Solicitation Group Overview

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new Veracross Community. Please update your bookmarks.

Here is the new version of this article in the Veracross Community.

Overview

Solicitation groups can be setup to track the various groupings for how a school does their solicitation. This is helpful when soliciting the various groups of constituents like Trustees, New Parents, Parents by Grade Level, Alumni by Graduation Year, etc. Each solicitation group can be used to track communication status, giving percentage and view performance against the target amounts set for the constituent group. Solicitation groups are set on each household's Giving History record. Each component relative to solicitation groups is outlined below.

Campaign Specific Groups

Campaigns & Funds

Campaigns and Funds are used to designate how a gift came into the school and where the money should be designated. Solicitation groups are associated with a particular campaign to identify which campaign a solicitor is responsible for raising money towards. Typically, solicitation groups are created for the Annual Fund campaign. Solicitation groups are not associated with a particular fund which means gifts can be designated to various funds after being solicited for a particular campaign. The way this looks within Veracross is that a solicitation group is made up of household giving history records, which are campaign specific, therefore the solicitation group is campaign specific.

Giving History

Giving History records are created for each household per campaign. The Giving History record is a place where all giving for a household is summarized in one place. On each giving history record, target amounts are set and communication and giving status can be set. Communication status tracks where the household is at in the solicitation process (Not Contacted, Solicited, Complete, etc.) and Giving status tracks whether or not the household has made a commitment yet (Refused, Soft Commitment, Gave, etc.). Each giving history record (and therefore each household) can then be assigned a solicitation group. Adding a solicitation group on the Giving History record associates all of the relative information for that record with the solicitation group, allowing you to track performance against target amounts as well as communication and giving status across all giving history records within a solicitation group.

Group Configuration

Setup

To help understand the hierarchy of solicitation group configuration, it may be helpful to think of it as a similar setup to the Course/Class/Teacher/Student configuration in Veracross.

The highest level of configuration is done by creating Group Types. Group Types can be considered like the Course in VC. These group types are used to organize solicitation groups together based on common criteria. Examples of this might be having different group types based on different roles if solicitation groups are broken up by role (eg. Alum, Parents, New Parents, Staff, Faculty, Board). These Group Types are defined and configured by the school.

Solicitation groups are then created and associated with a particular group type. Solicitation groups are made up of multiple Giving History records. In this way, solicitation groups are similar to the Class record in VC which is essentially a record that connects the teacher to the students. A solicitation group is the record which connects the solicitor to his/her solicitees.

Once you associate a solicitor ("teacher") with a solicitation group, you can assign giving history records for households ("students") to that group. By having a group record to tie this all together, the solicitor is associated with the solicitee and performance can be tracked per group.

Solicitation groups are associated with a particular campaign and school year, so new groups are created each year, even if group membership and solicitors generally stay the same. The purpose for this is so that over time, you have data to do useful year over year comparisons of solicitation group performance.

Groups vs. Classifications

There may be confusion about the configuration of solicitation groups vs. classifications within the development module in Veracross. Classifications live on Giving History records and are used for reporting and are dynamically assigned in the system based off of Primary Donor Roles, Donor Giving Categories, Solicitors, and more. The main purpose of classifications are for reporting. A giving history record (household) will almost always be associated with multiple classifications.

Solicitation groups are specifically for the purpose of soliciting. A giving history record (household) is manually assigned a solicitation group and will only be associated with one group per campaign.

Sometimes the definition of your solicitation groups and classifications will be the same (eg. if your solicitation group types are split out by role), however their purposes are different.

Office Reporting

Once solicitation groups are created, the development office can use these groups in many ways for reporting and staying up to date on the status of their donors.

System groups will be automatically created for each campaign with all persons tagged as Solicitors on solicitation groups. These groups make it easy for a development office to quickly communicate to all of their solicitors by campaign using email distribution lists.

With solicitation groups being made up of groups of giving history records, the solicitation group overview report makes it easy for users to see a high level performance overview of solicitation groups. It can quickly be seen how many families are in a group, how many have been contacted, and how many have given. Other data that can easily be seen per group are Participation, Total Target Amount, Total Giving, Total Giving compared to last year, # of LYBUNTS and SYBUNTS, as well as the number of households who have given more or less this year than last year.

Gifts can also be tracked back to a particular solicitation group by using the “Solicitation Group” field in a gift query. This allows the development office to quickly see who is responsible for a gift coming in from a particular donor.

A recent communication report can be run at any point to see new communication with donors. Notes and dates can be tracked per donor to have a historical track record of any communication between a solicitor and a donor/solicitee.