

THE BORGEN PROJECT



DONOR RELATIONS INTERNSHIP

TRAINING MANUAL

Fall 2015 Edition

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Note: This manual was intended to be read in the order it was written, as many tasks will build off previous ones. So jumping ahead or skipping to certain sections is not recommended without previously looking through the whole packet.

THE BORGEN PROJECT

Welcome new intern to The Borgen Project! We are so excited to have you join us for the next 12 weeks on our mission to end global poverty! This manual is your key to success here. Read it today. Read it tonight. And read it in two weeks. It's a little heavy on the "do's and don't" but that's only meant to give you clear expectations. We want you to be successful here and everywhere you go! If you have questions, consult your manual first. Most of the answers can be found in here. If you're really stuck, please contact one of your managers. They are here to help you on your adventure!

We've asked you to look through our website extensively during the application process, but that could have been months ago! Here's the basic breakdown: The Borgen Project is a nonprofit national campaign that fights global poverty. We generally do so by securing the support of our congressional leaders in order to advance poverty-reducing legislation through the House and Senate. The ultimate goal is to get these bills passed and signed into law by the President. In doing so, assistance and resources will be utilized to improve the living conditions of hundreds of millions of people in developing countries.

We know that fighting global poverty is a large goal, which might be deemed as insurmountable by the general public. This is where you come in! Every single one of our interns plays an important role in tackling global poverty, whether that's through our Political Team, Content Team, national volunteers, or the Seattle headquarters. We all play a part!

For the Donor Relations Internship, you will be managing a large portion of our financial activity that generally consists of a few hundred thousand dollars annually. One of your primary tasks will be to manage the email account for donors@borgenproject.org. You will be responding to emails from our national team, which usually consists of around 150-250 interns and volunteers. These could be receiving an intern's fundraising list or updating them with their current fundraising total and list of donors. Don't worry, as we'll walk you through this!

End Game. Have fun and enjoy yourself! This position is meant to offer you some real world professional experience that you can add to your resume. You will also learn important lessons on time management, prioritization and working independently with little direct supervision. You're responsible for managing both our interns and donors, and making sure that all of the financial data is properly recorded and accounted for. Good luck!

THE DONOR RELATIONS INTERNSHIP

Internship Hours:

300 hours in total need to be completed for you to finish the internship.

- 240 hours are completed in the office. This is 20 hours/week for 12 weeks. Your daily schedule will be Monday-Thursday from 8:30AM-2:00PM with a half hour break.
- 60 hours are completed from outside of the office. The tasks will be from the weekly tracker, attending events and working on your personal fundraising campaign.

If you cannot commit to these hours, please contact your manager ASAP. We understand many interns may be taking a heavy class load during the academic year. So you will have flexibility in picking a schedule (full-time or part-time), but you'll need to follow that schedule for the remainder of your internship (adjustments can be made between quarters). A minimum of three days/week or 15 hours/week is required. The office is open from 8:30AM-4:00PM.

Internship Requirements:

The following are requirements for the successful completion of the internship.

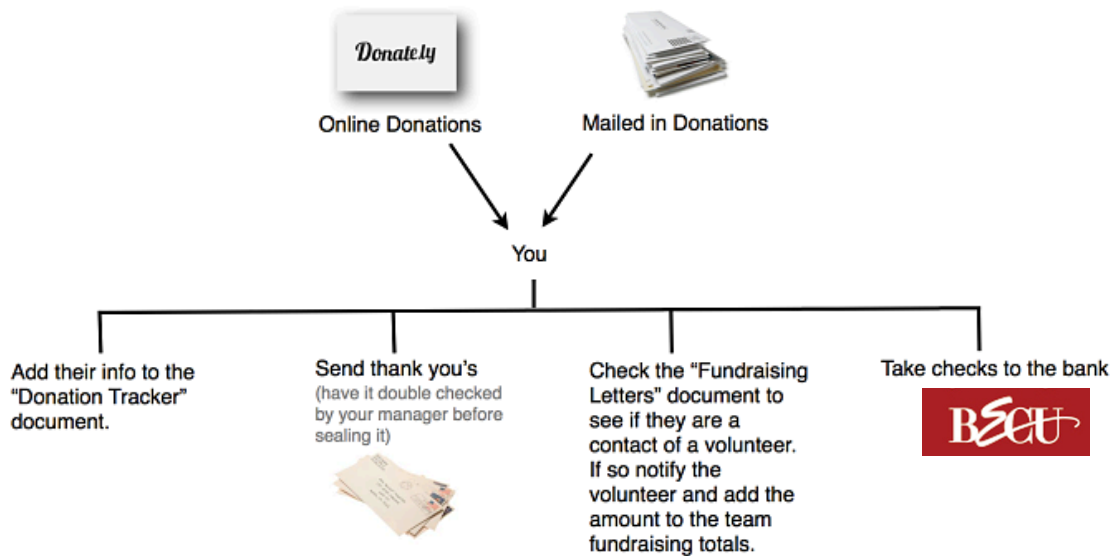
- Attend National Conference Call the first Monday of every month at 5:00PM.
- Complete a personal fundraising campaign and raise a minimum of \$500.
- Utilize your social media presence to share links related to the cause.
- Contact your 3 congressional offices each week in support of poverty-reduction programs and legislation.
- Turn in weekly tracker on time by Friday at 5PM of each week to today@borgenproject.org.

Things to Know:

Fundraising: Our funding levels determine our impact levels. It's that simple. Like weekly calls to congress, everyone who is part of the team steps up and participates in fundraising. Bookmark the [fundraising ideas page](#) and start planning your campaign. The Weekly Tracker will guide you through friends and family letters, but to reach the \$500 criteria you'll want to develop your own strategies as well. If you want to stand out at The Borgen Project, fundraising is a good place to do it. Our top fundraisers usually jump ahead and send their fundraising letters in the first week.

The Monthly Conference Call: The national conference call is attended by everyone involved with The Borgen Project and gives the team an opportunity to hear the latest news from the experts. Just dial in and learn! The first Monday of every month at 5PM. Register for the call [here](#).

CORE RESPONSIBILITIES



Daily Tasks:

1. Manage the donors@borgenproject.org email account
2. Drop off letters and pick up new mail at UPS store.
3. Process mailed in donations (checks and cash)
4. Process online donations (Crowdrise, Donate.ly, Little Green Light)
5. Prep fundraising letters
6. Send fundraising updates to interns
7. Send Thank You IRS receipts (checks, cash, donate.ly)
8. Update weekly and monthly stats

Account Information:

These are the donor accounts you will access on a regular basis.

Email: donors@borgenproject.org (rwanda24)

Crowdrise: donors@borgenproject.org (brazil200)

Donate.ly: general@borgenporject.org (atlanta34)

Little Green Light: donors@borgenproject.org (africa1)

DOCUMENTS

Here is a list of documents you will need in order to complete a large majority of your tasks. It is important to bookmark/download these documents. We recommend creating a folder in your bookmarks bar and on your desktop for the links and files.

Key Documents:

- [Donation Tracker - 2015 Donations](#) - Every donation will be recorded here
- [Master Volunteer List](#) - Update every volunteer's efforts to ensure they're getting credit for their fundraising requirements.
- [My Donors](#) - Update/search this documents for volunteer contacts.
- [Stats Details 2015](#) – Weekly stats
- [Fundraising Stats 2015](#) – Monthly Stats

Mail Merge Documents:

- [Fundraising Letters \(Mac\)](#) – Excel doc containing fundraising list with a merged Word doc that pulls info from Excel and puts it onto envelopes.
- [Fundraising Letters \(PC\)](#) – Excel doc containing fundraising list with a merged Word doc that pulls info from Excel and puts it onto envelopes.
- [IRS Receipts \(Mac\)](#) - Excel doc containing donor info with a merged Word doc that pulls info from Excel and puts it onto envelopes and thank you letters.
- [IRS Receipts \(PC\)](#) - Excel doc containing donor info with a merged Word doc that pulls info from Excel and puts it onto envelopes and thank you letters.

Other Documents:

- [Fundraising List](#) – Send to interns if we need an electronic copy of their list
- [Advocate Flier Template](#) – Send to interns if they need it for doing their fundraising letters
- [IRS Receipt Template](#) - Mail for donations through check, cash, or Donate.ly
- [Verify Document](#) – Add interns to the list when we receive their fundraising letters

DONORS EMAIL ACCOUNT

TASK 1 OF 8

Manage the donors@borgenproject.org email account:

Begin your day by clearing the inbox. Most of the emails will revolve around updating interns on their fundraising totals, adding fundraising lists to the My Donors spreadsheet, adding online profiles to the Master Volunteer List, or answering general maintenance questions. The number of emails in the inbox fluctuates quite rapidly based on the season and current number of interns we have on board. But expect anywhere from 10-30 emails at the start of each day. On a normal day, you can usually clear out your inbox within the first hour of your shift. But check back at the inbox for any new messages every 15 minutes or so to make sure everyone is being responded to. If you are working on a large task in the middle of your shift and realize that there are a few new emails in the inbox, it's always better to take five minutes and respond to those and then return to your task rather than letting potentially time-sensitive emails sit around for several hours with no reply.

Use Labels:



Self explanatory, but use labels! This makes our emails quickly identifiable and makes searching through old emails easier. Many of these labels will automatically populate on the emails, but add them if you notice they are missing. Common labels you'll use are:

- Update – An intern requests a fundraising total update
- Fundraising List – An intern sends you their list of potential donors
- Online Profile – Should automatically be marked as read, but those are for new interns who are setting up their online platform
- Crowdrise – Anything from Crowdrise
- Little Green Light – Anything from Little Green Light


DONORS EMAIL ACCOUNT

TASK 1 OF 8

Handling Specific Emails:

Here is more detailed information on how to respond to each email categorized by the labels listed before.

Update:

You'll send an Update email when an intern requests a fundraising total update. You'll also be sending these everyday after processing all the donations for the day to any interns who received new donations. Use the "Fundraising Update" canned response. To send a canned response, click the  button in the bottom right corner of an email next to the trash icon.

When sending an update, you'll need to include the intern's current fundraising total and all the donations they've received so far. For each donor, you'll need to include the donor's name, amount donated, type of donation and date donated. Below is an example email we would send out to emails giving them a fundraising update.

Hi Stan,

You're currently at **\$425** towards your fundraising goal!

We have received donations from:

Donor's Name	Amount	Type of Donation	Date Donated
Tony Stark	\$100.00	Check	6/9/2015
Steve Rogers	\$50.00	Check	6/11/2015
Bruce Banner	\$25.00	Online Donation	6/12/2015
Thor	\$25.00	Check	6/14/2015
Natasha Romanoff	\$100.00	Cash	7/1/2015
Clint Barton	\$50.00	Paypal	7/16/2015
Nick Fury	\$75.00	<u>Crowdrise</u>	7/19/2015

Make sure to send thank you letters!

Best,
[Your Name Here]

--

Donor Relations
The Borgen Project
www.borgenproject.org

DONORS EMAIL ACCOUNT

TASK 1 OF 8

Fundraising List:

You'll send Fundraising List emails when an intern sends you their list of potential donors and Advocate Flier (optional). Interns are required to submit a document with the names and addresses of contacts they're reaching out to for donations. Copy their information from the excel doc and paste it at the bottom of the My Donors spreadsheet. Reply back with the canned response "Thank you for the flier/list."

- If they do not send their Advocate Flier, remove that part of your reply.
- If they do not send their list of potential donors as an excel doc, reply back using the canned response, "Need Fundraising List in Excel Format."

Crowdrise:

You do not need to send out any replies to emails from Crowdrise. The only ones that will need some work is if the email subject says that someone has joined our fundraising team or set up a new campaign. If this happens, copy the URL of the new campaign and paste it into the Master Volunteer List for that specific intern (the Crowdrise links appear all the way to the right on the spreadsheet). We are currently transitioning from Crowdrise to Little Green Light for our online platforms, so the number of these emails should decrease. Eventually we will not need to worry about them anymore.

Automatic Emails:

We will often receive automatic emails from Crowdrise and Little Green Light. We have set up several filters to sort through our emails so our inbox doesn't get too cluttered. Many of the labels will already appear right when we receive the email based on keywords in the subject line or in the message itself.

MANAGING THE MAIL

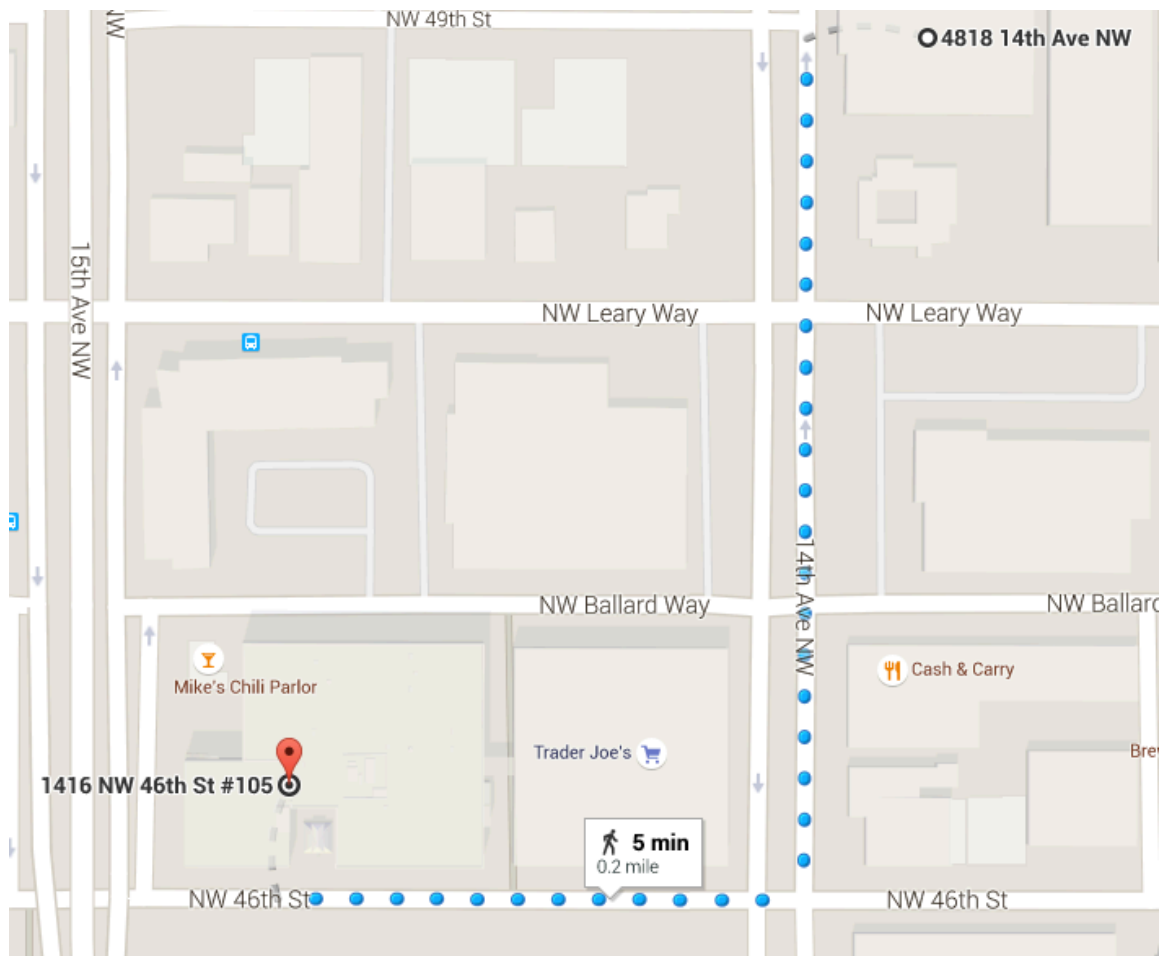
TASK 2 OF 8

In order for our office and programs to run smoothly, we need to make sure that mail gets in and out of our office as soon as possible. After taking some time in the morning to go through the donors@borgenproject.org, you'll want to make a trip to the UPS Store. Grab any mail, letters or envelopes in the office that are stamped and prepped and bring them to the UPS Store. Just put them on their desk and tell the store clerk that they are ready to send out.

Next, use your key (ask your manager for access to this) and open up our mailbox (#145) and grab any mail that was sent to The Borgen Project. You may need to sign off on any large packages (ask your manager to have you authorized to do this).

Our mailing address is:
1416 NW 46th Street, Suite 105 PMB 145
Seattle, WA 98107

Here's how to get from our office to the UPS Store:



PROCESSING MAILED IN DONATIONS

TASK 3 OF 8

The cash and check donations will always be a top priority because it is literally money that we aren't using. We also need to get them deposited as quickly as possible not only so that we have the records, but also so that the donor can see we received their donation. Please use discretion when processing cash and checks. Don't discuss donors or leave checks visible on your desk.

Processing Cash and Checks:

- Process each donation into the [Donation Tracker – 2015 Donations](#) with the **donor's name, address, amount, date donated, date deposited** and **volunteer/intern contact**. If the volunteer/intern is not listed on the check or envelope, search the donor's name in the [My Donors](#) spreadsheet to see if that donor is connected to any intern. If nothing still comes up, try searching the address listed on the donor's check, as it might have been sent by the husband/wife of the intern's contact. Try to eliminate as many "unknown" donations as possible. Unknown means that we have the donor's name, but do not know what intern they are supporting. Since all interns, including you, are fundraising for the \$500 goal, we want to make sure that all donations are properly assigned to each campaign.
- Most of the classifications will be **SF** (staff fundraising). If the donation is unknown, or not connected to an intern, leave it blank. The **CC** is reserved for checks from Capitol One, for the credit card program.
- The "**Date Donated**" column should match the day the check was written and cash can be the day it was received.

Depositing Checks:

- Stamp each check with our BECU stamp to endorse them.
- Use the BECU app on the office iPod to deposit them (ask your manager how to do this and to log you into our account)
- Once all checks are deposited, place them into the appropriate section of our 2015 Deposits Binder.

Depositing Cash:

- Place the cash in the blue bank bag next to the 2015 Deposits Binder and Clint will take them to the bank.

PROCESSING ONLINE DONATIONS

TASK 4 OF 8

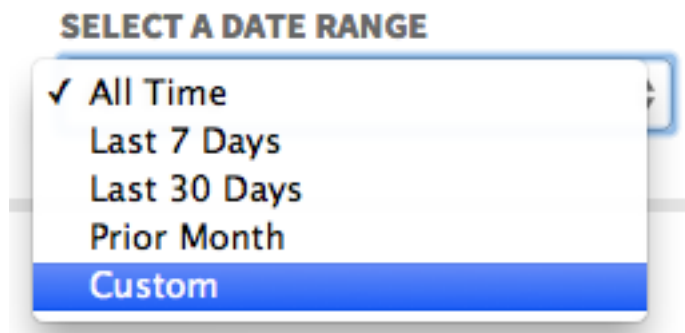
There are three main types of online donations made to The Borgen Project: **Crowdrise, Donate.ly, and Little Green Light**. Your job will be to check who donated through each of these sources and then add them to our Donation Tracker – 2015 Donations spreadsheet.

Crowdrise:

Username: donors@borgenproject.org

Password: brazil200

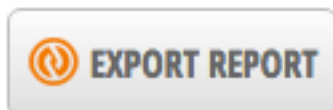
Go to the [Crowdrise: Report Center](#) and log in using the information above. Next, go to Select A Date Range and choose Custom. You'll want to process anything that hasn't been done before (excluding today, since you only want to process days that are complete).



After selecting your date range, click Run Report.



Make sure that they are all new donations (you don't want to process the same donation twice). Then click Export Report.



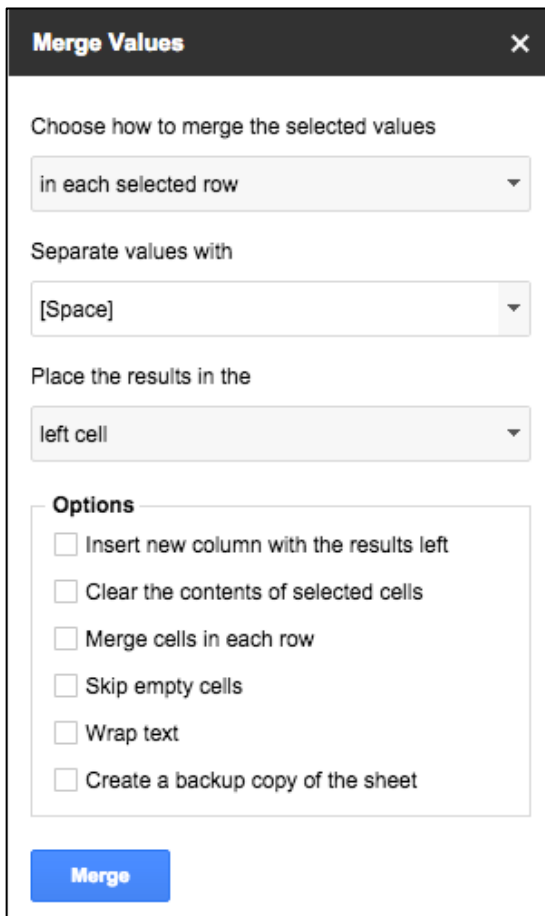
PROCESSING ONLINE DONATIONS

TASK 4 OF 8

You will be able download the Crowdrise Report as an excel/csv file. The easiest way to get the data onto Google Sheets is to compose a new email in the donors@borgenproject.org email account, attach the csv file, and send the email to donors@borgenproject.org. You can then open it up in Google Sheets.

From there you'll need to copy/paste the information from the Crowdrise Report to the [Donation Tracker – 2015 Donations](#). The easiest way to do this is to organize the report columns to look like the Donation Tracker's.

I strongly recommend using the Google Sheets Add-On: Merge Values. Click [here](#) to install it on the donor's account, if you do not already see it when accessing a spreadsheet on Google Sheets. To use Merge Values, open an excel/csv document in Google Sheets and click Add-ons. You will see Merge Values, click that and then hit start. The Merge Values screen will pop-up. Make sure your screen looks like this.



The screenshot shows the 'Merge Values' dialog box. It has a title bar with a close button. The main area contains three dropdown menus: 'Choose how to merge the selected values' (set to 'in each selected row'), 'Separate values with' (set to '[Space]'), and 'Place the results in the' (set to 'left cell'). Below these is an 'Options' section with six checkboxes: 'Insert new column with the results left', 'Clear the contents of selected cells', 'Merge cells in each row', 'Skip empty cells', 'Wrap text', and 'Create a backup copy of the sheet'. At the bottom is a blue 'Merge' button.

A	B
First Name	Last Name
Clark	Kent
Bruce	Wayne
Hal	Jordan
Barry	Allen
Oliver	Queen

Select the text you want and hit the blue Merge button.

Full Name
Clark Kent
Bruce Wayne
Hal Jordan
Barry Allen
Oliver Queen

PROCESSING ONLINE DONATIONS TASK 4 OF 8

Once the Crowdrise Report is formatted to look like the [Donation Tracker – 2015 Donations](#) spreadsheet, all you need to do is copy/paste the information into the Donation Tracker. The Crowdrise Report will initially have a lot of data, but most of it you do not need and it can be deleted. Your Crowdrise Report should look like this before copying the info for the Donation Tracker.

	A	B	C	D	E	F	G	H	I
1	Donor's Name	Donor Email	Donor Address 1	City	State	Zip	Transaction Date	Intern's Name	Donation Amount
2	Clark Kent	feelingsuper@verizon.net	6782 N Metropolis Rd	Arlington	VA	22207	8/26/2015	Kara Zor-El	100
3	Bruce Wayne	ihatebats@att.net	1542 Gotham St. Apt. 15	Joshua	TX	76058	8/28/2015	Dick Grayson	230
4	Hal Jordan	dontmakeitanimated@gmail.com	9871 Coast Cir.	Woodside	NY	11377	8/28/2015	John Stewart	10
5	Barry Allen	toofast@yahoo.com	1302 Central Ave N.	Brooklyn	NY	11226	8/28/2015	Wally West	30
6	Oliver Queen	youhavefailedthiscity@hotmail.com	9267 Star Road NE	Atlanta	GA	30307	8/29/2015	Roy Harper	100

Fill out any remaining info like if the donation is for an intern and whom it was processed by and you're all set!

Donate.ly:

Username: general@borgenproject.org

Password: atlanta34

Sign into Donate.ly [here](#) using the login information above. Select The Borgen Project account to access and then click "Manage Your Donations." You will now be able to view all donations made online through the Donate.ly system. We are switching over to Little Green Light as our primary donation system, so the only new donations on here should be recurring ones from before the switch.

Go to the right-hand side and select Date Range. Put in the dates for any new donations (excluding today since we only want to process complete days).

Date Range (format: 2014-04-03)

Start Date

End Date

PROCESSING ONLINE DONATIONS

TASK 4 OF 8

After selecting your date range, click Export Results in the bottom right-hand corner of the screen.

EXPORT RESULTS

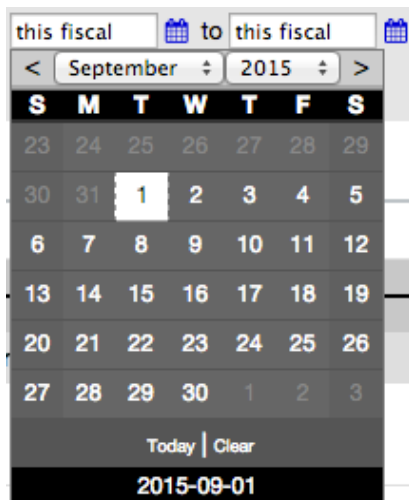
The process from here on out is nearly identical to Crowdrise in terms of organizing the report in Google Sheets, and then copying and pasting the information into the [Donation Tracker – 2015 Donations](#) spreadsheet. The only difference is that, unlike Crowdrise, Donate.ly doesn't list the intern's name. So you will need to go into the [My Donors](#) spreadsheet and search for the donor's name and see which intern they are connected to. If nothing pops up, search the donor's address, as the donation may have come from the husband/wife of the contact. Again, we want as few "unknown" donations as possible and want all donations to go to the correct campaigns.

Little Green Light:

Username: donors@borgenproject.org

Password: africa1

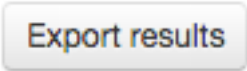
Go to Little Green Light's fundraising page [here](#) and login with the information above. Similar to Crowdrise and Donate.ly, you'll want to first set a date range to only see new donations that have not been processed yet. Click on the small blue calendar button to set the date ranges.



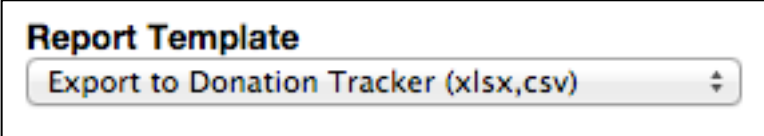
PROCESSING ONLINE DONATIONS

TASK 4 OF 8

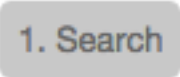
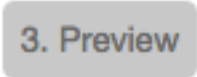
After selecting your date range, click Export Results in the top right-hand corner of the screen.

A light gray button with rounded corners and a thin border, containing the text "Export results" in a dark gray sans-serif font.

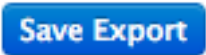
Under Report Template, choose “Export to Donation Tracker.”

A screenshot of a web interface showing a dropdown menu. The menu is titled "Report Template" in bold. Below the title is a selection box with the text "Export to Donation Tracker (xlsx,csv)" and a small downward arrow icon on the right.

Click “Next” or go straight to Save Export step.

A light gray button with rounded corners and a thin border, containing the text "1. Search" in a dark gray sans-serif font.A light gray button with rounded corners and a thin border, containing the text "2. Customize" in a dark gray sans-serif font.A light gray button with rounded corners and a thin border, containing the text "3. Preview" in a dark gray sans-serif font.A light gray button with rounded corners and a thin border, containing the text "4. Save Export" in a dark gray sans-serif font.

Then hit the blue Save Export button.

A blue button with rounded corners and a thin border, containing the text "Save Export" in a white sans-serif font.

The export will automatically be formatted to resemble the donation tracker so you will not need to reformat much. Just use Merge Values to combine the first and last names of the donors to make the information easy to copy/paste. You'll also need to check the [My Donors](#) spreadsheet to see which intern the donor is connected to.

FUNDRAISING LETTERS

TASK 5 OF 8

Prep Fundraising Letters:

All of the fundraising letters are sent to the office first from our national team of interns. We pull their data and prepare the letters before sending out the official copy to the intern's list of potential donors. All interns send a minimum of 15 fundraising letters, and it takes roughly an hour on our part to prepare one packet of these. Here are the steps you'll need to quickly prep fundraising letters.

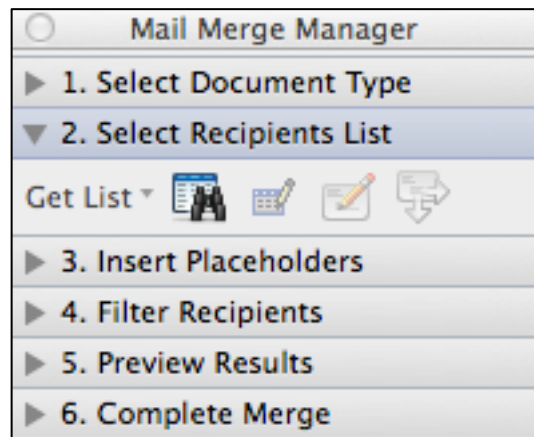
1. Check to make sure we have the intern's fundraising list
 - a. We can't do anything if we haven't received their list of potential donors. If we haven't gotten them yet, send the intern a message using the canned response, "Need Electronic Copy of Fundraising List."
2. Update Verify Document
 - a. Add the intern's name and their information to the [Verify Document](#)
3. Copy fundraising list from [My Donors](#)
 - a. Search for the intern's name with command-F, and copy their data
4. Paste data into "Excel Doc for Fundraising Letters"
 - a. Download the mail merge documents and open "Excel Doc for Fundraising Letters"
 - b. Paste the data from the intern's fundraising list into the spreadsheet
5. Reformat zip codes, names, etc. Then save doc.
 - a. Many zip codes won't display correctly if they start with a zero. (So the five-digit zip code 09812 will instead look like 9812). To fix this, highlight the zip code section and click command-1 or right-click and hit Format Cells. Go to "Special" and then select Zip Code.
 - b. Also quickly double check that the names of potential donors and city/states are spelled correctly

FUNDRAISING LETTERS

TASK 5 OF 8

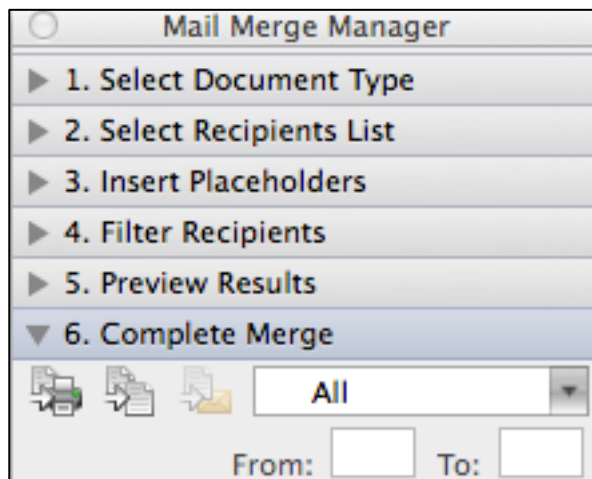
6. Open “Word Doc for Fundraising Letters”

- a. If prompted click Trust or Okay, if you need to open the document.
- b. Go into Tools and select Mail Merge Manager.
- c. In step 2, Select Recipients List, select “Get List,” and then “Open Data Source” and choose the “Excel Doc for Fundraising Letters.” Click Okay to trust the excel doc, and then Okay again to select the entire worksheet. You will only need to do this the first time you open the document.



7. Complete Merge

- a. Click the last step, Complete Merge, and click the 2nd or middle icon, “Merge to New Document.” This will open a new document with your completed envelopes.



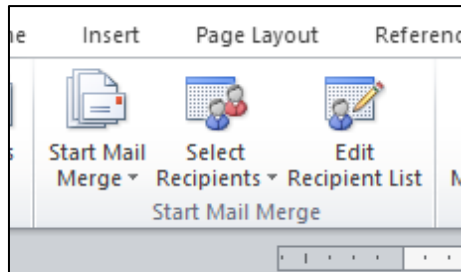
FUNDRAISING LETTERS

TASK 5 OF 8

Mail merge on a PC is slightly different than for a Mac. Follow the steps below to complete the mail merge on a PC.

Open Word Doc:

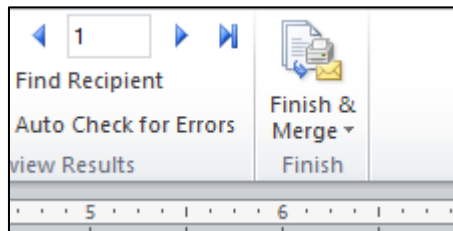
- If prompted click Trust or Okay, if you need to open the document
- Click on the Mailings tab at the top (four tabs down from File)
- Click Select Recipients then Use Existing List under the drop down menu



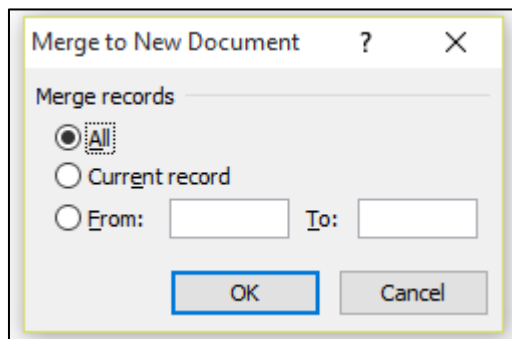
- Find the Excel doc in your computer files
- Click Open and then Okay in the Select Table pop up

Complete Merge:

- Click Finish and Merge and then Edit Individual Documents... on the drop down menu



- Click Okay to finish the merge!



FUNDRAISING LETTERS

TASK 5 OF 8

8. Print Envelopes

- a. Print the new document you just created and then close it out. No need to save it. You should save the “Word Doc for Fundraising Letters” so that it remembers that it is linked to “Excel Doc for Fundraising Letters.” Ask your manager where to find the envelopes and how to load them into the printer.

9. Print Advocate Fliers

- a. If the intern sent an Advocate flier, print those out as well. You can search the intern’s name in the donors@borgenproject.org email account to find the flier. You’ll want to print out the same number as you had for the envelopes since one flier will go in each envelopes.

10. Return Envelopes

- a. Ask your manager where to find the return envelopes and grab the same number as the envelopes and Advocate fliers you printed. There should be one of each for all letters.
- b. Write the intern’s name on the back of each return envelope. This way when we receive a donation we will know whom it is for.

11. Stuff Envelopes

- a. Put the letter, Advocate flier and return envelope into each regular envelope (make sure you put the letters in the correct envelopes). Don’t mix up the names! Put the letter on top of the advocate flyer when folding, and have the side with the intern's name on the return envelope facing outward so it’s the first thing you see when you open the envelope.

12. Send Notification

- a. Send the intern a notification that we received their letters and will send them out shortly, use canned response “Fundraising Letters Received.” Also make a note of this in the [Verify Document](#).

13. Stamp and Seal

- a. Have your manager double check your work and then stamp and seal the envelopes and have them ready to send out tomorrow.


FUNDRAISING UPDATES

TASK 6 OF 8

We hit on this before, but we want to make sure that interns are always up to date on how many donations we have received for them. So try to send Fundraising Updates after processing all donations every day. Obviously there are going to be days when you may have a lot of fundraising letters to do, or there could be an abnormally high volume of donations that need to be processed. So sending the Fundraising Updates is definitely one of the lower priority tasks that need to be done. Interns can survive a few days without an update. But try to update all interns on their new amounts at least once a week.

The instructions below were listed before on page 7 when discussing how to handle specific emails and is repeated below.

Update:

You'll send an Update email when an intern requests a fundraising total update. You'll also be sending these everyday after processing all the donations for the day to any interns who received new donations. Use the "Fundraising Update" canned response. To send a canned response, click the  button in the bottom right corner of an email next to the trash icon.

When sending an update, you'll need to include the intern's current fundraising total and all the donations they've received so far. For each donor, you'll need to include the donor's name, amount donated, type of donation and date donated.

FUNDRAISING UPDATES

TASK 6 OF 8

Below is an example email we would send out to emails giving them a fundraising update.

Hi Stan,

You're currently at **\$425** towards your fundraising goal!

We have received donations from:

Donor's Name	Amount	Type of Donation	Date Donated
Tony Stark	\$100.00	Check	6/9/2015
Steve Rogers	\$50.00	Check	6/11/2015
Bruce Banner	\$25.00	Online Donation	6/12/2015
Thor	\$25.00	Check	6/14/2015
Natasha Romanoff	\$100.00	Cash	7/1/2015
Clint Barton	\$50.00	Paypal	7/16/2015
Nick Fury	\$75.00	<u>Crowdrise</u>	7/19/2015

Make sure to send thank you letters!

Best,
[Your Name Here]

--

Donor Relations
The Borgen Project
www.borgenproject.org

THANK YOU IRS RECEIPTS

TASK 7 OF 8

We want to send out Thank You letters and IRS receipts as often as possible. But similar to Fundraising Updates, this is a lower priority task, as you can always do a large batch of Thank You IRS Receipts at the end of the week, or even the end of the month if you are backed up on everything else.

The process will be quite similar to the Fundraising Letters, as this also uses mail merge documents.

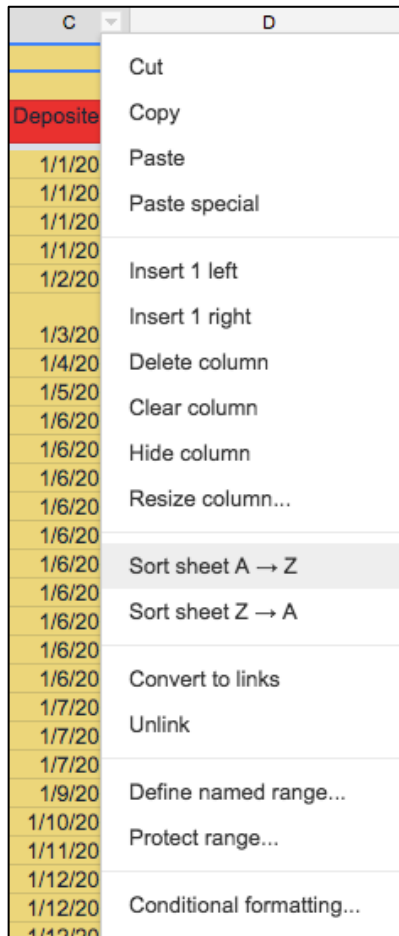
1. Open “Excel Doc for IRS Receipts”
 - a. Download the mail merge documents and open “Excel Doc for IRS Receipts.”
2. Copy Information from Donation Tracker
 - a. Copy all the information from the Donation Tracker – 2015 Donations that has not already had Thank You Letters sent out. Paste this information into the “Excel Doc for IRS Receipts.” Reformat the zip codes if needed.
3. Open “Word Doc for IRS Receipts”
 - a. Open “Word Doc for IRS Receipts” and use Mail Merge Manager to link this document to “Excel Doc for IRS Receipts” and then complete merge to new document and print.
4. Open “Word Doc for Envelopes”
 - a. Same process. Use Mail Merge Manager to link this document to “Excel Doc for IRS Receipts” and then complete merge to new document and print.
5. Stuff Envelopes
 - a. Write a quick handwritten note to the Thank You IRS Receipt. A simple. “Thanks so much for supporting The Borgen Project” followed by your signature is great and gives our letters a personal touch!
 - b. Put the Thank You IRS Receipt into the respective envelope
6. Stamp and Seal
 - a. Have your manager double check your work and then stamp and seal the envelopes and have them ready to send out tomorrow.

STATS TASK 8 OF 8

Completing stats is a task that only needs to be worked on once a week and at the end of every month, but it is probably one of the most challenging of the tasks. This is because it involves a large amount of numbers and making sure that all our financial data is logged appropriately.

Stats Details 2015 – Weekly Stats

Make a copy of the [Donation Tracker](#). Highlight the top sections as red so you know you're working on a copy. If you are going to make large edits on the Donation Tracker, ALWAYS make sure you are working on a copy. Organize the spreadsheet by the date deposited.



Click the arrow or right click on the section “Deposited” and select Sort Sheet A --> Z.

Next, choose a date range of the stats you want. For example: 8/1/2015 – 8/7/2015. And delete any other data. Once you do this, you can delete the column for Deposited, since you have all the dates you need.

We only need our Team Member’s Name section, but if the donation is unknown then there will be a blank space since there is no team member. Copy/paste the donor’s name into this section instead. Once there are no more blank spaces, you can delete the column for Donor’s Name.

Change any donations that say Donate.ly or Little Green Light to “Online Donation” since our interns don’t know the systems we use on the backend.

Organize your new spreadsheet by Team. Keep Team Member’s Name, Amount, and Type of Donation in that order.

STATS TASK 8 OF 8

The end product should look like this:

Team	Team Members Name	Type of Donation	Amount
Content	Thor	Check	\$25.00
Content	Tony Stark	Crowdrise	\$100.00
Content	Steve Rogers	Crowdrise	\$100.00
PA	Bruce Banner	Crowdrise	\$10.00
PA	Natasha Romanoff	Crowdrise	\$10.00
RD/Advocate	Clint Barton	Cash	\$15.00
Seattle	Nick Fury	Check	\$25.00
Seattle	Hal Jordan	Little Green Light	\$25.00
Seattle	Bruce Wayne	Crowdrise	\$20.00
Seattle	Clark kent	Donate.ly	\$100.00
Unknown	Barry Allen	Donate.ly	\$10.00
Unknown	Oliver Queen	Little Green Light	\$10.00

Now you will be able to quickly copy and paste your information into the Stats Details 2015 spreadsheet, found [here](#).

Once copied and pasted, it should look like this:

Week (2015)	Content Team Member Name	Donation Amount	Donation Type	Political Team Member Name	Donation Amount	Donation Type	Seattle Office Name	Donation Amount	Donation Type	Unknown Name	Donation Amount	Donation Type	RD's & Advocates Name	Donation Amount	Donation Type
8/1-8/7	Tony Stark	\$100.00	Crowdrise	Bruce Banner	\$10.00	Crowdrise	Nick Fury	\$25.00	Check	Barry Allen	\$10.00	Donate.ly	Clint Barton	\$15.00	Cash
	Steve Rogers	\$100.00	Crowdrise	Natasha Romano	\$10.00	Crowdrise	Clark kent	\$100.00	Donate.ly	Oliver Queen	\$10.00	Little Green Light			
	Thor	\$25.00	Check				Bruce Wayne	\$20.00	Crowdrise						
							Hal Jordan	\$25.00	Little Green Light						
Donation Totals:		\$225.00			\$20			\$170			\$20			\$15	

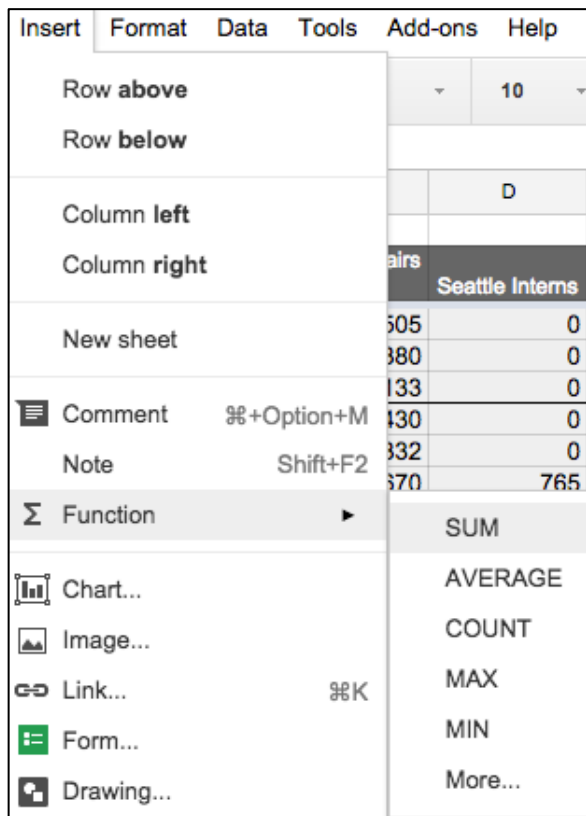
Here's a close up of one section, as it is hard to see.

Week (2015)	Content Team Member Name	Donation Amount	Donation Type
8/1-8/7			
	Tony Stark	\$100.00	Crowdrise
	Steve Rogers	\$100.00	Crowdrise
	Thor	\$25.00	Check
Donation Totals:		\$225.00	

STATS TASK 8 OF 8

Once you have the information in the Stats Details 2015 (Weekly Stats) spreadsheet, we need to put it into the Fundraising Stats 2015 (Monthly Stats) spreadsheet, which you can find [here](#). It is as simple as copying and pasting the totals for each time and will look like this.

Amount Raised Per Month							
Month	Content Team	Political Affairs Team	Seattle Interns	Unknown	RD/Advocate	Total Amount	Total # of Donors
8/1-8/7	225	20	170	20	15	450	12



The easiest way to get the totals for long lists of amounts is to click the blank cell where you want the amount, go to Insert=>Function=>Sum, and then select the data you want to pull from.

You'll also want to use this feature when doing the fundraising updates and for the weekly stats.

STATS TASK 8 OF 8

The next step will be to do the same thing but categorized by type of donation. The quickest way to do this is to go back into the copy of the Donation Tracker, and sort the sheet by type of donation so that it looks like this:

Type of Donation	Team Members Name	Amount	Team
Cash	Clint Barton	\$15.00	RD/Advocate
Check	Thor	\$25.00	Content
Check	Nick Fury	\$25.00	Seattle
Crowdrise	Tony Stark	\$100.00	Content
Crowdrise	Steve Rogers	\$100.00	Content
Crowdrise	Bruce Banner	\$10.00	PA
Crowdrise	Natasha Romanoff	\$10.00	PA
Crowdrise	Bruce Wayne	\$20.00	Seattle
Donate.ly	Clark kent	\$100.00	Seattle
Donate.ly	Barry Allen	\$10.00	Unknown
Little Green Light	Hal Jordan	\$25.00	Seattle
Little Green Light	Oliver Queen	\$10.00	Unknown

Then you can copy/paste the data into the Fundraising Stats 2015 spreadsheet.

Method of Paying						
Month	Mail	CrowdRise	Donate.ly Website	Little Green Light	Other	Total Amount
8/1-8/7	65	240	110	35	0	450

Make sure the total amount from the method of paying matches the total amount from when you organized the amounts by team!!!

STATS TASK 8 OF 8

Finally, you'll need to input the total amounts into each month! And you're done!

Amount Raised Per Month							
Month	Content Team	Political Affairs Team	Seattle Interns	Unknown	RD/Advocate	Total Amount	Total # of Donors
January 2015	1011	1406.48	829	5301	/	8547.48	64
February 2015	2055	2651	1167.25	7761.23	/	13634.48	108
March 2015	879	1975	560	26872	161	30447	115
April 2015	2366	2425.65	315	6743.63	30	11880.28	143
May 2015	3095	1630	10	6899	120	11754	94
June 2015	3287	3062	1520	8331.83	150	16350.83	182
July 2015	9189	7775.5	2815.06	3806	540	29719.56	444
August 2015							
September 2015							
October 2015							
November 2015							
December 2015							

Method of Paying						
Month	Mail	CrowdRise	Donate.ly Website	Little Green Light	Other	Total Amount
January 2015	6326.48	1620	246	/	355	8547.48
February 2015	10012.48	3065	461	/	96	13634.48
March 2015	27155	2307	590	/	395	30477
April 2015	8430.34	2485.94	690	/	274	11880.28
May 2015	5730	3290	1724	/	1010	11754
June 2015	10175.83	5139	781	/	255	16350.83
July 2015	13437.5	12411	3276	231	364.06	29719.56
August 2015						
September 2015						
October 2015						
November 2015						
December 2015						

END OF INTERNSHIP

Performance Review Form:

This is filled out by your manager at the end of your internship and goes on file. Please read carefully, so you know the policy for evaluating your impact.

Name:

Title:

Start Date:

End Date:

Hours/Parktime Review:

- Number of days late to work:
- Number of days left work early:
- Number of days missed:

Fundraising Impact:

- Number of fundraising letters sent:
- Number of donors:
- Total amount raised (Minimum \$500):

Impact with Telecommuting Hours:

- Was the weekly report ever late? How often?
- Were weekly targets met? Did they utilize the outside of office hours.
- Were events completed within 2 months of being hired?

Impact and Outcomes:

Rate on a Scale of 1 to 5 - (*1 bad, 3 average, 5 among the best we've seen*)

- Quality of work:
- Speed and daily impact:
- Team player:

Overall:

- Internship hours and requirements were completed?
- *The dedication and impact of staffer was? (bad, average, good, among the best we've ever seen)*
- Did the staffer perform well enough that the organization can be a reference for them?