



CompassSM Foundation Management

With Compass you record, follow and manage every member's life-long relationship with your organization, including fundraising details of your prospects and donors. Some of the data stored by Compass includes:

Donor-Related Information (whether individuals, chapters, corporations or foundations)

- Lifetime contribution history
- Outright, pledged and planned gift tracking
 - » Type of gift and gift date (actual and entered on dates)
 - » Legal, discounted and recognition value
 - » Payment schedules
 - » Payment methods
 - » Hard and soft credit linkages
- Gift dedications (in honor of, in memory of, etc.)
- Pledge reminder and gift acknowledgment history by donor
- Linking pledges with uneven payment schedules or multiple gift vehicles
- Rating / giving potential, source and notes
- "Moves Management" status by prospect, solicitor, chapter, account/fund and rating
- Solicitor assignments
- File and maintain detailed contact reports, proposals and other communications with donors and prospects

Track Campaigns

- Campaign appeal status
- Campaign results and reporting
 - » New donors
 - » Upgraded donors
- Segmentation reporting (LYBUNT, SYBUNT, Never Givers, etc)
- Create campaign gift charts

Track Fund Numbers and Campaign Accounts

- Account-specific statistics
- Fund number reporting

Track Foundation and/or Organizational-Specific Information

- Foundation board members & officers (current & historical)
- Filing cabinet of documents available to authorized users (manuals, policies)
- Internal filing cabinet of important documents (minutes, policies, etc.)

Establish Recurring Gift Programs (monthly, quarterly, semi-annually, annually)

Pledge management with customizable pledge schedules for any gift

Manage gift acknowledgement

- Thank-you letters may be sent by campaign
- Memorial/honorarium gifts
- Choose whether to include IRS charitable gift receipt language

Track Matching Gift Companies

- Min/max match amounts
- Percentage match
- Program restrictions
- Contact information

Reporting

- Standard reports are built-in, including those that may be generated across all members / donors and by group (by region, province or chapter)
- Create custom reports

Fundraising Features

- Gifts/payments made by individuals can be "split" and allocated to different funds
- ZIP-based prospect/donor look-up
- "Quick searches" and advanced queries
- Task management
- Data export (multiple file types)
- Customized organizational hierarchy
- Restricted access to Fundraising information
- Mass email capabilities
- Audit logs (all changes to donor records are tracked and easily reversible)
- Create custom fields on the fly
- Tax deductible and non-tax deductible gift tracking
- Monitor staff portfolio balance
- Open issues to staff and volunteers