

# Admin Ready Reference

Note: Every attempt has been made to make sure this information is correct and up-to-date, but if you see key information that is missing, incorrect or dated, please email [tartar@care.org](mailto:tartar@care.org)

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## Overview

**Org chart** – CARE has an organizational chart. An electronic version is located on the Portal on the home page. It is a good way to become familiar with CARE's structure and where you and your division fit in.

**Who's Who in your Workgroup** – Your manager will be introducing you to the members of your workgroup. You may want to write down their names here.

**Where You fit into your Workgroup** – Your manager will describe your unique role in your workgroup.

**Job Description** – Each person at CARE has a job description that gives a summary of what they are tasked to do and a weighted listing of the responsibilities and tasks to be performed. You probably saw the job description when you applied for this job. Review your job description often and work with your manager to make sure (1) you know how to perform all parts of it and (2) you are performing all parts satisfactorily.

**Annual Operating Plan for your workgroup** – Most divisions at CARE have an Annual Operating Plan or AOP. The AOP specifies your division's goals and objectives for this year – usually in a fairly quantitative way. Your manager will provide you with your Annual Operating Plan.

**Your Goals** – Ask you manager for your goals for this week, this month, the first three months, the first six months, the first year.

Goals for this week:

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Goals for this month: \_\_\_\_\_

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Goals for first 3 months:

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Goals for first 6 months: \_\_\_\_\_

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Goals for first year:

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## About CARE

**CARE History** – It is important to learn about CARE’s history. It will also be covered at the one-day New Hire Orientation that you will have an opportunity to attend in your first month or so.

**CARE Mission, Vision** – It is important to learn CARE’s mission and vision. This information is available at the one-day New Hire Orientation that you will have an opportunity to attend in your first month or so.

**Divisions at CARE** - CARE’s work is performed by several divisions. Become familiar with each division, especially in the areas that overlap with your division.

- Executive Office (Office of the President, Internal Audit, etc.)  
Notes and key people: \_\_\_\_\_
  
- International Programs and Operations (Country Offices)  
Notes and key people \_\_\_\_\_
  
- Program, Partnerships, Learning & Advocacy
  - Sectors  
Notes and key people \_\_\_\_\_
  
  - Institutional Fundraising
    - Foundations  
Notes and key people \_\_\_\_\_
  
    - Strategic Partnerships and Alliances  
Notes and key people \_\_\_\_\_
  
    - Competitive Bids  
Notes and key people \_\_\_\_\_
  
  - Advocacy  
Notes and key people \_\_\_\_\_
  
- Individual Fundraising and Marketing
  - Relationship Management and Individual Gifts  
Notes and key people \_\_\_\_\_
  
  - Direct Response and Web  
Notes and key people \_\_\_\_\_
  
  - Brand and Communications  
Notes and key people \_\_\_\_\_
  
  - Business Operations
    - Operations  
Notes and key people \_\_\_\_\_

- Information and Knowledge Management  
Notes and key people \_\_\_\_\_
  - Prospect Management and Research  
Notes and key people \_\_\_\_\_
  - Planning and Analysis  
Notes and key people \_\_\_\_\_
  - National Events and Support  
Notes and key people \_\_\_\_\_
- Finance
  - Treasury  
Notes and key people \_\_\_\_\_
  - Finance  
Notes and key people \_\_\_\_\_
  - Pamodzi  
Notes and key people \_\_\_\_\_
  - Admin Services  
Notes and key people \_\_\_\_\_
  - Compliance  
Notes and key people \_\_\_\_\_
  - IT  
Notes and key people \_\_\_\_\_
- Human Resources  
Notes and key people: \_\_\_\_\_

## HR Information

**New Hire Paperwork** – Your New Hire Paperwork comes in your welcome email from your HR Rep. Your HR Rep is your source for all questions about your New Hire Paperwork.

**Employee/Manager Self Service** – CARE’s main HR system is Lawson’s Employee/Manager Self Service. Your HR Rep will show you how to access it and use it. You will want to bookmark it on your computer since you will use it every day. It can be found at <https://selfservice.care.org/lawson/portal/>. When you sign on, the user name is your network user name. The password is your network password.

**Employee Handbook** – The Employee Handbook has valuable information both during your first few weeks and later on. It is located electronically on the Portal and on the Lawson section under Employment at <http://careweb.care.org/help/ehandbook/>. See your HR Rep with any questions.

**Benefits** – CARE’s many benefits are described in the Employee Handbook or electronically on the Lawson section under Benefits. See your HR Rep with any questions.

**Cigna Health Insurance for Medical and Dental** – CARE’s medical and dental carrier is Cigna. To get more information about Cigna, check the Employee Handbook or the Lawson section under Benefits. See your HR Rep with any questions.

**Health Club Membership** – CARE employees get a \$20 reimbursement on their monthly membership fees at a gym or fitness center. See the Employee Handbook or the Portal [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_716844\\_0\\_0\\_18/HEALTH%20CLUB%20REIMBURSEMENT.doc](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_716844_0_0_18/HEALTH%20CLUB%20REIMBURSEMENT.doc) for details.

**CARE Academy for Online Classes** – CARE offers many classes through an electronic system called CARE Academy. Some of your initial training can be found on CARE Academy. You will want to bookmark it since you will use it often. It can be found at <http://www.careacademy.org/>. When you sign on your user name is your email address. Your password is a password that you define the first time you use the system.

**Holiday Listing** – CARE offers several organization-wide holidays each year. They are listed on the “Did you know” section of the Portal at the beginning of every year. They can also be found at [http://mycare.care.org/portal/server.pt?open=space&name=Dir&psname=SearchResult&psid=3&cached=true&in\\_hi\\_userid=6873&control=OpenSubFolder&subfolderID=71560&DirMode=](http://mycare.care.org/portal/server.pt?open=space&name=Dir&psname=SearchResult&psid=3&cached=true&in_hi_userid=6873&control=OpenSubFolder&subfolderID=71560&DirMode=)

**PTOs** – CARE’s paid time off policy will be described to you by your HR Rep. It can also be found in the Employee Handbook. As an Admin you may be responsible for maintaining the PTO records for the people in your division. This involves (1) keeping track of the written requests for time off and (2) maintaining a spreadsheet for each person that shows the available days and the deduction of days as they are used. To get a blank form, log on to ESS/MSS and search under forms. See your HR Rep with any questions.

**PARS** – PARS is the system CARE uses to keep track of hours worked. It also keeps track of which division(s) the hours should be billed to. You should fill in your hours in PARS on a daily basis if possible and not forget to upload your hours at the end of every pay period. PARS is located in the Lawson system. Your HR Rep will show you how to use PARS. You can also see the basic steps described

on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_944989\\_0\\_0\\_18/4-%20PAR%20-%20Instructions%20on%20Entering%20Time%20-%20031009.pdf](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_944989_0_0_18/4-%20PAR%20-%20Instructions%20on%20Entering%20Time%20-%20031009.pdf).

**eAPAAs** - CARE's eAPAA (Electronic Annual Performance Agreement and Assessment) system is used to set up and review annual goals. It can be found at <https://care.mvpfeedback.com/Authenticate/Authenticate.asp?WCI=Logon&NextURL=%2Fhome%2FMVP%2Fhome%2Fasp%3FWCI%3DHome>. Your username is the name you use when logging onto email (i.e. your first initial and last name). Your password is created the first time you use the system. Instructions for how to use eAPAA can be found on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_1006399\\_0\\_0\\_18/eAPAA%20-%20Employee%20User%20Guide.pdf](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_1006399_0_0_18/eAPAA%20-%20Employee%20User%20Guide.pdf)

**Drumbeat of Excellence** – One of CARE's ways of acknowledging staff is called the Drumbeat of Excellence. Staff can nominate one another for outstanding performance, teamwork or other criteria. You can read about it in the Employee Handbook or the Portal on the home page.

**Communication within CARE** – Until recently, formal internal communications were called ALMISes (or "All Missions"). They still can be found at [http://mycare.care.org/portal/server.pt?open=17&objID=205&DirMode=1&parentname=Dir&parentid=2&mode=2&in\\_hi\\_userid=355&cached=true](http://mycare.care.org/portal/server.pt?open=17&objID=205&DirMode=1&parentname=Dir&parentid=2&mode=2&in_hi_userid=355&cached=true)

As of May 2010, there is a new method for communications. It can be found on the Portal or under Administrative Procedures Guide (HR Information section).

**Acronym List** – Like many organizations, CARE uses acronyms to make communications more efficient. But for a newcomer, that can be a challenge. A list of common acronyms can be found on the Portal or on under Administrative Procedures Guide (HR Information section).

**Other HR Topics** – For other HR topics see your HR Rep.

**Where to go with HR Questions** – HR has an email box for HR questions called [HRServiceCenter@care.org](mailto:HRServiceCenter@care.org).

## Safety

**Safety and Security Briefing** – There is a required course on CARE Academy that deals with safety and security at CARE.

**Handling Emergencies in the Work Environment** – The New Hire Orientation at HQ will cover how to handle emergencies in the work environment. If you have any specific questions or questions before then, see your manager or HR Rep. There are also some ideas on the Admin Procedures Guide under the folder called Safety.

**CARE's Critical Incident Protocol** – CARE has a Critical Incident Policy that covers most incidents that might happen at a CARE facility. It can be found on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_991449\\_0\\_0\\_18/Critical%20Incident%20Protocol%20-%20English.pdf](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_991449_0_0_18/Critical%20Incident%20Protocol%20-%20English.pdf). There is also a wallet card that can be found there.

**Where to go with Safety Questions** – If you have safety questions, see your manager or HR Rep.

## Building

### HQ Building Operations

Headquarters building hours are:

Weekdays 6:30 a.m. to 8:45 p.m.

Weekends 8:00 a.m. to 4:45 p.m.

Smoking in the Office:

- CARE USA strives to provide a healthy and comfortable working environment for all employees. Smoking by employees and visitors is therefore prohibited throughout all buildings. Employees and visitors who wish to smoke must therefore leave the building.

Location of Various Divisions at Headquarters:

- 1st floor: mailroom, SE Region Office, security officer, Breastfeeding room; SE region conference room
- 2nd floor: IT (and helpdesk), vending machines, shower room; HR Training room, IT training room, IT conference room
- 3rd floor: Finance & Administration, Human Resources, Competitive Bids Unit (part of PPLA);, HR conference room, Finance conference room, L&OD conference room
- 4th floor: Program, Institutional Fundraising (part of PPLA division), Individual Fundraising and Marketing (Brand & Communications, Photo, Web Master, Relationship Mgmt, Planned Giving); Program conference room, Communications conference room
- 5th floor: Executive area, Individual Fundraising and Marketing (Business Operations, Direct Response, Donor Relations), Internal Audit, Executive area conference room, Planned Giving (PG) conference room, Boardroom

### HQ Key Cards

- Access cards are issued to CARE headquarters staff and to visitors (if pre-authorized). Visitors may receive a temporary card if they are visiting for more than one day.
- If a CARE employee leaves their personal card at home they may request a temporary card which should be returned upon the following work day.
- Security will modify access levels as directed by management when the request is submitted in writing to Security – HQ ([bldgsecurity@care.org](mailto:bldgsecurity@care.org)).
- If a CARE employee believes that their card is lost or stolen they should contact security. The card will be deactivated to prevent unauthorized entry.
- Employees will need to pay \$5.00 to replace the lost card.
- Security will provide access cards to CARE groups meeting for extended periods. Please provide security with a list of the attendees in writing at least two weeks prior to your event to ensure adequate time for the programming of the cards.

**Visitors to HQ** - If you expect to have a visitor to CARE HQ, be sure to send an email to Security – HQ informing them of the date, time and name of the visitor and giving security a point of contact to be used in announcing the visitor's arrival. Be sure that the contact is available at the time of the visitor's arrival! This also includes notifying Security if you have ordered food to be delivered for meetings---be sure to tell Security where the meeting will be so they can find you!

**Handling Facilities issues** – At HQ, if you have a facilities issue send an email to Magic Help Desk and copy Curtis Peters. If it is urgent, contact the Security Desk at the front or see your manager. (In a Field Office, you probably have a building manager that can help you with issues.)

## **Equipment – Faxes, Copiers, etc**

**Faxes** – If you work at HQ, you should have a departmental fax mailbox on your computer (if not, contact the MagicHelpdesk). Incoming faxes should be forwarded to the addressee. In addition to receiving faxes through the computer, any computer-generated document can be faxed through your computer in the body of the email or as an attachment. The Biz Hub machines on each floor are multi-purpose (copy, scan and fax). (Field Offices have various systems for faxes. See your manager for how faxes work in your office.)

**Copy Machines** – It is helpful to learn all the features on your copier (i.e. collate/staple, 3-hole punch, etc.). At HQ, the Mailroom provides photocopy services for larger jobs (forms available from the Mailroom). They do not, however, copy bound books. (Field Offices have various systems for copying. See your manager for how it works in your office.)

**LCD Projectors** – At headquarters projectors are requested and borrowed through the Magic Help Desk. (In the Field Offices, see your manager about whether you have a projector and instructions for use.)

## Supplies

**Where Supplies are kept** – Many divisions have their own supply closet or room. See your manager for where to get supplies for your area.

**Ordering Office Supplies from OfficeMax** – OfficeMax is CARE's main supplier of general office supplies. We receive a substantial discount when we order within our agreed-upon supply list. Items not on this list can still be special ordered, but special orders are costly for the organization, so they should be kept to a minimum. You will need to request an online account and pin number from Robbin Smith before your first order. OfficeMax orders can be initiated by clicking on their website at <http://www.officemaxsolutions.com/index.shtml>. You will want to bookmark site this on your computer. Step by step instructions for placing an order can be found in the Supplies section of the Administrative Procedures Guide.

**Ordering Stationery and Business Cards from Trinity** – Trinity is the company that produces CARE's stationery and business cards. You will need to request an online account and pin number from Ellen Moens before your first order. You can access the Trinity's website at: <http://www.printstorefront.com/trinitypress>. You will want to make this one of your Favorites on your Portal page. Step by step instructions for placing an order can be found in the Supplies section of the Administrative Procedures Guide. You will need to place your order by the 10<sup>th</sup> of every month.

**Ordering Marketing Materials from Brand Support** – CARE's Marketing materials (notecards, holiday cards, calendars, booklets, brochures, etc.) are generally announced when they are created at which time you may order any quantity of them. They are not usually available for reorder, so you need to order as many as you think you will need when they are first announced.

**Ordering CARE Products from CAREWear** – CARE has a coordinated collection of apparel and other merchandise with the CARE logo. The selection includes t-shirts, caps, umbrellas, key chains, journals, windbreakers, backpacks, I am Powerful onesies and kids' t-shirts. If your manager wants to add you to the authorized user list, please notify Robbin Smith at [smithr@care.org](mailto:smithr@care.org). Use your PN and FC to direct bill CARE. Invoices for direct bill orders will be included with the merchandise and need to be submitted promptly for payment. Orders are shipped directly to the requester and product prices do not include tax and shipping. You may also order CAREWear items for your personal use using a personal credit card for payment. The CAREWear site is for internal use only. The website link is available on the portal home page under Popular Links.

**Ordering Larger Items from Procurement** – Furniture, computers and items over \$25,000 must be ordered through CARE's Procurement Department. There are very specific rules that you must follow. You will need to fill out a Requisition for Goods and Services and possibly other forms depending on the situation. See the Portal or contact Joanne Rivera if you have any questions.

**Ordering a Consultant's Services** – Consultant services are set up through the Procurement Department. There is a defined Procurement process that must be followed very carefully. For instructions and corresponding forms, see the Portal or contact Joanne Rivera if you have any questions.

**Using Publix Charge Accounts** – Admins at HQ can buy items through Publix. You should receive approval from your manager to allow Joanne Rivera to add your name to the list. After you have picked out your purchases, go to any register and use your charge card. Once the purchase is totaled, the

cashier will provide you with a receipt. As soon as you return from the store, fill out a Check Request Form, payable to Publix and have your manager sign. Attach the register receipt to the Check Request. Make a copy for your records and hand the original to Accounts Payable in the Finance department (3<sup>rd</sup> floor). Each month Jan Sandman will receive a statement of purchases.

**Where to go with Supply Questions** – Joanne Rivera or Ellen Moens

## Computers

**Magic Help Desk** - CARE's IT Help Desk is called the Magic Help Desk. It is the place to go for all computer questions and problems. AT HQ, the Help Desk also funnels requests dealing with telephone, building maintenance, temperature control, moving furniture, room set-ups, Boardroom usage, audio equipment, etc. Write to them at [magichelpdesk@care.org](mailto:magichelpdesk@care.org) or extension 1411 (or 404-979-9411). When writing them, put "HelpDesk" in the subject line. Then describe the problem or situation. You will get an automated email response saying that a ticket has been opened and then another email when the ticket is closed. At that point, be sure to check that the problem has actually been resolved.

**Getting Access to Various Computer Systems** – Your manager needs to submit a New User Request to the [magichelpdesk@care.org](mailto:magichelpdesk@care.org) to get you the various computer accesses that you need. Hopefully most of these accesses will be set up before you arrive. Others may still need to be set up. Typical accesses include (1) a network sign-on (2) email (3) the internet (4) Crystal Reports and (5) any specific departmental systems. You will also need access to certain shared network drives.

**Drives to Use** – Your manager can tell you what drives your division uses. If you do not have access to the drives you need or if you have any questions, contact the IT Help Desk at [magichelpdesk@care.org](mailto:magichelpdesk@care.org) or extension 1411. Everyone at HQ has access to the H Drive. That is where the Administrative Procedures Guide is located. (In the Field Offices, the same drives are called the V and P Drives.)

**Back Up Process** – If you save your data to the correct drives, it will be backed up automatically. If you save to your desktop or hard drive, your data will not be backed up. (Field Offices save to a server which is automatically backed-up every night. From time to time a Field Office Admin will be reminded to swap out tapes in his or her office's backup device. Contact Tapera Doma or the Magic Help Desk with any questions.)

**MS Office Hints** – If you have specific questions about any of the MS Office programs, you can use the built-in Help features of Microsoft or their Quick Reference cards. There are also classes on the Microsoft programs in CARE Academy that you can take to brush up your skills and knowledge.

**Where to go with Computer Questions** – [magichelpdesk@care.org](mailto:magichelpdesk@care.org) or ext 1411.

## Email

**Getting Access to Email** – Your manager will arrange for you to have email access upon your arrival. Guidelines/Policy – In a Statement of Policy effective October 1, 2003, every ALMIS and email should have one of the following importance categories assigned to it: Critical, Action or Information. To assist everyone in identifying what is significant; the category must be included at the top of each ALMIS and must be included in the subject line of all emails. Description of categories:

Critical - Emails labeled critical will contain information that is considered vital for staff and the organization and should be something that staff clearly need to know right away. For example, the budget/planning timeline and guidelines, or that staff are safe during an emergency.

Action - Emails in this category contain information of high value and have a deadline for response or action. These communications set organizational deadlines that staff must be aware of and/or act upon. For example, there might be an email announcing the Annual Performance Appraisal due date. For all communications in the action category, the deadline or due date should be included in the subject line of the email.

Information - Informational emails share information that staff should be aware of, but do not require immediate attention. While it is important that staff make time to read all organizational communications, for items in the information category, timeliness is not an issue. For example, new tools and guidelines that have just been developed are important for all staff to be aware of, however the impact would be negligible if a staff member did not read the email immediately upon receipt. Other examples may be department updates, a conference report, or the updating of a manual.

**Mass Emails** - Sending mass emails is not appropriate for announcements such as new or departing staff notices or general announcements (e.g. “leftover food in the boardroom, etc.”); or charitable events. To share these communications, use the “Bulletin Board” segments of the Portal Staff Info page.

**Tips** - When sending information via email, do not use graphics, clip art, etc. These take up large amounts of space and cause computer memory problems.

**Personal Email** – Be mindful that everything you email from your CARE email box is associated with CARE’s name. Avoid inappropriate emails (i.e. harassing, disrespectful, etc.).

**How to Access Email Remotely** – If you need to access email remotely, click on the link on the Portal on the home page under “Support” (at the bottom of the middle section) for Remote Access Email and follow the steps. You can also reach it at <http://web.care.org>.

**Signing on as a Delegate** - To help your manager manage emails, you should discuss whether you should be a delegate for your manager’s calendar, inbox, etc. From the manager’s (logged on) computer, go into Outlook, then Tools, Options, Delegate. Indicate what access you should have to your manager’s system (i.e. to help manage their calendar, you may decide to have Editor status – you can read, create and modify items or Reviewer status – you can read only, etc.) Another option is whether you should receive copies of meeting invitations to your manager. This may help you keep them on track.

**Out of the office?** Activate your Out of Office Assistant located in Outlook, under Tools. Let people know when you will return and whom they can contact in your absence.

## Portal

**Having the Portal be your default for internet Explorer** – The Portal, CARE’s intranet, is usually defined to come up when you sign onto Internet Explorer. (If it does not, contact the Magic Help Desk at [MagicHelpDesk@care.org](mailto:MagicHelpDesk@care.org).)

**Information that is available on Portal** – The Portal contains a lot of useful information. Below is a list of what can be found on the Home page:

- **What’s Hot:** Updates from the Executive Management Team, posted by internal communications.
- **Need to Know:** Notices posted by specific divisions. Examples include updates on policies or procedures; information on key meetings or trainings; and schedule changes, such as holidays or weather-related closures. Items are posted by the point person for each division.
- **Staff transitions:** Information about employees joining or leaving CARE, or changing roles, as well as opportunities for temporary duty assignments. Any staff member can post an item here.
- **Bulletin board:** This is an open area, where all staff members can post general information. Examples range from travel tips to items for sale to lost-and-found.
- **Topical links:** Quick links to commonly used materials. Items are grouped by category: popular links, organizational information, resources, HR materials, and support.
- **SIC feedback:** This area allows users to send an e-mail to portal administrators with questions and suggestions, or to advise that there is a problem, such as a broken link.
- **Executive Management Team and Divisions:** Quick links to CARE’s divisions, Helene’s space, and other EMT member bios and minutes of EMT meetings.
- **Helene Gayle’s space:** This page contains “frequently used forms” for staff members working on correspondence from Helene or an event in which she is participating. It also includes information on her staff meetings (with links to presentations), public appearances and Congressional testimony (with links to speeches), and media coverage (with links to the articles).
- **Board of Directors:** This area lists board members and minutes from their meetings, and provides a link to the board folders.
- **CARE International:** This area lists timely items from CI and provides a link to the CI folders.
- **CARE Domestic Staff search:** Search for contact information on employees.
- **CARE Office search:** This area provides contact details for US field offices, country offices and CI members.
- **Tabs:** The tabs just above “What’s Hot” allow users to go to the Staff Calendar, Travel page and Collaboration areas.
- **Staff Calendar:** Lists key dates, such as governance meetings (EMT, Board), staff gatherings (town hall, happy hours) and holidays. Any staff member can post here and should, so that people can plan accordingly.
- **CARE Travel:** Provides information such as contact for AdTrav, travel-related forms, per diem rates, emergency notices, and recommendations.
- **Collaboration areas:** Provides opportunity to join a collaboration group, as well as links to ones you have already joined.

**Searching Techniques for the Portal** – Become familiar with the items that are on the Home page. If you don’t see the item you are looking for, type it into the Search box. The Search box allows you to search for information. You can search the entire portal or choose “search this folder” from the drop-

down menu to narrow your results to a specific section. If you still can't find a piece of information, look under the appropriate division.

**What kinds of things should be posted on the Portal?** The purpose of the portal is for staff worldwide to have access to timely and relevant information about the organization. So we should post materials and information that will be useful to staff in other divisions, such as forms, changes to policies, descriptions of CARE's programs, and announcements about upcoming events or new employees. For materials under development, or working documents for a group of people collaborating on a project, use shared drives or Sharepoint sites. Also, documents should be current. If updated or replaced, remove the earlier version.

**Posting Items to the Home Page** - For items on the home page (such as Staff Transitions or Bulletin Board), click on "new record" and fill in the template that appears. If you have a "Need to Know" item, work through the point person for your division or send an e-mail to the portal administrator via the SIC feedback box (bottom center).

**Posting Items to a Folder** - To post a document in a folder, first set the properties. Open the document, click on file and then properties. In Microsoft programs, click on the summary tab (second from the left); in Adobe programs, click on the description tab (first tab on left). Fill in the following four fields. It is important to do them all, to yield the best possible search results:

- **Title:** The name should contain a clear and concise title, which will be understood by people outside your department, and the date. For example: "Asia Region Contact List February 2010"
- **Comments:** This field is very important, as the text will appear below the title link in the document repository. If you leave this field blank, the portal software will select text from the body of the document to appear below the title link.
- **Author:** Enter the department, so that staff will be able to address questions to the appropriate place. For example: "Human Resources"
- **Keywords:** Adding words here makes your document findable by the search engine. For example: "girls' education, Malawi, human interest story"

**CARE's Website - CARE's website** can be found at ([www.care.org](http://www.care.org)). Become familiar with the various types of information that can be found on CARE's website.

**Where to go with Portal Questions** – Write to [MagicHelpDesk@care.org](mailto:MagicHelpDesk@care.org).

## Telephones

**How to get a Long Distance Code** – Your manager will request/authorize a long distance code from the Magic Help Desk using the New User form.

**Placing an Outbound Call** – To make an outgoing call, lift handset, dial number and press the “Dial” soft key. You can also lift handset and press “New Call” soft key and dial number. You can also just press the light on right-hand side and dial number.

If you are dialing to another Cisco phone, dial the 4-digit number (ex 4510).

If you are dialing a long distance number, dial 9 + 1 + area code + number (ex: 9 + 1 + 503-671-6453)

If you are dialing an international number, dial 9 + 011 + phone number (ex 9 + 011 + 593-2204-1308)

**Answering an Inbound Call** – If you receive an inbound call, pick up your handset and touch the flashing light on your phone.

**Ending a Call** – To end a call, press “End Call” soft key.

**Holding a Call** - To put a call on hold, press the “Hold” soft key. To take a call off of hold, press the “Resume” soft key.

**Transferring a Call** – To transfer a call, press the “Transfer” soft key then dial the person’s 4-digit number. When the line starts to ring, you may wait until it is answered to announce the call, or immediately press the “Transfer” soft key and the two lines will be connected. If the person to whom you have directed the call does not want to take the call, you can touch the light signifying the call and have control of the call again. If the person is not there, it will go to their voice mail.

**Conferencing Together Two or more Lines** – Dial the first number. Then press the “More” soft key. Then choose the “Confrn” soft key. Dial the next number. Press the “More” soft key and “Confrn” soft key. Repeat until you have dialed in all numbers. End with the “Confrn” soft key. (Note: no one should put a conference call on hold or all participants will hear the hold message.)

**Joining a Call** - Similar to the Conference function is the Join function. The Join function allows someone calling in to join a call in progress (be it a 1 person call or a conference call). When the person calls, press answer (it puts the other call on hold), press “Join”, then select the other call (by toggling to it with the arrow key) and hit “Join” again and the new person is added to the call.

**Missed Calls** - You may see a message on your phone screen saying you have X number of Missed Calls on your phone. Press the Directories button (shaped like an open book) on the right side of your phone. The list of directories opens up. The first choice is Missed Calls. Press the “Select” soft key to see a listing of your Missed Calls. Tab to the call you are interested in. (To get the time and date that call came in, press the “More” soft key and then the “Details soft key.) Arrow to the call you are interested in. Press the “Dial” soft key if you wish to call that person back.

**Dialing Someone using the Received or Placed Calls Directory** - Press the Directories button (shaped like an open book) on the right side of your phone. The list of directories opens up. Arrow down to the Received Calls or Placed Calls. Press the “Select” soft key. Arrow down to the call you are interested in. (To get the time and date that call came in, press the “More” soft key and then the “Details soft key.) Press the “Dial” soft key.

**Dialing Someone using the Corporate Directory** - Press the Directories button (shaped like an open book) on the right side of your phone. The list of directories opens up. Toggle down to Corporate Directory (or press the number 5 because it is the 5<sup>th</sup> choice listed). Press the "Select" soft key. Spell out some or all of the person's first and last name using the letters under the number keys on the telephone. If you accidentally type in the wrong letter(s), you can use the << to erase one or more letters. When you have typed in a sufficient amount of information, press the "Search" soft key. Select the desired name and press the "Dial" soft key.

**Forwarding all your Calls to another Extension** - While on your primary line, press the "CFwdALL" soft key. Enter a target phone number. (The Call Forward icon will show above your primary phone number.) All of your calls will now ring on this extension. To remove the call forwarding, press the "CFwdALL" soft key again

**Using the Mute function during a Call** - To mute yourself during a call, press the Mute button on the lower left. (To go off mute, press the Mute button again.)

**Parking a Call** - In offices in the same phone group, you can park a call so that it can be picked up on any phone in the group. Once a call comes in you select the "More" soft key and then the "Park" soft key. It will tell you that a call is parked at 1900 (or 1901, 1902...depending on how many calls you park at any given time). You can then call the person and have them pick the call up out of park by dialing 1900 (or whatever extension your phone says it parked them at).

**Using Speaker Phone function** - To use the Speaker phone function, Press the Speaker button on the lower left. (To go off speaker, press the Speaker button again.)

**Suppressing your Phone from Ringing** - To suppress your phone from ringing, Press the DND (Do not disturb) soft key. You will still see the flashing light of any inbound calls, but they will not ring. The caller will get your voice mail and will be allowed to leave a voice mail message if they choose.

**Adjusting the Volume on your Phone** - To adjust the volume on your phone, Press the Volume bar on the front of your phone.

**Knowing if you have Voice Mail** - You can tell you have voice mail in three ways: (1) There will be a message on your phone screen that reads "You have voice mail" (2) The light on your handset will be red. (3) A voice mail message will show up in your email.

**Retrieving Voice Mail** - To retrieve your voice mail message, open the attachment in your email. Please note: the voice mails that show up in your email take up email space, so you should delete them if you no longer need them or your email box may go over its limit.

**Forwarding Voice Mail** - If you want to forward a voice mail, simply forward the email with the voice mail message attachment.

**Changing Your Voice Mail Message, Passcode, etc** - Press the Message button (shaped like an envelope) on the right side of your phone. You will be asked to enter your passcode. Follow the prompts that the system offers.

**Where to go with phone questions** - Wendi Handel is the person in charge of CARE's phone systems. If she is not available, contact the Magic Help Desk at [MagicHelpDesk@care.org](mailto:MagicHelpDesk@care.org).

## Meetings

### **If your manager asks you to organize a meeting, here are some things to find out:**

- The subject?
- Who will be attending?
- Do you need to prepare meeting materials? Get specifics.
- Will you need presentation materials?
- Audiovisual equipment? Microphones?
- What date and time?
- How do you want the room set-up?
- Will you provide coffee, food, etc.?
- At CARE or off-site?

**Using Outlook to Schedule a Meeting** - For internal attendees, you can send out an Outlook meeting invitation. Click on your calendar, click on new appointment, block the day and time of the meeting, click on meeting planner tab, invite internal attendees, at HQ invite the room you would like to hold the meeting in (i.e. Boardroom, HR Training Room, or one of the conference rooms). By using this method, you will be able to see the availability of invitees prior to sending the invitation. You can then make scheduling adjustments. When completed, click on Send.

**Reminders, Changes to an Outlook Meeting** - Invitees will either accept or decline your invitation. You can set the meeting reminder to appear on the attendee's calendar prior to the start of the meeting (so no need to send a separate email). Note: If you need to delete or reschedule an appointment, use the original invitation (do not create another invitation).

**Staff Resource Calendar** - If you are planning a large conference/workshop or event, please post it on the Portal calendar under Staff Resources. This is used to help guide planning and avoid scheduling conflicts.

**HQ Boardroom Meetings** - If you are holding your meeting in the Boardroom at HQ, send in a completed Boardroom Set-up form (located on the Portal under Forms) to the MagicHelpdesk. Indicate classroom-style, u-shape, etc. and they will forward your request to Maintenance. If you need to use the audio system in the Boardroom, you may reserve it through the MagicHelpdesk as well

**Outside Guests/Visitors at HQ** – If people will be coming to the HQ from the outside, email Security their name, location of the meeting and contact name/extension prior to their arrival. If guests are driving, please inform them that if parking is unavailable they will be directed to an off-site lot.

**Ordering Food (HQ)** - The Block and Barrel Deli (located on the 1<sup>st</sup> floor) is available at extension 1574. We also have an account with Publix but you would need to have your area representative with you to sign the charge slip. Please contact Procurement for additional information.

**Placing a Conference Call using the Cisco System** - The Cisco phone system can conference in multiple callers. It is the most economical way to schedule meetings for smaller meetings. Dial the first number. After the party answers, let them know that you are placing a conference call, press the "More" then the "Conf" soft key. Dial the second number, press the "More" then the "Conf" soft key. Repeat until all parties have been dialed in. When the last participant has been dialed in, press the "More" then the "Conf" soft key one last time, and all parties will be on the line.

**Placing a Conference Call using the (Facilitated) Chorus Call System** - If you are going to have many callers (more than 6), CARE's conference call provider is Chorus Call. To set up the call, call 1-800-967-4633 and provide account CAR11, the date and time (including time zone), chairperson, etc. for your call. Each participant calls in either using an 800 or long distance number (if overseas). Provide call-in number and confirmation number to each participant. If needed, the external conference call provider can record the conversation (it can help if notes of the call are required).

**Using the (Non-Facilitated) Chorus Call Option** - There is also a way to schedule a cheaper *non-facilitated* call with Chorus Call. Each caller is given a phone number and participants' passcode to use. No operator is involved. The host must be the first one to call in using a special host passcode. To get your host and participants' passcodes, or for any other questions about Chorus Call, contact the Magic Help Desk.

**Placing a Conference Call using Webex** - Webex is another conferencing service that is available. It allows attendees to see a presentation via their computers as a part of the meeting. For questions about Webex, contact the Magic Help Desk.

**Off-site Meetings, Conferences, Workshops** – If you are having an off-site meeting in the Atlanta area, the first site you should consider is the Loudermilk Center located at 100 Edgewood Ave. They have reasonable rates and are within walking distance from HQ. Contact them at 404-507-1690. Other nearby hotels (Sheraton, Marriott Marquis, Westin (downtown)) can also accommodate conferences and workshops. The Sheraton Suites Galleria (near Hwy. 41 and I-285) is also an option outside of downtown. Check with Procurement/Accounts Payable for additional options.

**Contracting with a Hotel** - If you do contract with a hotel, you will need to follow the Procurement procedures (i.e. submit a Requisition for Goods and Services, have your contract with the hotel reviewed by the Office of General Counsel if it requires major changes, use corporate credit card or check on direct bill arrangements, etc.).

**Using a Meeting Facilitator/Consultant** - If you are using a meeting facilitator/consultant, you will need to complete a Consultant Agreement (located on the Portal). For additional information, refer to the Meeting Planning Guide on the Portal.

**Quarterly Global Town Hall Meetings** – Helene Gayle, CARE's President, hosts an all staff "Town Hall" meeting once a quarter. The meeting is usually held using Webex, so those outside of Atlanta can see the presentation on their computers. The meeting covers topics of mutual interest, including how the organization is doing financially and changes and events that are coming. Town Hall meetings are usually recorded for viewing later for people who are unable to attend. You can find them under Helene's Space on the Portal.

**Meetings in your Division** – Each division will have regular meetings. See your manager about when yours happen and if you have any responsibility (agenda, presentation materials, minutes, etc.)

**1 on 1 Meetings with your Manager** – Your manager will tell you how often you will be meeting together and how you should prepare for these meetings.

## Presentations

**Your Role in Presentations** – Find out from your manager if you will be doing presentations and what his/her expectations are.

**PowerPoint** – Most presentations at CARE are done in PowerPoint. See the CARE Academy if you need to brush up on your PowerPoint skills. CARE has some specific templates that you should use when you make a presentation. These can be found on the Administrative Procedures Guide (Supplementary Materials) under Presentations.

**MediaBin** – MediaBin is CARE's graphics repository. It contains CARE's photos, logos and many official documents.

**Getting Access to MediaBin** – If you think you need to have access to MediaBin, have your manager write a request to Photo Requests ([photorequests@care.org](mailto:photorequests@care.org)) or Valenda Campbell ([vcampbell@care.org](mailto:vcampbell@care.org)). Users are issued a license. Usually there is only one license per work area.

**Doing Searches in Mediabin** - There are many techniques to doing a Search in MediaBin. A very simplified step by step is below. Please the MediaBin Manual and other information under Administrative Procedures Guide (Folder: Supplementary Materials on Admin Topics) under Presentations.

1. Open MediaBin. (<http://mb.care.org/mediabin/Main.asp#>)
2. Click on the **Find** tab on the left-hand side.
3. Click on the down arrow next to **Group**.
4. Your choices from the pull-down are All Metadata, Associations, Audiovisual, Brand, DM, Photo and Web.
5. Choose the desired media (**or All Metadata**). For instance, if you are looking for a photo, choose **Photo**. (You can also select **Media Database** next to **Search in** if you only want to search part of the repository. A pop-up will appear and you can click on the folder you want to search. For instance, **Logo** under the Branding and Graphics area.)
6. Pull down the arrow next to **Any Text** to see categories to search on. You will have choices like subject name(s), country, region, sector, keyword list, subject type, etc. **\*\*Be careful – name refers to the filename while subject name(s) refers to people.**
7. Depending on which category you select, the next line will be is, is exactly, contains, an element is, etc. In this case, we selected **sector**, and the second line became **is**. **\*\*Using is exactly is not recommended. Contains is a much better choice to get your desired results.**
8. Use the pull down arrow by the third line to see your choices.
9. Once you select your choice (in this case Education), then you must choose whether to include in search results assets, folders or both. You are asked if you want to include subfolders, and the maximum number of hits.
10. Once you have made these choices, click on the button **Find Now**.
11. You will get a brief message saying your search is being processed.
12. Then you will see the search results on the right hand-side. As your cursor moves over the results, a larger preview of the picture you are over appears on the left.
13. Scan through the assets until you see one you like.
14. If you click on the desired asset file name, you get additional information (metadata).
15. If you want to use this asset, click on the Shopping Cart at the top of the screen and then the **Add to Cart** choice from the pull-down.

16. You get a message that your asset was added to the Shopping Cart and an opportunity to either close the window and select other pictures or to **Go to Cart**.
17. You can also view the thumbnails and check the box next to the asset name. Then go to the top and select **add to cart** to add all the assets at one time. If you are viewing multiple pages of assets you must add the assets to your cart before moving to the next page.
18. If you choose **go to cart**, you see the picture(s) you have selected.
19. To download, check the small white box by the name of the asset. Then click on the **Download** option on the menu. You can also click on the select tab and choose select **all assets**.
20. You will get a Terms of Use contract to fill out. Fill in how you are going to use the assets you are downloading and click that you agree to follow the terms of this agreement.
21. You get a pop up window that asks you a few more questions regarding your download.
22. Use the pull down arrow by **Retrieval Task** and select from among the download options.
23. Your retrieval task will depend on what you are downloading (a) None task is not recommended. If nothing else applies then select none. It is a very large asset will tie up bandwidth, can't be emailed and will make presentations too large (b) Extract as EPS file – typically used to download logos or other eps files (c) JPEG – hi res for email – hi resolution file for printed publications, media, etc (d) Output multimedia file – for multimedia pieces such as flash or video (e) PowerPoint, Word, Web – for low resolution download when using assets in PowerPoint presentations, Word docs or on the Web (f) Retrieve MS Office documents – to download any MS Office file such as Word document, PowerPoint, etc
24. After you have made your choice, click on the **Submit** button.
25. You will get a message that the file is now ready for download. You are told to right click the link(s) and choose **Save Target** as to save the file to your local machine.
26. Right click on the file and choose the **Save Target** as choice.
27. Choose where to save your assets on your machine.
28. Rename the file with a unique file name. Save the zip file to the designated place. Once it is saved it is ready to use.

**Who to ask questions about MediaBin** – If you have questions to ask about MediaBin, contact Valenda Campbell at extension 1451.

**LCD Projectors** – At headquarters LCD projectors are requested and borrowed through the Magic Help Desk. (In the Field Offices, see your manager about whether you have a projector and instructions for use.)

## Budgets and Expenses

**Your role in Budgeting and Expense Management** – Ask your manager your role in creating and monitoring your area's expense budget.

**How Budgets are input** – Budgets are input through a program called BudgetMate. Training is available to new users. You can also see a user guide on the L (or P) Drive under Administrative Procedures Guide under Budgets and Expenses.

**CARE's Account Numbers** – Each type of expense has its own 4-digit account number depending on the type of expense. A complete listing of CARE's account codes can be found in the Administrative Procedures Guide under the Supplementary Materials section for Budgets and Expenses.

5071	Temp Staff, Agency
5080	Employee Training
5210	Computer Hardware Purchase
5240	Office Equip/Furn Purchase
5348	Volunteers/Interns
5360	Office Supplies
5364	Dues and Subscriptions
5370	Printing
5420	Fares
5430	Vehicle Rental
5431	Mileage/Tolls/Other Trans
5440	Lodging
5450	Per Diem (M&I)
5451	Employee Meals
5460	Communication Travel
5470	Entertainment/Representation
5480	Miscellaneous Travel
5482	Passport Fees/Airport Tax
5483	Travel Medical Charges
5550	Communications Usage

**Project Numbers (PN)** – Each division has a specific Project Number (PN) that is used to identify it. It begins with USA and is followed by three to five numbers (i.e. USA633 or USA92101). Your manager will tell you what your Project Number is. It is used on all expense documents.

**Fund Codes (FC)** – Each division also further identifies itself with a Fund Code (FC). A Fund Code begins with US and is commonly followed by three numbers. Your manager will tell you what Fund Code to use. Many Fund Codes are US001 which is CARE's main Unrestricted Fund Code.

**Cost/Benefit, Location, Sub-Analysis** – In addition, certain divisions have additional identifying numbers that need to be listed on expense documents. Your manager will tell you if you have a special Cost/Benefit, Location or Sub-Analysis number.

**Coding Format for Expenses** – All expenses should be coded as follows:

Account – Project – Fund - Cost/Benefit – Location - Sub-analysis  
e.g. 5420 (Airfares) – USA633 (Individual Giving) -US001 (Unrestricted)

**Signing Authority** - An authorized signer is someone with signature authority of the correct amount who is at least one grade above the person who is receiving reimbursement. It is preferred but not necessary that the manager of the employee receiving reimbursement be the signer. Please contact Alice Jones whenever a new hire (Full Name, Department Name & Grade) joins your group so she can verify if they need to have a signature authorization form. Only Grade G and above are authorized. See Administrative Procedures (Supplementary Materials) under Budgets and Expenses for a copy of the form and policy.

**Invoices** – When an invoice is received, verify that the item was actually received or work performed. Get an authorized signer to authorize the invoice for payment. On the invoice write:

Okay to pay  
Authorized signature  
Printed name of signer  
Account Code #  
Project Number (USAXXX)  
Fund Code (US001 or other FC as appropriate)  
Any Cost/Benefit, Location or Sub-Analysis numbers  
Today's Date

Photocopy each invoice and put a photocopy in the appropriate vendor file. Deliver to Jan Sandman in Accounts Payable. If you have questions, contact Jan at extension 1349.

**Check Requests** – Check Requests allow payment when there is not an invoice or purchase order or to reimburse an employee for larger non-travel expenses. The Check Request form can be found on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_440501\\_0\\_0\\_18/Check%20Request%20Form.xls](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_440501_0_0_18/Check%20Request%20Form.xls). Attach the proper receipts for documentation. In most cases a receipt will suffice, however if a purchase is made online, a credit card statement may be required. Give any useful explanations in the places provided. Get it authorized by an authorized signer. Make copies for the office before sending to Accounts Payable to keep in case something happens to the original and needs to be used in place of the original. If you have questions about Check Requests contact Jan Sandman in Accounts Payable at ext 1349.

**Petty Cash** – Petty cash is used for expenses under \$100. Headquarters and some Field Offices no longer use Petty Cash. In the Field Offices that have it, petty cash is kept in a locked box in a secure place. The Field Office Admin is usually the custodian and must follow proper procedures in paying out the money and seeking reimbursement when the petty cash runs low.) Full petty cash procedures can be found at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_716885\\_0\\_0\\_18/PETTY%20CASH%20PROCESSING%20Revised%208-25-04](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_716885_0_0_18/PETTY%20CASH%20PROCESSING%20Revised%208-25-04).

If you have any questions, email Jan Sandman or Lester Mendiola.

**P-Cards** – P-Cards (Purchase Cards) are credit cards that are issued for purchases on behalf of CARE. Not all items can be purchased using P-cards. They cannot be used for travel expenses. They cannot be used for items over \$5000 which require going through the Procurement Department. See full P-Card instructions under Administrative Procedures Guide under Budgets and Expenses. Contact Joanne Rivera at extension 1355 with any questions.

**Travel Expense Reports (TERs)** – After travel is completed, a Travel Expense Report or TER needs to be filled out so the traveler can get reimbursement. The Travel Expense Report can be found on the Portal at

[http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_1002114\\_0\\_0\\_18/Travel%20Expense%20Report%20010410.XLS](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_1002114_0_0_18/Travel%20Expense%20Report%20010410.XLS). Review the rules for TERs on the Portal. They can be found at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_1000899\\_0\\_0\\_18/How%20to%20complete%20a%20Travel%20Expense%20Report%20\(TER\)040308.doc](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_1000899_0_0_18/How%20to%20complete%20a%20Travel%20Expense%20Report%20(TER)040308.doc). For questions about Travel Expense Reports, email Linda Emuka: [lemuka@care.org](mailto:lemuka@care.org).

**Expense Record-Keeping** – Copies should be kept of all expense paperwork. This may consist of electronic copies or hard copies or both. See your manager for the practices in your area.

**Crystal Reports that deal with Expenses** – Your main expense reports come off of a reporting system called Crystal. Your manager needs to write to the [magichelpdesk@care.org](mailto:magichelpdesk@care.org) to get you access to Crystal reports unless it is set up already.

**Adjusting Your Settings when Using Crystal for the First Time** - The first time you use Crystal, you need to make a couple adjustments to your settings. Click on the Crystal Enterprise link on your desktop (the icon containing four orange balls). Click on Preferences at upper right of screen (above your name) and then click on Crystal Report Preferences (just below the CARE logo). Change View My Reports using to Active X. When you run or view your first report, a window will appear asking if you want to install the viewer. Click Yes, possibly many times, to install the viewer. This is a one-time installation.

**Scheduling the 201 Expense Report** – The 201 Report is a common expense report that shows your actual expenses against your budget. The steps for scheduling the 201 report are below:

1. Click on Crystal icon to open.
2. Click on Expenses.
3. Click on By Project/Department.
4. Click on HQ PN201 – Expense comparison to Budget by Project, Fund and Account. Choose Schedule on the pull down.
5. By Customize your Options: Choose Parameters on the pull down.
6. Fiscal Year: Enter Year (2011) Press Add button.
7. Fiscal Period: Month (Jan, Feb, etc.) Press Add button.
8. Project Range: Start of Range: Enter your PN as the beginning and end information.
9. F1SUMM Range: Start of Range: Enter F1US001 (or the appropriate FC); End of Range: Enter F1US001 (or the appropriate FC); Press Add Range button.
10. Budget Type: Leave at Operating. Press Add button.
11. Press Schedule on upper menu bar.

**Scheduling the 209 Expense Report** – The 209 Report shows the detail of your expenses.

1. Click on Crystal icon to open.
2. Click on Expenses.
3. Click on By Project/Department.
4. Click on HQ PN209 – Detail Transactions by Project, Fund and Account. Choose Schedule on the pull down.
5. By Customize your Options: Choose Parameters on the pull down.
6. Date Range: Start of Range: Use calendar to find the first day of the period (Nov 1, 2011). End of Range: Use calendar to find the end day of the period (Nov 30, 2011). Press Add Range button.
7. Account Range: Start of Range: 5000. End of Range: 5999. Press Add Range button.

8. Project Range: Start of Range: Enter your PN as the beginning and end of the range. Press Add Range button.
9. Fund Range: Start of Range: US001(or appropriate FC). End of Range: US001 (or appropriate FC). Press Add Range button. (Note: Do not put in F1 before the US001 as in the 201 Report.)
10. Press Schedule on upper menu bar.

**Handling Miscoded Expenses** – Sometimes expenses may be miscoded. If your 209 report indicates that an item has gone against the wrong account, PN or FC, fill out an Expense Detail Change Form (sometimes known as the Expense Change Request Form). Your Financial Rep can provide a blank copy to you if you need one.

Expense Change Request Form													
Month:													
PN:													
From:							To:						
Trans #	Acct	PN	FC	CB	Sub	Amt	Acct	PN	FC	CB	Sub	Amt	Explanation

**Handling Budget Discrepancies** – Your Finance Rep can help you learn to read and understand your expense reports. He or she can also help you see if certain items are significantly over or under budget. After a while, you will be able to spot these discrepancies yourself. Discrepancies need to be discussed with your manager.

**Tips for Controlling Expenses** – Your expense reports can tell you if you are spending more than budgeted in certain areas. While your manager should be the final word on managing expenses, certain areas like supplies, printing, mailing, etc can be lowered with some planning and thrifty decision-making on your part.

**Who to ask for general questions about budgets and expenses** – For questions about budgets, expenses and expense reports, see your Finance Rep.

## Mailings

**Your Role in Mailings** – Your manager can describe the kinds of mailings you may need to do. You may only do individual letters, or you may need to do mass mailings.

**Format for CARE letterhead:** - Top margin is 2.36.” Left margin is set at 1.38.” The bottom and right margins are set at 1”.

**Formats for Memos** – templates are available in Word - click on File, New, Templates.

**Mail Merging** – If you need to do a mass mailing you will need to become familiar with the Mail Merge program in Word. If you need a brush up in this area, see Help in Word.

**Keeping Copies of Mailings** – Copies of mailings are important, but many managers are working towards a paperless system. See your manager about how he or she would like you to proceed in this area.

**HQ Mailroom** – At HQ, the mailroom is located on the first floor in back of the Security Desk. At HQ, mail delivery occurs every morning with an additional pick-up in the afternoon. All outgoing mail needs to be coded (check with your department for proper codes). All internal mail should be clearly marked. Be sure to put the mail in the correct box. (Some Field Offices may have postage meters. See your manager about how mail is handled in your office.)

**Pouches** – HQ sends a pouch to country offices and domestic Field Offices every Thursday (deadline is 10a). Field Offices usually send a pouch to HQ every Thursday or Friday. It will include checks, invoices, TERs, Check Requests and other communications.

**Arranging for a FedEx/Courier Shipment** – At HQ, FedEx is used for overnight deliveries. For urgent local deliveries, Executive Courier is used (404-249-9000). Provide your departmental account code information. (Most Field Offices have a FedEx account for overnight shipments. Ask your manager for information.)

**Donor Mailings** – This section has been about mailings in general. If your mailing is a *donor* mailing, you may want to also check out the section Donor Mailings.

## Travel

**Where to find travel information on the Portal** – CARE’s travel information is located in the Travel section of the Portal. To find the Travel section, go to the Home page. Click on CARE Travel on the upper toolbar (next to Staff Calendar and Collaboration Areas).

**Key Travel Information to become familiar with** – A new person to CARE should read (1) CARE’s Travel Policy and (2) Checklist – What to know before you Go.

**CARE’s Travel Policy** – CARE’s Travel Policy is on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_1006559\\_0\\_0\\_18/CARE%20Travel%20Policy%20030410.pdf](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_1006559_0_0_18/CARE%20Travel%20Policy%20030410.pdf).

**Adtrav** – Adtrav is CARE’s travel agency. Adtrav should be used for all reservations for air travel, hotels and car rentals. You can read about them on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_1000887\\_0\\_0\\_18/All%20about%20Adtrav.pdf](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_1000887_0_0_18/All%20about%20Adtrav.pdf). This link also includes information on how to set up a profile so you can use Adtrav.

**Travel Approval Process** – Travelers must get approval from their EMT member in order to book travel. Adtrav will ask for the EMT member’s name before booking.

**Per Diems** – CARE will pay a traveler a certain amount per day for meals and incidentals. The amounts vary by city and usually are adjusted annually. Per Diem rates can be found on the Portal on the home page under Topical Links (Popular Links).

**Mileage Rates** – CARE travelers are paid a certain amount per mile when they use their own car for CARE business. Mileage rates are adjusted periodically. There is usually an email that comes out every time mileage rates are adjusted. The current mileage rate can always be found on the TER form.

**Travel Expense Reports (TERs)** – After travel is completed, a Travel Expense Report or TER needs to be filled out so the traveler can get reimbursement. This may be the function of the Admin in your division. See your manager for clarification here. The Travel Expense Report can be found on the Portal on the home page under Topical Links (Popular Links). Review the rules for TERs on the Portal. They can be found on the first page of the TER excel form. For questions about Travel Expense Reports, email Linda Emuka [lemuka@care.org](mailto:lemuka@care.org).

**Handling Changes to Travel Plans** – Adtrav can make changes to travel plans. After hours, there is a special number for travelers to call, 800-510-2835. The traveler will be instructed on how to complete the call and asked for your After Hours Code: 4BG.

**Handling Travel Exceptions** - When a traveler has some kind of exception to the travel rules, he or she must turn in a Travel Exception Form with their TER. The Travel Exception Form can be found on the Portal at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_1000913\\_0\\_0\\_18/Travel%20Exception%20Form102507.doc](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_1000913_0_0_18/Travel%20Exception%20Form102507.doc).

**Travel Questions** – If you have travel questions, contact Ellen Moens at [moens@care.org](mailto:moens@care.org).

**Topics Mainly for  
Field Office and Resource Development Staff**

## Donor Information

**Donor Records (Hard Copy)** – Many Resource Development Offices keep hard copy files for donors. Ask your manager if your office has them and where they are kept. The hard copy files can show a tremendous amount of detailed information, especially what was collected before we started keeping information electronically. If they are available, they are a solid way to get to know a donor. Of particular value you can see details of correspondence over the years and other nuances of the donor relationship.

**Donor Records (Soft Copy)** – Most Resource Development Offices are moving towards electronic records. Most Admins keep electronic information both in (1) a personal or Shared Drive and in (2) Donor Direct.

**Personal/Shared Drives** - See your manager if you will be saving donor information in an already established electronic record system, or if you need to start one from scratch. If the latter, make sure you set up a logical system and you name your donor files in a way that you can easily retrieve them.

**Donor Direct** - Donor Direct provides a way to keep various kinds of information about a donor, among them:

- Preferences using Interest, Flag and Suppression codes
- Cultivation steps using Ticklers
- Forms, reports, correspondence, photos, etc using the Attachment function
- Relationships through Links and Alt Addresses
- Misc information in Comments section

Note: Steps for entering various kinds of information in Donor Direct can be found in the Donor Direct section of the Administrative Procedures Guide.

**Record Retention Strategies** – There are unique rules about how long you should maintain various records. The new Compliance Unit will be in charge of managing a cross-CARE policy on document retention and will eventually issue new comprehensive guidelines. In the meantime, the tips below may help with your current document retention needs.

Donor Direct facilitates constituent information sharing among fundraisers and if used correctly, fundraising staff can build a full constituent picture by integrating background, biographical, financial and educational information as well as planned and historical contacts/visits and any other pertinent information. If records are maintained properly in Donor Direct, this should eliminate or at least reduce the need for hard files.

What should be retained in Donor Direct:

- Notes and documents at any stage of donor cultivation
- Checks and donations
- Documents and background information should be scanned into DD
- Any documents that facilitate collaboration between fundraisers, Advocacy and EMT etc.
- Contact reports should always be entered into Ticklers
- Contracts, leases, insurance policies, trusts, wills, etc. should be scanned and entered but originals should be kept for up to 7 years for audit purposes

What should be retained in hard files: Certain hard copy information should be kept for at least 7 years:

- Closed Estate files
- Final Distributions etc.
- Trusts/Annuities – originals should be sent to Finance
- Insurance policies, trusts, wills, leases, contracts
- Contracts should be kept for the life of the contract plus 6 years

Use your judgment if disposing of other documents in the hard files - make sure they are at least 2 years old and relevant pages have been entered into Donor Direct. If you have a document that you are not sure of, refer to the current Retention Schedule located on the Portal. If you have any questions about how long to retain a particular kind of records, please see your manager.

Note: Any confidential, personal information such as social security numbers should not be entered into Donor Direct and should not be kept in hard files.

**ER Help Desk** - The ER Help Desk is a help desk that handles questions and requests about donor issues. They can help with such things as:

- Adding a new donor into Donor Direct
- Changing a Cultivation Method for an existing donor
- Changing a fund code on a donor's gift
- Getting a duplicate IRS letter for a donor
- Doing a Mass Upload of Ticklers

The ER Help Desk can be reached at [erfohelp@care.org](mailto:erfohelp@care.org).

**Mass Uploads of Donor Information** – If you need to upload a large amount of information into Donor Direct, you can submit it on a special form, and it will be uploaded by the ER Help Desk. This form can be found under Administrative Procedures Guide (Supplementary Information) under Donor Information.

## Donor Cultivation

**Channels** – Donors are grouped into “Channels” according to their giving characteristics. The current Channels are:

- Small Sum – Gifts up to \$1K
- Annual Fund – Gifts \$1K > \$4,999
- Special Giving - Donors and prospects with the capacity to give \$5K > \$24,999
- Major Gifts - Donors and prospects with the capacity to give \$25K > \$499,999
- Leadership Gifts - Donors and prospects with the capacity to give \$500k+
- Foundations - ex: Gates Foundation, Buffet Foundation, HUGE Foundations
- Planned Giving - bequests, estates, wills, and some outright gifts

Small Sum and Annual Fund are under Direct Marketing. The other Channels are under Alicia Franck. A donor can be moved from one channel to another by submitting a Cultivation Method Change Form to the ER Help Desk. This form can be found under the L (or P) Drive under Administrative Procedures Guide under Donor Cultivation.

**Assigned Users** – Most higher level donors have a Relationship Manager that oversees their cultivation. A donor can have only one Relationship Manager. A donor may however have many other possible relationships. The most common ones are Consulting Relationship, Advocacy Manager, Prior Relationship Manager and Group Manager. A donor may also not have *any* relationships and be managed as a part of a group. Additions and changes to relationships can be entered through Donor Direct.

**Mail Preferences** – Each donor is coded to a particular mail program depending on their Cultivation and the type of mail program to which they respond. The current ones are:

- AA – Active (receives many mailings)
- AF – Annual – Fall only
- AV – Fall only, 1 World Report
- AX - World Reports, Annual Report, and a Presidential Ask at the end of the year
- AZ – Fall only and an Annual Report
- EC – Emergency or crisis only
- EM – Email only
- FD – Final distribution
- FO – Only Field Office contacts to this person
- MM – Monthly mailing
- PA – Park Advocacy Grasstops
- PD – Park Advocacy Dave Matthews Band
- PO – Park Advocacy One Campaign
- PW – Park Women’s Affinity Groups
- QU – Quarterly
- SF – Spring and Fall
- SS – Donor asks that we suspend all mailings
- WR – World Report only

**Ratings** – Higher level donors are *rated* to indicate what amount they might give this year and for what program(s). Ratings are entered into Donor Direct through the Tracking tab (Tracking/New Tracking Rating button at bottom.) Ratings may also be uploaded en mass by HQ.

**Solicitation Plans** – A Solicitation Plan is a detailed description of a plan to help reach CARE’s goals for that donor for the next fiscal year. An example can be found under the Administrative Procedures Guide (Supplementary Materials) under Donor Cultivation.

**Fundraising Tiers** - Fundraising tiers indicate a donor’s highest level gift capacity as well as inclination to give using an alpha numeric system. Inclination is measured on a scale of 1 to 4, and capacity is measured from A to L. Using CARE’s Tier System, we are able to see beyond a donor’s annual giving and identify those donors on our files with the most potential.

Inclination	
1	High
2	Medium
3	Low
4	Don’t Know/Requires Further Qualification

Capacity			
	Financial Capacity	Connecting Capacity	Planned Giving Capacity
A	\$10,000,000+		Donor has named CARE in their estate plans for \$10,000,000+
B	\$5M to \$10,000,000	Supporter with access to potential Tier A prospects.	Donor has named CARE in their estate plans for \$5M to \$10,000,000
C	\$1M to \$5,000,000	Supporter with access to potential Tier B prospects.	Donor has named CARE in their estate plans for \$1M to \$5,000,000
D	\$500,000 to \$1M	Supporter with access to potential Tier C prospects.	Donor has named CARE in their estate plans for \$500,000 to \$1M
E	\$200,000 to \$500,000	Supporter with access to potential Tier D prospects.	Donor has named CARE in their estate plans for \$200,000 to \$500,00 or as the sole beneficiary of their estate but the amount is unknown
F	\$100,000 to \$200,000	Supporter with access to potential Tier E prospects.	Donor has named CARE in their estate plans for \$100,000 to \$200,000
G	\$25,000 to \$100,000	Supporter with access to potential Tier F prospects.	Donor has named CARE in their estate plans for \$25,000 to \$100,000 or as one of the beneficiaries of their estate but the amount is unknown or capacity to fund a life-income gift of \$100,000+
H	\$10,000 to \$24,999	Supporter with access to potential Tier G prospects.	Donor has named CARE in their estate plans for \$10,000 to \$24,999 or capacity to fund a life-income gift of \$50,000 - \$99,999
I	\$5,000 to \$9,999	Supporter with access to potential Tier H prospects.	Donor has named CARE in their estate plans for \$5,000 to \$9,999 or capacity to fund a life-income gift of \$25,000-\$49,999
J	\$1,000 to \$4,999	Supporter with access to potential Tier I prospects.	Donor has named CARE in their estate plans for \$1,000 to \$4,999 or capacity to fund a life-income gift of \$10,000-\$24,999
K	No further gift potential, but high level of cust service		Donor has funded a life-income gift, but has no further potential for an outright gift of bequest gift
L	Undetermined		Unqualified prospects for outright & planned gifts.

## Donor Direct

**Background** - Donor Direct is our electronic repository of donor information. Your manager can request access from the Magic Help Desk. They can also assist you if you are having any problems with your system.

**Where to Find Instructions** - The Administrative Procedures Guide (Supplementary Material )under the topic Donor Direct contains the official manual called the Compass as well as illustrated instructions on frequently performed functions, such as:

- How to sign on and off
- Looking up donor info when you have donor number and when you don't
- Printing donor info
- Copying a donor's name/address into a letter or email
- Recognizing combined donors, alternative names and addresses, deceased donors
- Donor gifts – regular, adjusted, split, soft credits, Fund Codes, source codes
- Entering a prospect into system; assigning a current donor
- Printing a list of donors in a portfolio
- The Assigned User tab
- Entering an Interest Codes, Tiers, Flag Codes, Suppression Codes
- Entering a Rating
- Adding a Tickler
- Closing a Tickler
- Doing an Attachment
- Handling Presidential Acknowledgements
- Handling a mass upload

The topics are listed in the optimal order for learning.

## Donor Research

**HQ Research Requests** – Research requests should be submitted through the ERHelpDesk with RESEARCH REQUEST in the subject line. The requests will be sent to Anne Blankinship.

Provide:

**WHO:** Account and name. If there is no account, please provide home address

**WHAT:** Information you are seeking

**WHY:** Upcoming meeting, solicitation, new donor, new prospect, etc. This will help me to gauge the best format

**Research tab in Donor Direct:** Research that is done by CARE's corporate research person, Anne Blankinship, is posted in the Research tab in Donor Direct. Contact Anne with any questions or updates.

**Doing Your Own Research** – Admins may sometimes be asked to help with donor research. Some possible websites are below. Anne Blankinship may possibly have some suggestions on the best ones to use. Note: you may need to subscribe and/or get a user name and password.

- **Chronicle of Philanthropy** - to search archives on Foundations
- **Finance@yahoo.com** - gives lots of tools that help you determine approximate worth of holdings.
- **Forbes.com**
- **Google** - Google advanced search page is helpful in defining parameters for search
- **Guidestar** - useful for board/trustee identification, to research foundations, trustees, and past giving via (990s). Foundation Center is also good; recommend that you get your own account
- **Hoovers** - to research corporations, key executives, industry news and rankings. Information on private companies is not as accurate.
- **Lexus Nexis** - database for news etc.
- **Local Newspaper** - Sign up for the local newspaper to get sent articles on your TOP donors
- **Open Secrets** - [www.opensecrets.org](http://www.opensecrets.org) – provides information on the individuals political contributions
- **Salary.com** - Job title and zip. This works well with publicly traded companies. Salary.com is a great resource because it also has cost of living. Look at bonuses and stock options to understand full capacity.
- **Tray** - [www.tray.com](http://www.tray.com) which provide information on the individual's political contributions.
- **www.secinfo.com** - to research industry insiders (people who hold a significant amount of a corporation's stock).
- **www.theultimates.com/white/** - will work through different search engines
- **Zillow.com** – good for property information
- **Zoominfo.com** - Another bio website

**Corporate Research** – Corporate Research is done under the auspices of the SPA team. Corporations need to be vetted to make sure their values match CARE's. Please contact CARE's Corporate division with questions.

## Donor Reports

**Crystal Reports that deal with Donors** – Your main donor reports come off of a reporting system called Crystal. If you do not have access to Crystal, ask your manager to write to the [magichelpdesk@care.org](mailto:magichelpdesk@care.org).

**Adjusting Your Settings when Using Crystal for the First Time** - The first time you use Crystal, you need to make a few adjustments to your settings. Click on the Crystal Enterprise link on your desktop (the icon containing four orange balls). Click on Preferences at upper right of screen (above your name) and then click on Crystal Report Preferences (just below the CARE logo). Change View My Reports using to Active X. When you run or view your first report, a window will appear asking if you want to install the viewer. Click Yes, possibly many times, to install the viewer. This is a one-time installation.

**How to Schedule a Donor Report in Crystal** – Below are some abbreviated instructions on how to schedule a report in Crystal. If you would like to see these instructions with illustrations, look under the Administrative Procedures Guide (Supplementary Materials) under Donor Reports.

1. Double click on the Crystal icon on your desktop to open it (icon with three orange balls).
2. Double click on the type of report you wish to schedule. Donor reports are under Constituent Management.
3. Find the report you want. When you place your cursor over it, there is a brief description of the information that is in it.
4. When you click on a particular report, a small pull down of choices appears: View, View latest instance, Schedule and History
5. First click on the Schedule option. The Schedule screen appears.
6. Pull down the options arrow next to the word Schedule. A list of choices appears: Schedule, Database logon, Parameters, Filters, Destinations, Format, Print Settings. Choose **Parameters**.
7. Several fields with choices will appear depending on the report you have selected. Usually each of these choices will have a pull-down set of options.
8. For instance, if you are asked to select a Manager, you would click the pull-down arrow and select the name of the manager you want.
9. Sometimes the Relationship Manager that you want will not be in the list. You can enter the information manually if you use the correct format (their User ID).
10. When you have made your choice, press the Add button. The choice you selected will appear in the Current Value section.
11. Select your other parameters (Flag Codes, Relationship Type, Date, etc). Don't forget to press Add after each choice.
12. When you are done, go up to the top and choose **Format** from the pull-down menu.
13. From the Set the Format screen, select your preferred format. The most common ones are Excel and Crystal Report. (Many reports already default to Excel. When you know a report already defaults to Excel, you don't have to select a choice from the Format menu. You just click Schedule in the upper right-hand corner.)
14. Now you are in the History tab. You can see your report there. When its Status is Success, you can click on the Instance Time to open it. (You may have to hit Refresh to update its Status.)

**Opening and Formatting a Crystal Report** - Once a Crystal report has been run, there are a few small adjustments you need to make so it is usable. Below are some abbreviated instructions on how to make these adjustments. If you would like to see these instructions with illustrations, please look under the Administrative Procedures Guide under Donor Reports.

1. Go into Crystal and select the report you are interested in. Then select the History option. (If you have just scheduled a report, you will automatically be put into the History section of that report.)
2. Click on the particular report you are interested in.
3. If the report opens up in Excel, its fields are initially compressed.
4. Highlight the spreadsheet on the Crystal screen and Copy the spreadsheet.
5. Paste the spreadsheet into a new blank spreadsheet in Excel.
6. Your spreadsheet is now in a new Excel sheet.
7. Highlight the entire spreadsheet, and choose Format then Cells.
8. Then choose Alignment. Remove the selection of Wrap Text and/or Merge Cells that are under the heading of Text Control.
9. Press OK.
10. The screen will now be configured in a way that can be sorted, etc.
11. As always, name your spreadsheet with a logical name and save it in the appropriate place in your electronic files so you can find it easily at a later time.

**What Report to Use** – There are many Crystal reports, and it is often difficult to choose the best one for your needs. Below are some suggestions for the most common needs.

<b>Need</b>	<b>Report Name</b>	<b>What's included</b>	<b>Comments</b>
Donor List for a Mailing for a particular Relationship Manager	Constituent Listing Mail Merge Report by Manager	Name, Alt Name, Company, Address, Salutation, Tier, Cultivation, Address Status, Mail Preference, Birthday	All purpose mailing list
Donor List with Gift Info for a particular Relationship Manager	Gifts Total Report (Outright and Cum)	Name, Alt Name, Company, Address, Salutation, Tier, Cultivation, Cum Gifts for last 5 FYs, Life Cum, Last Gift Date and Last Gift Amount.	Can be used for a mailing. Gifts include soft credits. Can't see Unrestricted and Restricted distinction
Donor List for Phoning or Emailing Donors for a particular Relationship Manager	Contact Information Report	Name, Alt Name, Address, Salutation, Tier, Cultivation, Address Status, Mail Preference, Birthday, Phone, Email, Donor Type, Interests, Suppressions	No Company - so not good for a mailing
Donors with a particular Flag Code for a particular Relationship Manager	Contact Information Report by Flag Code and Manager	Name, Alt Name, Address, Salutation, Tier, Cultivation, Address Status, Mail Preference, Phone, Email, Donor Type, Suppressions	No Company - so not good for a mailing
Donors with a particular Interest Code for a particular Relationship Manager	Contact Information Report by Interest Code and Manager	Name, Alt Name, Address, Salutation, Tier, Cultivation, Address Status, Mail Preference, Phone, Email, Donor Type, Suppressions	No Company - so not good for a mailing

Need	Report Name	What's included	Comments
Donors who have given to a particular Fund Code for a particular Relationship Manager*	Constituent Donations by Gift Type	Name, Alt name, Address, Salutation, Fund Code, Fund Code Description, Amount, Date	No Company - so not good for a mailing. Doesn't show soft credits. Each gift has its own row so can't see combined for a donor.
A Relationship Manager's Gifts by showing Fund Codes and lining up in Restricted and Unrestricted Columns	Constituent Donations by Gift Type	Name, Alt name, Address, Salutation, Amount, Fund Code, Fund Code Description, Date	No Company - so not good for a mailing. Doesn't show soft credits. Each gift has its own row so can't see combined for a donor.
A Relationship Manager's Soft Credits showing Fund Codes and lining up in Restricted and Unrestricted Columns	Soft Credit Received (Restricted and Unrestricted) Report	Name, Cultivation, Amount, Fund Code. Date of Gift, Name of Hard Credit Donor, Cult of hard Credit Donor, Relationship Manager of Hard Credit Donor	Best use is to blend in with Constituent Donations by Gift Type to see a full picture of a Relationship Manager's Gifts

**Non-Crystal Reports** - While Crystal is by far our main source of reports, there are a couple useful reports from other sources.

**Donor Direct Fund Code Report** – Donor Direct has its own internal reports under the Reports tab. While most of the reports under the Reports tab were created for other users, there is one that is of some use. It pulls all the donors at CARE who have given to a particular Fund Code (This is helpful if you want your results to include donors who have many different Relationship Managers or who may not even have a Relationship Manager.) To get this report, click on Reports on the Donor Direct menu bar. Then click on the Custom Reports tab. Select PIDI\_CUST020 from the pull down list. Enter in the Fund Code, dollar range and date range. This report has a couple disadvantages. Its results are very broad so you have to sift through a lot of data if many people gave to that particular Fund Code. The report also does not show the Relationship Manager in the results and does not have any easy way to sort by State since it lists City, State and Zip as one block. You have to be a bit of a detective using this report!

**Donor Direct Portfolio Manager Exports** - Some Admins and Relationship Managers find it easier to export data from Portfolio Manager rather than run a Crystal report.

## Donor Trips

**Background** - Donor trips can be an effective cultivation tactic. They are however costly in time and resources and require advance decision-making and coordination with RD management and the Country Office. As a first step, always check the Portal for the most updated instructions. They can be found at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_973083\\_0\\_0\\_18/Trip%20Planning.doc](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_973083_0_0_18/Trip%20Planning.doc).

### Main Steps involved in a Donor Trip

	Requirement	When
1	Check the GAER Trip Calendar	Ideally 6-8 mos. before trip
2	Submit <u>Donor Trip Request Form</u> to your Revenue Channel Manager	Ideally 6-8 mos. before trip
3	Once approved, the Revenue Channel Manager should submit the Donor Trip Request Form to the RD SVP	Ideally 6-8 mos. before trip
4	If trip approved by the RD SVP, obtain approval of the CARE Country Director in destination country – provide clear expectations about desired trip outcomes	Ideally 6-8 mos. before trip
5	If trip approved by CD, submit rough itinerary to the CARE USA Director of Security for approval	Ideally 6-8 mos. before trip
6	If trip approved by all above parties, add trip to GAER Trip Calendar	Ideally 6-8 mos. before trip
7	Consult the Donor Trip Folder on the Portal to develop a trip planning calendar, trip budget and trip briefing materials	Ideally 6-8 mos. before trip (ongoing)
8	Schedule pre-trip briefing call with donors to review briefing materials	1 month before trip
9	Collect human interest stories and photos for RDC	during trip
10	Debrief relevant Relationship Managers on all important communication with donors during trip and record developments in Donor Direct	during and after trip
11	Monitor and document outcomes of trip and inform SVP RD and channel manager of results and next steps	Within 2 weeks after trip

**Approval** – You must get advance approval on many levels for all donor trips. The approval form is found on the Portal along at the bottom of the other donor trip information: [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_973083\\_0\\_0\\_18/Trip%20Planning.doc](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_973083_0_0_18/Trip%20Planning.doc). There is also a copy on the Administrative Procedures Guide on the H (or V) Drive under Donor Trips.

**Finances** - Most donor trips involve creating a budget with the Country Office and collecting money from the donors. This money should be itemized and submitted on a Donor Trip Collection Form which can be found at [http://mycare.care.org/portal/server.pt/gateway/PTARGS\\_0\\_6873\\_716915\\_0\\_0\\_18/Donor%20Trip%20Collection%20Form.xls](http://mycare.care.org/portal/server.pt/gateway/PTARGS_0_6873_716915_0_0_18/Donor%20Trip%20Collection%20Form.xls). There is also a copy on the Administrative Procedures Guide on the H (or V) Drive under Donor Trips. Work with Finance to make sure the money flows across to the Country Office on the right timetable.

**Suggestions:** Talk with others who have managed donor trips in recent times. They can be great sources of information and pitfalls to avoid.

## Donor Mailings

**Background** – While face-to-face meetings and phone conversations are usually the most effective way to work with a donor, donor mailings can also be an important cultivation tool. These mailings can be unique letters or handwritten notes to one donor in particular, or they can be a mass mailing where the same message is delivered to many people. The rest of this section will deal mostly with mass mailings.

**Mail Merges** – A mail merge takes a template letter (usually done in Word) and produces many letters that are customized in key parts (name, address, amount, etc.). The customizable data usually comes from a spreadsheet (Excel) containing this information. One of the best reports to use to create the spreadsheet for a general mailing is the Crystal report called *Constituent Listing Mail Merge Report by Manager*. Note: The Relationship Manager should review the spreadsheet before the merge is done to make sure no names need to be removed and the information is accurate. One of the key pieces of information to review is the *Salutations* information. After the mail merge is done, the Relationship Manager signs the letters and, if desired, writes a handwritten note on the margin, top or bottom. In some offices some or all letters are photocopied for the donors' files. See your manager for the protocol in your office.

**End-of-Year Mailings** – One of the most common mass mailings is the end-of-year mailing usually done in November or early December. This mailing can be a direct solicitation (Ask) or it can be a general letter of thanks (No Ask). Sometimes a Relationship Manager may want to use a spreadsheet that contains gift information in order to determine whether the donor should receive an Ask or No Ask letter. One of the best reports to use for this type of mailing is the Crystal report called *Gifts Total Report (Outright and Cum)*. It contains the donor's giving in recent years and their last gift date and amount.

**Emergency Solicitation Mailings** – When an earthquake, flood or other disaster occurs, Relationship Managers often want to reach out quickly to a large number of potentially responsive donors. The Relationship Manager can often work with HQ or colleagues to quickly pull together an effective solicitation letter. The Crystal report *Constituent Listing Mail Merge Report by Manager* can be pulled to get a list of all donors. If the Relationship Manager wants to write to only to Emergency Responsive Donors, the *Contact Information Report by Flag Code and Manager* can be run. (Please note this report does not currently contain Company, so some care should be taken in proofing the report for names that are likely to be business addresses that are missing the Company's name.)

**HQ Mailings** – Occasionally HQ will mail materials and solicitations directly to managed donors (depending on their Mail Preference). Relationship Managers are usually offered an opportunity to “opt out” any donors that they do not want to receive the mailing. If Relationship Managers regularly find themselves opting out the same donors, they should consider changing the Mail Preferences so they will not be included in these types of mailings in the future.

**Mail Preferences** – For HQ mailing, each donor is coded to a particular mail program depending on their Cultivation and the type of mail program to which they respond. The current ones are:

- AA – Active (receives many mailings)
- AF – Annual – Fall only
- AV – Fall only, 1 World Report
- AX - World Reports, Annual Report, and a Presidential Ask at the end of the year
- AZ – Fall only and an Annual Report
- EC – Emergency or crisis only

- EM – Email only
- FD – Final distribution
- FO – Only Field Office contacts to this person
- MM – Monthly mailing
- PA – Park Advocacy Grasstops
- PD – Park Advocacy Dave Matthews Band
- PO – Park Advocacy One Campaign
- PW – Park Women’s Affinity Groups
- QU – Quarterly
- SF – Spring and Fall
- SS – Donor asks that we suspend all mailings
- WR – World Report only

## Donor Gift Processing

**Background** – Donors may give to CARE through many methods (checks, credit cards, stock, wire, etc). Much of the time, the donors deal directly with CARE's website, locked box, or HQ, but sometimes these gifts come to a Field Office. Below are the steps to handling each of these kinds of gifts.

### Checks

1. Find the Check Donation Form in your saved files or on the Portal. (It can also be found in the Administrative Procedures Guide under Donor Gift Processing.)
2. Fill out the requested information (Relationship Manager, Date, Channel Manager, Office Manager, Donor's Donor Direct Account #, Donor's Name and Address, Soft Credit Donor Direct #, Amount of the check, Source Code, Fund Code , any Notes).
3. If you have a bank stamp payable to SunTrust Bank, stamp back of check with bank stamp. (Stamp on top 1 ½ "of opposite the donor's name and address.)
4. Paperclip the check to the blank spot at the bottom of the Check Donation form.
5. Make 4 copies of the check and any accompanying paperwork (letter from the donor, etc.)
6. Paperclip one copy to the form with the original check.
7. Put the original and copy into an envelope for Treasury to go in the weekly pouch to HQ.
8. Distribute the other copies as follows: (1) goes in the donor's hardcopy file (2) goes in the Check Notebook for the current fiscal year (3) goes to the Relationship Manager. Note: Some Field Offices do not follow this distribution process exactly. See your manager for the current process in your office.
9. Note: If you are at HQ, the procedure is somewhat different. Take the original check, envelope and a copy of supporting correspondence to Treasury Office on the Third Floor. Log in the check amount, date, originator, and any special comments in the log that Treasury keeps at the secure window. If no one is there, log the check and drop in the door letter box.

### Credit Cards

1. Go into the Portal to find the Credit Card Processing form or refer to your files. (It can also be found in the Administrative Procedures Guide on the H (or V) Drive under Donor Gift Processing.)
2. Fill out the form. If it is an existing donor you should include the donor ID, name, address, amount, Source Code, Fund Code, credit card type, credit card number, expiration date. In addition if it is a new donor, make sure you include the Cultivation Method, Donor Type and Mail Preference.
3. Email the form as an attachment to ER Donor Revenue at [erdonrevenue@care.org](mailto:erdonrevenue@care.org). The ER Donor Revenue mailbox is checked daily by a member of the Donor Revenue team.
4. If the bank declines the card, you will be contacted by a member of the Donor Revenue team to follow-up with the donor.
5. Note: Do not keep the donor's credit card information in files or otherwise where its security can be compromised.

### Credit Cards called in to HQ

1. Under certain circumstances, you may have to work directly with someone at HQ to put your credit card through by phone. This may happen on the last day of the calendar year when there is no opportunity for an emailed credit card gift to be processed in the current year.
2. Phone Constituent Services at extension 1433 or Romelia Richards at extension 1103.
3. Note: A gift made this way will go through as Unrestricted. If you wish to restrict it, special steps need to be taken.

**Stock Gifts** – A donor may want to give a stock gift to CARE. If this is the case, try to get (as much as possible of) the following information from the donor:

- Name(s)
- Address
- Telephone number
- Name of the stock
- Number of shares
- Intended amount
- Broker's name
- Broker's firm name
- Broker's telephone number
- Approximate date of the transfer

Thank the donor and have him tell his broker make an electronic transfer to

- BANK OF AMERICA
- ABA #026009593
- Beneficiary: CARE USA
- DTC#955/Institution 20955
- Account #79161005845031

**Stock Instructions for the Donor** – If the donor would like written instructions on how to handle a stock gift, there is a convenient attachment you can send them called Stock Instructions. Stock Instructions can be found under the Administrative Procedures Guide under Donor Gift Processing. Note: There is a place on this form to personalize your office name and phone number before you send it to the donor.

**Security Notification Form for Headquarters** – After you learn about a stock gift, you need to fill out a form called the Securities Notification Form and email it to HQ (currently to Felisha Bowie). This form can be found on the Portal or in the Administrative Procedures Guide under Donor Gift Processing. Note: The form is updated every year. If you need an updated version, check the Portal.

**Cash Wire Gifts** – Donors may occasionally wish to give a gift to CARE through a wire transfer. Because they are rather rare, you should pay special care to these gifts so they do not go astray. When a donor indicates that they want to wire money to CARE, send them the page of instructions that can be found in the Administrative Procedures Guide under Donor Gift Processing. It is called Cash Wire Transfer Instructions. Notify Florence Makope [fmakope@care.org](mailto:fmakope@care.org) 404-979-9245 or Lester Mendiola [lmendiola@care.org](mailto:lmendiola@care.org) 404-979-9340 that a wire transfer is coming through.

**Flow of Gifts through Headquarters** – There are many steps to processing a gift depending on the kind of gift and how it was received. Ultimately, however all gifts end up in posted in Donor Direct.

**How to verify a Gift** – There are several ways that a Relationship Manager or Admin can check on a gift. (1) Look in the donor's Donor Direct account under the Donations tab. (2) Look in Portfolio Manager (sorting by last gift date which will make the most recent gifts come to the top). (3) Look through the Transaction Detail Report (TDR report). If an expected gift is not posted within an expected timeframe, check back through the steps for that gift. If it was a check or credit card, make sure it was received at Headquarters. If it was a stock gift, check the Unknown section of the Stock Log. If it was a wire transfer, begin a dialogue with Florence Makope or Lester Mendiola.

**IRS Receipt** – Donors will receive a tax receipt for their gift shortly after it is processed. You can see the date the donor was sent a tax receipt by looking at the donor’s account in Donor Direct. Click on the Donations tab and look for the column that says “Tax Date.”

**Duplicate Receipt** – If a donor has lost or never received their tax receipt, you can request a duplicate. Email Constituent Services ([ERDONORRELATIONS@care.org](mailto:ERDONORRELATIONS@care.org) or Ramona Biggs with this request. Give them the donor’s name, account number, date and amount of gift.

**Source Codes** – When you process a gift, you will be asked for a Source Code. The Source Code tells the source of the gift. *Why* did the donor give this gift? When the donor is responding to a marketing piece, there is usually a source code on the return envelope. Gifts that come through a Field Office usually go under a generic Field Office Source Code. The generic Field Office Source Code number changes by one digit every year. This number should be on your Check Donation Forms, your Credit Card Donations forms, etc. You can also request a unique Source Code if you are having an event and expect a lot of gifts that you would like to tie to the event. There is an official Source Code Request form. It can be found on the Portal or in the Administrative Procedures Guide under Donor Gift Processing.

**Fund Code Overview** – When you process a gift, you will be asked for the Fund Code. The Fund Code tells where the money will be *spent*. Donations to CARE are either (a) Restricted which means they may only be used in a specific program or for a specific type of activity or acquisition or (b) Unrestricted which means CARE is free to use the funds in the manner it chooses. Generally gifts need to be over \$10,000 to be Restricted (except for pooled fund codes as described below).

**Getting a Fund Code for a First Time Restricted Gift** –When receiving a first time *Restricted* gift, to get a Fund Code, the Relationship Manager or Admin needs to fill out a PSI Request Form and send it to Amy Wing or [RDCsupport@care.org](mailto:RDCsupport@care.org) indicating that a restricted donation has been received. Be sure to state the date by which the funds must be spent and the project duration. Also attach electronic copies of the check and the accompanying letter. The PSI Form can be found in the RD Library or in the Administrative Procedures Guide Supplementary Materials under Donor Gift Processing. The process of getting a Fund Code may take several days to several weeks, as there are many steps involved. The Fund Code will be sent to you when the process is complete.

**Fund Code Format** - Fund Codes are of the format LLNNN (i.e. BR069). Fund Codes regularly incorporate the first two letters of the country involved and then three numbers. For instance NP177 is the fund code for the Nepal Saeeno Project. Often emergency Fund Codes will have the letters US as the first two letters, even if the emergency is in another country. For example the Haiti Earthquake Emergency fund code is US801. While waiting for a new Restricted Fund Code to be assigned, the gift goes in the Holding Fund Code US159. Unrestricted gifts all go into fund code US001.

**Subsequent Gifts to the Same Project** - If a gift is a second or subsequent gift to a project that is already in progress, you may generally use the same Fund Code that was assigned to the initial gift. Be sure to Email Amy Wing with the amount, project name and Fund Code. This will ensure that the funds are applied to the correct Fund Code, the Country Office knows the money has been received and the financial reports include accurate information. When [RDCsupport@care.org](mailto:RDCsupport@care.org) is not notified, several months may go by before the allocation is made.

**Pooled and Emergency Fund Codes** - If a gift is for a pooled Fund Code or an emergency, you do not need to fill out a RDC form since the Fund Code has already been assigned.

**Looking Up a Fund Code** – If you need to find a particular Fund Code, there are a couple places to try. (1) The best method is if you know that a particular donor has given to that Fund Code in the past, look in Donor Direct for that donor’s account and then look in the Donations tab for the Fund Code associated with that gift. (2) Donor Direct contains a list of Fund Codes under Edit/Code Tables/Fund Codes. Unfortunately this list is a little difficult to use since a lot depends on how the Fund Code was *named*. If you don’t know the exact name, you may not be able to find it. (3) The Information and Knowledge Management Department may be able to help you as a final resort. Email [RDCsupport@care.org](mailto:RDCsupport@care.org).

**Requesting Reporting for a Restricted Gift** – When you receive a Restricted gift, the Admin or the Relationship Manager needs to fill out the RDC Request Form to request reporting. (This can be done on the same form that you used to request a Fund Code.) When figuring the dates for a report, be sure to allow *at least* one month for the compiling and writing of a particular report. Put a Tickler in Donor Direct for each report you are requesting. Attach the RDC form. Put the due date of the report as the Action Date. Put a reminder one month before.

**Relationship Manager Acknowledgement of Gifts** – It is customary and good practice for a Relationship Manager to thank a donor for any gift. Note of this acknowledgement should go in Donor Direct. Some Relationship Managers also keep a photocopy in the donor’s hard copy files.

**Presidential or COO Acknowledgements** – There is a process set up for donors to receive a special Presidential Acknowledgement letter for gifts of a certain size. The steps are below. (You can see an illustrated version of this in the Administrative Procedures Guide under Donor Direct/Presidential Acknowledgements.)

1. When a donor gives at a certain level, his or her Relationship Manager receives an automatic email with a Tickler pasted inside. This Tickler by itself does not trigger the letter. It is a reminder to the Relationship Manager to start the process.
2. The Relationship Manager then forwards this email to their Admin.
3. The Admin creates a Presidential or COO letter for the donor using templates that are provided from Kara Ansotegui at [\\Apps\er\Resource Development\RD Services\Donor Stewardship\Gift Acknowledgement Templates](file:///C:/Users/er/Resource%20Development/RD%20Services/Donor%20Stewardship/Gift%20Acknowledgement%20Templates) . The Admin then copies and pastes the donor’s name and address into this template letter and sends it to the Relationship Manager for their approval. (Note – very few changes are encouraged by the President’s Office. If the Relationship Manager wants personalization, they should write their own letter in addition to the Presidential letter.)
4. Once the letter is approved by the Relationship Manager, the Admin then revises the original Tickler by:
  - Changing the Action Date to the current date plus two days
  - Removing the Relationship Manager’s name from the Email Sent field
  - Making the User Status to Pending
  - Making the User Assigned President’s Office (or Tricia Trice for COO letters)
  - Making the Remind Date today’s date
  - Reminding User: President’s Office (or Tricia Trice for COO letters)
  - Attaching the modified letter
  - Changing the Tickler Notes to say “XXX sent donor an Acknowledgment for contribution received on MM/DD/YY.”

5. The Executive Office (or Trina Trice) will then:
  - Open the Tickler
  - Print the Letter
  - Have Dr, Gayle or COO sign the letter
  - (Possibly) reattach the signed letter
  - Close the Tickler
6. A Relationship Manager can also create a Presidential or COO Acknowledgment for an amount that is less than the target amount. In this case, the Admin has to create the Tickler. At this time, there does not seem to be any problem with having an Acknowledgement sent to a donor who gives less than the target amount.
7. If the Relationship Manager wants a personal signature, place the words “Helene Gayle Signature PA” in the first line of the Tickler notes. Fill out and upload the PA Signature Checklist Form. This form can be found in the Administrative Procedures under Donor Gift Processing.
8. If the Relationship Manager wants an *email* sent from Dr. Gayle, email this request to Kara Ansotegui. Include a filled-out CEO/Leadership Engagement form with the appropriate details including email address to be sent to, Relationship Manager’s email address as a cc and a draft of the email. (A copy of the CEO/Leadership Engagement form can be found in the Administrative Procedures Guide under Donor Gift Processing.)
9. All letters and gift acknowledgement letters and communication to the Board are handled through Carol Hudson.
10. Because there are sometimes questions that come up, the Admin might want to either save Presidential letters in a unique electronic file or create a spreadsheet of list of the Presidential Acknowledgement letters that have been processed or both. Note: In saving the files, the Presidential Office requests that the Donor’s *account number* be in the document title.

## Program

**Background:** Admins supporting Resource Development should become familiar with the Program aspect of CARE's work. This includes knowing what countries we work in, the kinds of work we do and details of current program initiatives.

**Annual Report** – Become familiar with CARE's current Annual Report. Read it through thoroughly. It will give you a head start in understanding the program work that CARE does.

**Country Office Contact Lists** – A list of the countries where CARE works and a list of their staff can be found on the home page of the Portal under the middle section called Popular Links.

**Focus Programs** – While CARE operates in a wide variety of sectors and is known for its breadth, it is currently giving a special focus to four umbrella areas:

- Health
- Gender and Empowerment
- Food Justice and Livelihood
- Humanitarian Assistance

Information (proposals, reports, brochures, etc.) about the these focus areas and other programs can be found on the Portal.

**PAL** - The PAL or Project Availability List lists the main projects that are currently seeking funding. It is updated weekly by the RDC group. It consists of a spreadsheet and a Word document. The spreadsheet lists all the projects and is sortable by country, sector, etc. The Word document has a description of each project. Be sure to use the current version of the PAL, as new projects are added regularly. You can find the most updated version of the PAL in the [Resource Development Library](#) on the Portal. If you have any PAL-related questions, send them to [rdcsupport@care.org](mailto:rdcsupport@care.org).

**Proposals** – If a Relationship Manager wishes to submit a proposal to a donor, he or she should work with the RDC Department to create a proposal. Proposals should be requested using the first section of the RDC Request Form on the Portal or the Administrative Procedures Guide in the section called Program.

**Resource Development Library** – The Resource Development Library is a compilation of program information of interest to donors, Relationship Managers and other stakeholders inside and outside of CARE. It can be accessed from [http://mycare.care.org/portal/server.pt?open=17&objID=71533&qid=33700371&rank=1&parentname=SearchResult&parentid=7&mode=2&in\\_hi\\_userid=962&cached=true](http://mycare.care.org/portal/server.pt?open=17&objID=71533&qid=33700371&rank=1&parentname=SearchResult&parentid=7&mode=2&in_hi_userid=962&cached=true)

. Among the things you can find there:

- Country and Region [Overviews](#)**
- [Dollar Handles](#) (more than 50 examples)**
- Human Interest [Stories](#) (over 600 stories)**
- [Pooled Fund](#) Proposals and Reports**
- Project Availability List ([PAL](#))**
- [Project Reports](#) (select reports developed by RDC)**

- Reports Developed by Program Teams**
- Signature Program and Signature Issues Documents**

**Ubora** - Ubora is CARE's Organizational Performance and Learning System. It is named for the Swahili word meaning "excellence." The goal of Ubora is to enable CARE to be more strategic by strengthening our ability to measure, analyze, and improve performance across country offices, regions, Atlanta divisions, and globally. Ubora also helps CARE by assessing the quality of our work and the extent to which we are achieving desired impact. You can find Ubora at <http://ubora.care.org/Pages/Default.aspx>. If you have questions, write to [ubora@care.org](mailto:ubora@care.org).

**Program Quality Digital Library** - The PQDL is a strategic subset of the many documents, manuals, thought papers, and studies produced throughout CARE USA. Its aim is to answer the question asked so often by field staff: "What at a bare minimum, do I need to know and do in order to run successful programs and projects in CARE?" To answer this, the PQDL organizes three kinds of program information: policy, recommended good practice, and new emerging ideas. The PQDL can be found on the Portal at: <http://pqdl.care.org>.

## Volunteer Groups

**Background:** Field Offices may have one or more groups of volunteers that support CARE's work. Volunteers may organize events, handle speaking engagements, fundraise for specific projects, advocate on behalf of CARE with local or national leaders, or participate in a host of other functions. Volunteers may be tightly organized or loosely coordinated. Overseeing them is usually the responsibility of a Resource Development fundraiser but it may also be a Field Coordinator or Admin.

**Volunteer Groups in the Field Offices** – Currently the following volunteer groups are active in the Field Offices:

- New York – New York Women's Initiative (NYWI); Young Professionals for CARE (YP)
- Chicago - Chicago Women's Initiative (CCWI)
- San Francisco – Bay Area Committee for CARE (BACC)
- Seattle – Northwest Community for CARE (NWCC) and Nepal Women's Group
- South East – CARE Alabama

Contact the Admin in the Field Office you are interested in for more information. A description of New York's Young Professionals for CARE can be found in the Administrative Procedures Guide under Volunteers as an example of how one volunteer group works.

## Events

**Background** - Field Offices often hold events as a means of awareness-building or donor cultivation. These events may be either local in scope (market-driven) or part of a national initiative.

**National Conference and Celebration** – One of the main national events we hold each year is the National Conference and Celebration. At the National Conference and Celebration, CARE supporters from around the country come to Washington DC to meet with their elected representatives and advocate for pro poor policies, especially those affecting women and girls. Christine Santos is in charge of this event. In 2012 the NCC will be somewhat scaled down to mainly include state and district Chairs. See the Portal for more information.

**National Initiative Events** – There are other national initiative events. One of the main one of these is CARE on Tour. In CARE on Tour, CARE workers from around the world come to share CARE's work with donors and prospects. Information about CARE on Tour and other national events can be found on the Portal. The Portal also contains forms to use in planning, executing and evaluating these events. [http://mycare.care.org/portal/server.pt?open=17&objID=71410&DirMode=1&parentname=Dir&parentid=1&mode=2&in\\_hi\\_userid=6873&cached=true](http://mycare.care.org/portal/server.pt?open=17&objID=71410&DirMode=1&parentname=Dir&parentid=1&mode=2&in_hi_userid=6873&cached=true)

**CEO Events** – Events involving CARE's CEO have their own set of procedures and forms. See Kara Ansotegui for these forms.

**Local Events** – Local events can range from a few donors meeting for a brown bag with a CARE speaker to an elaborate production involving many invited guests, an external venue, printed invitations, refreshments, agendas, talking points, a variety of materials and a number of expected outcomes. Please see Events section of the Administrative Procedures Guide for some materials you can tailor for these events including an Action Item List you can customize for your particular event.

**Other Information** – See the Meetings section of the Administrative Procedures Guide for more suggestions about how to arrange and hold a successful event.