



CAMPAIGN MANAGEMENT GLOSSARY OF TERMS

Document Version 1.0 October 11, 2011 FrontStream





A

Acknowledgement Questions

Questions created by the organization or company displayed to the donor at the end of the pledge process. Each activated acknowledgement question is answered by the donor selecting "yes" or "no." Acknowledgement questions typically are used to gather more information about the donor's giving preferences. Typical acknowledgement questions include: "I would like to release my name to the agency(ies) receiving my contribution," "I would like to receive future emails from your organization," or any statement that is formatted for the donor to answer with a "yes" or "no."

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Acknowledgement

Administrative User Login

A login that grants coordinators permission to the Campaign Management back-end reporting system (OPPS).

Location in OPPS: Users & Groups level > Users > "Add a new user" link

Agency

An organization, company, or bureau that provides some service for another. Agencies are stored in iGuide or in OPPS Agencies.

Auto Allocation

Enables donors' undesignated pledge to default automatically to the default designation account established for the associated primary designation panel. When activated, the auto allocation feature is presented to the donor at the bottom of the Primary Designation Panel, accompanied by customizable text and a pre-populated designation amount, set to 100%. The donor simply designates to agencies of his/her choice and the auto allocated designation amount will adjust accordingly.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Designation





B

Business Rules

Characteristics of a campaign, including the client's rules around payment types, designation count, designation options, etc.

Campaign Code

A code used to identify a specific company's campaign. Campaign Codes must be unique and are determined by the company that creates the campaign.

Location in OPPS: Campaign level > [Campaign]

Campaign Coordinator A user given enough access to create and launch a campaign initiative. Typically, campaign coordinators are on-site company managers or staff level employees who work closely with the United Way administrator. The campaign coordinator helps the United Way administer gather campaign specific information needed for the operation of the campaign.

Campaign End Date

The date a campaign closes to donors.

Location in OPPS: Campaign level > [Campaign] > Settings

the Navigation Tree

Campaign Level of Where administers configure year specific campaigns for a company. Each campaign is unique and may have different settings.





Campaign Settings Where administrators configure the settings associated to a specific

campaign.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Settings

Campaign Start Date The date a campaign opens to donors.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Settings

Campaign Team On-site company personnel who help the campaign coordinator with

the management of a campaign. The campaign team may include personnel from Human Resources, Payroll, Data Management, IT,

and/or Marketing departments.

Carry Over Designed for Continuous Giving Campaigns. The carry over tool

provides the ability for users to carry over donations from one campaign to the next, without the need to export donations and

import them into a new campaign via the donation import.

Location in OPPS: Campaign level > [Campaign] > Carry Over

CFC Agencies Agencies specific to Combined Federal Campaigns. A specific list of

agencies offered to federal employees. This is grouped by a different

set of agencies and is designed specifically for CFC campaigns.

Company Level

Hierarchy

A structure that the company defines to drive reporting. This hierarchy

is capable of mimicking any parent-child relationship.





Company Level

The location in the Company Level hierarchy where employees are associated.

Location in OPPS: Company level > [Company] > Company Levels

Confirmation Email If set up and enabled, confirmation emails are automatically sent to donors when a gift is submitted. Donor records must be populated with a valid work or home email address for this functionality.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Website > [Website] > Content > Confirmation Emails

Confirmed Gift

In a Continuous Giving Campaign, confirmed gifts are donations that are carried over, imported into the system, or created by the donor, and then confirmed by the donor on the donor site.

Continuous Giving Campaign

Campaigns that provide donors the option to carry over their pledge and designations from a previous year's campaign to a current campaign.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Continuous Giving

Contribution Review

Additional instructions that display at the top of the contribution review page of the donor site.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Website > [Website] > Content > Contribution Review





Contribution Review

Additional instructions that display at the top of the contribution review page of the donor site.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Website > [Website] > Content > Contribution Review

Coordinator Level

Determines what donor records a coordinator will have access to through the campaign dashboard.

Location in OPPS: Company level > [Company] > Coordinator Levels

Coordinator Level Hierarchy

A structure that the company defines to drive reporting. This hierarchy is capable of mimicking any parent-child relationship.

Location in OPPS: Company level > [Company] > Company Levels

Coordinator Role

Assigning a coordinator role to a coordinator's donor record activates the dashboard on the donor site for a specific donor. From the dashboard, campaign coordinators can manage donors they are responsible for, send email, and generate reports or exports. The information that populates in the reports, as well as the visible filtering options, is controlled by the campaign administrator in OPPS.

<u>Location in OPPS</u>: Company level > [Company] > Option Sets > Coordinator

Corporate Match Program

Corporate Match programs are used to encourage employee generosity by amplifying the impact of their gifts with a promise to match a donation by a specified percentage.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Corporate Match





Custom Align

A setting that allows the donor to manually enter an alternate zip code to align to in order to see different designation options.

Location in OPPS: Campaign level > [Campaign] > Settings

CyberSource

CyberSource – A provider of electronic payment and risk management services. FrontStream uses CyberSource as a merchant account for credit card processing.



Dashboard (formerly Campaign Status) A link that appears on the donor site for any employee associated with a Coordinator Role. This link will give the employee access to the reporting associated with his/her position in the Coordinator Level Hierarchy. This link works directly off the Coordinator Level Hierarchy.

Demo Instance

An environment that allows Local United Ways to create campaigns and run unlimited test transactions for the purpose of testing at no additional cost. This environment also allows administrators to "port" campaign elements over to production to ensure live campaigns are as efficient as the campaign tested in Demo Instance.

Designation Max (Maximum Designation Count) The maximum number of agencies a donor may pledge funds. The Campaign Management system's maximum designation is eight.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Designation





Designation Option Set

The settings that affect the designation options on the Primary Designation Panel for online donors and designation options for batch donors.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Designation

Designation Panel

A group of designations that populate on a single panel to present to the donor. Designation Panels control the donation options displayed to the donor during the pledge process. There are three types of Designation Panels: the Introductory Panel, the Primary Panel, and the Locate an Agency Panel. Introductory Panels are the main designation options available to the donor during the pledge process. Primary Panels are available if the campaign is using Panel Groups, and are the secondary designation options presented to the donor during the pledge process. Primary Panels draw attention to the campaign's focus areas. Locate an Agency Panels allow donors to search and designate to specific agencies of their own choice.

<u>Location in OPPS</u>: Organization level > [Organization] > Designation Panels

Disassociate Donors

Disassociating donors from a campaign differs from deactivating donors. Disassociation refers to disconnecting the donor from the campaign. After disassociating a donor from a campaign, the donor remains active in other campaigns he/she is associated to.

Location in OPPS: Campaign level > [Campaign] > Donors

Distributing Organization

Designates the organization responsible for processing and disbursement of funds collected through the campaign.

Location in OPPS: Campaign level > [Campaign] > Settings > Distributor





Donor Ceiling

The highest amount of money the company will match for an

individual donor.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets >

Corporate Match > [Corporate Match Program]

Donor Donation Count Limit Establishes the number of donations a donor can make within the

campaign. The default is one.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Settings

Donor Identifier (Donor ID)

A unique code associated to a donor.

<u>Location in OPPS</u>: Company level > [Company] > Donors > [Donor] or

Campaign level > [Campaign] > Donors > [Donor]

Donor Import File

File that contains the necessary data to load donor profiles into the

Campaign Management database.

<u>Location in OPPS</u>: Company level > [Company] > Importing > Import Type dropdown or Campaign level > [Campaign] > Importing > Import

Type dropdown

Donor Payroll Donation Count Limit Establishes the number of payroll donations a donor can make within

the campaign. The default is one.

Location in OPPS: Campaign level > [Campaign] > Settings

Donation Tracker

A tool that allows donors to track the payout of their gift using a

system generated transaction ID.





Donor Geographic Alignment

An option that offers a default United Way as a recommended designation. The displayed United Way is aligned with the donor's work address zip code or home address zip code.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Designation Panels > Panels

Donor Group

A group of donors that share common business rules.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Donor Groups

Donor Review

Additional instructions that display at the top of the donor information

review page.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website]

> Content > Donor Review

Donor Site

The site where donors experience a campaign. All donor sites are configured in Campaign Management to personalize and customize each donor's experience. Everything configured in Campaign

Management is applied to this site.

Location in OPPS: Campaign level > [Campaign] > Websites > [Website]

Dynamic Panel Group Campaign administrators select desired criteria and information is automatically pulled from iGuide. If something changes in iGuide, it will also change here.

<u>Location in OPPS</u>: Organization level > [Organization] > Panel Groups > [Panel Group] > Group





Dynamic Pledge Content

Website content specific to DPE campaigns.

Location in OPPS: Campaign level > [Campaign] > Websites > [Website] > Content > Dynamic Pledge Content

Dynamic Pledge Experience (DPE)

A pledge experience that provides a donor interface that integrates a high level of customization in Campaign Management. DPE can be configured to provide a Pledge Driven or Designation Driven experience for the employees of a campaign. Additionally, DPE enables United Ways to effectively communicate their initiatives to their users.

Location in OPPS: Campaign level > [Campaign] > Websites > [Website]

Dynamic Variables Placeholders used to customize the donor experience. For example, donors can be greeted individually by including the dynamic variable, **%Firstname%**, in the welcome message. The first name of the each donor will populate where the dynamic variable appears.

E

A charity's unique Employer Identification Number. EIN

Exports

Files or records pulled from the system into a savable copy, such as an Excel spreadsheet, for company records.

<u>Location in OPPS</u>: Reporting > Exports at all levels of Campaign Management





F

Flexport

Editable files or records pulled from the system into a savable copy, such as an Excel spreadsheet, for company records.

Location in OPPS: Reporting > Exports at each level of Campaign

Management

Focus Area

Groupings of agencies or programs with common community focuses or needs. Focus areas educate donors about community priorities, or they solicit donations to groupings of agencies and programs. Examples of focus areas include: Early Childhood Development, Emergency and Crisis Services, Homelessness, etc.

Location in OPPS: Organization level > [Organization] > Panel Groups

Functional Level

The location in the Functional Level Hierarchy where the employee is associated.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Settings > Distributor

Functional Level Hierarchy A company-defined structure that encompasses reporting requirements. This hierarchy is capable of mimicking any parent-child relationship.

Location in OPPS: Campaign level > [Campaign] > Settings > Distributor





G

Geographically Align

In Geographically Aligned campaigns the system looks at the donor's zip code (either home or work, depending on zip code alignment set on the campaign settings page) and aligns the donor to the appropriate United Way market area, utilizing the GiftLink file. If the donor's zip code falls into two or more United Way market areas, the donor will have the ability to choose the United Way they wish to designate to. In addition, the campaign coordinator has the ability to allow the donor to choose different market areas, utilizing the Donors May Custom Align functionality.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Designation Panels > Panels

Gift Amount Alert Threshold

Gift Amounts trigger an automated email to the assigned site coordinator alerting him/her when an associated donor submits a pledge that meets or exceeds the specified threshold.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Donor Groups > [Donor Group] > Settings

Giving History

Details on a donor's past donations and designations.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > Content > Giving History Page

F

Impact Pledge Experience (IPE)

A Pledge experience that Reverses the traditional online campaign experience and provides both high level and in-depth information about a United Way, including its priorities, images, goals, and results.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website]





Imports

Files or records that can be uploaded into the system instead of manually entering data.

 $\underline{\text{Location in OPPS}}\!$: The Importing node at all levels of Campaign

Management

Inactive Donors

Donors that are associated to a campaign, but are not activated; thus cannot participate in a campaign initiative.

<u>Location in OPPS</u>: Company level > [Company] > Donors > [Donor] > Company Donor Profile > Donor or Campaign level > [Campaign] > Donors > [Donor] > Company Donor Profile > Donor

Introductory Panel

Panels on the donor site that contain one or more designation options available to the donor during the pledge process.

<u>Location in OPPS</u>: Organization level > [Organization] > Designation Panels > [Introductory Panel]

Investment Guide (I-Guide)

A database that holds approximately 90,000 agency records. These 90,000 agencies have been researched and found to be legitimate non-profit organizations. This database also holds details about all 1,300 plus United Ways and their initiatives.

Leadership Option Set

Donor thresholds (known as Leadership Levels) unique to each option set.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Leadership





Leadership Levels Donation ranges established by the campaign management team to recognize donors who give at the predetermined levels.

> Location in OPPS: Organization level > [Organization] > Option Sets > Leadership > [Leadership Level]

Leadership Upgrade Feature

A customizable message that encourages the donor to give more. An example based on a threshold established at the Organization level might be, "You are only \$__ away from reaching the ____ level!"

Location in OPPS: Organization level > [Organization] > Option Sets > Leadership > [Leadership Level]

Locate an Agency Panel

Panels that present large groupings of agencies to donors in a searchable format.

Location in OPPS: Organization level > [Organization] > Designation Panels > [Locate an Agency Panel]

Master Website

Selecting a master website for a specific donor site turns other websites into children websites, permitting content to pull directly from the master website.

Location in OPPS: Campaign level > [Campaign] > Websites > [Website]





Merchant

The holder of credit card processing data. A merchant account is required in order to offer credit cards as a payment type in a campaign.

Location in OPPS: Organization level > [Organization] > Merchants

Minimum Donation for Designation

Sets the minimum donation amount required for the donor to search a broader database of agency designation options. Note that leaving this field blank will allow the donor to designate regardless of donation amount.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Settings

N

No Donation Gifts

Gifts that give donors the opportunity to participate in the campaign without giving, which is sometimes beneficial to company participation goals.

Location in OPPS: Organization level > [Organization] > Option Sets > Payment Types.



Option Package

Packages are used to bundle Option Sets configured for a campaign. Organizations can have multiple Option Packages and can be applied to donor groups with specific business rules within one campaign.

<u>Location in OPPS</u>: Option Sets > Option Packages appear at all levels of Campaign Management





OPPS (Online Pledge Processing System)

The site where campaign administrators can log in to see raw data, run reports, and configure donor websites.

Option Set

Settings used to configure the business rules for a campaign (i.e. payment types, acknowledgment questions, designation limit).

<u>Location in OPPS</u>: The Option Sets node appears at all levels of Campaign Management

Organization Level of the Navigation Tree

The top level of Campaign Management. The Organization level is where users configure organization-based options, such as payment types, Designation Panels, etc. Once this level is set up, users may never need to make adjustments to it again.

P

Panel Item Exceptions

Enable the administrator to include or exclude specific designation items from Designation Panels bundled into an Option Package. Inclusions are used to offer a specific designation option to all donors in a geographically aligned campaign or to add a designation item to a frequently used designation panel without affecting the other campaigns. Exclusions are used to restrict designation options to all donors in a geographically aligned campaign or to remove a designation item from a frequently used designation panel without affecting the other campaigns.

<u>Location in OPPS</u>: Organization level > [Organization] > Designation Panels > Designation Panel Settings





Panel Group

A group of like designation entities that appear on the donor site. Panel Groups provide a group of agencies with an overall name and description on the Locate an Agency and/or on the Primary Designation Panels.

Location in OPPS: Organization level > [Organization] > Panel Groups

Panel Option Set

For each type of Designation Panel, business rules are set that determine the maximum item count and type of designation entity allowed on the Designation Panel. These business rules are configured in the Panel Option Sets.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Panels

Payment Type Option Set

A list of payments in the system that, if selected, can be configured for a campaign. Many payment types can be added to one Payment Type Option Set. Additionally, campaign administrators can create multiple Payment Type Sets, which can then be applied to specific campaigns and donor groups.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Payment Types

Pay Periods

A reoccurring length of time over which employee time is recorded and paid. Employees can choose to spread out their donation over the course of time by deducting a gift amount from their paycheck each pay period.

Location in OPPS: Company level > [Company] > Pay Periods





Payroll Ask Questions

The system displays a set of payroll ask questions to the donor based on the amount and values of salary information contained in the donor record. This provides the ability to ask a different set of payroll ask questions for different salary levels/ranges.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Payment Types

Payroll Deductions

A method of payment for donors in which donations are received via deducting an amount from an employee's paycheck.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Payment Types

Primary Panel

Contains one or more designation options that will be made available to the donor on the Invest Your Donation page during the pledge process.

<u>Location in OPPS</u>: Organization level > [Organization] > Designation Panels > [Primary Panel]

Primary Pledge URL

Establishes the primary URL that donors will use to access the site. This is the URL that will populate in system generated emails.

Location in OPPS: Campaign level > [Campaign] > Settings > Login

Production Mode

Production implies the campaign is live. While the campaign is in production, donors can make pledges, transaction charges are incurred, etc. Campaigns should only be set to production when they are ready to go live.

<u>Location in OPPS</u>: Campaign level > [Campaign]





Progressive Search Mode

When a Designation Option Set allows donors to search the National IRS database and/or Write-in an Agency, in addition to searching the Locate an Agency panel, the multiple agency options may overwhelm donors. Progressive Search merges the Locate an Agency, IRS (National) database search, and Write-In option into a single natural flow on the donor site.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Designation

Public Campaigns

Campaigns designed for public use, unlike Workplace Campaigns, which are designed for employees of a company. Public campaigns require the user to register before logging in and making a pledge.

Location in OPPS: Campaign level > [Campaign]

R

Recognition Option Set

An incentive program that encourages donors to give by providing donor recognition awards. When all Recognition Program rules are met, the donor is asked to opt-in to receive the award of the program.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Recognition

Record Type 4

File specification that donor data needs to be in for payroll deductions. This file is created by the company and supplied to FrontStream each time payroll deductions are transferred from the company to FrontStream.





Registration

Registration options control information donors are prompted to provide about themselves during the donation process.

Location in OPPS: Campaign level > [Campaign] > Registration

Registration Fields

Custom questions that are presented to the donor on the Registration page of the donor site. Registration Fields are a useful way of getting information about the donors; for example, to find out their typical donating habits.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Registration > Registration Fields

Reporting

Reporting is available at all three levels of Campaign Management. At each level, Reporting displays the reports associated to that level. Reports can be filtered and customized.

<u>Location in OPPS</u>: The Reporting node of all levels of Campaign Management

S

Signature Question

Text that certifies the donor's approval of the contribution.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Payment Type > Payroll Deduction

Single Sign-On (SSO)

A donor login process that includes the company's IT department populating an icon on their intranet. Authentication takes place when the employee logs into the intranet. If SSO is enabled for a campaign, the donor is not required to enter a username/password to log into the donor site and make a pledge.





Skins

A wrapper or design for a campaign site. Skins can be custom made or selected from a variety of default skins available in the system.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website]

Skin Override

An optional feature that allows administrators to associate a different skin to specific pages of the donor site.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website]

Special Events

The Special Events functionality provides the option to group event dollars by Coordinator Level, Company Level, Functional Level, as well as donor group. When a special event is associated to a Coordinator Level, the special event dollars will display to the coordinator on the dashboard.

<u>Location in OPPS</u>: Company level > [Company] > Option Sets > Coordinator

Standard Panel Group Traditional panel group that allows administrators to manually pick and choose the designation entities to add to the panel group.

<u>Location in OPPS</u>: Organization level > [Organization] > Panel Groups

Standard Pledge Experience (SPE)

A pledge experience where the donor accesses the donor site, chooses a pledge type, amount to give, designations, and then checks out.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website]





Standard Search Mode

Provides a standard search function to the donor. Standard search mode allows donors to search the National IRS database, the Locate an Agency panel, and/or Write-in an Agency.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Designation

Survey Questions

Questions that are presented to the donor after the pledge process.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > Content > Survey

T

Territories

Used for territory- aligned campaigns. Within the Territories level, administrators configure the zip code range for potential donors. This allows administrators to choose territories in which their donor groups can give to.

Location in OPPS: Organization level > [Organization] > Territories

Thank You Message

When employees complete the donation process, the campaign administrator has the ability to present the donor with a custom thank you message.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > Content > Thank You Message

Timeout

A termination of login from either the donor or admin site based on a period of inactivity by the user.





Tools

A convenient way to perform highly functional jobs within Campaign Management.

<u>Location in OPPS</u>: Available via the Tools node at all levels of Campaign Management



Unconfirmed Gift

In a Continuous Giving Campaign, an unconfirmed gift is a donation that has been pre-imported into the system that the donor has yet to confirm on the donor site.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Continuous Giving

User

Users are created by the campaign administrator. A new user profile needs to be created for anyone requiring access to Campaign Management. New users can be manually added or uploaded into the system.

Location in OPPS: Users & Groups > Users



Website Caption

A caption that displays at the top of each page of the donor site.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > Content > Welcome Message





Website Content

Allows administrators to create custom messaging, activate pledge bars, create email templates, activate campaign surveys, populate a company privacy policy, provide gift type instruction text, and customize instructional text presented on the designation panels.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > Content

Website Events

Give administrators the capability to inform donors of upcoming events displayed on a calendar on the donor site.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > Events

Website News

Allows administrators to keep donors informed about important items of interest regarding the campaign. This feature is often used to motivate donors; for example, to let donors know when a substantial gift has been received or when the campaign committee decides to add a bonus day off for contribution of a percentage of salary.

<u>Location in OPPS</u>: Campaign level > [Campaign] > Websites > [Website] > News

Workplace Campaigns

Campaigns designed for employees of a company. Employees are given a pre-registered username and password or use SSO to access the website and make a pledge.

<u>Location in OPPS</u>: Campaign level > [Campaign]

Write-In

Write-in designations allow donors to designate to a specific agency that has not been displayed as a designation option. Allow Write-in Agency applies to online donations and batch donations.

<u>Location in OPPS</u>: Organization level > [Organization] > Option Sets > Designation