

Building Stronger Relationships through Soft Credits

with
bloomerang



Do you scratch your head when you receive a check or direct deposit from a financial institution, foundation, or donor-advised fund that was requested by a donor?

WHO?		Date <u>5/1/25</u>	000
Pay To The	Your Nonprofit	\$	5000.00
Order Of	Five thousand and 00/100		
		Dollars	
: 000000000 : 00000000000000 - 0000			





- Who do you thank?
- Who gets credit for the gift?
- How do you recognize the donor?

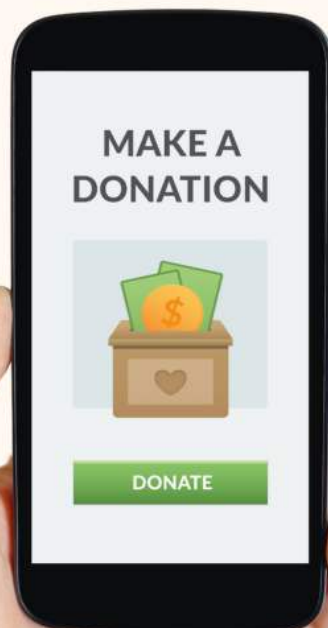


Institution



Gift
Referral

A few extra steps
can solidify
donor relationships
and
help secure future
gifts!



bloomerang
makes it easy!

By the end of this session, you'll learn:



How to enter donations with soft credits in Bloomerang

How to create acknowledgment letters for both the donating institution and the soft credit.



How soft-credited gifts appear on Bloomerang's Annual Giving Statements

WHO SENT THE CHECK?

DAF's



Your Town
Community
Foundation

Giving Platforms



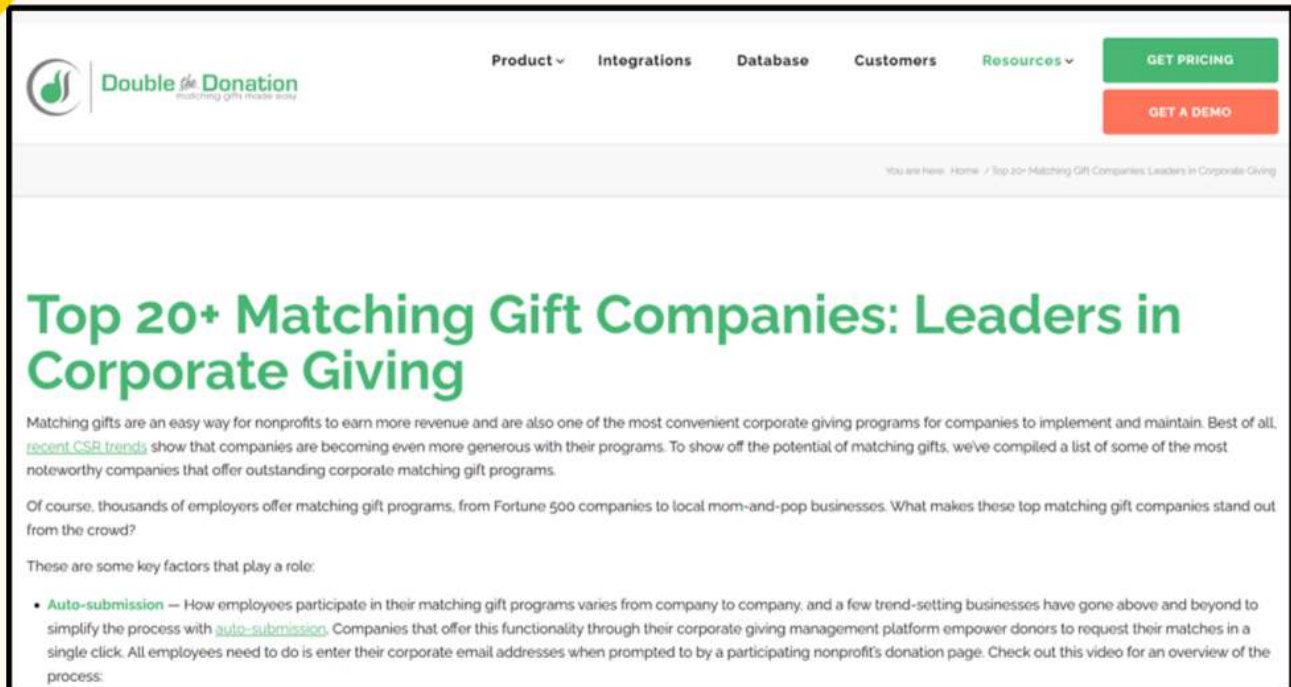
GIVING
TUESDAY

Gift Matching Corporations



PRO TIP

<https://doublethedonation.com/list-matching-gifts-companies/>



The screenshot shows the Double the Donation website. The header includes the logo, navigation links (Product, Integrations, Database, Customers, Resources), and buttons for 'GET PRICING' and 'GET A DEMO'. The main heading is 'Top 20+ Matching Gift Companies: Leaders in Corporate Giving'. Below the heading, there is a paragraph about matching gifts and a list of key factors that play a role in choosing a company.

Top 20+ Matching Gift Companies: Leaders in Corporate Giving

Matching gifts are an easy way for nonprofits to earn more revenue and are also one of the most convenient corporate giving programs for companies to implement and maintain. Best of all, [recent CSR trends](#) show that companies are becoming even more generous with their programs. To show off the potential of matching gifts, we've compiled a list of some of the most noteworthy companies that offer outstanding corporate matching gift programs.

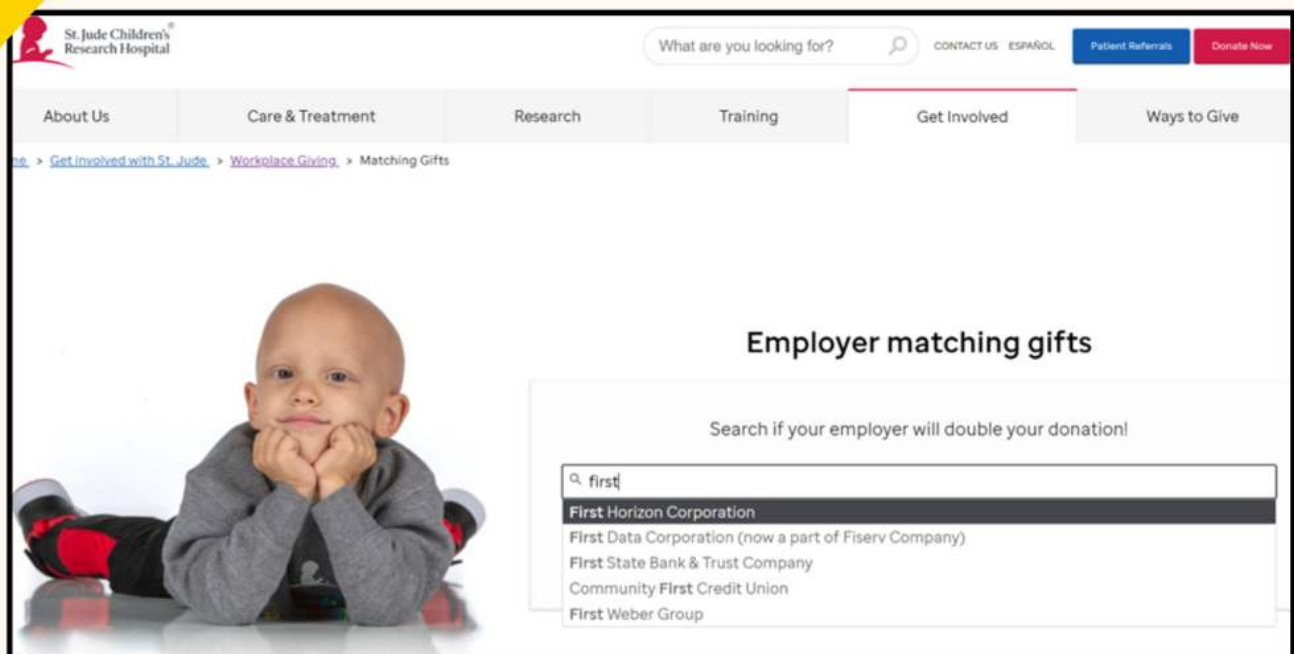
Of course, thousands of employers offer matching gift programs, from Fortune 500 companies to local mom-and-pop businesses. What makes these top matching gift companies stand out from the crowd?

These are some key factors that play a role:

- **Auto-submission** — How employees participate in their matching gift programs varies from company to company, and a few trend-setting businesses have gone above and beyond to simplify the process with [auto-submission](#). Companies that offer this functionality through their corporate giving management platform empower donors to request their matches in a single click. All employees need to do is enter their corporate email addresses when prompted to by a participating nonprofit's donation page. Check out this video for an overview of the process:

PRO TIP

www.stjude.org/get-involved/workplace-giving/matching-gifts.html



The screenshot shows the St. Jude Children's Research Hospital website. The header includes the logo, a search bar, and links for 'CONTACT US', 'ESPAÑOL', 'Patient Referrals', and 'Donate Now'. The main navigation bar includes 'About Us', 'Care & Treatment', 'Research', 'Training', 'Get Involved', and 'Ways to Give'. The 'Get Involved' section is active, showing a breadcrumb trail: 'Get Involved with St. Jude > Workplace Giving > Matching Gifts'. The main heading is 'Employer matching gifts'. Below the heading, there is a search bar with the text 'Search if your employer will double your donation!'. A dropdown menu shows search results for 'first'.

Employer matching gifts

Search if your employer will double your donation!

first

- First Horizon Corporation
- First Data Corporation (now a part of Fiserv Company)
- First State Bank & Trust Company
- Community First Credit Union
- First Weber Group

Matching gifts offered!

Already made a donation? Use the button below to submit your matching gift request.

[GO TO MATCHING GIFT FORM](#)

Match Amounts

Your donation must meet the following guidelines to be eligible for matching.

Minimum	Maximum	Match Ratio
\$24	\$5,000	1:1

Employee Eligibility

Your donation must meet the following guidelines to be eligible for matching.

Full-Time Employees	Part-Time Employees	Retired Employees
Yes ✓	Yes ✓	No ✗

Matching Gift Program Details

Bank of America Corporation matches donations to nearly all nonprofit in the organizations including:

- Educational institutions (K-12 included)
- Health and human services
- Arts and cultural organizations
- Civic and community organizations
- Environmental organizations
- And most other 501(c)(3) organizations

What is a Soft Credit?

A soft credit gives recognition to a donor
who influences a gift
but is NOT the direct donor.





Soft Credits
help track people
who influence
gifts to your
organization
&
help you develop
relationships with
other prospective
donors

Adding a Soft Credit in Bloomerang

ADD

during creation of a Donation

LINK

soft credits to a different
constituent than the one who
made the gift.

How to Add the Donation

Your Town Community Foundation Date 5/1/25 000

Pay To The Order Of Your Nonprofit \$ 5000.00

Five thousand and 00/100 Dollars

[Signature]

|: 0000000000 |: 0000000000000000||· 0000

1. Search for the donating constituent in your database.
2. If new to your nonprofit, add a **New Constituent**.

New Constituent

What type of Constituent are you creating?

Individual

An individual Donor, Volunteer, Contact, etc.

Organization

A company or organization account with a primary contact.

3. Enter the **Organization Name** and **Primary Contact**.

- Read attached letters or documents to find the contact to thank.
- If you can't find one, look up the organization's website to find the correct department and call or email to find a good contact.

New Organization

Edit Details Save

Organization Name

Your Town Community Foundation

Primary Contact

Job Title

Donor Advised Fund Manager

Title

Ms.

First **Middle**

Jenny

Last

Money

Suffix

Informal Name

Jenny

Formal Name

Ms. Money

Envelope Name

Ms. Jenny Money

Your Town Community Foundation

Recognition Name

Your Town Community Foundation

4. Add as much **personal information** as possible.

- Take the time to search for and paste social media pages and website.

5. Add the appropriate **communication preferences**.

- Set restrictions, so you are only sending appropriate info to organization.

Personal Information

Gender:

Birthdate:

Employer:

Facebook Page:

Twitter Handle:

LinkedIn Page:

Website:

Communication Preferences

Preferred Channel:

Communication Restrictions: The constituent does not have any restrictions

Email Interests: The constituent will not receive any emails

**PRO
TIP**

6. Add Custom Constituent Fields under **Settings/Custom Data/Constituents**

- Add and update any new descriptors that are unique to your nonprofit.
- Makes each constituent searchable for Reporting and Groups!

Custom Fields and Values

Constituents
Create and manage custom fields for constituent profiles.

Transactions
Create and manage custom fields for transactions.

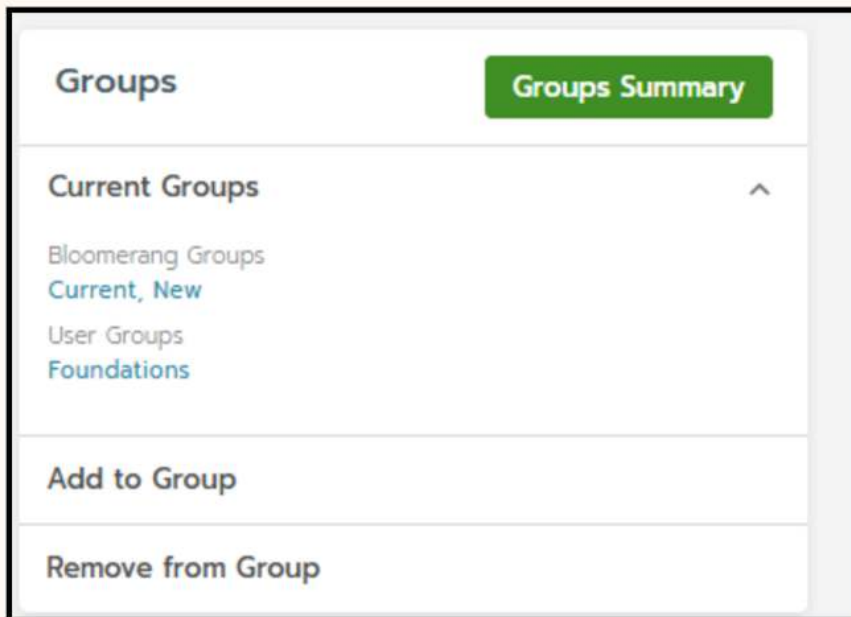
Relationships
Manage the roles available for relationships between constituents.

Funds
Create and manage funds to allocate donations.

Individual Tags
Alumni
Attorney
Board Member
Client
Community Influencer
Family Member
Foundation
Friends of DCI
Generosity Screen
Grandparent
Grantee
High Adventure Supporter
KDS DAR School Alumni
Law Enforcement
Legacy Giving Society
Legacy of Faith
Legacy Parent
Legislator
Major Gift Donor

PRO TIP

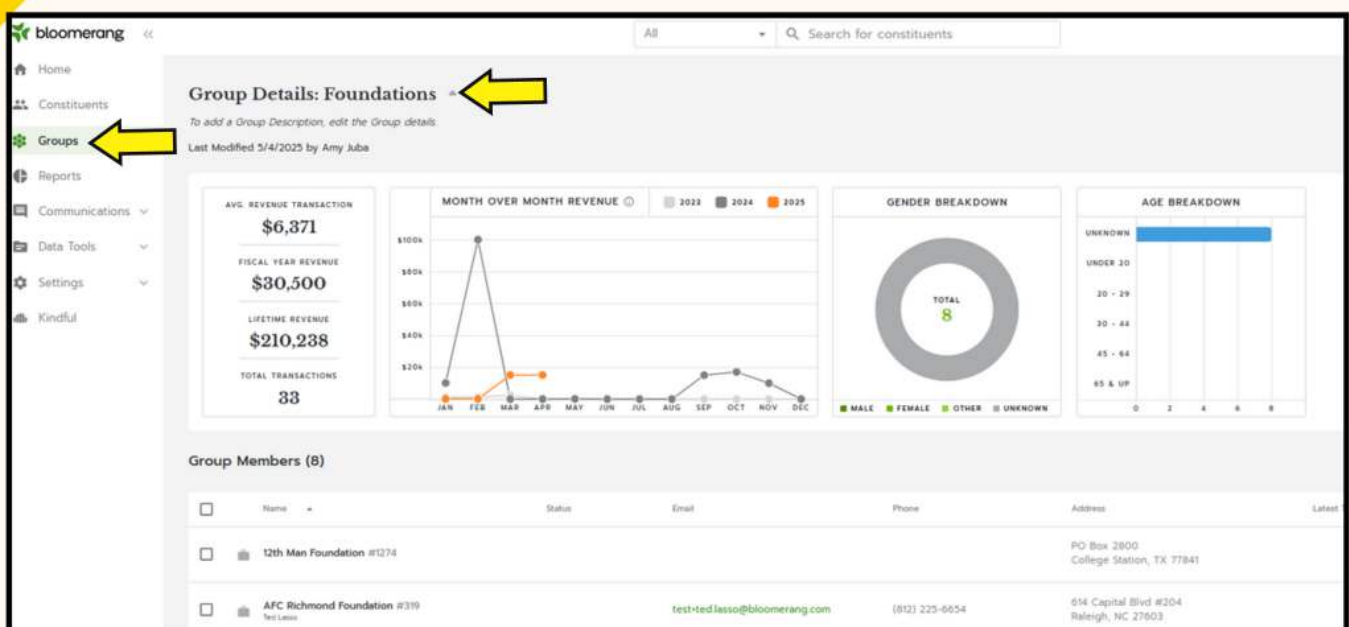
Once you have new constituent tagged and saved, open their profile and **add** them to that **Group**.



PRO TIP

Open **Groups** and choose the group you want to view.

- Use for all of your institutional giving sources that have soft credits: Matching Gift Companies, Foundations, Giving Platforms, etc.
- Now you have an easy-to-read list for tracking and contacting.



Enter the donation:

1. Enter the **donation** under the donating organization.
2. Add current **date**, **amount** of gift, **Fund**, **Campaign**, & **Appeal**.

Tip: Make an Appeal with the specific source of the gift, ex. DAF, Matching Gift, etc.)

3. Add payment **method** & info.
4. Add a **note** about who requested the gift.

Summary Profile **Timeline** Relationships

Edit Donation

Date
5/4/2025

Amount
\$5,000.00

Non-Deductible
\$0.00

Fund
Unrestricted

Campaign
2025 Annual Campaign

Appeal
Donor Advised Fund

Method
Check

Check Number
5432

Check Date
5/1/2025

Note
Requested by Jimmy Olsen

Add the soft credit:

1. In the **Soft Credit** section, click the + icon.
2. In the **Find Constituent** window, search for the constituent. Click the name. (Choose one individual.)
3. The **Soft Credit** pane will open on the right side of the screen.
4. Edit the **Amount** field, if necessary, by typing in the amount of the soft credit.



Actions Cancel Save

Acknowledgements +

Has this donation been acknowledged?
☒ No ☐ Yes ☐ Do Not Acknowledge

Send an acknowledgement now?
☐ Letter ☐ Email ☒ No

Soft Credits +

Soft Credit

Jimmy Olson

Amount
\$5,000.00

Acknowledged?
No

Cancel Add

5. Make sure your **Acknowledgment Status** is set to NO. (WHY?)

6. Click **Add** and **Save**.

NOTE: You may have more than one soft credit on the donation.

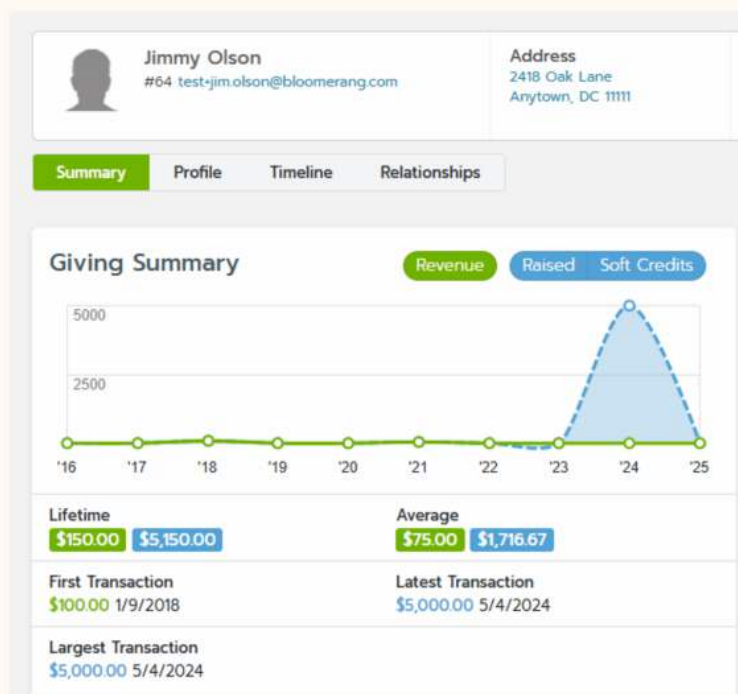
If you are unclear...



ASK!

Do this in whatever way you think they're most likely to respond (e.g., phone call, email or text).

How Soft Credits appear...



So far, you've learned...



How to enter donations with soft credits
in Bloomerang

Now, we will learn...

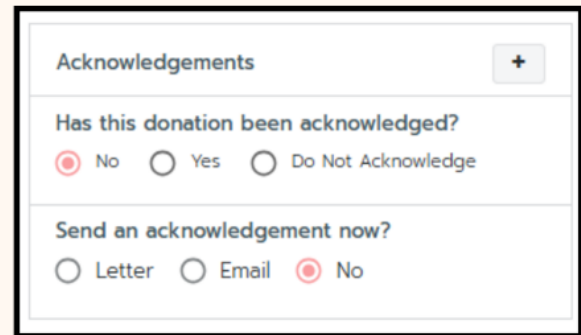
How to create acknowledgment letters
for the donor of a gift with a soft credit.



Acknowledging Soft Credits

Sending out acknowledgement letters from Bloomerang should be done based on the **Acknowledgement Status** field on each Transaction.

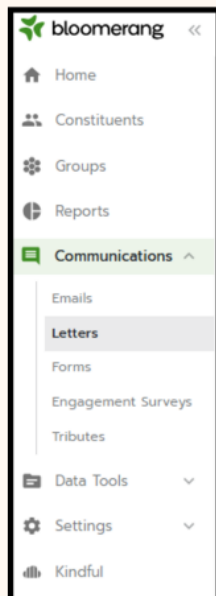
- **No:** Constituent hasn't been thanked (Default)
- **Yes:** Already acknowledged
- **Do Not Acknowledge:** Development Office chose not to send acknowledgment.



The screenshot shows a form titled "Acknowledgements" with a "+" button in the top right. Below the title, it asks "Has this donation been acknowledged?" with three radio button options: "No" (selected), "Yes", and "Do Not Acknowledge". Below that, it asks "Send an acknowledgement now?" with three radio button options: "Letter", "Email", and "No" (selected).

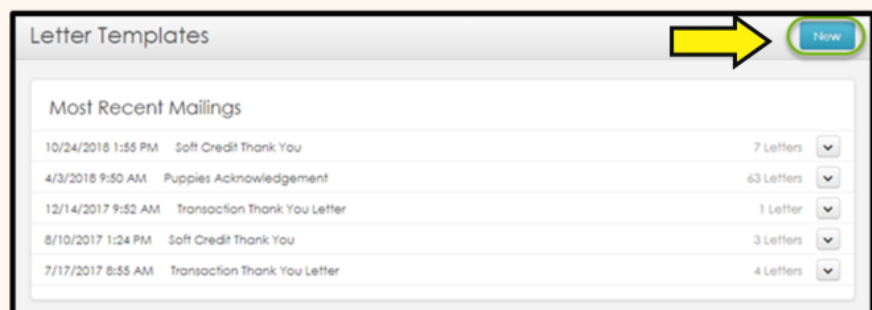
When creating your acknowledgment letter or email, filtering for the **Acknowledgement Status** will allow you to pull in only the transactions that need to be acknowledged.

Creating an Acknowledgement Letter Template



For this template, you will want to create a **Transactions** based letter with the purpose of **Acknowledgement**.

1. Click **Communications** and then **Letters** on the left side of the screen and then **New** in the top right corner.



Filter your Audience

2. Choose how you want to filter your audience. If you are acknowledging a donation, you will choose **Transactions**, and then click the **Select** button.

Your choice affects what filters and data fields you can use in the letter. Every type includes the constituent and summary fields.

The screenshot shows the Bloomerang 'New Letter' interface at Step 1/2. The title is 'New Letter'. Below it, a progress bar indicates 'Step 1/2'. The main heading is 'How are you filtering your audience?'. There are four boxes, each with a 'Select' button. The 'Transactions' box is highlighted with a yellow arrow. The boxes contain the following information:

- Constituents**
Use this to create:
 - Profile-based solicitations
 - Newsletters
- Transactions**
Use this to create:
 - Acknowledgements
 - Receipts
 - Pledge reminders
- Interactions**
Use this to create:
 - Event confirmations
 - Volunteer acknowledgements
- Tribute Notificants**
Tribute Notificant letters for:
 - "In Memory Of" survivors
 - "In Honor Of" honorees

Letter details

3. Type in the details for your letter:

- **Name:** A brief, descriptive name that references donation with a soft credit.
- **Purpose:** A drop-down menu will open for you to select the primary purpose of the letter. (Acknowledgement)
- **Create One Letter Per:** Select how you want to group your letters. You can create one per transaction or group them by constituent or household.

The screenshot shows the Bloomerang 'New Letter' interface at Step 2/2. The title is 'New Letter'. Below it, a progress bar indicates 'Step 2/2'. The main heading is 'Describe Your Letter'. There are four fields: 'Name' (text input), 'Purpose' (drop-down menu), 'Create One Letter Per' (drop-down menu), and two checkboxes: 'Allow Blank Merge Fields?' and 'Allow Bad, Incomplete, or Missing Addresses?'.

Make sure both of these boxes are NOT checked:

- **Allow Blank Merge Fields?:** When checked, constituents will not be skipped due to blank merge fields.
- **Allow Bad, Incomplete, or Missing Addresses?:** When checked, constituents will not be skipped due to bad, incomplete, or missing addresses

4. Click **Next** on right side of screen.

Edit Your Donor Letter



5. In the body of the letter, add the **Bloomerang Data Fields** that you would like to by clicking on the Bloomerang icon and selecting the fields you want to use in the search box.

Click the location where you want each date field to be included (i.e., Today's Date, Envelope Name Address fields, Informal Name, and Amount of donation. They will appear in a gray box.

The screenshot shows a 'Letter Body' editor with a rich text toolbar at the top. Below the toolbar, several data fields are inserted into the letter template, each enclosed in a gray box. The fields include: 'Today', 'Name', 'Street', 'City', 'State/Province', 'ZIP Code', 'Dear Formal Name', 'Amount', and 'Soft Credit Name(s)'. The letter text includes a thank you message and a statement about the donation's deductibility.



Make sure you include the **Soft Credit Name** field in the letter.

PRO TIP

Continue editing your Donor Letter

6. Continue to edit the letter, including the style and format. To change margins or set up the letter to fit on letterhead, click on **Page Settings**.

Consider adding a statement about the **tax-deductibility** of the donation.

Also consider adding a line **summarizing the donation** amount, method of payment, and other relevant information the donor may want to reference.

Tamara Fields
Executive Director

Happy Hills Equine Rescue is a qualified nonprofit organization under Section 501(c)(3) of the Internal Revenue Code. Tax ID# 45-000000. Consult with your tax advisor to determine whether your donation is deductible. Please keep this written acknowledgement of your donation for your records.

Amount Donated: **Amount** Method of Payment: **Method** Check Date: **Check Date** Check Number:

Add Filter(s) to Letter

- In the Filter tab of the letter, add a filter for **Acknowledgement Status** is **No**. This will filter the letter template for all transactions that have not been acknowledged.
 - Click the **And..** box and add **Soft Credited Amount** is at least \$1.00.
 - Click the **And..** box and add **Appeal** is Donor Advised Fund, Matching Gift, or another specific appeal that has donations with soft credits.
 - Remove **Soft Credits** from the **Exclude** section.

Name	Date	Amount
TOTALS		
		\$5,000.00
Your Town Community Foundation	5/4/2025	\$5,000.00

Save and Preview your Letter

- Click **Save** and **Preview** in upper right corner of screen.

Check the **Design Preview** and the **Recipients** to make sure the letter is OK and the recipient is correct.

Run your Letter

- Click **Run** if the letter is OK or **Make Changes** if edits need to be made.

Click **Test** if you want to download the first 5 sample letters to review

Click **Run** if you are ready to print your letters.

A dialog box titled "Which Would You Prefer?" with a close button (X) in the top right corner. It is divided into two columns. The left column is titled "Do a Test" and contains four radio button options: "Just the first 5 letters.", "Will not create any interactions.", "Will not add to Recent Mailings.", and "Just verify that everything looks correct." Below these options is a light blue button labeled "Test". The right column is titled "Create My Letters" and contains three radio button options: "All letters.", "Create interactions for each letter.", and "Add to Recent Mailings." Below these options is a dark blue button labeled "Run".

Download Letters, etc.

- You have generated your letter. Now, you can download the letter, addresses for a mail merge, envelopes or labels in a .pdf format.

A screenshot of a web page titled "Generate Letter" with a subtitle "Acknowledgement Letter with Soft Credit". The page has a light gray header. Below the header, there is a section titled "We're Done!" with a subtext: "We've created Interactions for all of the constituents that are getting a letter. You can download a PDF of these letters by clicking the large Download button below." Below this text is a large dark blue button labeled "Download Letters". Underneath, there is a line of text: "If you are printing labels or envelopes, you can download a .csv file to perform a mail merge." Below this is a light blue button labeled "Download Addresses". Further down, there is another line of text: "Download a PDF of #10 envelopes for all constituents included in this letter." Below this is a light blue button labeled "Download Envelopes". At the bottom, there is a line of text: "Download a PDF of Avery 5160 address labels for all constituents included in this letter." Below this is a light blue button labeled "Download Labels". At the very bottom of the page is a small light blue button labeled "Go to Letter Home".

Donor Profile Updated

- Your letter is saved in the donor's profile, where you can edit it and print, if needed.

- The donation is also automatically marked as **Acknowledged** and the letter is linked in the transaction.

The image shows two screenshots of a donor management system. The left screenshot shows a donor profile for 'Your Town Community Founda...' with ID #1354. The 'Timeline' tab is active, showing a 'Mail' event on May 4: 'Acknowledgement - Letter: Acknowledge...' and a '\$5,000.00 Donation' on May 4: 'Unrestricted 2025 Annual Campaign Donor Advised Fund'. A yellow arrow points from the 'Mail' event to the right screenshot. The right screenshot shows the 'Acknowledgements' section. It asks 'Has this donation been acknowledged?' with radio buttons for 'No', 'Yes' (selected), and 'Do Not Acknowledge'. Below, it asks 'Send an acknowledgement now?' with radio buttons for 'Letter', 'Email', and 'No' (selected). A date '5/4/2025' is shown, followed by a link 'Letter: Acknowledgement Letter with Soft Credit' and a 'Mail' button. At the bottom, the 'Soft Credits' section shows 'Jimmy Olson' with a '\$5,000.00' credit.

Don't forget about the soft credit!

How to create acknowledgment letters for the gift INFLUENCER (the SOFT CREDIT).



- Just because the check came from their DAF, say THANK YOU!
- After all, it's the individual donor who directed the gift your way.
- Your thank you lets the donor know they're making the impact they intended to make.

Step 1: Creating an Acknowledgement Letter Template for the SOFT CREDIT.

1. Open Letters and find the **Letter Template** you just made.
2. Click on the down arrow on the right and click **Copy**.

Letter Templates

Most Recent Mailings

5/4/2025 4:37 PM	Acknowledgement Letter with Soft Credit	Transactions	Acknowledgement	▼
3/24/2025 5:03 PM	New Donation Thank You - Donation	Transactions	Ackn	Edit
2/27/2025 8:23 PM	New Donation Thank You - Donation 2 (Copy) (Copy)	Transactions	Ackn	Copy
2/27/2025 8:21 PM	New Donation Thank You - Donation 2	Transactions	Ackn	Preview
2/24/2025 12:24 PM	Family Bio Test			

Displaying 1 - 26 of 26

Acknowledgement Letter with Soft Credit

Canadian Tax Receipt

CE Certificate

DAF Acknowledgement

Transactions Ackn

Copy

Preview

Step 2: Edit the Letter Details

Edit Letter Z - Acknowledgement Letter for Soft Cred...

Design Filter Details

Name
Acknowledgement Letter for Soft Credit Donation Influencer

Purpose
Acknowledgement

Create One Letter Per
Transaction

Allow Blank Merge Fields?
☒

Allow Bad, Incomplete, or Missing Addresses?
☒

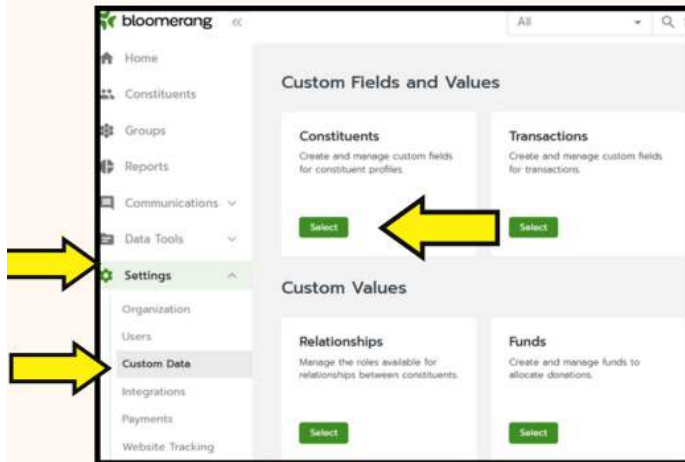
Change **Name** to reference the letter is for the Soft Credit Influencer.

Change **Create One Letter Per** to **Transaction**.

PRO TIP

Add Custom Constituent Fields under **Settings/ Custom Data/ Constituents**

- Create a **Custom Field** For Constituents that reflects how donors give indirect gifts.
- For example: set up a **Donor Advised Fund Category**
 - Add Name of Donor Advised Fund
 - Add Name of Institution Holding DAF.



PRO TIP

Edit Soft Credit Donor Profile

- As soon as you learn that a donor recommended an direct donation resulting is a soft credit, edit their profile using the Consituent Fields you created.
- This will assist you in writing their thank you letter now and in the future.



Step 3: Edit Soft Credit Letter Using Bloomerang fields you created.

Dear [Formal Name],

We believe all beings deserve a second chance. THANK YOU for helping Happy Hills Equine Rescue do just that.

We wanted to inform you that we have received a donation from the [Name of Donor Advised Fund] in the amount of [Original Transaction Amount]. We are grateful to you for requesting that [Name of Institution Holding DAF] send us this generous donation from your donor advised fund.

This gift is a true act of kindness, which enables us to continue helping neglected and unwanted horses. Thank you for helping us rescue, rehabilitate, and re-home the majestic creatures.

We are so grateful for your support!

Sincerely,

Tamara Fields
Executive Director

Step 4: Save, Preview, Run, and Download the soft credit letter.

Dear Mr. Olson,

We believe all beings deserve a second chance. THANK YOU for helping Happy Hills Equine Rescue do just that.

We wanted to inform you that we have received a donation from the Olsen Family Donor Advised Fund in the amount of \$5,000.00. We are grateful to you for requesting that Your Town Community Foundation send us this generous donation from your donor advised fund.

Rules for Donor Advised Funds

- NO generic form letters!
- Do not thank them for their “tax-deductible gift” or refer to any tax information in the letter.
- Do not tell the donor they will receive anything of value.
- Do not apply the indirect gift to the non-deductible portion of a fundraising event ticket or membership.

Ok, now we have learned ...



How to enter donations with soft credits in
Bloomerang

How to create acknowledgment letters for both
the donating institution and the soft credit.



Finally, let's learn...



How soft-credited gifts appear on
Bloomerang's Annual Giving Statements

Donor Year-End Giving Statement

Bloomerang Demo

5724 Birtz Road, Indianapolis, IN 46216
EIN: 12-3458523

Ms. Jenny Money Your Town Community Foundation

Year-End Giving Statement
01/01/2024 - 12/31/2024

 **Tax Summary**

Date	Payment Method	Total Amount	Tax Deductible Amount
5/4/2024	Check	\$5,000.00	\$5,000.00

Total: \$5,000.00
Tax Deductible Total: \$5,000.00

No goods or services were exchanged for the charitable contribution represented in "Tax-Deductible Amount".

Soft Credit Year-End Giving Statement



Bloomerang Demo

5724 Birtz Road, Indianapolis, IN 46216

EIN: 12-3458523

Mr. Jimmy Olson

Year-End Giving Statement

01/01/2024 - 12/31/2024



Indirect Donations



Indirect donations are monetary gifts made through donor advised funds, workplace giving programs, and other indirect channels.

Date	Gifted From	Amount
5/4/2024	Your Town Community Foundation	\$5,000.00

MAKE A
DONATION



DONATE



bloomerang
makes it easy!

Thank you for joining this webinar!



Amy Juba, CFRE
nonprofit consulting

www.amyjubanonoprofitconsulting.com

Interested in learning more about  **bloomerang** ?

<https://bit.ly/BloomerangJuba>