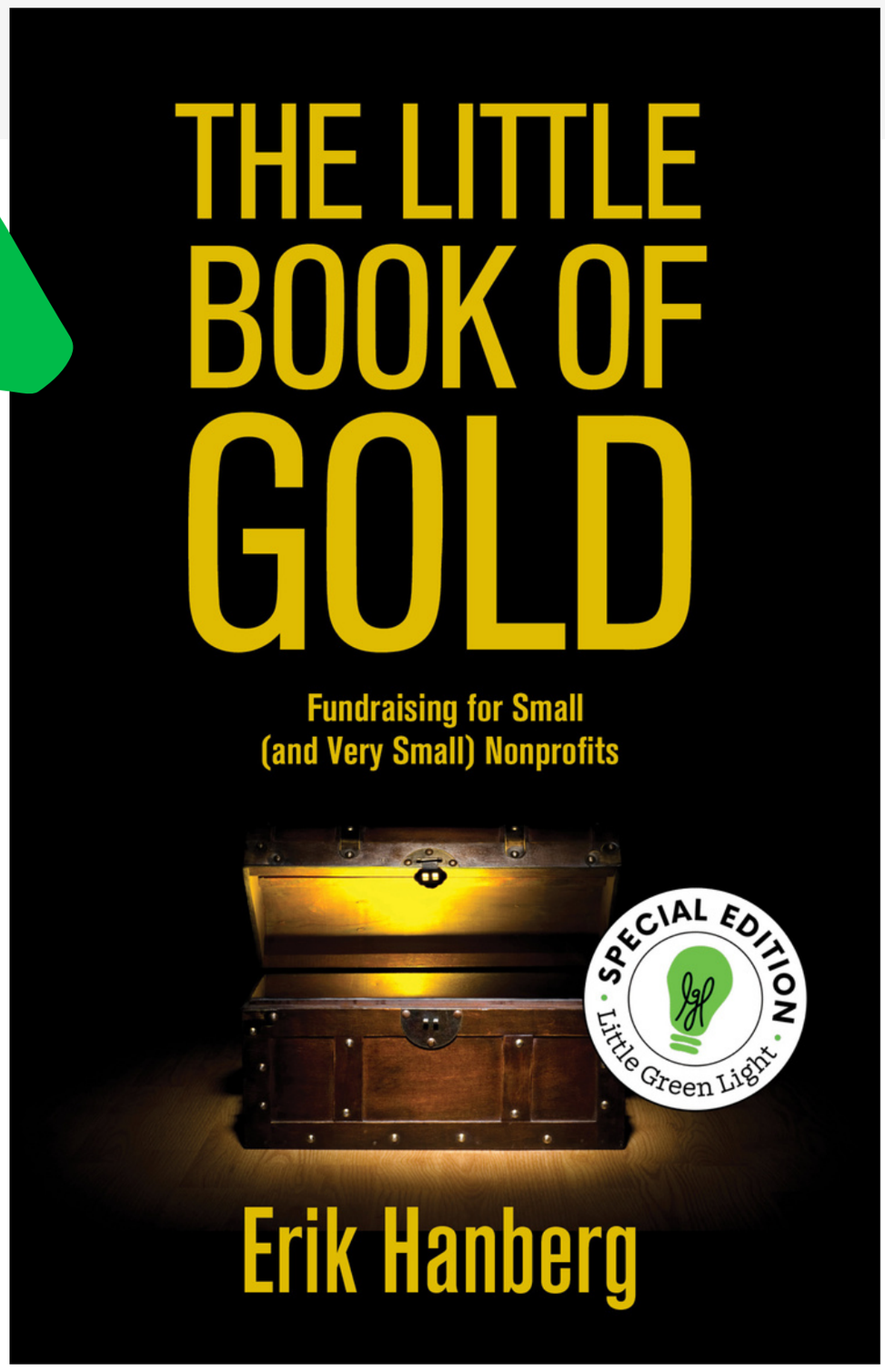
LGL's Companion Guide to The Little Book of Gold

by Erik Hanberg

Free digital copy available to LGL customers through 2022



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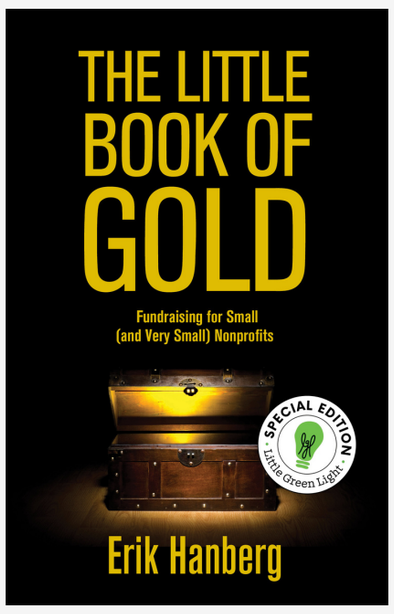

LGL Customers:

Little Green Light customers can access a FREE copy from within their LGL account. Head over to the Help page in your account for the download link.

Not yet using Little Green Light?

Erik Hanberg's The Little Book of Gold is available at Amazon, the author's website, and wherever books are sold.

Chapter 1: How to use this guide

How to use this companion guide

In Erik Hanberg's The Little Book of Gold, you'll meet Linda, the executive director of a small historical society. For each chapter of The Little Book of Gold, we've written a companion chapter that demonstrates how Linda can use Little Green Light to manage her fundraising efforts. At the end of each chapter, you'll find a list of additional resources from Little Green Light's Knowledge Base, blog, and training videos to help you implement what you learned.

As we explore the different aspects of Little Green Light that Linda can use, you'll probably discover some tools you didn't know about. Other aspects of LGL may be familiar to you already. You might want to keep your development plan or fundraising calendar handy and make notes on how you can use these tools for your own work.

Each organization's fundraising efforts vary, and there are likely aspects of your development plan that aren't covered in the book. But The Little Book of Gold's emphasis on best practices and good fundraising strategies are timeless, and you can apply them to all your organization's development work.

Once you've followed Linda's work at her historical society and gotten familiar with how to use Little Green Light in each of those cases, you'll have a strong foundation of knowledge that you can use to help you assess new fundraising opportunities, too. You'll be able to determine if these opportunities are right for your organization and, if so, how to implement them effectively using Little Green Light.

Ultimately, we hope that The Little Book of Gold and this companion piece will help guide your work and strengthen your ability to raise funds. We also hope you'll feel less overwhelmed and more prepared to tackle the challenges you face at your nonprofit. As the sole employee of a small organization, it's especially important that Linda has tools that help her manage her work effectively. We know that's true for you, too. Your time is valuable, and you need to be able to maximize your fundraising efforts. We're excited to show you how Little Green Light can help you do that.

Chapter 2:
Board giving

Board giving

In Chapter 2 of The Little Book of Gold, we meet Linda. She's the executive director of a small historical society who wants to get 100% of her organization's board of trustees to donate.

To work toward this goal, Linda needs to:

- Do some research on past giving: How much was raised, from how many donors?
- Meet one-on-one with board members to ask for donations
- Keep track of those interactions
- Record the board's gifts, some of which may be recurring gifts or pledges

Good news for Linda: She can use Little Green Light to accomplish the items on her list with minimal stress.

To achieve that, Linda will need to understand how to do the following in Little Green Light:

- Run constituent searches and giving searches, and know when to use which one
- Create tasks
- Create contact reports
- Accept recurring gifts
- Track pledges and recurring gifts

Using constituent searches or giving searches

In Little Green Light, Linda can quickly run searches to find the totals she needs. In this case, she needs to know how much money was raised and how many donors contributed in that same time period.

As she gets started, she'll need to consider the information she's seeking and decide whether to run her search under Fundraising → Giving, or on the Constituents page in her account.

To find out how much was raised, Linda needs to navigate to Fundraising → Giving and run her search there. Linda's search results will contain gift records. This means that if a constituent made five gifts in 2021, their name will correctly be listed five times in Linda's search results—once with each gift record that meets her search criteria. Above her search results, Linda will see the total amount of those gifts listed, which is a nice way to view on screen both the total raised and the number of gifts made in that time period.

Using constituent searches or giving searches (con't.)

To find the number of constituents who made gifts, though, Linda will need to run a constituent search. When she runs her search on the Constituents page, the number of search results is the number of constituents who donated in that time period. Each constituent's name will only appear once among the search results each time, even if they made five gifts during that time period.

Whenever you need to run a search in Little Green Light, take a moment to make sure you're starting in the right place: Do you need to run a constituent search or a giving search? If you run a search and are worried because you're seeing duplicate names among your search results, you probably ran a giving search when what you needed was a constituent search. When that happens, navigate over to the Constituents page and create your search there.

Groups

So that she can easily find her board members, Linda can add them to a group called “Board Members”. This group, assigned to each board member, also makes it simple for her to search and report on gifts made by board members.

Tasks

Linda is scheduling one-on-one coffee dates with each of her board members, starting with her board chair. Those are a lot of dates for Linda to keep track of; and remember, she’s the sole employee of the historical society. The fewer details that Linda has to keep in her head, the less stressed she’ll be.

Linda can navigate to Activity →Tasks and create tasks in Little Green Light to keep track of items on her fundraising to-do list that have due dates. In this case, she might add tasks with a task type of “meeting” for each of the coffee dates she arranges. Linda can receive email reminders from Little Green Light as the due date of any of these tasks approaches. Once she’s met with a board member, she can then have the satisfaction of marking that task as complete in Little Green Light.

Linda can also rely on tasks to remember when

grant applications or final reports are due, and other important deadlines.

Contact reports

Linda meets with each of her nine board members as part of her effort to increase board giving. Through those individual interactions, Linda gleans important information from each board member about their interest in the organization, their capacity to give, etc. It's important to capture those details so that Linda, and other staff members in the future, can access that information.

In Little Green Light, you can use contact reports to record those details. Whereas the mailings functionality allows you to record broad communications to your constituents, such as solicitation letters or newsletter mailings, contact reports are intended to record highly individual interactions with constituents.

Linda navigates to Activity → Contact Reports and creates a contact report after she meets with a board member to record pertinent information from the meeting.

Contact Report:
Smith, Sally > Board gift request

Contact report details

Date of contact
2022-01-05

Hours
1.0

Contact Type
Meeting

Team Member
Linda

Result

Linda met with Sally and John over coffee to discuss their board gifts to this year's Annual Appeal. Sally's two daughters are both in college this year, so although she plans to donate, her gift will be smaller than last year.

Image: Example contact report in Little Green Light

LGL forms

Linda needs to accept online gifts made using credit cards as well as process recurring online donations. Lucky for Linda, she can use LGL forms to do both of these things and more.

You can use LGL forms to build forms to accept online gifts, which are processed through a payment processor like Stripe. You can map the forms to fields in your database so that the data flows into LGL without needing to be entered manually.

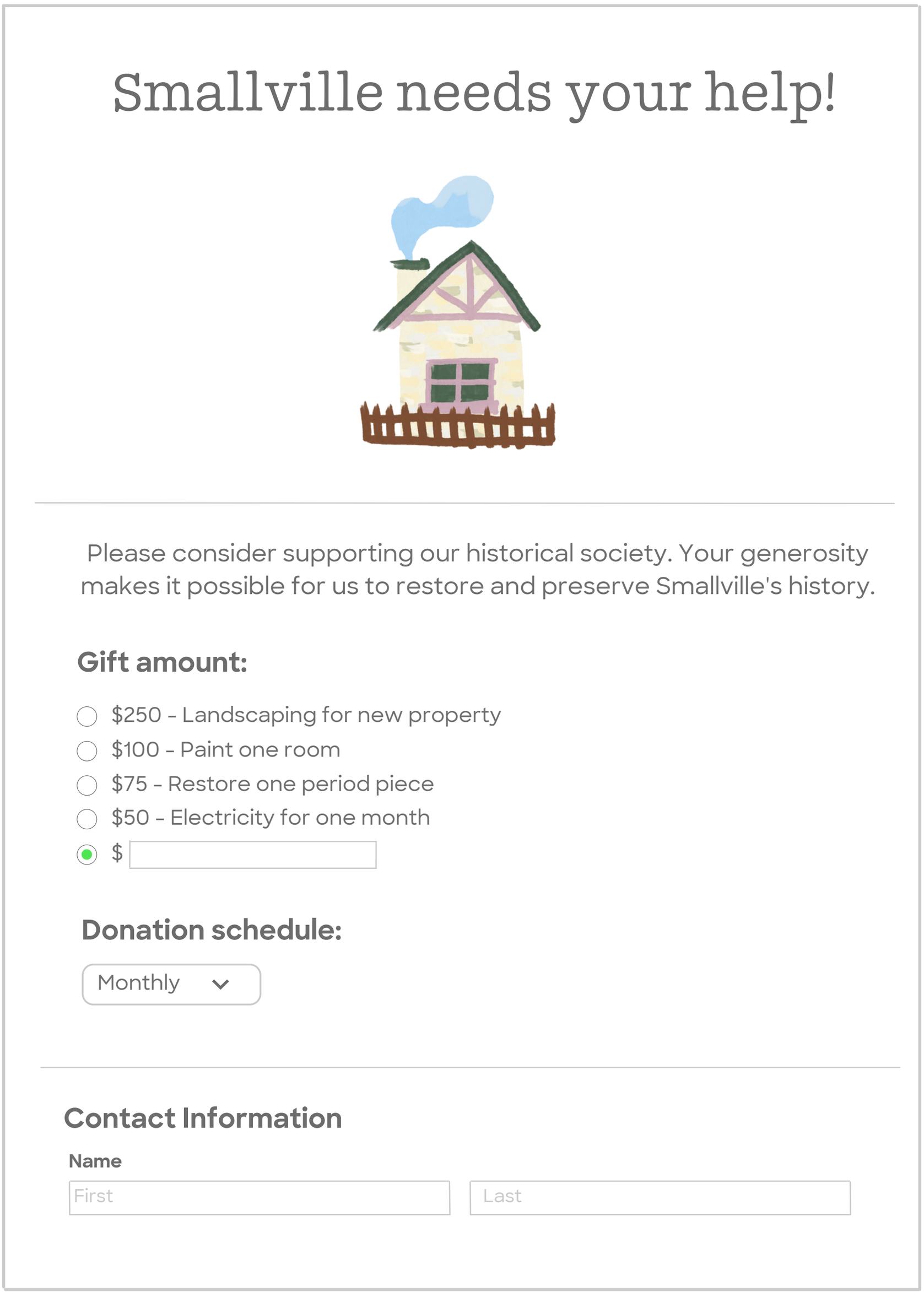

Image: Example of a recurring gift payment form in Little Green Light

LGL forms are a versatile tool. So while you can use them to accept one-time and recurring gifts, you can also build forms to accept volunteer applications, have volunteers submit their hours, or collect basic event registrations. Think how much time Linda will save by using LGL forms!

Tracking recurring gifts versus pledges

Linda's efforts are paying off. She's met with her board members and secured gifts from them, some of which are recurring gifts.

Sometimes people refer to pledges and recurring gifts interchangeably, but they are actually very different. While both are effective tools to help Linda raise money for the historical society, it's important that Linda understand the differences so that she can enter data into Little Green Light properly.

A pledge is a promise to donate a specific sum to an organization. The donor fulfills the pledge at a later date, either by making one payment or multiple payments. For example: If Linda's board chair makes a pledge, he's made a commitment to pay a total amount such as $2,500. He might opt to pay in four installments of $625 or in monthly installments of $250. The point is that the board chair promised to pay a specified amount over a set period of time.

Linda can use the pledge functionality in Little Green Light to enter the board chair's pledge, set up the payment interval, and send a reminder when an installment is due. She can look up the pledge and see the remaining balance due at a glance.

Tracking recurring gifts versus pledges (con't.)

Another board member decided to make a recurring gift of $10 a month. She didn't commit to pay a total amount the way the board chair did. Instead, she agreed to pay the same amount, $10/month, for as long as she likes. She could cancel her recurring gift two months from now, or five years from now. If and when she cancels it, there's no obligation to pay a full amount that she left unfulfilled. She's making a series of repeated gifts to the historical society, which she can continue indefinitely or cease at any time.

Since Linda is using LGL forms, those recurring gifts will be processed automatically each month until the credit card expires or until the recurring gift is canceled. Linda should not use the pledge functionality to track recurring gifts in Little Green Light. Instead, she needs to enter the gift record and code it as a recurring gift.

Summary

In this chapter, we've explored how Linda can use Little Green Light to run searches, create tasks and contact reports, use LGL forms, and track pledges and recurring gifts. Linda's been focused on increasing her board's giving, but now that she knows how to use those tools in LGL she can apply them to her other fundraising activities, too.

Chapter 2 resources:

Tasks

Contact reports

Best practices: Using groups in LGL

Forms: Create and manage recurring gifts

How to build a volunteer form

The difference between pledges and recurring gifts

Chapter 3: Asking outside the board

Asking outside the board

Linda has some momentum now that she's secured gifts from each of her board members. It's time for her to turn her attention to raising money from a larger pool of donors.

As fundraisers, we're always on the lookout for a strategy or tool that will help raise more funds for our organization. It can be tempting to view a new tool as the silver bullet of fundraising: Launch a [insert trendy idea of the month] and the funds will raise themselves! The reality is that any successful fundraising effort requires careful planning, execution, stewardship of donors, and follow-up. And while the tried-and-true approaches may seem old school, the truth is, they work.

That's why Linda is gearing up to do a solicitation mailing, and she's going to rely on her board members for some help with this effort. Beyond writing her solicitation letter, there are a lot of components for Linda to manage.

Some of the items on Linda's to-do list are:

- Decide which constituents to solicit, and what size donation she'll be requesting
- Personalize her appeal letters with donor names, contact information, and ask amounts
- Enter and acknowledge gifts in a timely manner
- Report on her appeal
- Have board members make thank-you phone calls to some donors

Using Little Green Light will help Linda stay organized, target her mailing effectively, and be able to report on the amount raised through this specific effort. She'll need to know how to do the following in Little Green Light:

- Create an appeal, as well as add segments to the appeal
- Use LGL merge fields in her mail template
- Add a default acknowledgment template to her appeal
- Run constituent searches using "Appeals" and "Appeals (giving)", and know when to use which one
- Use stewards
- Add related tasks to gifts

Appeals, segments, ask amounts

Linda has a lot of work to do, but she's not feeling as stressed about it because she knows she can use the Appeals functionality in Little Green Light to manage the solicitation. By navigating to Fundraising → Appeals and creating an appeal in LGL, Linda will be able to track which constituents were solicited and easily report on how much was raised.

Adding constituent records to her appeal helps Linda manage and measure the effectiveness of her appeal. By adding everyone to the appeal who will receive the solicitation, she has the ability to track the appeal response rate and determine who was asked to donate and either did or didn't. When Linda adds constituents to her appeal in LGL, an Appeal Request is added to the constituent record, which means she will be able to run a constituent search by appeal to find all constituents who were asked to donate to that appeal.

Linda wants to be targeted in her approach, so when she creates her appeal in LGL, she adds segments to it. Appeal segments refer to groups of constituents within your appeal who share a commonality.

Appeals, segments, ask amounts (con't.)

Some examples are donors whose total giving amount is above a certain threshold, lapsed donors, or board members. A constituent can only be included in one appeal segment, so Linda doesn't need to worry about duplicating constituents in her segments.

Appeal Segments

+ Add segment

Position	Segment Name	Ask Amount	Constituents	Progress
1 ↓	Board members	$500	8 records **0 excluded due to overlap**	Gifts: $1,000
2 ↑ ↓	Lapsed donors	$250	75 records **2 excluded due to overlap**	Gifts: $2,000
3 ↑ ↓	Past $1000+ donors	$1,000	38 records **6 excluded due to overlap**	Gifts: $6,000

Image: Example of the Appeal segments tab in Little Green Light

With her appeal segments set up, Linda can modify the content of her appeal letter for each segment and set ask amounts; either default amounts by segment or customized ask amounts for specific constituents. By using LGL merge fields and the Mailings functionality, she can pull personalized information such as names, address, and appeal ask amounts into her letter.

Entering and acknowledging gifts made in response to Linda's appeal

When Linda enters a gift record manually, she can code the gift to a particular appeal. This way, she'll be able to determine how much was raised as a result of the appeal. Since the constituent record was already added to the appeal, coding the gift record to the appeal will update the constituent's appeal status to "Donated".

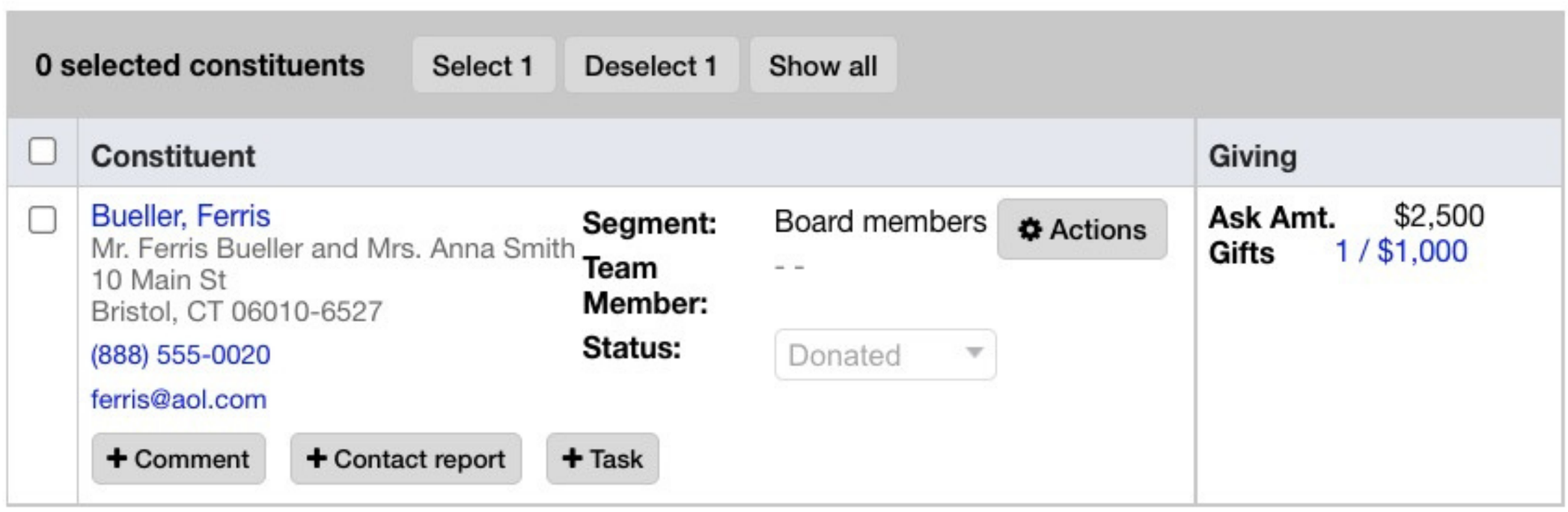

Image: Example of the Appeal status in Little Green Light

Linda can run a search on the Constituents page using "Appeals (giving)" to find all constituents who have a gift record coded to an appeal.

Linda wants to be as efficient with her time as possible, so when she drafted her appeal letter she also drafted the acknowledgment letter that she'll send to donors when they make a gift. She set this acknowledgment template as the default acknowledgment for this appeal.

Entering and acknowledging gifts made in response to Linda's appeal (con't.)

That means when she enters a gift manually and codes it to this appeal, the acknowledgment letter template will be assigned to the gift automatically. When she's done entering gifts for the day, Linda can go ahead and download her file of acknowledgment letters to print and mail.

Using stewards

A steward, or solicitor, is a team member in your Little Green Light account who is assigned to a constituent. The steward plays a key role in the organization's relationship with that constituent.

In some cases, Linda will want particular board members to add a handwritten note on an appeal letter and/or acknowledgment letter. She's also asked board members to make thank-you phone calls to certain donors. Linda can add her board members as team members in LGL so that she will be able to assign them as stewards to particular constituents.

As she works on her appeal, Linda may want to assign board members to help manage this particular solicitation effort for specific constituents. If so, she can assign them as team members on the appeal ask.

Related tasks

Earlier, Linda used tasks to help manage her coffee dates with board members. Now, as she enters gifts made in response to her appeal mailing, she can use tasks again. Of course, every gift is assigned an acknowledgment template so that the donor is properly thanked in a timely manner. Remember how Linda decided that all donors who give more than $50 should receive a thank-you phone call? Since Linda added her board members as team members in LGL, when she creates a gift record of more than $50, she can add a related task and assign it to a board member. That way, board members will get an email notification about the task, which they can mark as complete once they've made the call.

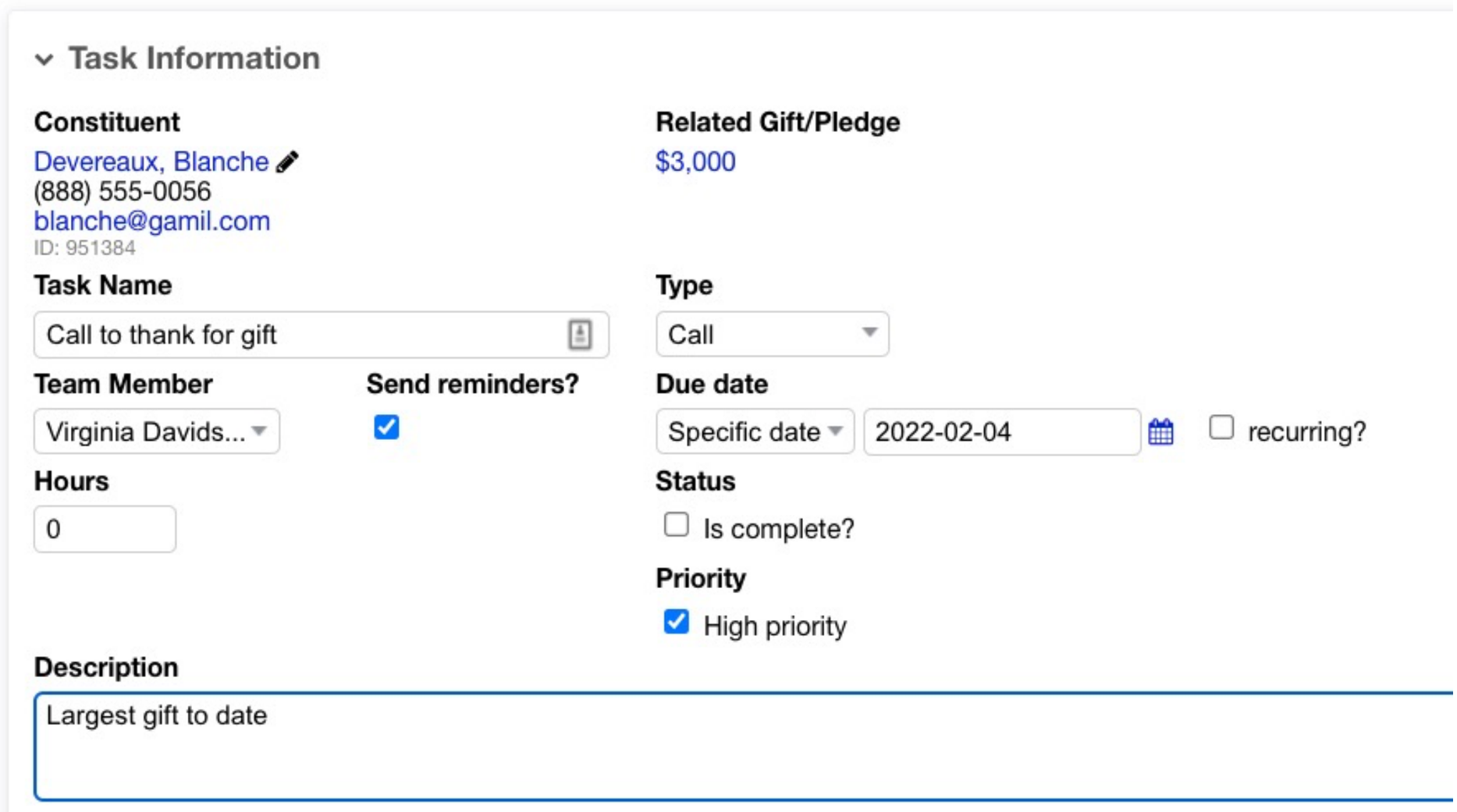

Image: Example of a related task in Little Green Light

If they learn any important details from the donor during the call, board members can also complete a contact report in LGL documenting that information.

Phonathon template

Linda's investing her time in a mailing because it's more efficient than a phonathon. If she decides to explore a phonathon in the future, she can use the phonathon report template in LGL.

Summary

In this chapter, we've seen how Linda can effectively manage her solicitation mailing by using the Appeals functionality in LGL. By adding her board members to LGL, she can assign them as stewards of specific constituents and assign follow-up tasks to them.

Chapter 3 resources:

Appeals

Adding segments to your appeal

Your guide to writing a compelling appeal letter

Six steps to a successful appeal

LGL Basic Training: Gift Management 101

Guide to acknowledging gifts

Working with stewards

Call sheets for our phonathon

Chapter 4: Events will kill you

Events will kill you

Linda is pleased with the results of her mailing. As she expands the historical society's fundraising efforts, she wants to dip her toe into events, particularly to introduce new prospective donors to the organization. But she knows the limitations of her time. And as you learned from following along with Linda in Chapter 4 of The Little Book of Gold, the auction she ran in the past dominated her time and energy without yielding great financial results.

So Linda's trying a new approach and launching a simple fundraising breakfast. Her board members will serve as table captains, and they'll invite people from their circles to join them at their table.

As Linda prepares to launch her fundraising breakfast, she's feeling a little nervous about the details she'll need to manage, which include:

- Invite constituents and manage registrations
- Track RSVPs and attendance status
- Track event-specific information like guest names, table captains, and meal preferences
- Report on the money raised by this event

To do all this, Linda will need to use the Events functionality in LGL. She'll learn how to:

- Create and customize an event
- Decide whether or not to use the optional setting for additional guest tracking
- Build a simple registration form
- Record contributions and other income
- Run constituent searches by "Events" and "Events (giving)", and know when to use which

Managing events

With the Events functionality in Little Green Light, Linda can track constituents who are invited to the breakfast and send invitations and track their RSVP status and their attendance. Once she's created her event under Fundraising → Events she can also add event segments, like she did for her appeal, to send targeted communications if she needs to. For example, she might add a segment for potential sponsors, as they'd receive a different mailing than her individual invitees.

As she did with her appeal, Linda can create an event-specific acknowledgment template and set it as the default acknowledgment template for her event.

Managing events (con't.)

Linda's board members will serve as table captains, and they're each responsible for inviting 7-8 guests. Linda needs a way to manage those details, so she adds a custom category in her event. She calls it "Table Captains" and adds a value in that category for each board member's name. That way, as invitees RSVP yes for the event, Linda can code them with that category.

Linda might need to track meal preferences, too. Here again, she can add a custom event category. This time she calls it "Meal Preference" and adds values for breakfast burrito, veggie breakfast burrito, and a vegan option, too.

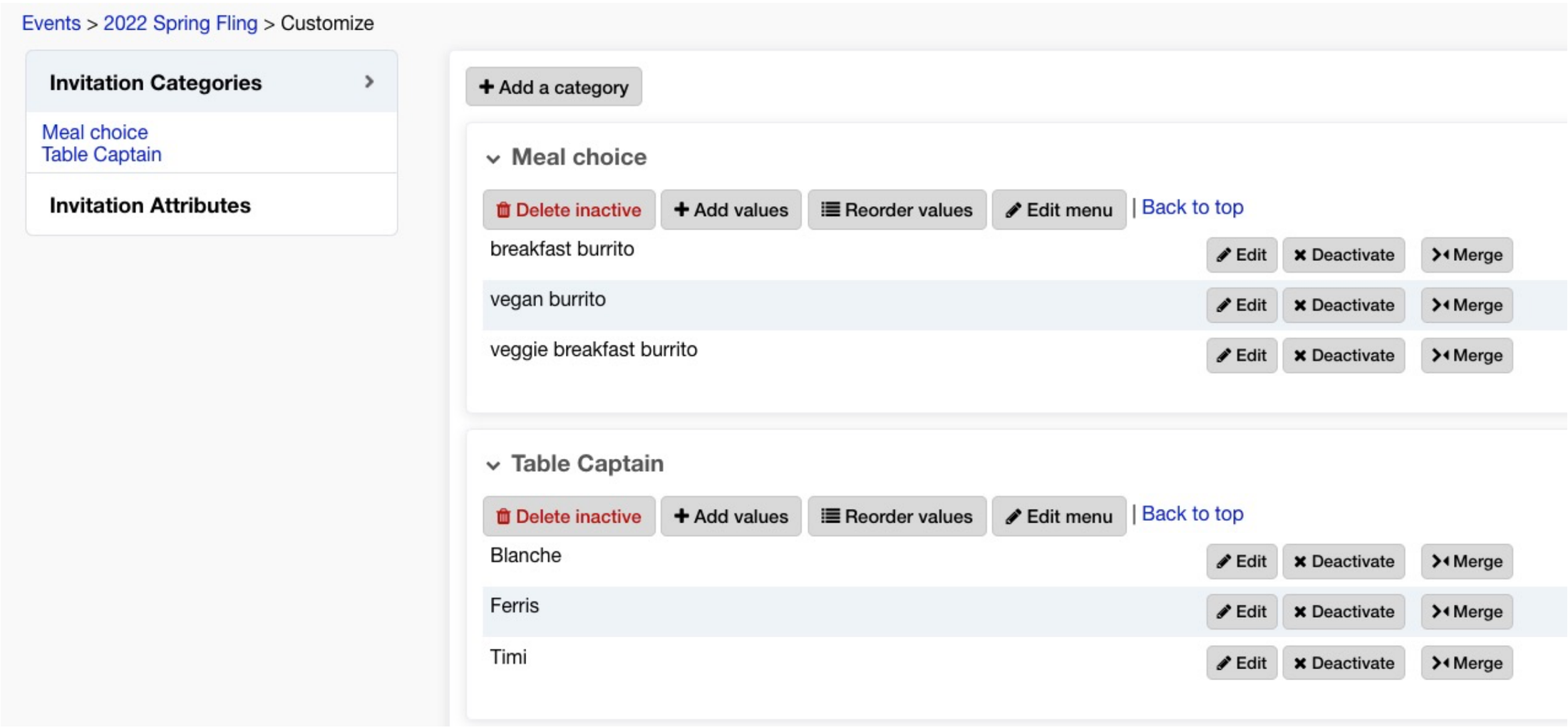

Image: Example of an event using custom fields in Little Green Light

Optional setting: Additional guest tracking

Linda plans to create an LGL form to accept event registrations. Before she does that, though, she needs to decide whether or not she will use LGL's additional guest tracking functionality.

For the fundraising breakfast, Linda wants to be able to track details like meal preference and table captain for each attendee, rather than just the primary attendee. She'll also want to print name tags for each attendee, not just the primary constituent.

She considers the details of this event compared to the casual ice cream social that the historical society hosts in July. At that summer event, the most important thing is to know how many people will be attending so that Linda buys enough supplies for the ice cream sundae bar and has enough folding chairs available on the lawn. But there are no seating assignments for the ice cream social, and no meal selections that need to be made in advance.

Linda decides that, for the fundraising breakfast, she needs to enable additional guest tracking. When it's time to add an event for the ice cream social in LGL, she'll leave additional guest tracking off.

Building a simple registration form

Now that Linda has thought carefully about the details she needs to manage for her fundraising breakfast and enabled additional guest tracking in her event, she can start building a simple registration form using LGL forms, and map it so that attendees and their guests' names and meal preferences are mapped directly to her event in LGL. This saves Linda from having to manually enter all that data.

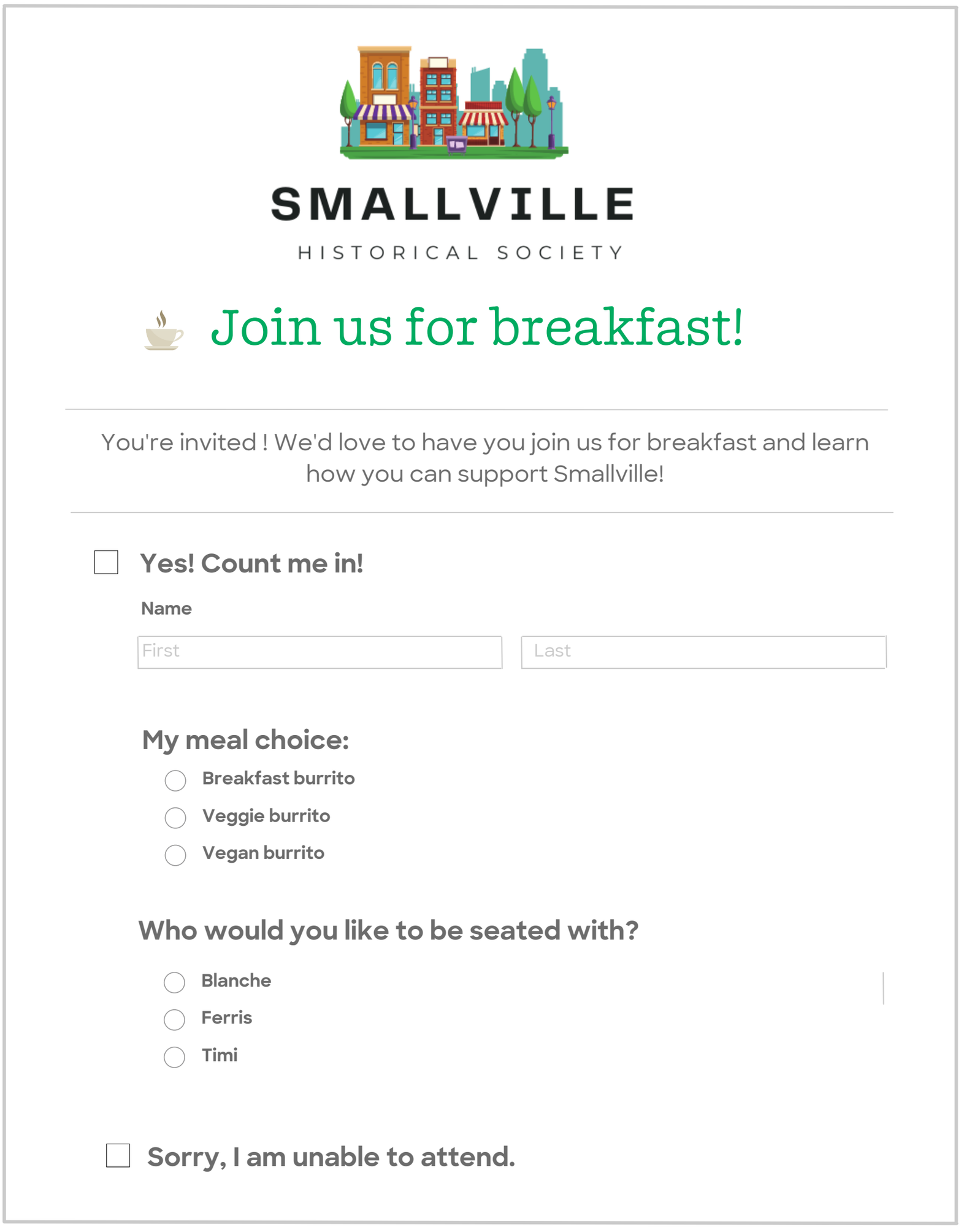

Image: Example of simple event registration form in Little Green Light

“Other income” versus “gifts”

Linda decided that there will be no ticket price for the breakfast, but she reminds her board that guests should come prepared to make a gift. She also plans to sell some of the historical society’s branded merchandise, like mugs and magnets, at the event.

When Linda enters the funds raised by the event, she can distinguish between charitable contributions and purchases by using different gift types. For charitable contributions, which are tax-deductible, Linda will assign the gift type of “Gift”.

When entering funds received for purchased items (such as mugs, magnets, and tote bags), she will instead assign the gift type of “Other Income”. This gift type is used to code non-philanthropic contributions, such as the purchase of merchandise, which is not tax-deductible for the donor. When Linda assigns “Other Income” as the gift type, the deductible amount will always be $0.

Because Linda set up her acknowledgment template and assigned it to the event, like she did with her appeal, as she enters gifts and codes them to the event she doesn’t need to remember which acknowledgment template to assign. One less thing to think about! Linda can get right to work generating and mailing the acknowledgments for tax-deductible gifts.

Searching/reporting by “Events” versus “Events (giving)”

Linda also wants to report back to the board about the amount raised and the number of attendees.

To find the amount raised, Linda navigates to her event and clicks the Gifts tab. There, the filters on the left show at a glance the amount of “Other Income” dollars raised and the amount raised by “Gift” dollars. If she needs to, Linda can create an export from the event and choose to include event details, like table captain and meal preference, too.

When she navigates to her event in LGL, Linda will also see the number of constituents who were invited to the breakfast, the number of each RSVP status (Yes, No, Maybe, None), and the number of constituents who were marked in LGL as attending the event.

Linda wants to be sure to leverage the attendees’ experience at the event. Once her acknowledgments are sent, she decides she’ll send an additional thank you to everyone who contributed at the event, and she’ll include a copy of the recent newsletter.

Searching/reporting by “Events” versus “Events (giving)” (con't.)

To find everyone who made a gift coded to the event, Linda navigates to Constituents. There she searches by “Events (giving)”. Then she clicks “Send Mail” to create a mailing in LGL to those specific constituents.

If Linda instead just wanted to find everyone who’d been invited to the event, she would search by “Events” rather than “Events (Giving)”. This distinction is starting to stick with Linda, as it’s similar to how she searched by “Appeals” versus “Appeals (giving)”.

Importing from another system using the Flex Importer

For now, Linda has decided not to continue the historical society’s auction, but circumstances could change in the future. If Linda finds herself organizing an event like an online auction, she may decide to use auction-specific software to manage all those nitty-gritty details.

Importing from another system using the Flex Importer (con't.)

Luckily, using another platform for her event doesn't mean Linda will lose the ability to track the amounts raised by the event or follow up with attendees in Little Green Light. As long as Linda can export her data from the other platform, she will be able to import it into LGL using the Flex Importer. When she does that, she can map her data so that constituents are added to the event in LGL and their gifts are coded to the event, too. That way, Linda can still manage follow-up communications and report on her event with ease.

Summary

When it comes to events, Linda is careful to consider the amount of time they require. By deciding to retire the historical society's labor-intensive auction and replace it with a simpler breakfast, she saves herself a lot of time and has potential to maximize profits. She's learned to take time to think about the details of her event and then set up her event and registration form accordingly. Using the Events functionality in LGL, Linda is able to stay on top of details leading up to the event, and afterward she can follow up with attendees and report on the event.

Chapter 4 resources:

Managing events in LGL (step by step)

Customize your event

Optional setting: Tracking additional guests

When to use the “additional guests” setting in your event

Example form: Event registration

Forms: Mapping from LGL forms to events with additional guests

LGL Training: Event registration forms

What event registration options are compatible with LGL?

Mapping events

How to make your events more meaningful

Chapter 5: Big asks

Big asks

As Linda prepares to solicit larger gifts, she knows she'll have a lot of one-on-one interactions with constituents. And by now, she's already familiar with some of the tools in Little Green Light that she'll use to track her work.

Linda needs to:

- Identify constituents with a strong giving history
- Schedule personal interactions with prospective major donors
- Enlist her board members to help with those
- Make sure her top donors are stewarded effectively

In LGL, she'll take advantage of the following:

- Fundraising views
- Tasks and stewards
- BCC dropbox
- Donor stewardship widget
- Giving tiers

Identifying prospective major donors

Before Linda can start to solicit major gifts, she needs to have a good understanding of her constituents' giving history. To get a quick and solid overview of which constituents have made the most gifts and their total giving amount, Linda can navigate to Fundraising → Giving and make use of the fundraising view called "Giving by constituent".

View: Giving by constituent

Results 1 - 50 of 117

Constituent	# of gifts	Total amount
Totals	821	$1,338,842
Bueller, Ferris	67	$166,230
Brady, Michael	47	$123,729
Smith, Anna	25	$91,610
Gates, Bill	2	$75,100
White, Carol	28	$71,249
Brady, Marcia	12	$68,500
Paccioretti, Timi	21	$60,875
Wolfe, Nero	6	$57,770
Jordan, Michael	2	$55,000
Fletcher, Jessica	5	$53,045

Image: Giving by Constituent Fundraising View in Little Green Light

Scheduling and recording personal interactions

Linda's really making use of tasks and stewards in LGL. She's already in the habit of using tasks to schedule to-dos pertaining to specific constituents. When it comes to cultivating major donors, those tasks are personal interactions like phone calls and meetings. Linda and her board members share the responsibility for those, so Linda assigns those tasks to the appropriate team member in LGL.

Afterward, they'll create contact reports to document the details of those personal interactions.

Even if a board member interacted with two constituents at the same time, her contact report for each would include different details. For example, she might have lunch with two sisters who are looking to increase their philanthropy as they enter retirement. They share a love of history and think it would be fun to get involved with the historical society. The contact report for one sister might mention that she still has two kids in college and wants to volunteer for now, and will consider a major gift in the next two years, while the other sister's contact report for that same lunch would record that she wants to be involved in the organization's outreach committee.

Creating contact reports with the BCC dropbox

Some of these constituents may not be available for calls or meetings, or they may prefer written communication. In those cases, Linda can create contact reports by sending email to her LGL dropbox, which she can enable under My Profile → Dropbox. Then, whenever she adds her dropbox email address to the BCC line of an email she sends from her regular work email account, it will be recorded in LGL as a contact report, with the content of the email. Linda can enable the email dropbox option for each of her board members in LGL, too.

Donor stewardship widget on the dashboard

Linda keeps her eye on the Stewardship Opportunities widget on her dashboard. This handy tool lets her quickly see if any of her top donors have limited stewardship this year, which means they haven't had a personal interaction that's been documented in LGL. If that's the case, Linda knows to make a plan to connect with that donor.

Stewardship Opportunities

Steward: All

Top 100 donors with no gifts or pledges this fiscal year	23 constituents
Top 100 donors with limited stewardship this fiscal year	23 constituents
LYBUNTs (gave last year but not this)	29 constituents
SYBUNTs (gave some year but not this)	110 constituents
Gifts not marked as acknowledged in LGL	0 gifts

Image: Stewardship widget on the LGL dashboard

Giving tiers

As Linda solicits larger gifts, she may decide to implement giving societies as part of her effort to successfully cultivate and recognize major donors. She can use gift tiers in LGL to reflect those giving societies and generate reports that automatically sort her donors' total giving into those gift tiers.

View: Gifts by tier

Results 1 - 8 of 8

Gift tier	# of gifts	Total amount
Totals	814	$1,338,842
$50,001-$100,000	1	$75,000
$25,001-$50,000	5	$235,000
$10,001-$25,000	24	$478,000
$5,001-$10,000	6	$55,000
$1,001-$5,000	92	$279,277
$501-$1,000	107	$94,997
$251-$500	158	$66,060
Up to $250	421	$55,508

Image: Example gift tier table in Little Green Light

Summary

Linda and her board members can rely on functionality in LGL to track and document their personal interactions with major donors. That's important, because it means that the details aren't just scribbled on a notepad somewhere, or worse, only held inside the steward's head. With these interactions documented in LGL, Linda and future staff have a wealth of information that can be used to guide the stewardship and solicitation of major donors. The historical society is well-positioned to strengthen its relationships with donors and solicit major gifts.

Chapter 5 resources:

Create contact reports by sending email to your LGL dropbox

Your dashboard

Adding gift tiers for reporting

How small shop fundraisers can steward major donors

Chapter 6: Finding new donors

Finding new donors

Linda knows that, to expand her donor base, she needs to be diligent about collecting contact information for people who interact with or show interest in the historical society.

To do that, she needs to think about where and how prospective donors encounter the historical society, and how she can get that information into LGL.

Linda needs to:

- Find a way to get her newsletter subscribers into LGL
- Make a plan to regularly import data to LGL
- Track memberships to the historical society

To do all that, she'll do the following in LGL:

- Create an LGL form for newsletter signups
- Integrate her email marketing system (Mailchimp or Constant Contact) with LGL
- Use the Flex Importer to import new constituents to her database
- Track giving status
- Enable the memberships functionality in LGL

Creating a newsletter signup form

Linda's already created a payment form with LGL forms, which makes it easy to collect and store information for people who choose to make an online gift.

Linda also wants the opportunity to cultivate people who sign up for her organization's e-newsletter. So, she creates a non-payment form with LGL forms specifically to allow people to subscribe to her Mailchimp list, which is what the historical society uses to send bulk marketing emails. With the integration between LGL and Mailchimp or Constant Contact, Linda can manage her subscribers in LGL and the data syncs over. She'll still design her marketing emails using the templates in Mailchimp, but she'll only need to maintain her list in one place: LGL. That's a big time-saver right there!

SMALLVILLE

HISTORICAL SOCIETY

Join our e-news list!

Sign up to receive the latest news and happenings at Smallville Historical Society!

Contact Information

Name *

First Name | Last Name

Email *

email@example.com

What would you like to hear about most?

- ☐ Latest happenings
- ☐ Upcoming events
- ☐ Funding needs
- ☐ Volunteer opportunities

Submit

Image: Example e-news signup form in LGL forms

Flex Importer

As with the auction that Linda could host in the future, there may be times when Linda collects data through other platforms, such as EventBrite or GiveLively. In those cases, it's a priority for Linda to get those names and contact information into LGL as quickly as possible. For small numbers, she'll enter the data manually. But in cases with many rows of data, Linda can upload spreadsheets of data using the Flex Importer.

Giving status

As the number of constituents in her database grows, Linda needs an easy way to know the number of donors versus non-donors in her account. Rather than manually coding constituents as non-donors, which would require her to change the coding if and when they make a gift, she can rely on giving statuses in LGL. Giving statuses are system-generated, which means they aren't prone to human error. A constituent with no gifts in LGL is identified as a non-donor; if Linda enters a gift made by that donor, their status is automatically updated to Active Donor. Giving status also helps Linda steward her Top 100 Donors, which are the constituents with the greatest lifetime giving.

Giving Summary

Highlights (all dates)

First	$60 on March 25, 2010
Latest	$1,000 on January 14, 2022
Largest	$25,000 on November 30, 2015
Consecutive	9 Years
Status	Active Donor, Top 25 Donor

Image: Giving status in the Giving Summary widget in Little Green Light

Tracking memberships

Linda decides to promote a membership program as a way to support the historical society. She can use LGL to track membership levels and expiration dates. She'll first need to enable the membership functionality under Settings → Subscription Settings in her account. Then, she can add the membership levels for the historical society and start tracking membership start and end dates. By using LGL's membership functionality, Linda can easily send renewal notices to constituents whose memberships are about to expire. And once again, she can rely on LGL forms to make her job easier by building a simple membership form.

Summary

Linda doesn't want to miss an opportunity to stay connected with people who've expressed interest in the historical society. For this reason, she uses LGL forms, integrations with other software services, and the Flex Importer to make sure that names and contact information are all stored in one central place: Little Green Light. She can count on the system-generated giving statuses to send targeted communications to reach out to non-donors, lapsed donors, and top donors. And, the membership functionality makes it possible for Linda to manage and grow her membership program with ease.

Chapter 6 resources:

Subscribe your form users to Mailchimp or Constant Contact

Mailchimp integration

Constant Contact integration

Using the Flex Importer

LGL User Training: Importing fundamentals

Constituent giving summary

Tracking memberships

Forms: Build and map a simple membership form

Should your organization start a membership program?

Chapters 7 & 8: Grant requests, planned giving, and capital campaigns

Grant requests, planned giving, and capital campaigns

When it comes to grants, planned giving, and capital campaigns, Linda will rely on similar functionality in LGL for all of them. Though Linda is putting in a lot of effort to expand the historical society's development efforts, she finds that she's not as overwhelmed by it as she initially thought. She's become increasingly familiar with LGL and is able to apply what she learned earlier to new endeavors.

Once again, Linda is going to employ the following functionality in LGL to manage to-dos and documentation related to grants, planned giving, and capital campaigns:

- Tasks and contact reports, along with her BCC dropbox

This time, she'll also learn to use another tool in LGL:

- Goals

Goals

Linda can use the Goals functionality in LGL to add specific fundraising goals to particular constituent records, whether it's an organization record or an individual record.

As Linda pursues grants, she can add a goal to the organization record in LGL. She can create a task to help remind herself of the grant's due date, and she can use goal statuses to track progress toward the goal. If and when a grant is received, she can connect the gift to the goal and mark the goal as complete. Then, she can add tasks for the interim and final reports that the foundation requires. No need to worry about missing an important deadline!

To quickly review the goals she's created, Linda can navigate to Fundraising → Goals.

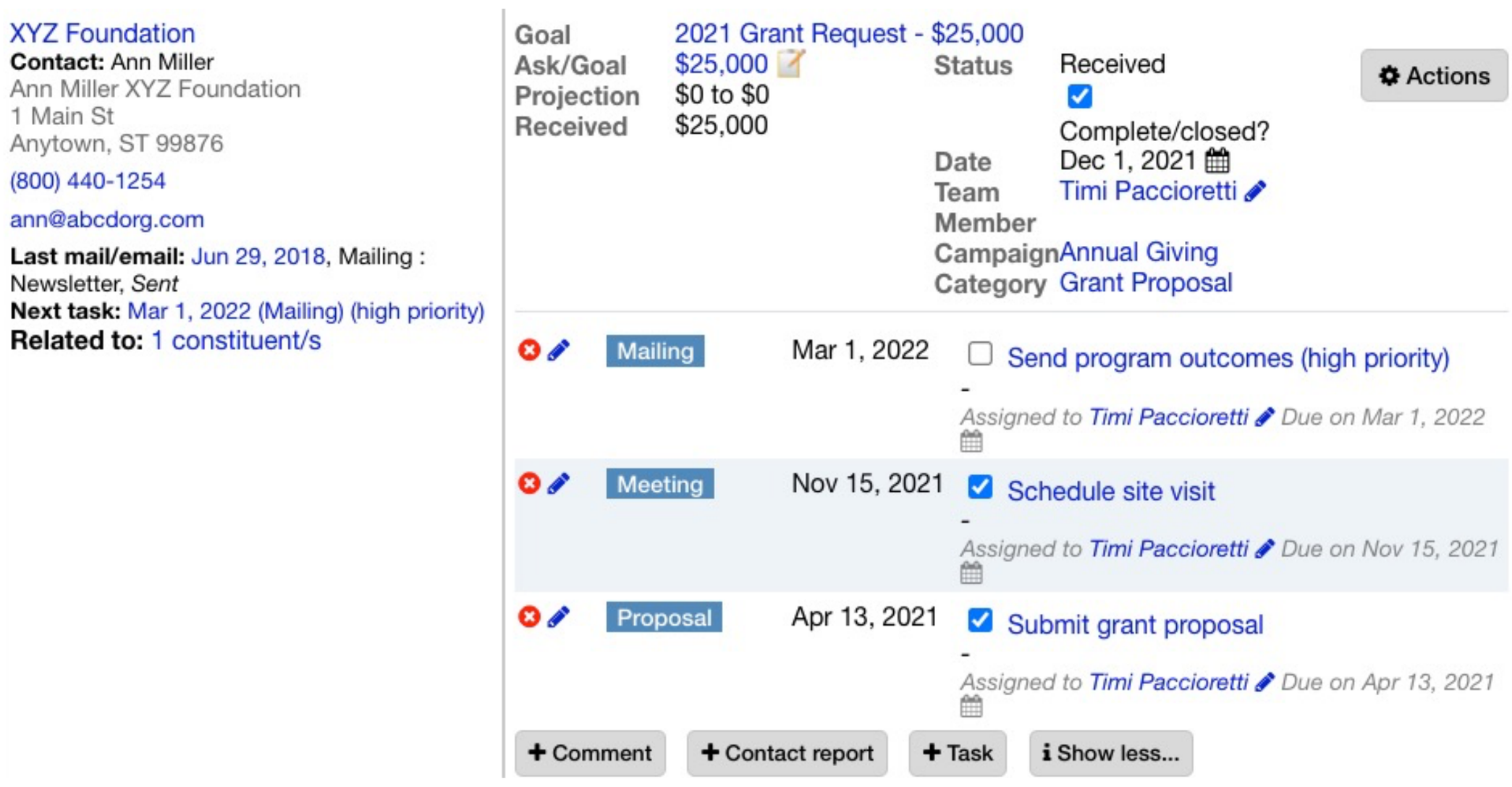

Image: Example goal record in Little Green Light

Goals (con't.)

Linda can also use goals for planned gifts like bequests. A goal works nicely for bequests as it can hold a high and low range. If Linda is notified about a bequest, she can add a goal to the individual's constituent record. When the historical society receives the funds, Linda can connect the gift to that goal. In the meantime, if she needs to add tasks related to the goal (e.g., checking in with the executor of the estate, etc.) she can do that, too.

Finally, when the historical society is ready to launch a capital campaign, Linda can use—you guessed it!—goals, tasks, and contact reports to manage the components of that campaign.

Summary

When we first encountered Linda, she was preparing to ask each of her board members to make a gift to the historical society. Now she's pursuing grants, planned gifts, and preparing for a capital campaign with confidence. When Linda looks back on her progress, she realizes that each step along the way helped prepare her for the next. And each time she familiarized herself with an aspect of Little Green Light, she was able to apply what she learned to manage her other fundraising efforts.

Chapters 7 & 8 resources:

Using fundraising goals for major gifts or grants

How to start a planned giving program without a planned giving officer

Organizing your campaigns, funds, events, and appeals

Conclusion

In each chapter of The Little Book of Gold, Linda expanded her fundraising efforts. In this companion guide, you've seen how Linda invested time in learning to use Little Green Light to manage the development operations of the historical society. Because of her use of LGL, she's been able to streamline her work, save herself time and stress, and she's increased the success of her solicitation and stewardship efforts.

Linda now has the knowledge and skills to determine if the historical society has the capacity to undertake a new fundraising effort and how they could successfully manage it. She knows that, with LGL, she'll be able to lead the historical society's fundraising program forward effectively. And as you explore how to use Little Green Light for your own organization, we hope you'll help yourself to the various resources that are available to guide you in your work.

Learning to use Little Green Light

Our Knowledge Base and Video Library are the first places to learn about LGL. There you'll find articles about every feature and videos about the most commonly used features, as well as recorded webinars on topics like using appeals, event management, and the fundamentals of importing data.

Get fundraising tips

If you're looking for guidance on general fundraising tips and best practices, like how to launch a planned giving program without a planned giving officer or how to read nonprofit financial statements, check out Little Green Light's blog.

Little Green Light training webinars

One of the best ways to learn how to use LGL is to join our Basic Training webinar series. It is made up of three separate sessions, which we recommend participating in sequentially:

- Constituents 101: The basics of managing constituent data as well as a review of simple searching and filtering techniques.
- Gift management 101: The basics of managing gift data as well as a review of the Acknowledgements process in LGL.
- Reporting 101: The basics of generating reports in LGL.

Each session lasts one hour and focuses on a specific area of functionality. Sessions are interactive, and time is allotted in each one to answer participant questions. Recordings of these sessions are also always available for viewing in our Video Library.

Little Green Light customer support

All of our one-on-one support is provided by email, so when you need help troubleshooting an issue, head to the Help page in your account and send a message to our support team. We'll be happy to provide guidance.

We also offer a live Q&A session each week where we work through questions (submitted ahead of time) in a demonstration account. This is a great opportunity to watch an expert show you how things are done.

The Help page in your account is where you can find all these support and training resources as well as register for upcoming webinars.

Your goal is to raise funds to help your organization achieve its mission. Our goal at Little Green Light is to help you do just that.

About the author

Virginia Davidson

Virginia is a member of LGL's customer support team. She has over 15 years of fundraising experience and continues to be active in development as she fundraises for Alamo Rescue Friends, a nonprofit dog rescue organization she founded in 2010.