Development Office Workflows During COVID-19

Updated Jul 19, 2021

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

The current fundraising climate can cause challenges for both donors and development offices. Donors may need to modify their interactions with and commitments to your school for a time, while development offices may need to review and adapt their fundraising strategies to better align with current realities. The following workflows can help you track specific changes to donors' desires, as well as help you better understand your fundraising situation.

To view additional resources for your school during COVID-19, we recommend that you read our clearinghouse article for COVID-19 resources at Learn Veracross.

Prioritizing Outreach

There are two reports that can assist you with arriving at decisions regarding who is a priority to reach out to during the final weeks of the fiscal year.

LYBUNT Report

The LYBUNT (Last Year But Unfortunately Not This) report on your annual fund will let you quickly see who gave to the annual fund last year, but has not yet this year.

Pledge Status Report

The Pledge Status report on your annual fund will let you quickly see who has an outstanding pledge towards this year's annual fund.

Pledge Installment Changes and Write-Offs

Donors may contact your office and need to change when they make their next donation towards a pledge they have made to your school; or they may — unfortunately — need to cancel the rest of their commitment due to the change in circumstances.

You can easily make changes to pledge installment dates and/or write-off some or all of an open pledge in Veracross. Learn more about the write-off process by reviewing documentation at Learn Veracross.

Temporary "Do Not Solicit" Requests

In this season, donors may request to not be solicited; yet you'd like to track this hopefully temporary “Do Not Solicit” request in such a way that it could be revisited in the future. You can use profile codes and person notes to easily track these requests.

After adding this temporary “Do Not Solicit” notation, it is recommended that you also mark the actual “Do Not Solicit” field as “Yes.” This will prevent you from accidentally soliciting the person in this season, while the Profile Code will allow you to easily revisit whom made such temporary requests.

Learn more about using profile codes by reviewingdocumentation at Learn Veracross.

Constituent Tags

If you are using Development 3, you can use Constituent Codes and the Constituent Log to easily track these requests, including adding notes about the request.

Setting Up Special Funds & Campaigns

You may be looking to do a special fundraising related to the effects of the COVID situation, perhaps funding to help support financial aid at your school. This could require the setting up of a new fund or general campaign.

Creating a New Fund

As a reminder, it is best to work closely with your business office before adding any new funds, as they may want you to track this special project in a different way. Prior to creating a new fund, we highly recommend you review documentation on this topic at Learn Veracross.

Creating a New General Campaign

In addition to a fund, you might need to add a new general campaign in connection to this new fund. Whether or not you need a new Campaign will depend on many factors at your school, including the overall fundraising structure of your development office and whether or not you are currently using Development 3 or Development 2.

Development 3

Development 2