

DRAFT

Public Lands Foundation
Membership and Donations
Business Guide
January 16, 2026

The Public Lands Foundation was established in 1987 to “advocate and work for the retention of America’s Public Lands in public hands, professionally and sustainably managed for responsible common use and enjoyment.”

The Public Lands Foundation (PLF) is a non-profit, tax-exempt organization under the 501 (c)(3) tax code (EIN 54-1437054). The PLF work is funded through membership fees and donations, and donations from other individuals, businesses, and corporations. It is critical that membership and donation information is consistently captured and reported in a timely and systematic manner for use by the PLF Executive Committee, Board of Directors and other officers and members of the PLF working on specific projects.

This Business Guide is specific to management of membership and donation information. This document services as an internal manual for business definitions, standard operating procedures and standard reports. This guide will outline and explain what membership and information is needed, why the information is needed; and how that information is captured, stored and used. It will also discuss integrated tools used to gather and manage this information.

Purpose:

The purpose of the PLF Membership and Donation Business Guide is to standardize internal operations regarding the acquisition and management of membership and donation information.

Audience:

The audience for this information is the PLF members appointed to gather, manage and report out information needed by the organization for membership and donation information.

In addition, information generated from the administration of this information will benefit the PLF Executive Committee, the Board of Directors, the general membership and non-membership individuals, organizations or corporations seeking member and donation information.

Content:

This Business Guide will clarify PLF membership and donation policies and definitions, specific information management workflows, step-by-step procedures (SOPS) and information necessary to administer integrated software tools. It will also identify roles and responsibilities of the following:

- President
- Vice President
- Executive Board
- Operations Officer
- Secretary
- Data Base Administrator – primary, associate
- Bookkeeper
- Treasurer
- Membership Officer
- PLF Website Administrator
- Memorial Wall Administrator
- Executive Director

Scope:

The PLF Membership and Donation Business Guide is specific to the management of this information for specific use of the information to meet the non-profits business needs. Business needs for this specific information will be clarified in the Guide.

Member and Non-Member Donation Policies

The PLF is a member driven organization made up of retired Bureau of Land Management (BLM) employees and others who believe strongly in the professional management of Public Lands administered by the BLM. The PLF general/advocacy operating budget, the George Lee Scholarships, the Student Congress and the Endowment Fund are all funded by membership dues, donations and grants. Donations are made by members and non-members. Membership dues are considered donations.

Members benefit from joining the PLF by receiving the quarterly newsletter, voting in Board of Directors annual elections, participating in advocacy activities and by volunteering to serve on working committees and the Board of Directors. Non-members benefit through PLF actions which support the PLF Mission and their desired outcomes.

Members join and renew membership in PLF mostly through annual membership renewals using the Membership form on the PLF website at “publicland.org”. Members may submit this form electronically on the website or they may mail or provide the form personally to the PLF Bookkeeper. Members and non-member donors make donations using the Donations form on the PLF website or by giving the donation to the Bookkeeper in person or via the mail.

PLF Membership and Non-Membership Donations are collected and managed in 2 main ways:

1. Website information collection and administration. Member and Donor personally identifying information and submittal electronically of the donation via credit card using PayPal or Stripe. Donation information received from credit card third parties such as PayPal or Stripe which is sent to the PLF bank account and then processed by the Bookkeeper using QuickBooks and updated in the website database.
2. Membership forms and/or donations acquired through letters or onsite personal interactions with the Bookkeeper and paid via cash, Zelle, Venmo, PayPay or check. Members can join or renew their membership by sending a complete form and check to the PLF Bookkeeper or by providing renewal information and a check or cash to the PLF Bookkeeper in person. All other donations from members or non-members can be made the same way.

Grants are collected directly by the Bookkeeper, separate from the membership and donation management system. **(is this correct??)**

It is the policy of the PLF that a standardized email acknowledgement will be sent to the donor for donations under \$250.

It is the policy of the PLF that a personalized email or letter will be sent by the PLF President to the donor for donations \$250 or more.

Definitions

Current (? Active? Annual, Suggest using Current, it's not as hot a word) Member:

There are two types of Current Members:

1. A person who has paid the annual membership dues (fee). Annual membership dues cover a period of 12 months from the date of payment received. Annual membership dues go into the General/Advocacy unrestricted fund.
2. A person who is granted 12-month membership gratis to build support and interest in the PLF Mission. The 12 month period starts upon receipt of gratis membership by the person receiving it.

Lifetime Member: This is a grandfathered type of membership that is valid and active for the life of the person who received this type of membership. This type of membership is no longer available for new participants as of **DATE**.

Past (? Inactive) Members: A person whose 12-month membership has expired.

Past Member – Deceased – NOTE: *clarify if this is a separate inactive/past member category of a label and placed in separate date file related to the Memorial Wall.*

Non-Member Donor: A person, organization or business that donates funding or in-kind support of the PLF Mission.

Level of Membership

Current (? Active, Annual?) Membership: An annual 12-month membership in PLF includes the following donation levels:

Regular:	\$ 50.00
Contributing:	\$100.00
Sponsoring:	\$200.00
Patron:	\$500.00
Gratis:	\$ 0

Membership dues (fees – need to decide and be consistent) are considered donations to a tax-deductible non-profit organization and are therefore considered as a type of

donation within the membership and donation information management system. Membership Dues are directed into the General/Advocacy unrestricted fund.

Members have the option to include a 3% (current, subject to change) credit card processing fee when using the website Stripe or PayPal option to submit payment.

Types of Donations: There are 4 types of financial donations accepted by the PLF. Donations are received from members and non-members in all fund categories.

The 4 types of donations are:

1. Unrestricted donations to General/Advocacy, which is the general operating fund to be used as needed by the PLF Officers per their approved annual budget. (**? Clarify wording used “non-directed, Board discretionary – could confuse discretionary vs non-discretionary funding needed**)
2. Restricted donations to the George Lee Scholarship Fund. Only used to fund annual college and university student scholarships.
3. Restricted donations to fund the John Freemuth Student Congress.
4. Restricted donations to fund the Endowment Fund for the long-term sustainability of PLF’s advocacy and general operations. (**?? Are any donations used for other purposes such as scholarships or the Student Congress**)
5. **??? Should we add In-Kind donations? Are these ever tracked and if yes, purpose?**

Any of these types of donations may be specifically identified by the donor as a Memorial donation in memory of someone who has passed away or as an Honorary donation, honoring the work of a current or former BLM employee. (**question – are these known as Tributes??**)

Data Dictionary

Member Identifying Data:

First Name (Required)

Last Name (Required)

Mailing Address (Required?)

Street Address or PO Box

City

State

Zip Code (**Required Suggest Requiring Zip Code at a minimum for sorting and contact purposes**)

Country

Email Address (Required?) (***Suggest Either Mailing Address or Email Address Be Required***)

Phone Number (Optional)

Landline

Mobile

NOTE: *Clarify if email or cell phone is provided, is there a business need to then offer option to receive or not receive messages via phone or text?? Who would use this function if provided.*

Membership Level

Regular

Contributing

Sponsoring

Patron

Lifetime

Gratis

Membership Status

Current (***Suggest changing – Active, Inactive to Current, Past***)

Past

PLF Officer

Board Member

Member at Large

State Representative

Executive Director

President

Vice President

Secretary
Treasurer
Operations Director
Database Administrator
Webmaster
??

Member Affiliation

BLM Employee
BLM Retiree
BLM Former Employee
Other

Note: Membership Dues Donations are only directed to the General/Advocacy Fund.

Opt In for PLF News & Announcements Emails

Yes
No

Non-Members Identifying Data

Organization Name (if appropriate) (***note this needs to be added to the website form***)

Or

Individual Donor: First Name (Required)

Individual Donor: Last Name (Required)

Individual Co-Donor: First Name (Required)

Individual Co-Donor: Last Name (Required)

Mailing Address (Required?)

Street Address or PO Box

City

State

Zip Code (**Required – suggest Requiring Zip Code for sorting and contact purposes**)

Country

Email Address (Required?) (***Suggest Either Mailing Address or Email Address Be Required***)

Phone Number (Optional)

Landline

Mobile

NOTE: Clarify if email or cell phone is provided, is there a business need to then offer option to receive or not receive messages via phone or text?? Who would use this function if provided.

Tribute Donation (? Gift, change name for clarity?) ***NOTE: Clarify how workflow is processed for Tribute Donations that are in memory or honor of multiple people.***

No

Yes, Memorial Donation:

Memorial in name of:

Yes, Honorary Donation:

Honorary in name of:

Fund Choice for Donations:

Advocacy (non-restricted) **(This is the only choice for Membership Dues)**

George Lee Scholarship Fund (restricted)

John Freemuth Student Congress Fund (restricted)

PLF Endowment Fund (restricted)

Donation Amounts

Membership Dues

Regular: \$ 50.00

Contributing: \$100.00

Sponsoring: \$200.00

Patron: \$500.00

Gratis: \$ 0

Other:

Donations not related to membership dues:

\$ 50.00

\$ 100.00

\$ 250.00

\$ 500.00

\$1000.00

Other:

Donation Schedule

One Time

Yearly (***Note: webform says “Yearly”, should this be updated to say “Annual”?***)

Date of Payment Received

Needed for membership dues renewal date

For credit card or electronic payments requiring processing fees add 3% to the donation total

Yes

No

Opt In for PLF News & Announcements (Note: Is this an option for all donors?)

Yes

No

Monetary Donation Payment Types**Website Payment Type**

Credit Card (PLF currently uses Stripe as a 3rd party credit card payment provider)

PayPal

Check

In Person Payment Type

Credit Card (PLF currently uses Stripe as a 3rd party credit card payment provider)

PayPal

Check

Cash

Zelle

Venmo

Other?

Other Donation Types (Do these need to be tracked in the membership and donation management system or just tracked by the Treasurer and Bookkeeper outside the system or at all??)

Services (i.e. volunteer time, zoom subscriptions, etc)

Goods

Estate

Donation Anonymous

Yes

No

Note: Need to clarify that donations may be made for different purposes in 1 submittal, i.e. Tribute to Honoree and Memorial, Funds to GL Scholarship and JFSC. Is this accurate? Is this how PLF wishes to continue? If yes, then need data elements and workflow to allow multiple entry flows from single webform entry. (1 to Many)

Donation Receipts

Donations under \$250 to receive autogenerated acknowledgement and tax receipt

Donations over \$250 to receive personal handwritten or email acknowledgement and receipt (**Need to identify by who in the roles and responsibilities**)

Responsibilities By Position

The following PLF officers primarily use information from the membership and donation management system to understand that status of PLF membership and donation levels. These positions use information provided by the Data Base Administrator and other key positions. These positions do not personally run the information reports. They rely on the Data Base Administrator, Secretary, Bookkeeper, PLF Website Administrator and Memorial Wall Administrator to run membership and donation reports as required and as needed to provide information. These officers are responsible for using the membership numbers and donation information as critical metrics for financial stability, operational strategy, and community influence. These positions use membership information to contact members for national, state and local meetings or calls to action for specific events, Bureau of Land Management proposed actions such as rules, regulations, Plan decisions or policy changes. This information is also used to generate new memberships, renew memberships and to campaign for non-membership donations.

- **President:** The President has the added responsibility of writing and sending letters of personal acknowledgement or emails to donors when the donation is \$250 or more.
- **Vice President**
- **Executive Board**
- **VP DC Affairs**
- **VP Operations**
- **Secretary:** The Secretary notifies the President if donations \$250 or larger are received via the PLF mail. The President then sends the personalized acknowledgement.
- **Treasurer**
- **Student Congress Representative**
- **Membership Officer (?) *Does this position exist?***
- **Directors-at-Large**
- **State Representative**
- **Executive Director (Vacant)**

The following PLF officers and positions are the primary people responsible for providing membership and donation information to the positions listed above.

- **Database Administrator (*should this be Systems Administrator??: primary, associates*):** The Database Administrators are responsible for managing, maintaining, securing and optimizing PLF's membership and donation information. The Database Administrators are responsible for ensuring the data is

reliable, accessible and protected. The Database Administrators are responsible for system installations, configuration, performance monitoring, security, backup and recovery of information, access control, troubleshooting, functionality and reports to meet PLF business needs. The Database Administrators are responsible for working closely with the Bookkeeper to ensure that data and reports from the online (website) system align with financial data from the financial management system (currently QuickBooks).

- **Bookkeeper:** The Bookkeeper is the primary user of the membership and donation information from the online management system. This person is responsible for running monthly, quarterly, annual donation reports and associated membership numbers. The Bookkeeper is responsible for working with the Database Administrators to ensure quality control and alignment of membership and donation information in the online (website) database and the financial database (currently QuickBooks). In addition to running reports related to membership and donation numbers the Bookkeeper plays a critical role in data collection outside of website data input. The Bookkeeper receives memberships and donations outside of the website entries via mail or in person. The Bookkeeper is responsible for entering this information into the online database. **(?? Question for later is why – can QuickBooks run reports needed?)**
- **Membership Officer (?) – *Does this position exist?? If yes, need to identify their responsibilities.***
- **PLF Website Administrator:** The Website Administrator for Publicland.org is responsible for ensuring that the membership and donation forms on the website accurately request membership and donation information are required to meet PLF business requirements.??? **Are there any specific tasks associated with this position related to the membership and donation information??**
- **Memorial Wall Administrator:** Once the Memorial Wall Administrator receives information regarding a member's or past member's death, this Administrator is responsible for updating the online management system to identify members as Past and Deceased. This position then adds information to the PLF Memorial Wall, which is on Publicland.org and in the Monitor, which is the online newsletter. This is a separate action from the online management system update.

REPORTS

For business purposes the PLG officers and positions require the following reports:

Membership Numbers

1. Current Membership Numbers: Membership number queries should be able to provide the number of current members as needed. This type of report could be used monthly, quarterly, annually or for an aggregate of several years for analysis purposes such as current members on average for the past 5 years. This report is used primarily by the:
 - a. Secretary for presentation in the Monitor,
 - b. VP of Operations for use of membership information for short and long-term planning.
 - c. Bookkeeper to reconcile online membership information with the financial management information system.
 - d. Secretary, Bookkeeper and President for membership sign up and renewal acknowledgements.
2. Current membership expiration date report. Expiration date notice is needed 30 days prior to membership expiration to send the member a 30 day until your membership expires email notification requesting membership renewal. ***(Clarify – does the online system generate these letters automatically or put in a queue for the Bookkeeper or other position to process? Could this be done by Mailchimp or a different mail management system)***
3. Current membership expiration date is needed for 30 days past expiration for one final renewal request to be sent to the member with notification that their membership is cancelled but can be renewed at any time.
4. Current membership past the expiration date is moved from the current membership file into the past member file. ***(? Is a report needed for this or does the online management system do it automatically)***
5. Past Membership Numbers: Need to clarify – how far back are past membership data needed? 5 years? 10 years? 1 year. Consider keeping the past membership information active for 5 years from expiration date. This information can be queried for use in membership renewal campaigns. Once past 5 years, archive the data for future access if needed. It should not be kept as active file to safeguard past member information and active file storage space.

Current Member Donations

1. Membership donation queries should be able to provide the level of donations made by each current member and as an aggregate. This type of report could be used monthly, quarterly, annually or for an aggregate of several years for analysis purposes such as current members on average for the past 5 years. Reports are needed to label member donations as Tributes or as Anonymous, if relevant to ensure proper reporting in the Monitor.
1.
 - a. Donation type, amount and donation date should be tied to each individual member donor.
 - i. Regular Membership Dues: \$ 50.00
 - ii. Contributing Membership Dues: \$100.00
 - iii. Sponsoring Membership Dues: \$200.00
 - iv. Patron Membership Dues: \$500.00
 - v. Gratis Membership Dues: \$ 0
 - vi. Other Membership Dues:
 - vii. Non-Membership Dues Donations: \$ 50.00
\$ 100.00
\$ 250.00
\$ 500.00
\$1000.00
Other:
 - b. Donation fund type should be tied to each member donation:
 - i. Fund type:
 1. General/Advocacy (non-restricted) This is for Membership Dues which all go to this fund. Membership dues cannot be directed to other fund types. Members can donate in addition to their dues to any fund type.
 2. George Lee Scholarship Fund (restricted)
 3. John Freemuth Student Congress Fund (restricted)
 4. PLF Endowment Fund (restricted)
 - c. For any donation other than membership dues, identify if the donation is a Tribute: No or if Yes, then what Memorial or Honorarium and who
 - d. Identify if the donation is anonymous: Yes, No

Past Member Donations:

Information reported for past members includes the information in the previous section with the date of membership expiration. Reports for past member numbers and donations may be made using similar queries as above. The key difference is that these reports would only be for past members for the past 5 years. Then past member information would be archived.

Note: Currently there is Gift History within LGL. Need to clarify if this functionality is used and if so, by who and for what purpose. The decide if the functionality is needed.

The unique report is for a monthly listing of deceased members. This report is run by the Memorial Wall Administrator and is posted on the PLF Website and provided to the Secretary for inclusion in the Monitor.

Non-Member Donations

2. Non-Member donation queries should be able to provide the level of donations made by non-member individuals or organizations and as an aggregate. This type of report could be used monthly, quarterly, annually or for an aggregate of several years for analysis purposes such as non-member donations on average for the past 5 years. Reports are needed to label non-member donations as Tributes or as Anonymous, if relevant to ensure proper reporting in the Monitor.
 - a. Donation amount and date of donation should be tied to each non-member donor.
 - i. Non-Membership Dues Donations: \$ 50.00
\$ 100.00
\$ 250.00
\$ 500.00
\$1000.00
 - b. Donation fund type should be tied to each non-member donation:
 - i. Fund type:
 1. General/Advocacy (non-restricted)
 2. George Lee Scholarship Fund (restricted)
 3. John Freemuth Student Congress Fund (restricted)
 4. PLF Endowment Fund (restricted)
 - c. Identify if the non-member donation is a Tribute: No or if Yes, then what Memorial or Honorarium and who
 - d. Identify is the donation is anonymous: Yes, No

These reports are used primarily by the:

- a. Secretary for presentation in the Monitor,
- b. VP of Operations for use of membership information for short and long-term revenue planning.
- c. Bookkeeper to reconcile online membership information with the financial management information system.

- d. Treasurer for revenue planning and expenditure purposes.
- e. Secretary, Bookkeeper and President for membership sign up and renewal acknowledgements.

Member and Non-Member Contact Information

Standardized or custom reports regarding current member and non-member contact information.

Contact information (names, email address, mailing address) is used to:

- a. Acknowledge donations,
- b. Identify membership joining and renewal status and expiration date. And
- c. Send Webmaster email news blasts, calls to action and national meeting notifications.
- d. Send state and local meeting or gathering emails or mail notifications.

Current state needs clarification. Address and email contact information is being used by LGL to put standard acknowledgment emails for donations under \$250 into a queue for the Bookkeeper to process and send. Standardized emails for donations of \$250 and larger may also exist but are not processed by the Bookkeeper online. They notify the President to write a personal letter (Mailing Address needed from database) or a personal email (data needed from database).

The Secretary also personally notifies the President for mail in check donations \$250 and over by members and non-members. Not sure how any mail in check donations under \$250 are acknowledged.

The PLF Webmaster uses Mailchimp to send email blasts (and I think the Monitor) to emails – not sure if data comes from LGL to WordPress than Mailchimp or is just populated in Mailchimp from the webform???. Need to clarify and possibly streamline using Mailchimp functionality.

Report Potential

Reports regarding current and past membership contact information could be useful to each state's Board Member and State Representative to encourage state and local membership participation in meetings, social events or PLF working group efforts regarding specific work tasks. Contact information could also be beneficial for fund raising campaigns and acknowledgement.

Clarification is needed regarding in-kind, volunteer hours and other contributions such as vehicle donations or estate donations. A decision is needed regarding the capture and use of this information in the membership and donations management system or as stand-alone data kept in the financial management system administered by the Bookkeeper.

Report Queries could be:

Current Member Numbers nationally.

Past member numbers – past 5 years, 1 previous year.

Current or Past Members by State (name or number by state ID or zip code): To know number of members per state to illustrate support for PLF Mission.

Current or Past Members by State or zip code: email list for contact by Board or State Representative.

Current or Past Members by State or zip code: mailing address for contact by Board or State Representative.

Current or Past Members by State or zip code: phone number for call or text by Board or State Representative.

Non-member donation numbers and amounts nationally.

Non-member donations by State or zip code to identify and target areas around the Country providing support.

Confirmation that membership joining or renewal donation acknowledgement was sent.

Confirmation that non-membership donation was sent and if made, Tribute was individually identified in acknowledgement that was sent.

Systems to Integrate or Consider for Integration

The following systems may or may not require integration: WordPress, QuickBooks, Mailchimp, MySQL, Survey Monkey, LGL.

Workflow received from Beau. I believe this was sent as part of Courtney's records:

Membership Management – This was done by the Executive Director (position is vacant, some tasks being done by the Bookkeeper, others not being done?)

- Validate annual membership dues payments
 - Weekly review of LGL form submissions in the “Submissions Queue” (accept/reject)
 - Ensure proper membership categories, updated expiration dates, and fund assignment
 - Category: Gift: Dues
 - Fund: Unrestricted
 - Enter payments by check
 - Legacy membership autopayments (pre-LGL) – manual data entry
 - Sometimes odd dues payments amount happen and they require manual review and editing per above. Examples are when a member opts to cover the credit card processing fees, and the pre-LGL dues payments that are still being made at the \$35 annual dues level. We have no way of cancelling those payments. Eventually, those credit cards will expire and this problem will end.
- Email receipts for dues payments
- Send expiring membership email reminders – upcoming month
- Contact information
- Current, paid-up member list for annual Board elections
- Flagging deceased members
 - Additions to the Memorial Wall are updated in LGL by Tim O'Brien, but not all obits that we learn about are on the Memorial Wall
- Produce current member lists for Board use or for member requests
- Member searches, for example when PLF needs a member to attend a local event
- Run quarterly membership dues payments >\$50 for the Monitor
- Modify the LGL Membership form as needed. The form is linked to our website.

Donation Management

- Weekly review of LGL form submissions in the “Submissions Queue” (accept/reject)
- Enter payments by check
- Receipts for donations
 - Email for donations <\$250, unless we do not have an email address for a check payment; letters for ≥\$250
 - Text for email receipts and letters are edited in LGL.
 - Both emails and letters require manual administration. LGL *does not* provide automation for these functions.
- Ensure credit card and PayPal donations are properly categorized to targeted purposes

- Category: Gift: Donation
 - Fund: donor's choice of Scholarship, Student Congress, or Unrestricted. If no choice indicated, use "Unrestricted"
- Validate memorial and honor donations
 - Some editing may be needed particularly when a donor designates multiple individuals
- Run quarterly donor reports for the Monitor
- Modify the LGL Donations form as needed. The form is linked to our website.

MailChimp Integration

- LGL feeds contact information for members and anyone wanting to subscribe to our e-blasts. These records are in our MailChimp "Public Lands Foundation News" contact list. One purpose of this is to facilitate BLM employees receiving alerts when the Monitor is available. (Note: a separate "PLF Contacts" list is maintained separately in MailChimp. These are for external contacts such as partner organizations.)

Merging Duplicate Members/Donors

- LGL has a dupe checker that enables us to merge seemingly duplicate members or donors. Dupes happen when individuals use different email addresses when they donate or pay dues. Searches can be made based on various combinations of criteria such as first name and email address, address and last name, etc.

Volunteer Tracking

- LGL can track volunteer hours by Board members and others who provide kind contribution support. Courtney initiated this, but it seems to have been dropped.

Reports

- LGL provides a searchable database that can be queried for producing reports. Some standard reports are set up by LGL; others have been set up by PLF. The principle behind them is to use filters to capture the desired records, select and place the data fields to include, and select the output file format from the available options. These are usually .CSV, Excel, or PDF but may vary depending on the report.
- PLF Report examples
 - Expired/expiring annual memberships
 - Current memberships
 - Board of Directors List
 - A report has been set up to manage and produce a list of Board members and their contact information

- Under an LGL “Constituent” record, edit “Groups” and check/uncheck the “Board Member” box.
- LGL Donation reports
 - New donors this year
 - Donors who gave last year, but not this year
 - Giving by year, by tiers
 - Annual report information (total contributions by donor for the year)
 - Donation category reports, e.g., Scholarships, Student Congress
 - Donations by appeals, e.g., Board members to donate to Scholarships
 - Comprehensive Export of all “Constituents” and their data into a .csv formatted, compressed zip file.

LGL Account Administration

- Administrator(s) set up access to LGL as needed
 - Current LGL Team Members are Beau, George, Margret, Mark, Ray, and Tim.
- One administrator provides his or her credit card for the LGL subscription payment
 - LGL bills every six months and draws down a monthly subscription fee of \$45 from our payment.
 - Last payment: \$459 on April 21, 2023.
 - Next payment: April 1, 2024
 - Currently, LGL is being charged to George Stone’s PLF Visa. This will need to be changed, presumably to Margaret.

QuickBooks Integration

- LGL integrates with QuickBooks Online Plus and Advanced editions. These editions are needed to get access to the “Class” feature to track income and expenses by program. See: [LGL : QuickBooks Online \(littlegreenlight.com\)](http://LGL : QuickBooks Online (littlegreenlight.com))

Other Integrations

- WordPress
 - Gravity Forms
 - This is how we obtain names and email addresses for individuals who want to subscribe to our E-Blasts. This integration links the subscription form on our website to MailChimp.
- Additional integrations are available for services such as DonorSearch, and WealthEngine which are prospect research services for fundraising.

Constituent Giving Summary

This information was provided by Beau. I believe he received it from Courtney. I do not know of any officer currently using this information.

In this article:

- Giving status (#status)

What data is contained in the gift summary?

Giving Summary

First

Latest

Largest

Consecutive

Status

By Gift Type

Gifts

In Kind

All Dates

Total value

\$50 on 2023-08-28

\$400 on 2024-09-19

\$500 on 2024-02-22

2 Years

Top 100 Donor, Active Donor

	4/ \$950	
	1/\$400	
	\$1,350	
		This Year
		3/ \$900
		1/\$400
		\$1,300
Other giving activity (not included above)		
Other Income	1/ \$500	1/ \$500
+ Add gift	+ Add goal	Gift History
Volunteering		
Total		
Committed		
Remaining	0 hours	Gift History this year
		Gift History last year
		Gift History this fiscal
	0 hours	Gift History last fiscal
	0 hours	
Vol. Statement		Gift History all dates

The Giving Summary shows highlights, including the first gift, the most recent gift, the largest gift, and the constituent's consecutive years of giving.

<https://help.littlegreenlight.com/article/73-constituent-giving-summary>

10/31/25, 12:37 PM

Constituent giving summary - Little Green Light Knowledge Base

Below this data, you see a breakdown of giving by gift type. This breakdown has two columns, one for all dates and one for this year. Date ranges can be changed, so you can compare this year to last year or other years to one another.

Totals for gift types that include other income and related gifts are shown below the fundraising information.

You can download different time segments within the constituent giving history by clicking the *Gift History* button and making your selection:

Giving Summary

Highlights (all dates)

First

Latest

Largest

Consecutive

Status

By Gift Type

\$1,000 on February 5, 2019
\$100 on October 23, 2022
\$450 on July 25, 2020
4 Years
Active Donor, Top 500 Donor

All Dates

This Year

Gifts

In Kind

18/\$2,465
\$0
3/\$550
\$0

Total value

\$3,015
\$0

+ Add gift

+ Add goal

Gift History

Volunteering

Total

0 hours

Committed 0 hours

Remaining 0 hours

Vol. Statement

Gift History this year

Gift History last year

Gift History this fiscal

Gift History last fiscal

Gift History all dates

How the numbers are calculated

First: The first contribution and date (this includes related gifts but excludes other income)

- *Latest:* The most recent contribution and date, excluding other income

Largest: The biggest single contribution and date, including other income

- *Consecutive years:* The constituent's consecutive years of giving, which is limited to the gift type of gift

- *Status:* The constituent's giving status, or statuses ([//help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions](https://help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions)) (in kind, other income, and related gifts do not contribute toward a constituent's giving status)

<https://help.littlegreenlight.com/article/73-constituent-giving-summary>

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Goals: Goals associated with the constituent

By gift type: A list of each gift by type with a count and total amount. Clicking these links will bring up a list of all gifts by type

Total value: This number is the sum of all contributions (cash and otherwise), including gifts, in-kind donations, pledges, soft credits, peer credits, and matching gifts (other income is not included)

Giving status

LGL automatically calculates giving status information ([//help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions](https://help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions)) based on the constituent's giving history. Here are the possible giving statuses for all constituents:

Top 100 donor. Calculated based on the total giving (included gift types are your account's default gift types ([//help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions#gifttype](https://help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions#gifttype))) of all constituents, ranked in descending order

New donor: First gift date occurred during the past X number of days (you select X in your subscription settings- -the default is 90 days)

- **Active donor.** Set for all constituents who have donated within the past 18 months

Lapsed donor. Set for all constituents who have donated at some point, but not within the last 18 months

- **Non donor.** Set for all constituents who have never donated to your organization

NOTE: It is possible to adjust the settings for how giving status is calculated in your account

([//help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions](https://help.littlegreenlight.com/article/524-set-your-default-gift-type-filters-and-customize-giving-status-definitions)) by

going to *Settings > Subscription settings > Gift settings*, and scrolling down to the "Giving Status and consecutive years" section to adjust the settings.

Generate a "Constituent Giving History" report

It is possible to generate a report based on the constituent giving history for multiple constituents by building a constituent report ([//help.littlegreenlight.com/article/126-generating-custom-reports-from-the-constituents-or-fundraising-tab](https://help.littlegreenlight.com/article/126-generating-custom-reports-from-the-constituents-or-fundraising-tab)) and selecting the "Constituent Giving Summary (PDF)" option from the *Report Template* dropdown menu, as shown here:

New export

1. Search
2. Customize
3. Preview
4. Save Export

Ready to export **1789** constituents. Add/remove in the Search tab.

You cannot add columns to this report, as it is not customizable.

Report Template

Constituent Giving History
(pdf)

Save this template as your default selection for constituent reports.

Note Field selections and formatting cannot be customized for PDF reports.

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Little Green Light (<http://www.littlegreenlight.com>) 2025. Powered by Help Scout (https://www.helpscout.com/docs-refer/?co-Little+Green+Light&utm_source=docs&utm_medium=footerlink&utm_campaign=Docs+Branding)

Here is how PLF could use the membership and donation information strategically. This is beyond the scope of this project. Just sharing for now as I found it interesting and potentially some of the officers may also find interesting.

1. Financial Forecasting and Stability

Membership numbers provide a **predictable revenue stream** through dues, which is often more stable than erratic individual donations or competitive grants.

- **Budgeting:** By tracking retention rates and new sign-ups, nonprofits can forecast their annual "baseline" budget.
- **Tiered Revenue:** Organizations use membership statistics to create "Value Ladders" (e.g., Bronze, Silver, Gold). They analyze which tiers have the most members to adjust pricing or add benefits where there is the most demand.

2. Operational Decision-Making

Data-driven nonprofits use membership numbers to allocate their limited resources effectively.

- **Capacity Planning:** If membership grows by 20%, an organization knows it may need to increase staff or upgrade its member management software (CRM) to maintain service levels.
- **Program Development:** By tracking which types of members (e.g., students vs. professionals) are increasing, nonprofits tailor their programming (webinars, workshops, or events) to fit that specific demographic.

3. Demonstrating Impact and "Social Proof"

High membership numbers act as a seal of approval for external stakeholders.

- **Grant Applications:** Large membership bases prove to foundations that the nonprofit has community "buy-in," making them a lower-risk investment.
- **Advocacy:** For "Members-as-Advocates" models, a high number of members gives the organization more political leverage when lobbying for policy changes.

4. Donor Pipeline Development

Nonprofits often see members as "donors in training."

- **Identifying Major Donors:** Statistics show that long-term members are the most likely candidates for "Major Gifts" or legacy (will) giving.
- **Member Lifetime Value (MLV):** Organizations calculate the total financial contribution of a member over their entire relationship. This helps them determine how much they can afford to spend on acquiring one new member (Member Acquisition Cost).

5. Managing "Churn" and Retention

Membership numbers are the primary tool for identifying when an organization is losing touch with its community.

- **Churn Rate:** If numbers dip, nonprofits use "diagnostic analytics" to see why (e.g., a specific event didn't resonate, or renewal emails were missed).
- **Lapsed Member Recovery:** Organizations flag members who haven't renewed and target them with specific "win-back" campaigns.