PATRON SOFTWARE INCORPORATED

Support. Service. Success.

Running a Capital Campaign: How Patron Software Can Help

Here's the scenario:

Your board of directors has voted to build a new Youth Activity Center. The land has been donated, but it's up to your organization to raise the $12M needed for the building fund.

How do you begin such a major project?

Studies show that in capital campaigns, the majority of needed funds are donated by less than 1% of the total donor base. The remaining amount is attained through grants, federal, state and local government funding, and the general public.

The Executive Committee decides that the first thing to do is identify the top 20 donors in the community. Representatives will be assigned to cultivate each potential donor. A representative is anyone who acts on behalf of your organization; a board member, someone on the advisory council, a staff member or a volunteer.

Naming opportunities will be offered. For example, if someone donates $2M, that donor has the option of naming the Youth Activity Center after his/her family or company. Other naming opportunities include the Auditorium ($1M) and Classrooms ($250K each).

After $9M is raised through private donations, the general public will be invited to contribute to the project. Possible naming opportunities are Seats ($500 each), or Bricks ($100 each).

The goal is to raise all of the needed funds and begin building within three years.

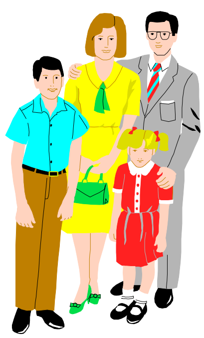
The top 20 donors in the community come from a combination of private contributors and public funding sources.

A private contributor is an individual or family that donates personal resources.

Examples of public contributors are companies, government agencies, foundations or institutions.

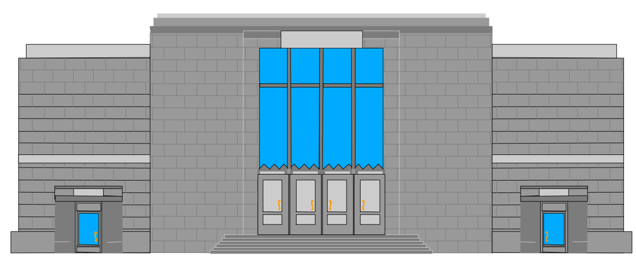
The type of information you need about a private donor is different than the information you need about a public donor.

With ***Patron Software***, you can track the appropriate information for each type of contributor.



For private donors, you can enter information that defines the relationship each family member has to your organization and to the community. When building relationships with private individuals, you need as many links as possible to cultivate their commitment to your project.

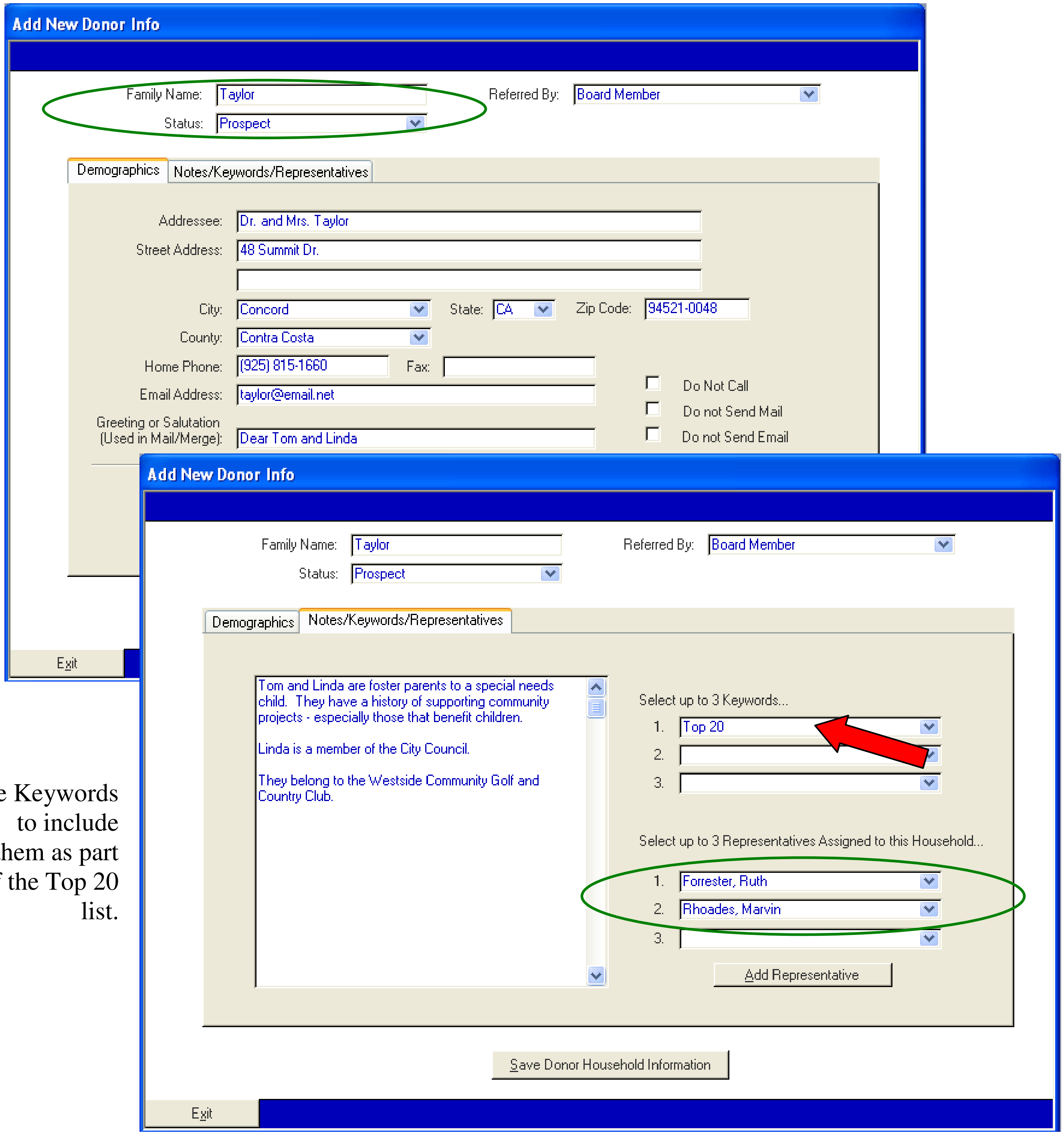
And for public donors, the organization may stay the same, but the contacts within the organization change over time. With ***Patron Software***, you can keep personnel information current, while maintaining a history of your relationship with the organization.



With ***Patron Software***, it's easy to enter, update and track relevant donor information. It's also secure. Only authorized representatives can access or view your confidential records.

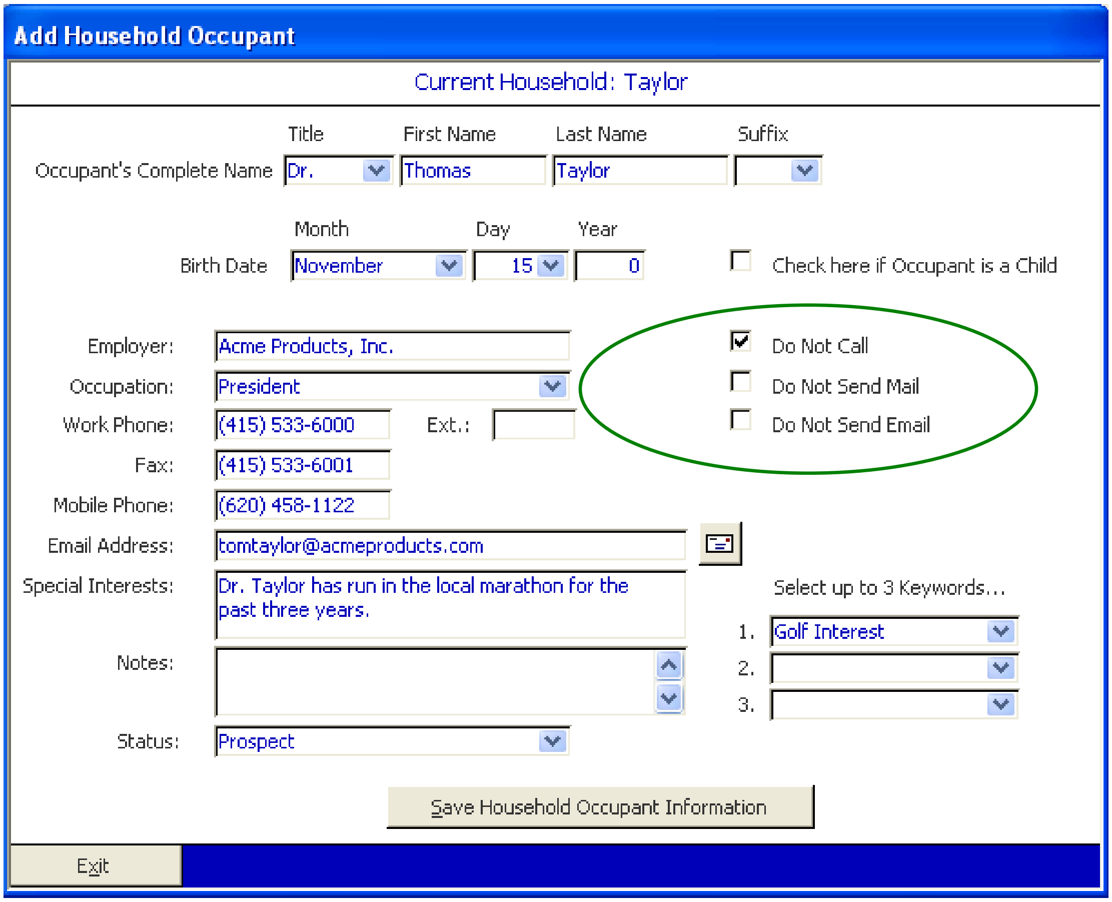
When building relationships with private donors, it is crucial to remember personal information about them. And with ***Patron Software***, you don't have to rely on your memory.

Use the **Add New Donor Info** form to enter general information about the potential donor and his/her family.



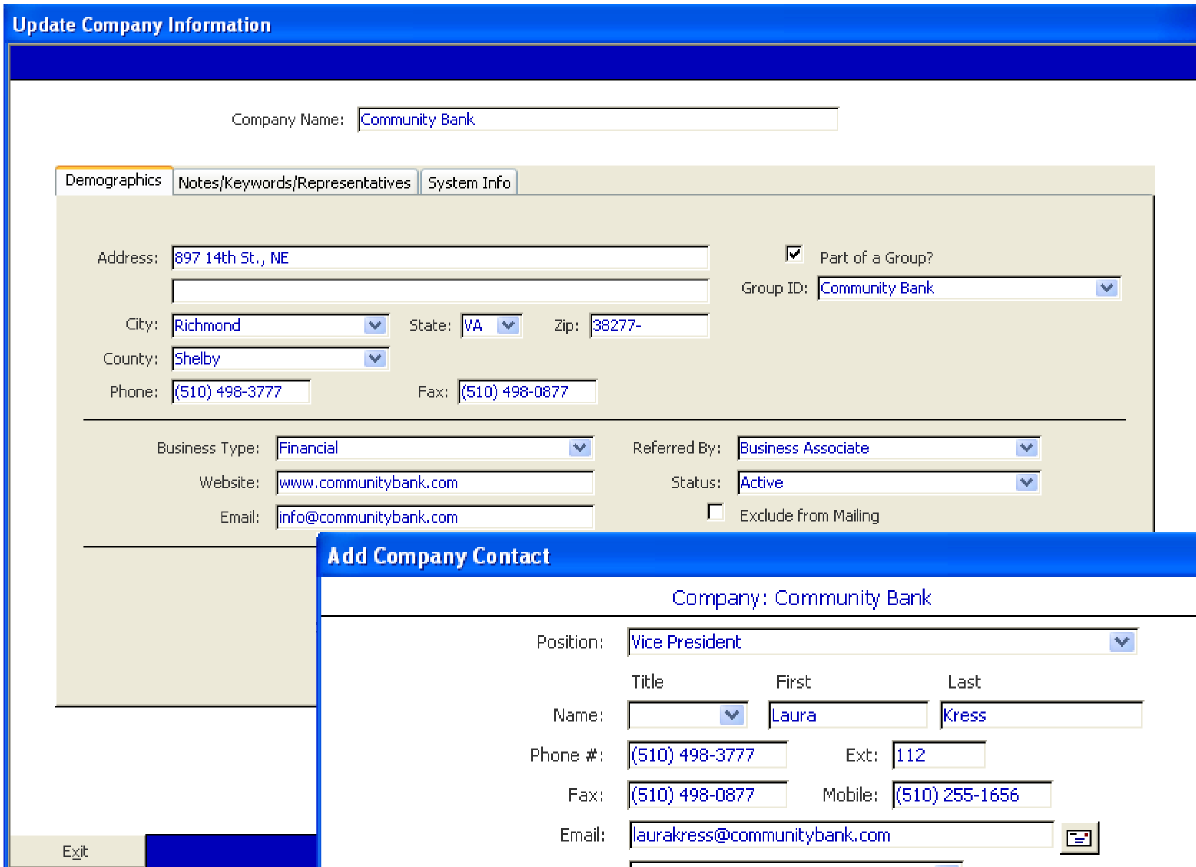
Use Keywords to include them as part of the Top 20 list.

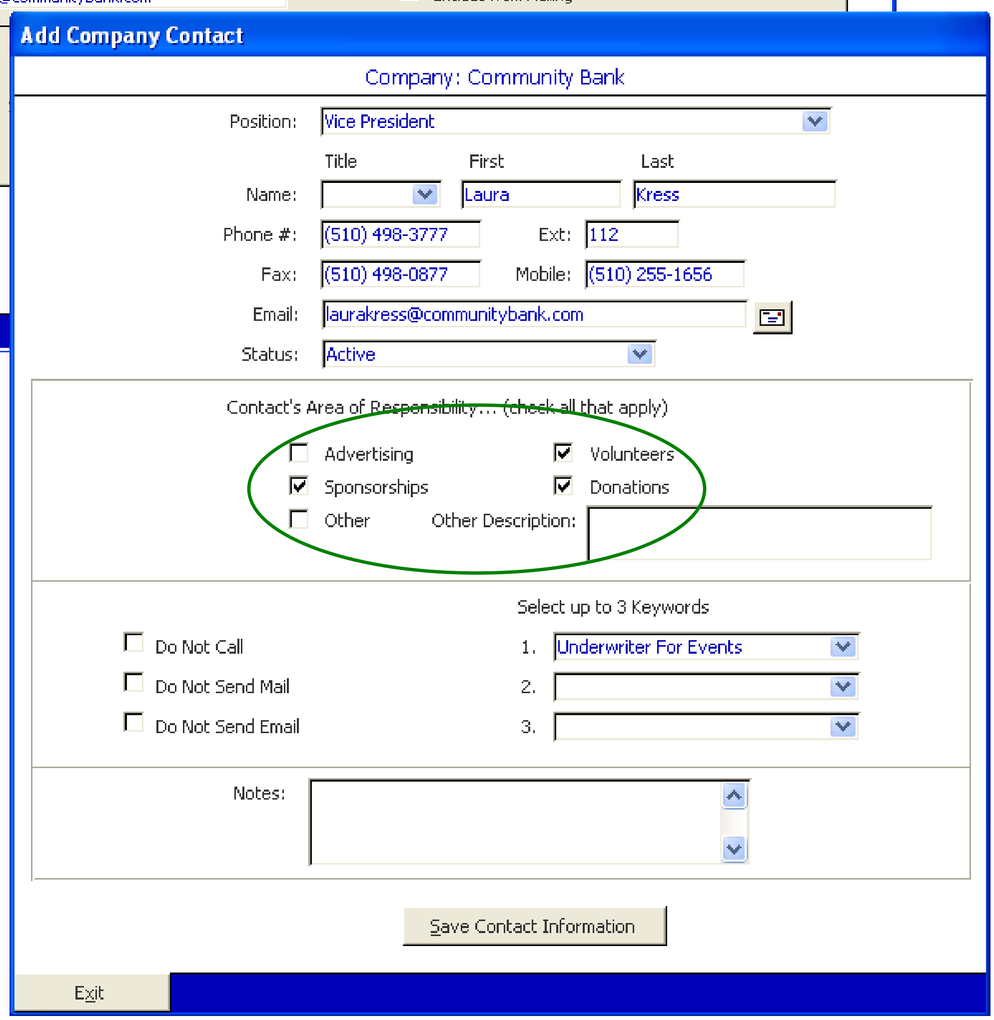
Enter personal information about each family member.



Patron Software allows you to note special requests such as "Do Not Call", "Do Not Send Mail", or "Do Not Send Email".

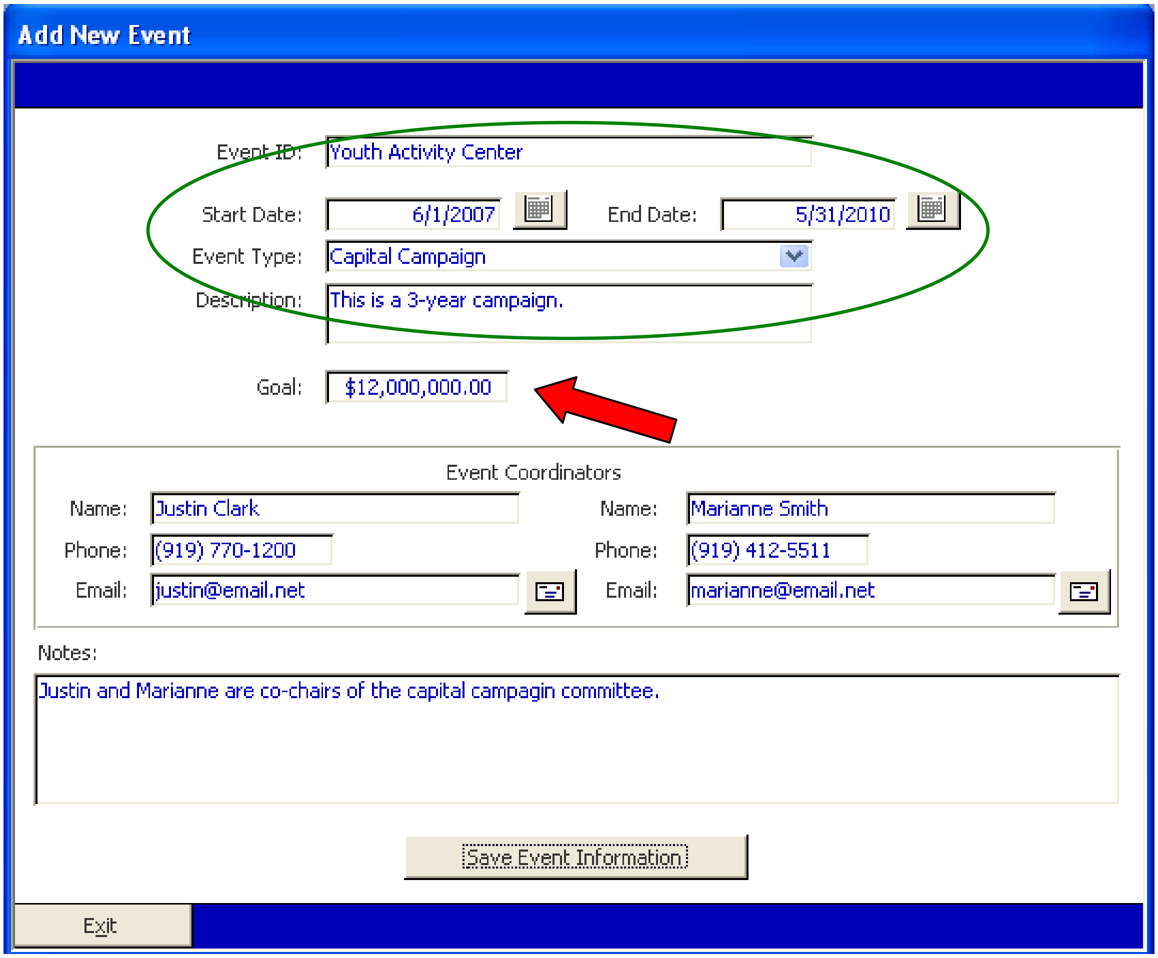
Patron Software allows you to keep information on as many contacts within an organization as needed.





You can also identify each contact's area of responsibility.

In ***Patron Software***, the Event record is used to tie together contributions, volunteer hours, calendar entries and activities.

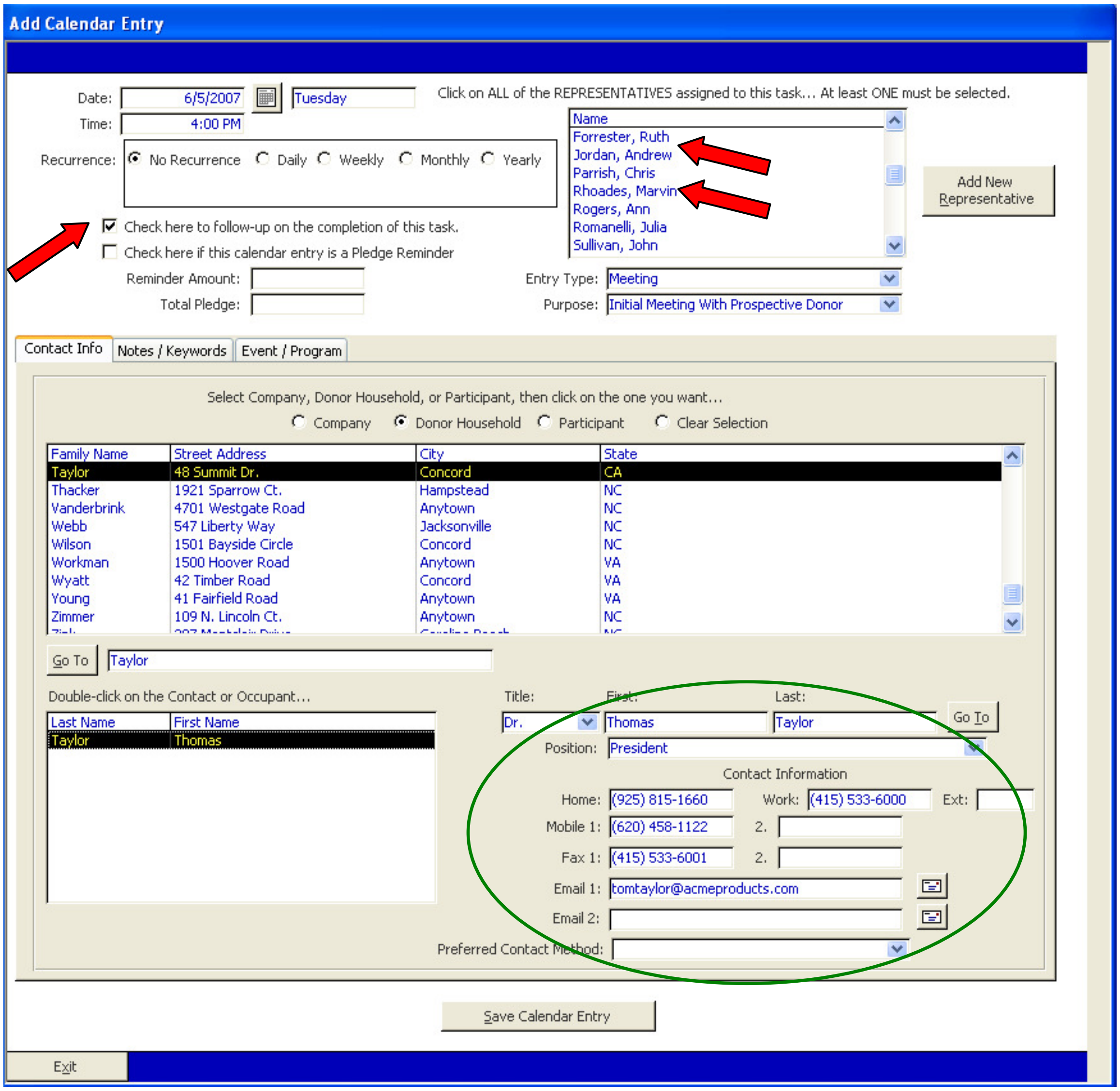


Now that you've identified the top 20 potential contributors in your community and created your Event record, it is time to start building the relationship between assigned representatives and prospective donors.

Begin by scheduling a meeting between the representative(s) and each individual on the list.

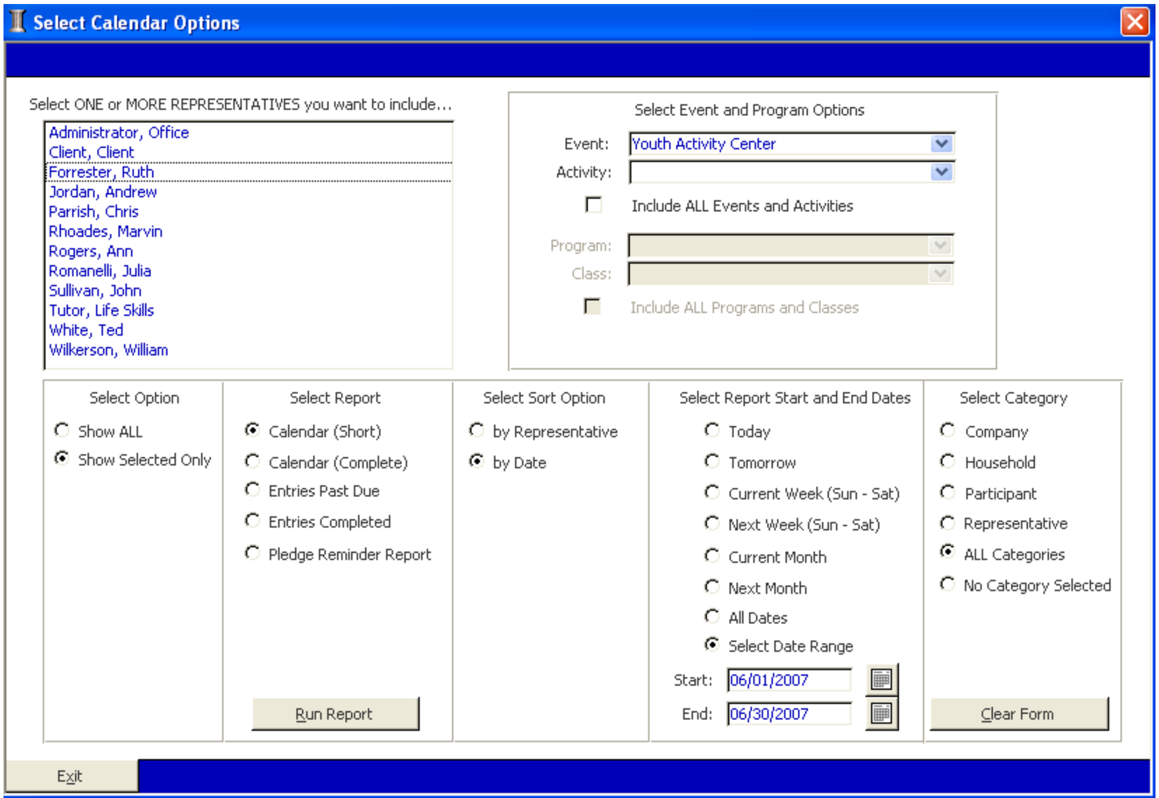
The first meeting scheduled is with Dr. Thomas Taylor. The representatives assigned to him are Ruth Forrester and Marvin Rhoades.

Check the Follow-up checkbox to help the Office Administrator remember to follow-up with the representatives on how the meeting went.

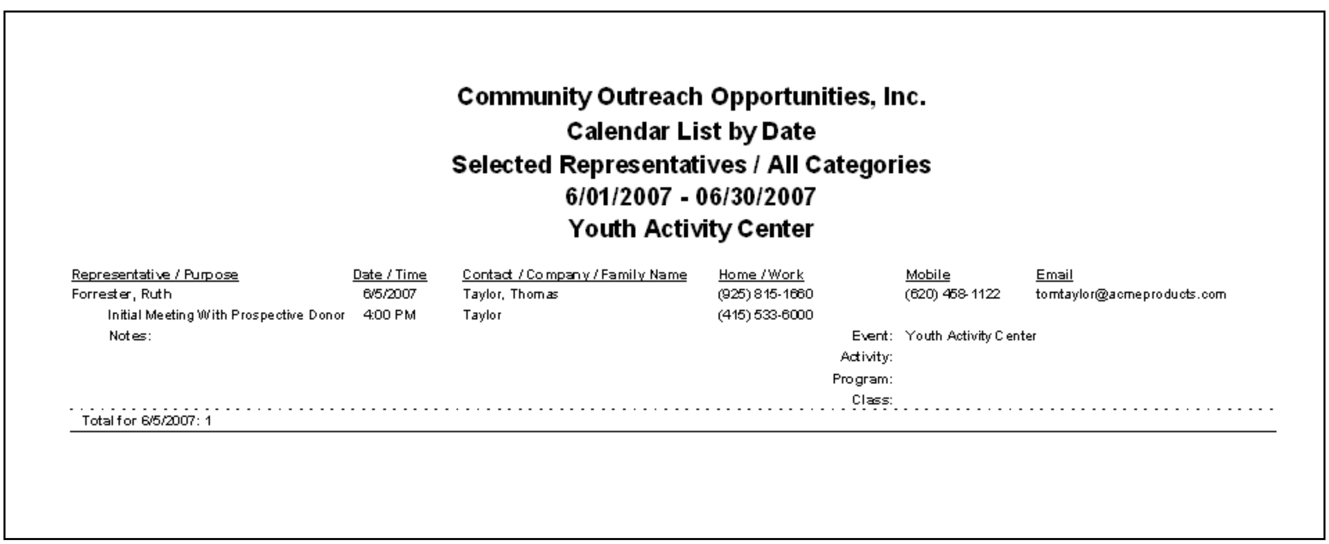


The date and time of the meeting scheduled will appear on both Ruth Forrester's and Marvin Rhoades's calendars.

Use the **Select Calendar Options** form to select the calendar format you want printed.



The report can then be distributed to the appropriate representatives.



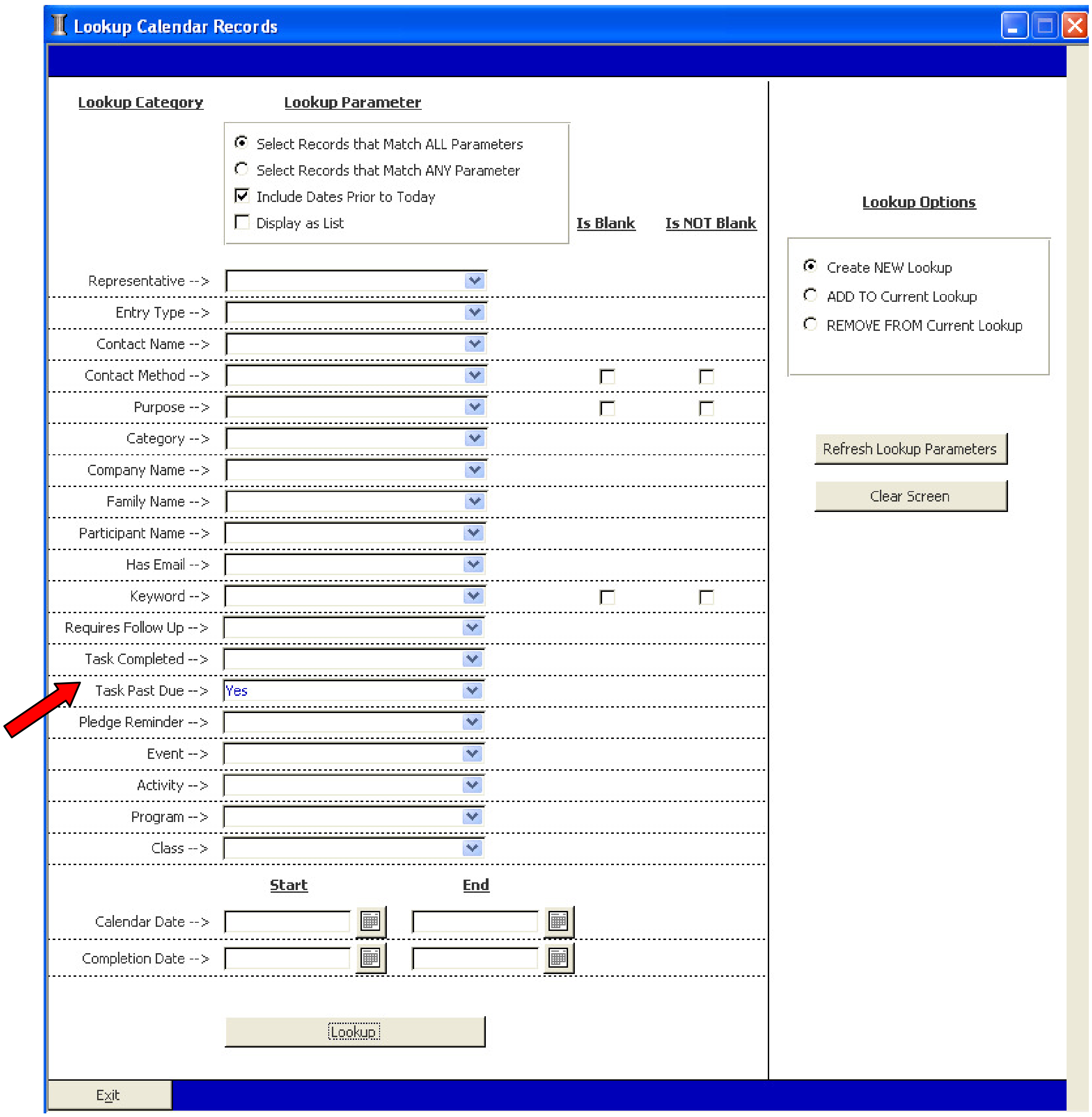
Community Outreach Opportunities, Inc.
Calendar List by Date
Selected Representatives / All Categories
6/01/2007 - 06/30/2007
Youth Activity Center

Representative / Purpose	Date / Time	Contact / Company / Family Name	Home / Work	Mobile	Email
Forrester, Ruth	6/5/2007	Taylor, Thomas	(925) 815-1660	(620) 458-1122	tomtaylor@acmeproducts.com
Initial Meeting With Prospective Donor	4:00 PM	Taylor	(415) 533-6000		
Notes:				Event:	Youth Activity Center
				Activity:	
				Program:	
				Class:	

Total for 6/5/2007: 1

By checking the Follow-up checkbox, the Office Administrator can keep track of what tasks have been completed. Building relationships with potential donors is a team effort. Since representatives of your organization are probably not going to be paid employees, it's up to the Office Administrator to make sure that no one misses a meeting and that what transpired during the meeting gets recorded.

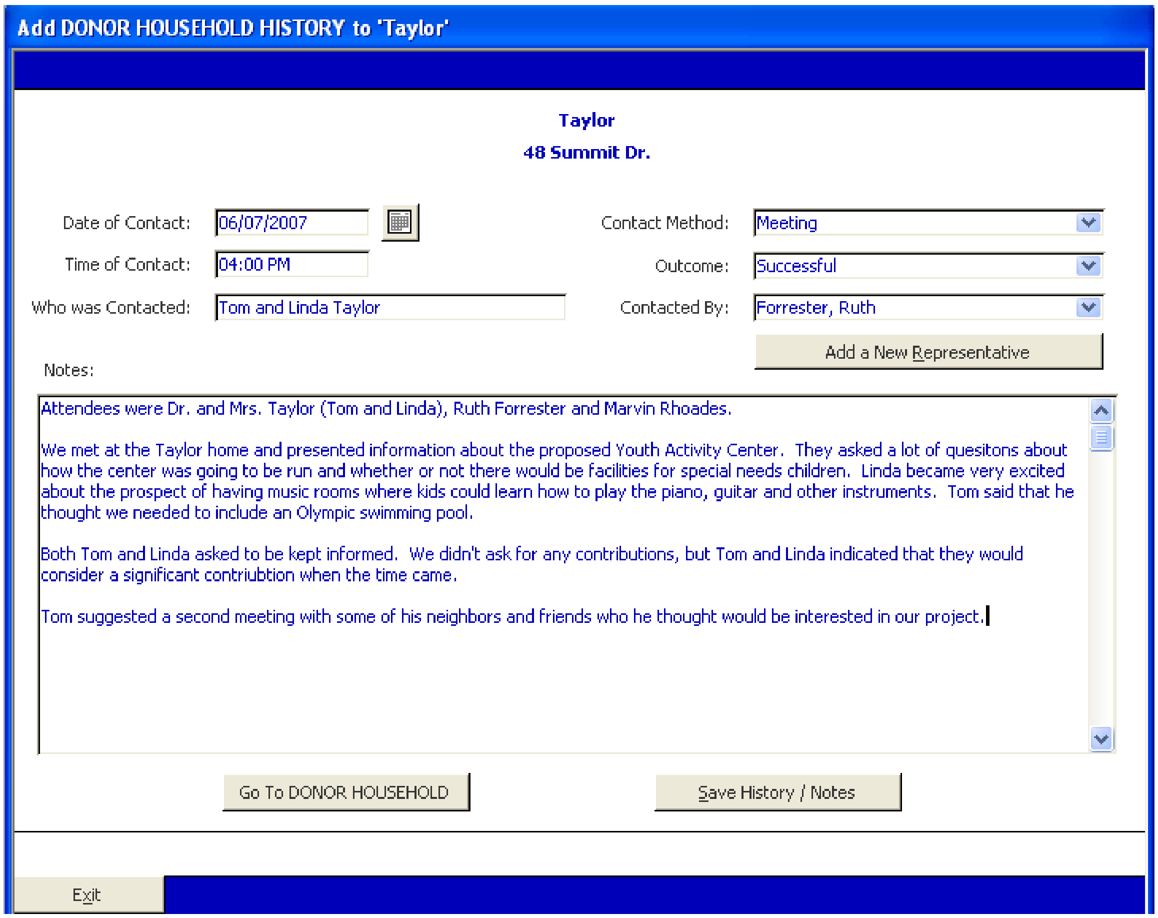
It's easy to find overdue tasks by using the **Lookup Calendar Records** form.



After the initial meeting, document what took place using the **Add History** Form.

Be as detailed as possible.

With unlimited notes, you can document as many personal details about each prospective donor and record the assigned representatives' observations. This allows your organization to continue developing the relationship even if there are staff or board changes.



Add DONOR HOUSEHOLD HISTORY to 'Taylor'

Taylor
48 Summit Dr.

Date of Contact: 06/07/2007
Contact Method: Meeting
Time of Contact: 04:00 PM
Outcome: Successful
Who was Contacted: Tom and Linda Taylor
Contacted By: Forrester, Ruth
Add a New Representative

Notes:

Attendees were Dr. and Mrs. Taylor (Tom and Linda), Ruth Forrester and Marvin Rhoades.

We met at the Taylor home and presented information about the proposed Youth Activity Center. They asked a lot of quesitons about how the center was going to be run and whether or not there would be facilities for special needs children. Linda became very excited about the prospect of having music rooms where kids could learn how to play the piano, guitar and other instruments. Tom said that he thought we needed to include an Olympic swimming pool.

Both Tom and Linda asked to be kept informed. We didn't ask for any contributions, but Tom and Linda indicated that they would consider a significant contriubtion when the time came.

Tom suggested a second meeting with some of his neighbors and friends who he thought would be interested in our project.

Go To DONOR HOUSEHOLD
Save History / Notes
Exit

Developing a good relationship with a potential donor requires multiple interactions.

Schedule the next meeting to keep the momentum going.

Over time your organization will develop a complete history of every interaction with a prospective donor.

When entering notes about an interaction with a prospective donor, think about using words or phrases that are meaningful to your organization.

One of the many tools ***Patron Software*** offers is a Global Search that enables you to find words or phrases in History Notes.

To activate the **Global Search** feature, click on the binoculars located on the ***Patron Software*** Toolbar.

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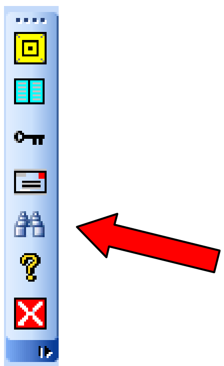
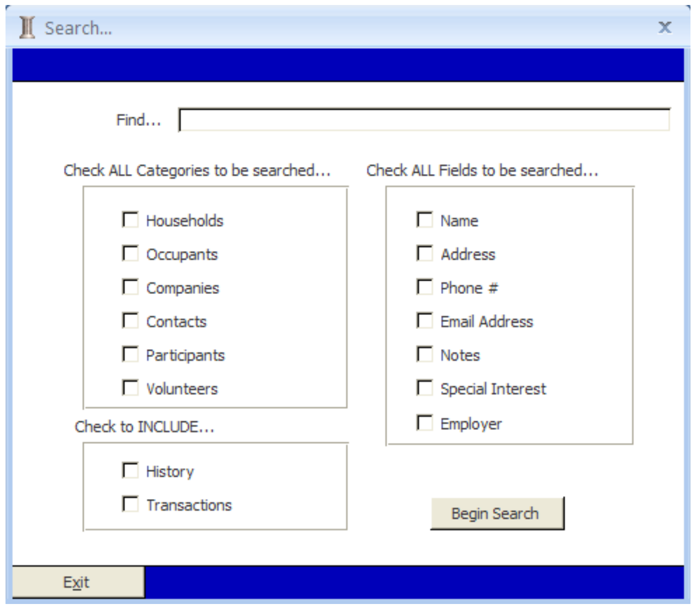
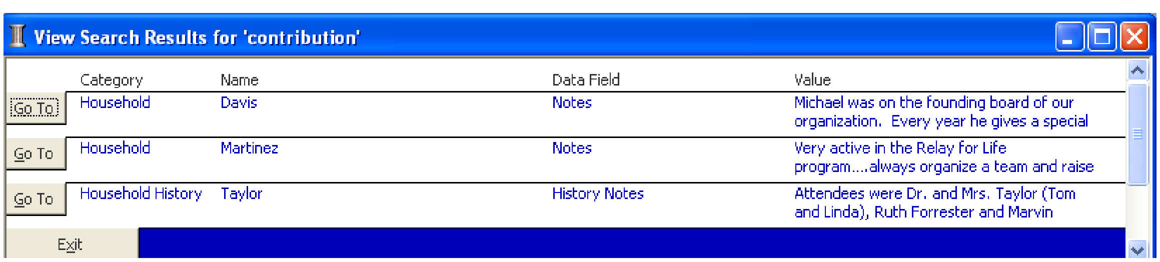




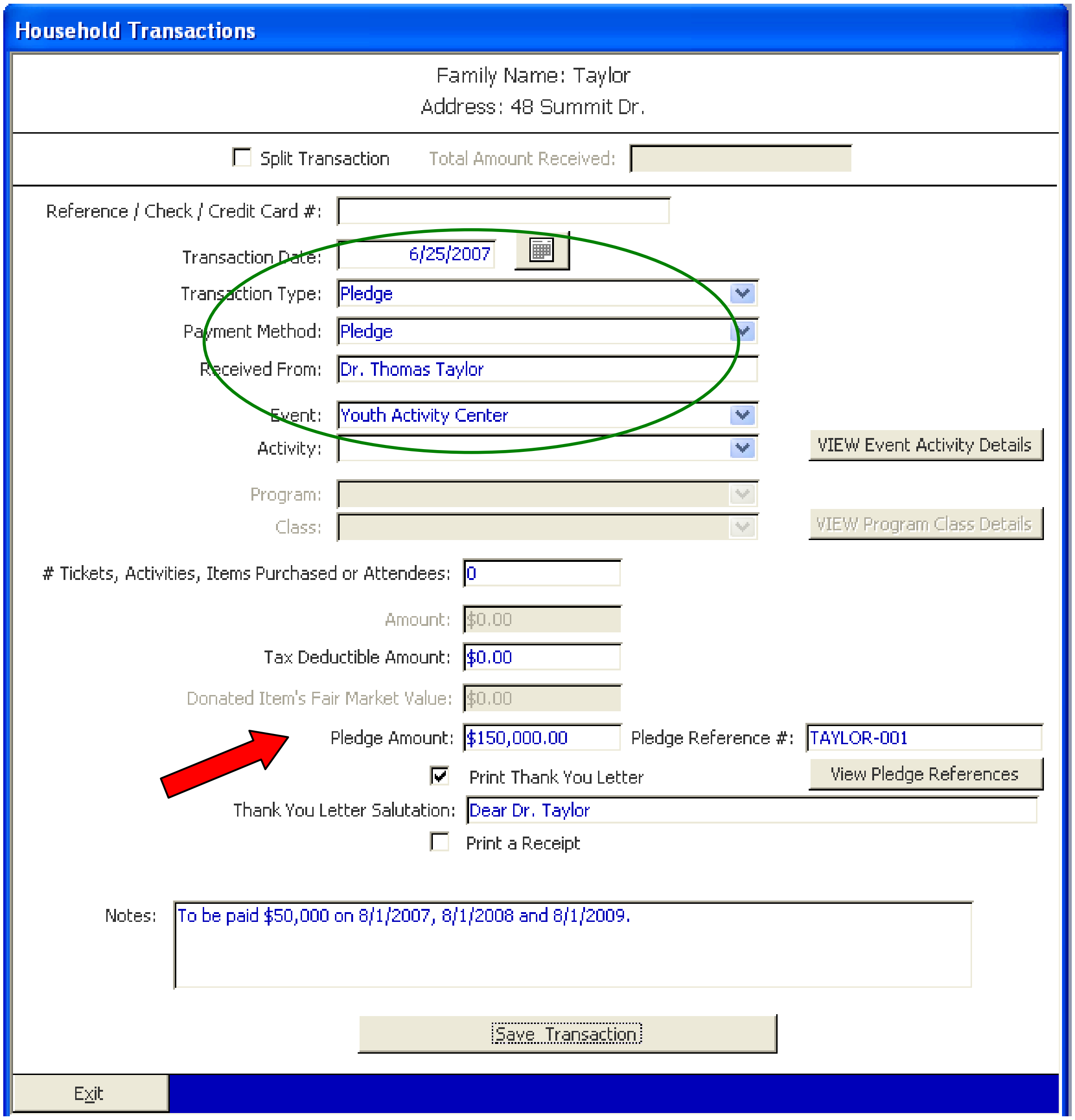
Enter the word or phrase you want to find… then click on Begin Search.

A list of records containing the word or phrase entered is displayed.

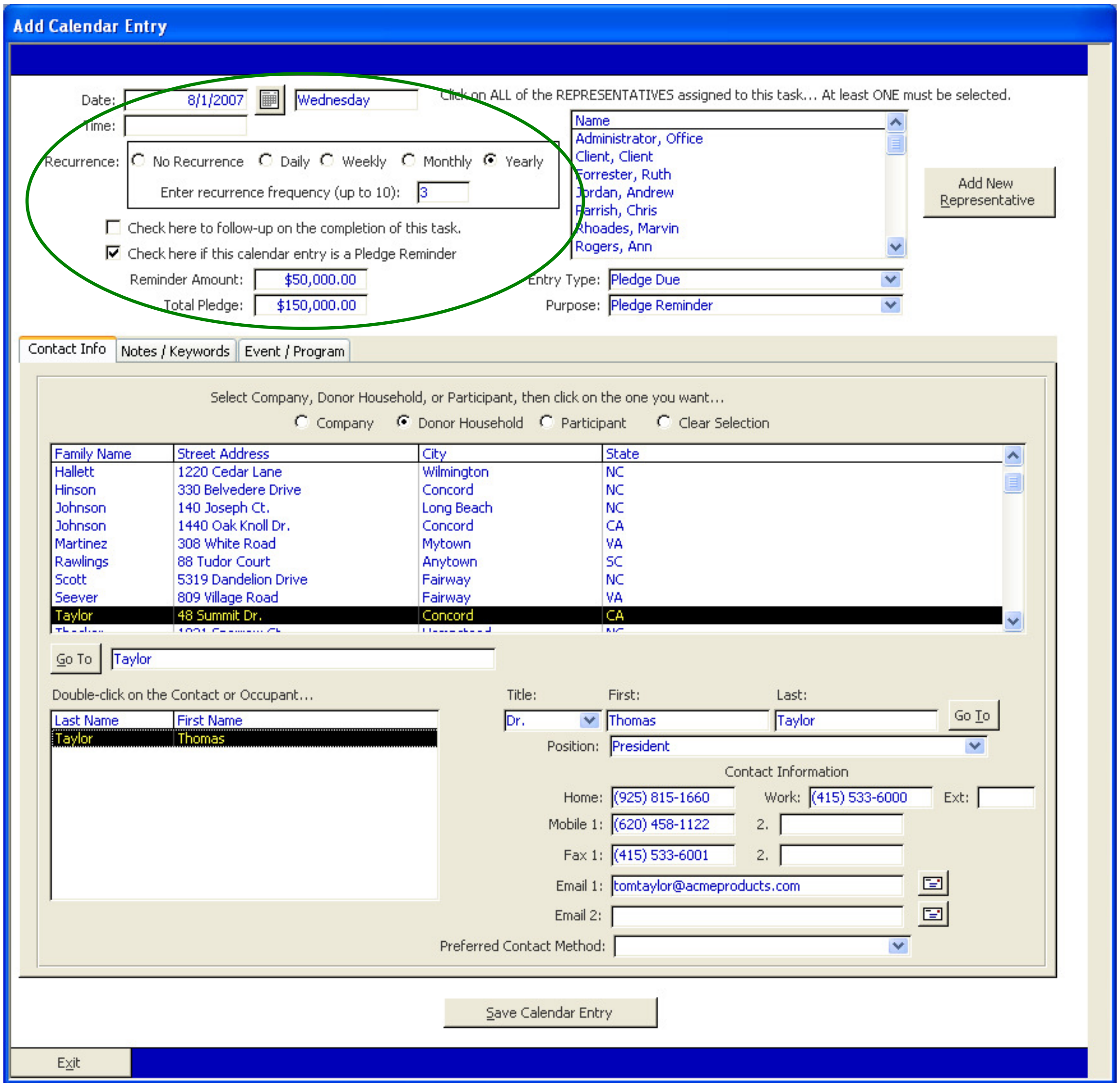


Your organization has established a good relationship with your list of prospective donors. It's time now to ask for a financial commitment. Since your project spans three years, many donors may choose to pay incrementally.

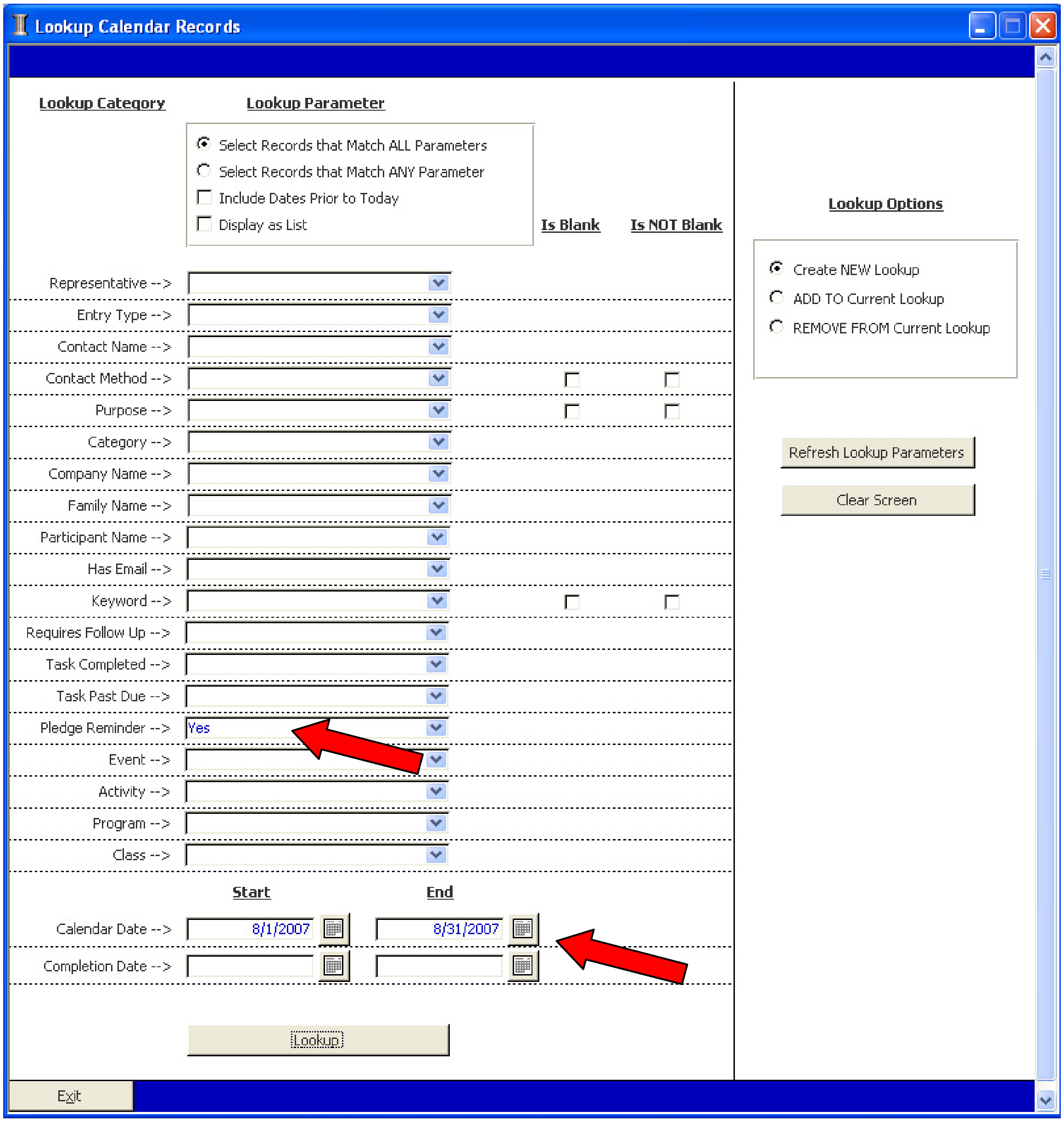
For example, Dr. Taylor has pledged $150,000 to be paid in three annual payments of $50,000 each.

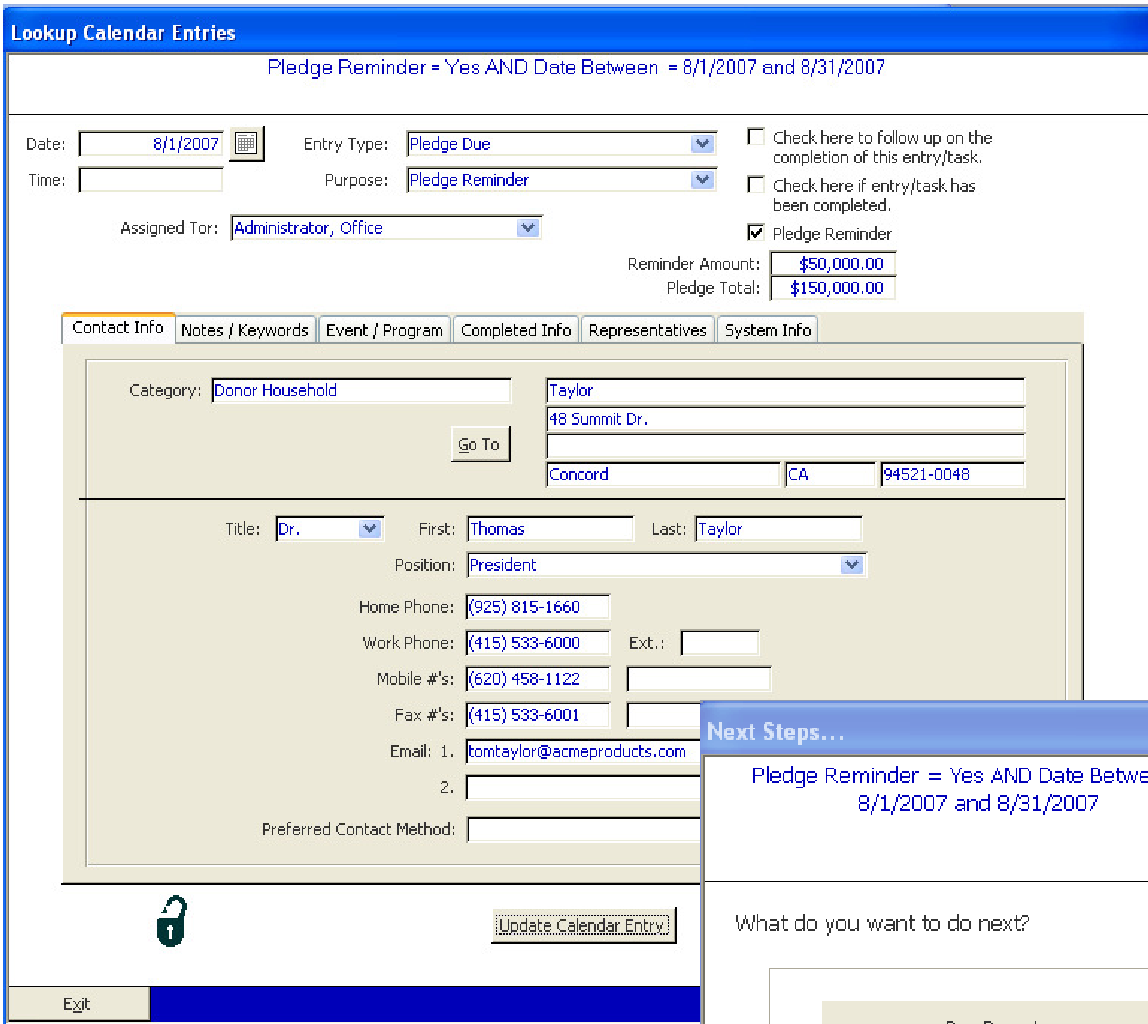


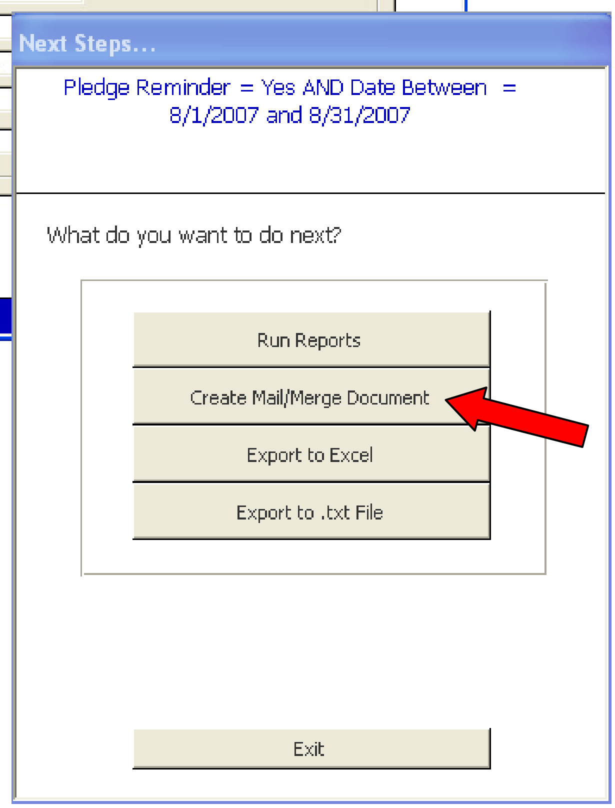
Dr. Taylor's pledge has been recorded and a pledge reference number assigned. Use the pledge reference number to tie his annual payments to this specific pledge. A donor may pledge financial support to more than one project within your organization.
Use the **Add Calendar Entry** form to record Dr. Taylor's pledge due dates.



Use the **Lookup Calendar Records** form to find all Pledges due for a specific month.


Lookup Calendar Records
Lookup Category
Lookup Parameter
Select Records that Match ALL Parameters
Select Records that Match ANY Parameter
Include Dates Prior to Today
Display as List
Is Blank
Is NOT Blank
Lookup Options
Create NEW Lookup
ADD TO Current Lookup
REMOVE FROM Current Lookup
Refresh Lookup Parameters
Clear Screen
Representative -->
Entry Type -->
Contact Name -->
Contact Method -->
Purpose -->
Category -->
Company Name -->
Family Name -->
Participant Name -->
Has Email -->
Keyword -->
Requires Follow Up -->
Task Completed -->
Task Past Due -->
Pledge Reminder -->
Yes
Event -->
Activity -->
Program -->
Class -->
Start
End
Calendar Date -->
8/1/2007
8/31/2007
Completion Date -->
Lookup
Exit





Select Create Mail/Merge Document on the **Next Steps** form to personalize Pledge Reminders.

Generate a **Pledge Report** to help forecast income for your capital campaign. You can also see who has pledged and how much has already been paid.

Community Outreach Opportunities, Inc.
Pledge Report
8/1/2007 – 8/31/2007
Youth Activity Center

Best Bet Rentals
2000 Broughton Circle
Suite 1200
Mytown, VA 25707

Reference #	Date	Pledge Amount	Amount Paid	Balance
BBR 1001	3/15/2008	$150,000.00	$0.00	
Totals for Best Bet Rentals - BBR 1001		**$150,000.00**	**$0.00**	**$150,000.00**

Mr. and Mrs. Ted Gray
362 Shaw Drive
Apt. 317
Anytown, NC 39288

Reference #	Date	Pledge Amount	Amount Paid	Balance
GRAY-001	6/25/2008	$75,000.00	$0.00	
Totals for Mr. and Mrs. Ted Gray - GRAY-001		**$75,000.00**	**$0.00**	**$75,000.00**

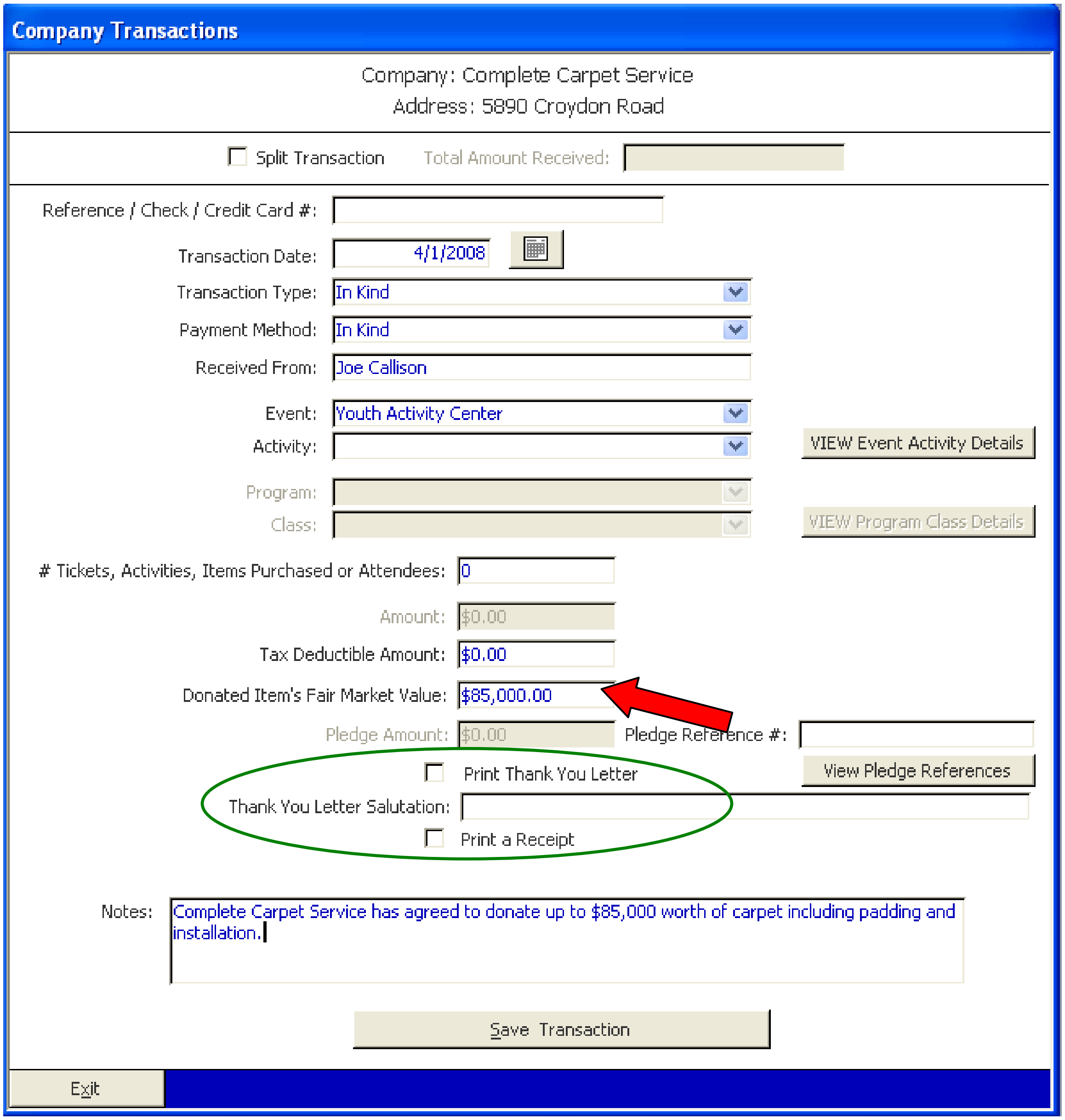
Dr. and Mrs. Taylor
48 Summit Dr.
Concord, CA 94521

Reference #	Date	Pledge Amount	Amount Paid	Balance
TAYLOR-001	6/25/2007	$150,000.00	$0.00	
TAYLOR-001	8/1/2007	$0.00	$50,000.00	
Totals for Dr. and Mrs. Taylor - TAYLOR-001		**$150,000.00**	**$50,000.00**	**$100,000.00**

		Pledge Amount	Amount Paid	Balance
Grand Totals:		**$375,000.00**	**$50,000.00**	**$325,000.00**

Individuals and organizations are also likely to contribute to your campaign with in-kind gifts. Use the **Apply Transaction** form to record all gifts.

You can choose to print a Thank You Letter or a Receipt at the time you enter the transaction.



Print a **Goal Comparison Report** periodically to see how close your organization is to attaining its financial goal.

Community Outreach Opportunities, Inc.
Event Goal Comparison Report
All Dates Included
Youth Activity Center

Event Goal: $12,000,000.00

General Contributions
Activity Goal: $0.00

	Amount	Pledge	Fair Market Value
Household	$300,000.00	$225,000.00	$0.00
Company	$125,000.00	$150,000.00	$85,000.00
Participant	$0.00	$0.00	$0.00
	$425,000.00	$375,000.00	$85,000.00

Center Naming Opportunity
Activity Goal: $2,000,000.00

	Amount	Pledge	Fair Market Value
Household	$2,000,000.00	$0.00	$0.00
Company	$0.00	$0.00	$0.00
Participant	$0.00	$0.00	$0.00
	$2,000,000.00	$0.00	$0.00

Grand Totals:

	Amount	Pledge	Fair Market Value
Household	$2,300,000.00	$225,000.00	$0.00
Company	$125,000.00	$150,000.00	$85,000.00
Participant	$0.00	$0.00	$0.00
	$2,425,000.00	**$375,000.00**	**$85,000.00**

Event Goal =	**$12,000,000.00**
Total Amount =	**$2,425,000.00**
Total Pledge =	**$375,000.00**
Total Fair Market =	**$85,000.00**
Difference =	**$9,115,000.00**

Patron Software helps your organization know where it's been as well as where it's going.


If you believe that *Patron Software* may be right for you, your staff and your organization, please contact us.
We will be happy to answer your questions about *Patron Software* and your record-keeping needs.
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info@patronsoftware.com
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201 Lawton Circle
Wilmington, NC 28412
Thank you!