Caging and Data Capture

Presented By:

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Presentation Goal

To provide the attendee with an understanding of the caging, lockbox, imaging, data capture and donor appreciation process.

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The short overview of this service includes receiving donor mail, processing the donations, facilitating the depositing of all contributions to the organization's bank account, capturing all of the data information, providing mailing results and helping to strengthen donor relationships.

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Account Set-Up

- Procedure Manual - Business Rules
  An instruction guide on how to handle your responses.

  1. Post Office Box
  2. Banking Instructions
  3. Batching Instructions
  4. Processing Instructions
  5. Database Instructions/Rules
  6. Data Capture and Formats

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- Post Office Box

  Setting up the return address for the donor responses.

  1. Location Decision (Testing)
  2. Set-Up Process and Artwork
  3. Type of Mail (Business Reply Account)
  4. Fees (Your PO Box)
  5. Seeding for Delivery
  6. Post Office Accounts Management

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- **Receipt and Sortation Process**
  How the responses are received, sorted and counted.

  1. Covered Mail Trays or Packages
  2. Timing Based on Location
  3. Maintaining the Integrity of the Mail
  4. Special Instruction
  5. Fine Sorting
  6. Opening/Counting

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- Caging

  The processing of the contents of the responses including handling of checks, cash and credit cards.

  1. Business Rules
  2. Batch Instruction
  3. Separation by Payment/Response Type
  4. Rejects/Exceptions
  5. Comment Mail
  6. Flag Code Assignment

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- Specialized Caging
  Focus on high touch items.

  1. Matching Contributions
  2. Memorials/Tributes
  3. Sustainer Program
  4. High Dollar Donations
  5. Exception Mail Processing
  6. Donor Requests

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- Credit Card Processing
  Why these transactions must be processed separately.

  1. Merchant Account
  2. PCI DSS Compliance
  3. Credit Card Processor
  4. Separate Process
  5. Sustainer Processing
  6. Security

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- Depositing and Banking

  The procedures followed for preparing deposits and making sure all money is deposited to your account.

  1. Preparation of Deposits
  2. Audit
  3. Deposit Logs and Reports
  4. Cash and Checks
  5. Image Cash Letter
  6. Separate Bank Accounts

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- Data Capture

  This process provides crucial information for the continued success of all future mailings as well as building strong donor relationships.

  1. Scanning and Scan-Lines
  2. Digital Imaging of Documents (100%)
  3. Image Retrieval
  4. Manual Data Entry/On-line
  5. Data Transmission
  6. Reporting and Analysis

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- Security

The secure processing of donations is of paramount concern to all organizations.

1. Background Checks
2. Security Cards
3. Surveillance Cameras
4. Vaults
5. Cash Seeding Process
6. Security Audits

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Donor Appreciation

- Acknowledgement/Thank You
  Strengthening the relationship between the non-profit and the donor through a continuing "thank you" program.

  1. Strategic Message
  2. Package Format (letter only/return device/receipt)
  3. Window, Closed Face, Stamp
  4. High Donors (a call followed by handwritten)
  5. Timing
  6. Premium

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Thank You!

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