



WEBINAR SERIES

Getting the Most Out of the iMIS Fundraising Module

Presented by:
Association Technology Solutions
Boost It Up





About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 120 integrations
- ASI's Client Sales Leader of the Year and Chairman Circle for 2020





Presenter:

Sarah Hoddinott

Principal Consultant

Boost It Up | Consulting Services

Email: Sarah@BoostItUpfr.ca



NO IMAGE
AVAILABLE

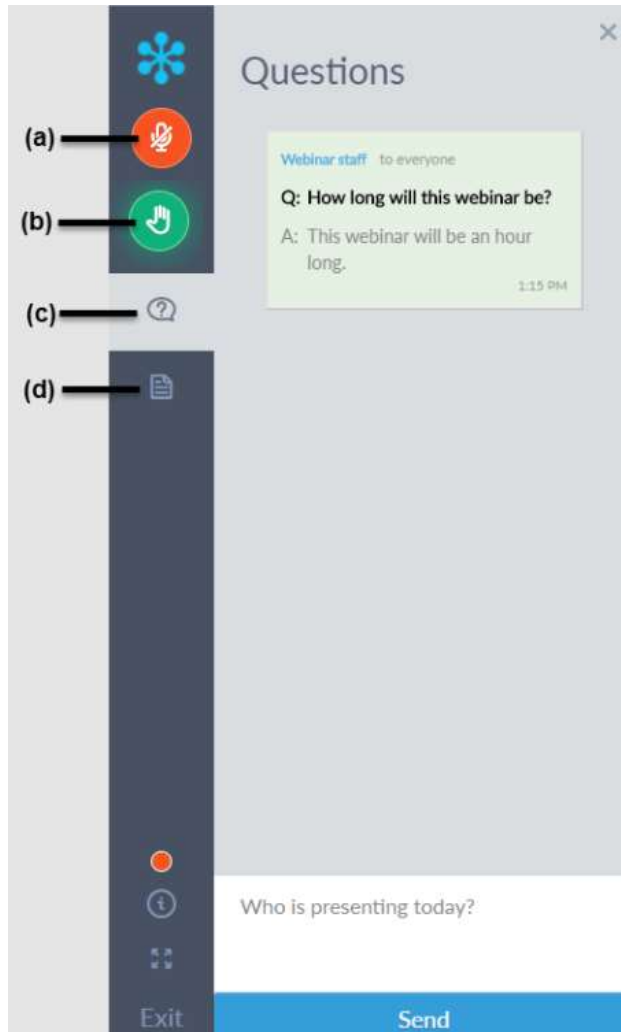
Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Email: rbanks@atsol.org



- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete



- Technology driven Fundraiser since 1993
- Worked directly with 4 non-profit organizations
- Worked with hundreds of organization while at ASI for 17 years
- Today, I work directly with clients who need a variety of fundraising, technology and marketing support
- Company name is deliberate – I focus on nudging in the right direction and making change possible



The picture in 2020

- Needs exceed organizational capacity
- Large organization need to be innovating to maintain mission
 - Many, in service, travel and Covid impacted industries have laid off staff
- Smaller organizations may have temporarily stopped operations
- Revenue sources have been affected
 - Events
 - Fundraising
 - Membership
- In particular, unrestricted revenue is less stable

(Imagine Canada Non-Profit Sector Highlights 2021)



Covid & Non-Profits

- The picture in 2021 is still being written

2021 Quarterly Overall Giving Trends by Organization Size



[\(Blackbaud Institute Index\)](#)

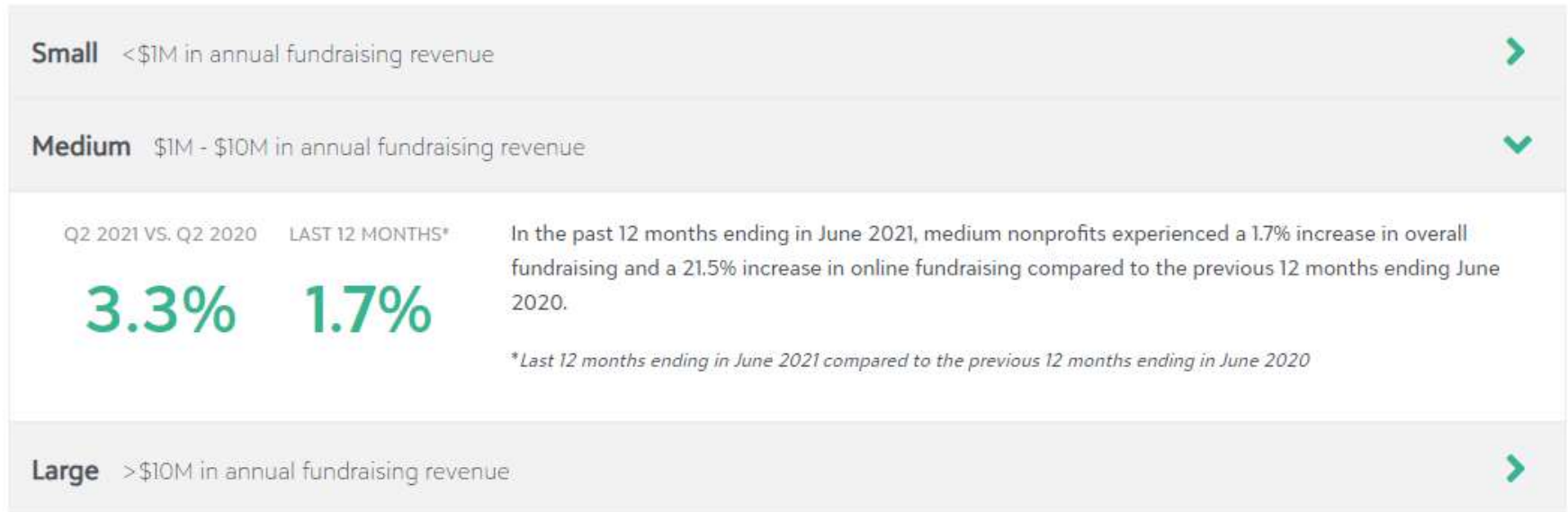




Covid & Non-Profits

- The picture in 2021 is still being written

2021 Quarterly Overall Giving Trends by Organization Size



[\(Blackbaud Institute Index\)](#)





Covid & Non-Profits

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2021 Quarterly Overall Giving Trends by Organization Size



[\(Blackbaud Institute Index\)](#)





You'll **never** be bored
when you **try**
something **new**.

There's really no limit
to **what you can do!**

-Dr. Seuss



Organizational strengths?

Organizational weaknesses?



How to get started?



Organizational Strengths

Every fundraising organization serves a community



And has a funding community





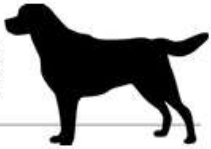
How we got started →

After iMIS was live, watching, tracking new things, adding in new Donor Relations Touchpoints

Our new 'thing' was a memorial program:

- Call if there was an affiliation to someone we served
- Annual letter / call to the primary next of kin

LAB
RESCUE
LRCP



How we got started →

- New website
- Add monthly giving
- Thank a donor program
- Major donor event
- Focused on our peer-to-peer event

Ask for ideas...

listen...

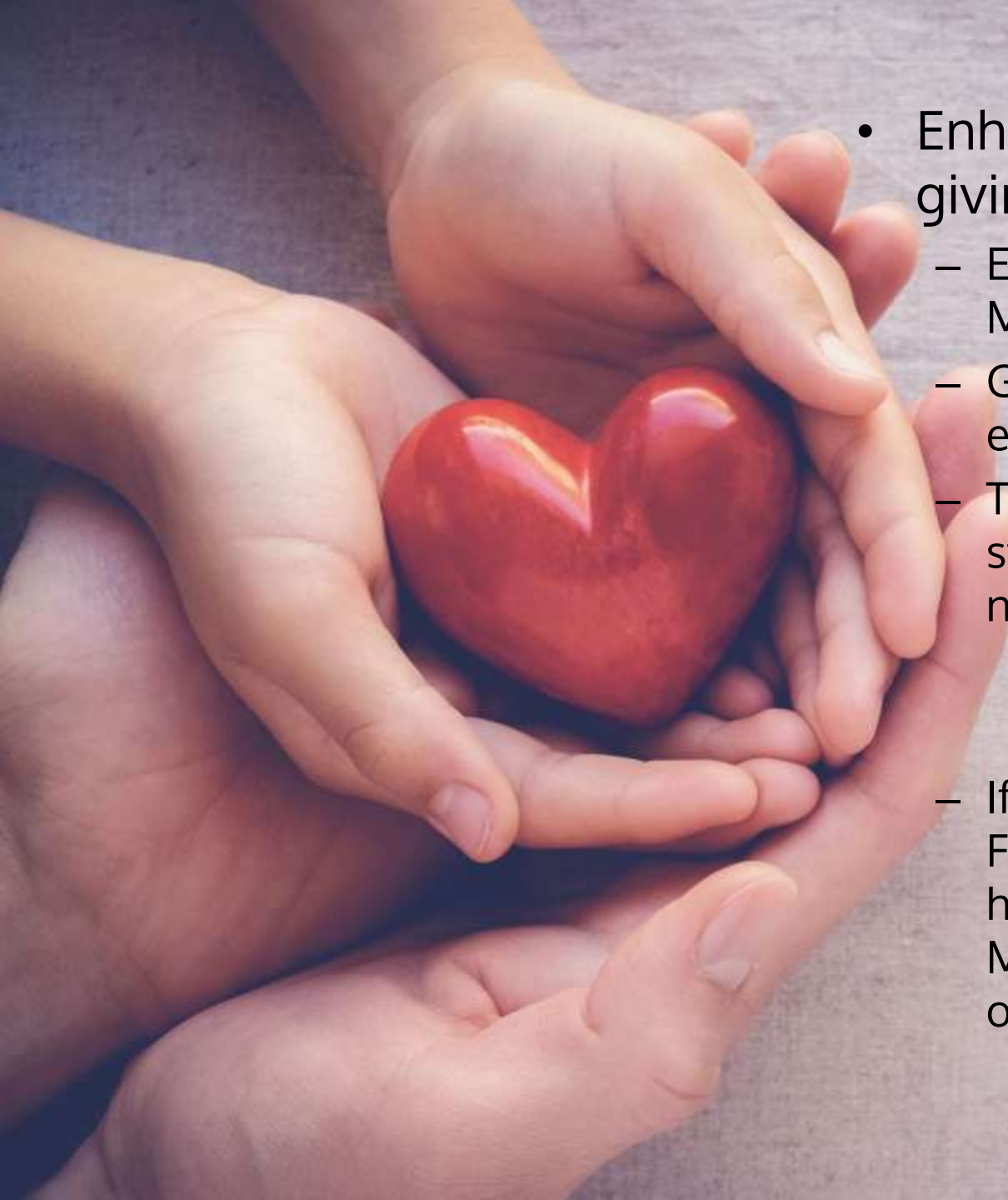
Try one or two!



iMIS



1. Don't have one? Get one!
2. Run an upgrade campaign



- Enhance your major giving program
 - Everyone does Moves Management differently
 - Getting started is quite easy
 - Talk to your Development staff to find out what they need
 - If you're licensed for Fundraising, you already have a version of Moves Management – 2017 onwards.



Moves Management

iMIS

- Community
- Membership
- Fundraising
- Moves Management
- Dashboard
- My donors
- Events
- Commerce
- Marketing
- Finance
- Continuum
- RISE
- Settings

Keyword search

Mr. Brian Murphy

Major donors

48

Revenue from donors

18,185

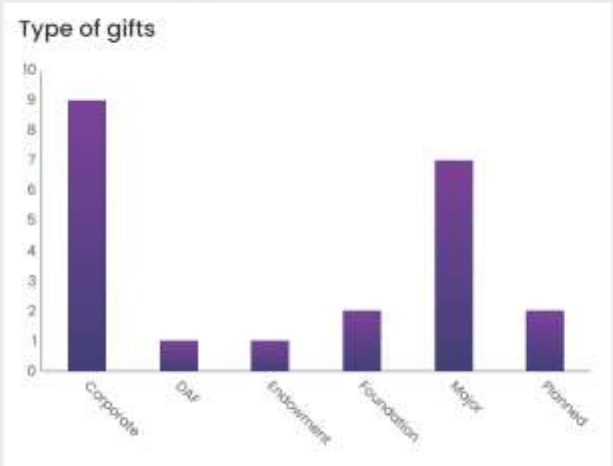
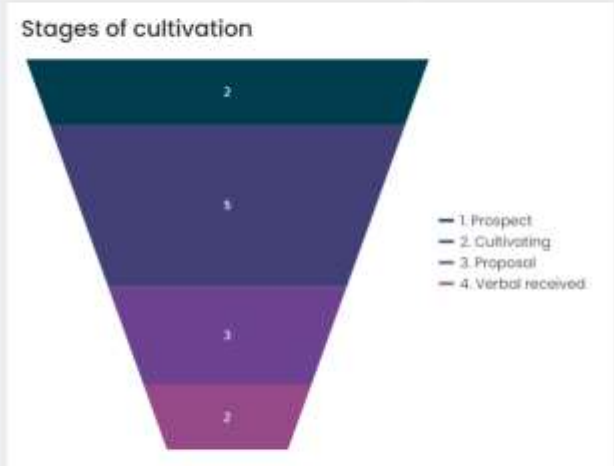
Last year's revenue: 13,735

Average gift amount

505

Potential major donors

7



Recent Major Donor gifts

Opus Canada: 25,000.00 on 9/13/2021

Moves managers | Potential major donors | Task reminders | Board member giving | Proposals

Select a query: All moves managers

Export

MANAGER	NUMBER OF DONORS
Dr. Chris L. Baker, PhD	2
Ms. Traci J. Benning	1





Moves Management

iMIS

Keyword search

Mr. Brian Murphy

Major donors

5

Revenue from donors

0

Last year's revenue: 0

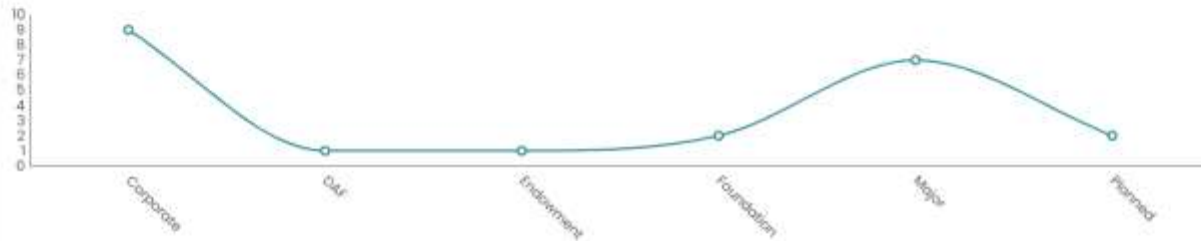
Event Revenue from donors

0

Potential major donors

7

Prospects by gift type



Recent Major Donor gifts
Opus Canada: 25,000.00 on 9/13/2021

Major donors for Sarah Hoddinott

Last name starts with First name starts with Org name contains

Find

Export

PROSPECT	LIFETIME GIVING AMOUNT	GIFTTYPE	STAGE	ESTIMATEDVALUE
Don and Audrey Williams Foundation		Foundation Proposal	3. Proposal	\$1,000.00
Geo International Foundation Southwest		Foundation Proposal	2. Cultivating	\$5,000.00
The Catherine and Maxwell Meighen Foundation				\$15,000.00
The Catherine Donnelly Foundation				\$25,000.00
The George Lunan Foundation				\$5,000.00





Moves Management


iMIS

- Community
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- Settings

Keyword search

Mr. Brian Murphy

Manage donor



Geo International Foundation Southwest

Geo International Foundation
 1315 Barbara Jordan Boulevard
 Austin, TX 78723
 UNITED STATES
 (512) 472-9844
geofoundationsw@mailinator.com

Status: Active

[Donate](#) [Email](#)

[View Account Page](#)

Moves management Giving

Moves Management/Cultivation Plan

Gift type
Foundation Proposal

Estimated value
\$5,000.00

Planned ask date / gift expected date
4/1/2021

Stage
2. Cultivating

Second relationship manager (optional)
Mr. Andrew Cabot

Note
Proposals are due April 1st for the following fiscal year.

Interactions / reminders

DATE	TYPE	NOTE	FOLLOW UP DATE	ASSIGN TO	ATTACHMENT
9/25/2021	Email	Email intent to apply			

Proposals

PROPOSAL TITLE	STATUS	LIKELIHOOD	ASK DATE	ASK AMOUNT	EXPECTED DATE	EXPECTED AMOUNT
Capital Expense - Education Center	Pending	Somewhat Likely	9/25/2021	\$50,000.00	12/31/2021	\$50,000.00

Relationships

[Add relationship](#)



IMIS

- Community
- Regional Directors
 - Fund Donors
 - Prospects
 - Dashboard North Central
 - Dashboard West
 - Dashboard Southeast
- Platform Guests
- Fundraising
- Events
- Reporting
- Finance
- Commerce
- Marketing
- HR
- Settings

Keyword search

Contact Photo



About this Person

Background Summary

Giving by year



Year	Amount
1995	0.00
1996	0.00
1997	0.00
1998	0.00
1999	0.00
2000	5,000.00
2001	0.00
2002	0.00
2003	0.00
2004	0.00
2005	0.00
2006	0.00
2007	0.00
2008	0.00
2009	0.00
2010	0.00
2011	0.00
2012	0.00
2013	0.00
2014	0.00
2015	0.00
2016	0.00
2017	0.00
2018	0.00
2019	0.00
2020	0.00
2021	0.00

Contact Details

Full Name

Prof

Drg

Title

Mak

Mem

Ente

Prim

Web

Acc

Event Info

Event	Last Event Date
11	11/2/2018

Relationships

-
-
-
-
-
-
-
-
-
-

Suggested Fundraising Goal based on Last 12 Months Giving

Current Giving Level	Fundraising Goal
Currently - First Team Member donating between \$20-49 / month	Relationship Building: lots of thank you's and consider as a future Planned Giving donor

Account Status

Member Type

Category

[Donate](#) [Send Email](#)

[View Main Act Page](#) [Add New Interaction](#)

Gift Type

New Annualized Amount

Cultivation Notes

Stage

Last Communication Date

Gift Type: [dropdown]

New Annualized Amount: [input]

Cultivation Notes: Lisa upgraded her gift last year. Not able to upgrade this year.

Stage: 5-Declined to Make a Gift

Last Communication Date: 4/5/2021

Relationship Manager

Full Name

[input]

Past Interactions

Note was written within X Years

Note type

[input]

[input]

Description

There are no records.



Matching Gifts

- iMIS
- Community
- Membership
- Fundraising
- Moves Management
- Events
- Commerce
- Marketing
- Finance
- Continuum
- RISE
- Settings
- PARTICIPATION
- ABOUT
- MEMBERSHIP
- TRANSACTIONS
- GIVING
- VOLUNTEERING
- ANNUAL WALK
- PREFERENCES
- ALERTS

Keyword search

Mr. Brian Murphy Actions



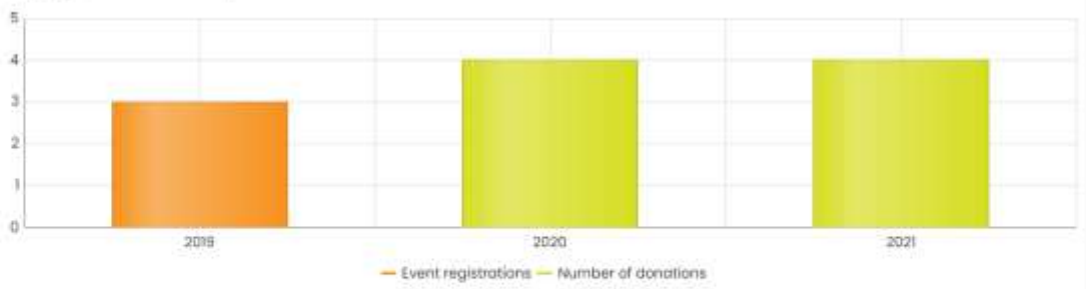
Dr. Jack Carroll
 Director of Research
 Medical Digitizing Services
 056 2239 3790
 jackcarroll@mailinator.com

ID: 18747 Type: Donor Status: Active

Tasks

DATE	ASSIGNED TO	ACTION(S)	FOLLOW UP DATE	ATTACHMENTS
There are no records.				

Engagement history



Upcoming event registrations

DATE	EVENT	LOCATION	VIEW REGISTRATION
There are no records.			

0

A matching plan is available for **Medical Digitizing Services**.

Type: One to one match
 URL: www.mds.com/matching
 Min Amount: \$100.00 Max Amount: \$5,000.00
 Staff Responsible: Katrina Devlin
 Updated: 6/1/2021

Major Donor
 Moves Manager: Katrina Devlin



- Leverage Relationships
 - If you already track company relationships
 - Track their matching gift info
 - ASK about matching gift plans that can benefit your org
- Double the Donation
 - Software that helps identify matching gift plans

Use Volunteers

- Thank you calls
- In person meetings
- Ask if their Company has a match plan





Use iMIS

- Query who to contact
- Create tracking mechanisms
- Support the operations of a new adventure
- Create measurements
- Evaluate and improve over time



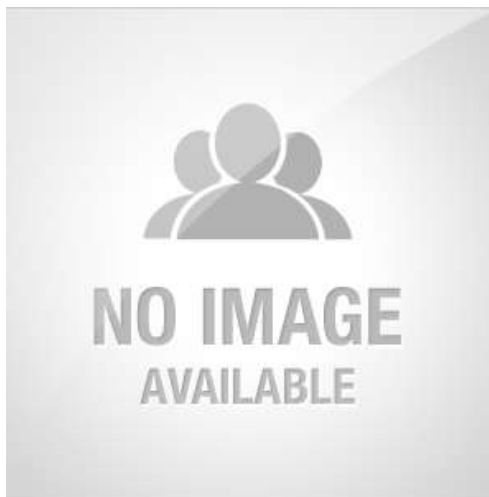
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Sarah Hoddinott

Principal Consultant

Boost It Up | Consulting Services

Email: Sarah@BoostItUpfr.ca



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Email: rbanks@atsol.org

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