the Available Fields tile, and click on Campaign in the Additional Fields tile. In the Criteria tile, click on the check-box to select each Campaign that you use to record Capital donations.

Select Preview from the pull-down list on the Tasks pane, then click on Save And to run the query.

2) To find the total amount pledged and gifted in Capital donations, run the report Benevon Form for Success/Gift List against the query created in step 1).

The total amount raised will appear at the top of the report. This is the value to be recorded in VIII.b.

FFS Endowment Donations

You may have a method of tracking Endowment donations outside of *eTapestry*. If you do track these donations in *eTapestry*, you are probably using the Fund field to identify Endowment donations. If so, you can use the following approach to retrieve the information for the report.

Start by creating a query to return Endowment donations that were not counted in the Ask Event totals.

1) First, create a new query in the Query Category you created to store this information.

Modify the new query as follows:

    a. Change the Data Return Type to Journal Entries.

    b. Select Defined Fields on the pull-down list of the Additional Fields tile. Click on Approach, and select the approach "Benevon One on One Ask", and any other values that you use to categorize gifts that are given outside the Ask Event process.

    c. Select Commonly Used Fields in the pull-down list on the Available Fields tile, and click on Journal Entry Date. In the Criteria tile, enter the date range that you are tracking on the Form for Success.

    d. Select Commonly Used Fields in the pull-down list on the Available Fields tile, and click on Fund in the Additional Fields tile. In the Criteria tile, click on the check-box to select each Fund that you use to record Endowment donations.

Select Preview from the pull-down list on the Tasks pane, then click on Save And to run the query.

2) To find the total amount pledged and gifted in Endowment donations, run the report Benevon Form for Success/Gift List against the query created in step 1).

The total amount raised will appear at the top of the report. This is the value to be recorded in VIII.c.

FFS Board Donations

To find the number and percent of Board Members who give money to the organization:

First create a query that lists all of your current Board Members.

Note: If you do not use the Benevon Intial Contact UDF to identify your Board Members in Next Step, you wil need to create your own query to retrieve a list of current board members. If your Board Members are not otherwise marked in *eTapestry*, you can create a Custom Account Query that will

list your Board Members. Refer to Queries for more information on creating a Custom Account Query in *eTapestry*.

1) If you use the Benevon Initial Contact UDF to identify board members, make a copy of the query Benevon Initial Contact / Board Member to create a list of Board Members.

2) As time goes on, your Board Membership will change, and the values on the Benevon Initial Contact field will change along with it. To create a snapshot of this year's Board Members, open the copied file, select Create Custom Query on the pull-down menu in the Tasks pane, and click Save And.

This will allow you to give a name to the Custom Account Query. The number of Board Members retrieved will appear at the top of the list of Board Members.

Now that you have a list of Board Members, you should identify which Board Members have given a gift in the time period covered by the Form for Success.

3) Make a copy of the query template Benevon Form for Success/ Donors by Date Range in the Query Category you made to store this information.

4) Modify the copied query as follows:

- Change the Selection Criteria from Base/All Constituents to the Board Members query that you created in step 2).

- Change the Journal Entry dates in the Criteria section to the date range that you are tracking on your Form for Success. This will limit the results to donations made during the last year.

Select Preview from the pull-down menu on the Tasks pane and click on Save And to run the query.

The number of Board Members who have given during to the organization during the time frame will be displayed at the top of the query results. This is the # value to be stored in field X.e.

5) Calculate the percent by dividing the number of Board Members who have made donations from step 3) by the total number of Board Members from step 1). This is the % value to be stored in field X.e.

FFS FFGCE Attendance

To determine the number of Multiple-Year Giving Society Members who attended at least one FFGCE this year:

1) Make a copy of the query template Benevon Free Feel Good Cultivation Event / Free Feel Good Cultivation Eventin the Query Category you made to store this information.

2) Modify the copied query to select events during the desired date range, and to run against the query of current Multiple-Year Giving Society Members that you created in step 12) of FFS Table Captain Donations. The number of Multiple-Year Giving Society Members who attended at least one FFGCE this year will be displayed at the top of the query results. This is the # value to be stored in field VIII.b.

3) The percent of Multiple-Year Giving Society Members who attended at least one FFGCE this year is calculated by dividing the number of constituents found in step 2) by the total number of Multiple-Year Giving Society Members found in step 4) of FFS Table Captain Donations. This is the % value to be stored in field VIII.b.

FFS MYGSD Upgrade

To create a list of Multiple-Year Giving Society members who made a gift or pledge during the period reported in the Form for Success:

10) Create a new query in the Category you created for Form for Success queries.

Modify the query as follows:

- Change the Starting Criteria from Base/All Accounts to the Multiple Year Giving Society Member query that you created in step 12 of FFS Table Captain Donations.
- Select Commonly Used Fields on the Available Fields pull-down, then click on both Journal Entry Date and Journal Entry Types.
- Select the Gift and Pledge Journal Entry types that your organization uses. Be sure not to check the box for Payments.
- Enter the date range you are tracking on your form for success in the Journal Entry Date fields.

Select Preview from the pull-down list on the Tasks pane, then select Save And to run the query.

The number of members found will be displayed at the top of the query results. This is the # value to be stored in field IX.c.

11) To calculate the percent, divide the number stored in IX.c. by the total number of Multiple Year Giving Society Members found in step 12) of FFS Table Captain Donations. This is the % value to be stored in field IX.c.

FFS Ask Event Donations by Giving Level

Your organization will only find four of the five line items under V.e. to be applicable, since either V.e.ii or V.e.iv will reference a giving level that is not part of your Multiple-Year Giving Society program.

You will need to repeat the steps below for each of the Giving Society levels that your organization uses.

Ask Event Gifts at this Giving Level

1) Create a new query in the Query Category you created to store this inforamation.

Modify the new query as follows:

- Change the Data Return Type to Journal Entries
- Change the Starting Criteria to contain the query that you created in step 4) of FFS First Time Donors.

2) Modify the copied query to select only the desired Giving Level. To do this, select Defined Fields from the Available Fields pull-down, then click on User Defined Field - Transaction. Click on the UDF that you use to track giving level, then select the desired option.

Select Preview from the pull-down list on the Tasks pane, then click on Save And to run the query.

3) To find the total amount raised for the selected Giving Level, run the report Benevon Form for Success/Gift List against the query created in step 23.

The total amount raised will appear at the top of the report. This is the $ value to be recorded in the sub-item of V.e. associated with the specified level.

Ask Event Donors at this Giving Level

Since some of these gifts may have been given by couples or other households, we need to run a query to be sure that we pick up all of the Donors at this level.

4) Make a copy of the Ask Event Donations query that you created in step 18 of FFS New and Renewing MYGS Members in the Query Category you made to store this information.

5) Modify the Starting Criteria to use the Giving Level query that you created in step 2).

Selecting Preview on the pull-down menu in the Tasks tile and clicking Save As will run the query.

Match with Attendees

6) Make a copy of the query that you created in step 20 of FFS New and Renewing MYGS Members in the Query Category you made to store this information. Change Query 1 to be the query you created in Step 5 to limit the donations to those in the desired Giving Level.

Select Preview on the pull-down menu in the Tasks tile and click Save As to run the query. The number of Multiple-Year Giving Society Members who gave at the selected level will appear at the top of the query results.

This is the number value to be entered on the line associated with the appropriate giving level (fields V.e.i-V.e.iv.).

7) To calculate the percent, divide the number of donors at the specified Giving Level (from step 1) by the total number of guests at the Ask Event stored in field III.a. This is the percent value to be entered on the line associated with the appropriate giving level (fields V.e.i-V.e.iv.).

Note: You will need to repeat each step for each applicable Giving Level.

FFS Other Gifts

Ask Event Gifts at the "Other" Giving Level(s)

Start by creating a query to return donations made to the "Other" Giving Levels.

8) First, create a new query in the Query Category you created to store this information.

Modify the new query as follows:

- Change the Data Return Type to Journal Entries
- Select Defined Fields on the pull-down list of the Additional Fields tile. Click on Approach, and select the approach associated with the Ask Event in the Criteria tile.
- Then click on User Defined Fields - Transaction. In the Criteria tile, click on the UDF that you use to track Giving Level. Select all of the giving levels that are not major gifts or part of the Multiple-Year Giving Society.

Select Preview from the pull-down list on the Tasks pane, then click on Save And to run the query.

9) To find the total amount raised for the "Other" Giving Levels, run the report Benevon Form for Success/Gift List against the query created in step 8.

The total amount raised will appear at the top of the report. This is the $ value to be recorded in the sub-item of V.f.

Ask Event Donors at this Giving Level

Since some of these gifts may have been given by couples or other households, we need to run a query to be sure that we pick up all of the Donors at these levels.

10) Make a copy of the Ask Event Donations query that you created in step 18 of FFS New and Renewing MYGS Members in the Query Category you made to store this information.

11) Modify the Starting Criteria to use the Giving Level query that you created in step 8).

Selecting Preview on the pull-down menu in the Tasks tile and clicking Save As will run the query.

Match with Attendees

12) Make a copy of the query that you created in step 20 of FFS New and Renewing MYGS Members in the Query Category you made to store this information. Change Query 1 to be the query you created in step 8 to limit the donations to those in the "Other" Giving Levels.

Select Preview on the pull-down menu in the Tasks tile and click Save As to run the query. The number of Multiple-Year Giving Society Members who gave at the selected level will appear at the top of the query results.

This is the number value to be entered on line V.f.

13) To calculate the percent, divide the number of donors at the "Other" Giving Levels (from step 12) by the total number of guests at the Ask Event stored in field III.a. This is the percent value to be entered on line V.f.

FFS Follow Up

You can access follow-up information for POE attendees.

1. Create a copy of the query template Benevon FollowUp -> POE Followup Complete in the Query Category you made to store this information.

2. Edit the copy.

   Select items in the date range that you are tracking on your Form for Success. Select Dates from the pull-down menu in the Available Fields section, then select Journal Entry Date in the list of dates.

   Enter the range of dates that you are using for your Form for Success in the Criteria section. Select Preview from the pull-down list in the Task section, then click on Save And to run the query.

   This will give you a list of all POE Attendance contacts that have a value of "Yes" in the UDF Benevon Follow Up Done?

   When you run this query, the number of accounts that it identifies will be displayed at the top of the query results page. This is the value that goes into the # portion of field II.a.

3. To calculate the percent, divide the number of attendees in field II.a by the total number of POE guests found in Section 1 step 5). This is the value that goes into the % portion of field II.a.

4. Run the report Benevon Form for Success-> POE Followup Dates against your updated query

from step 2) to retrieve the Last Modified Date (the estimated date that the Follow Up was completed) for these contacts. Note: if you have chosen to use a separate UDF to track the Follow-Up Complete Date, you will need to modify this report to display that UDF instead of the Last Modified Date.

5. After you export the report results to *Microsoft Excel*, you can use the Days360 function to determine the number of days between the Last Modified Date (or your custom UDF) and the Date of the event.

6. Use the Average function in Excel to calculate the average number of days within which follow-up contact was made. This is the value that goes into field II.b.