LEU Business Overview Team Fundraising Account Set Up & Management



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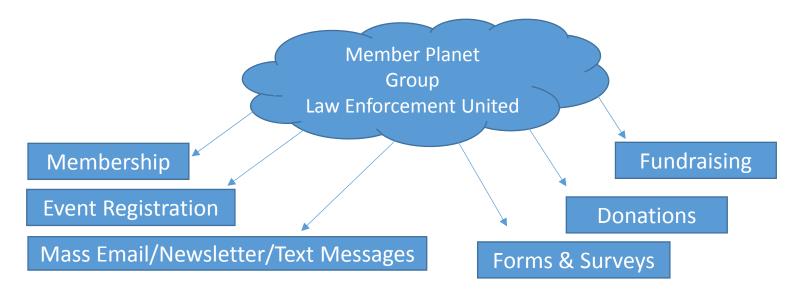
LEU Business Operation Set Up

• LEU operates their individual Division/Ride Websites on the public side, and Member Planet on the back side for LEU and Member business operations.



Member Planet Membership Site

 LEU has moved all membership, event registration, forms, donations, and fundraisers to a single management site using Member Planet

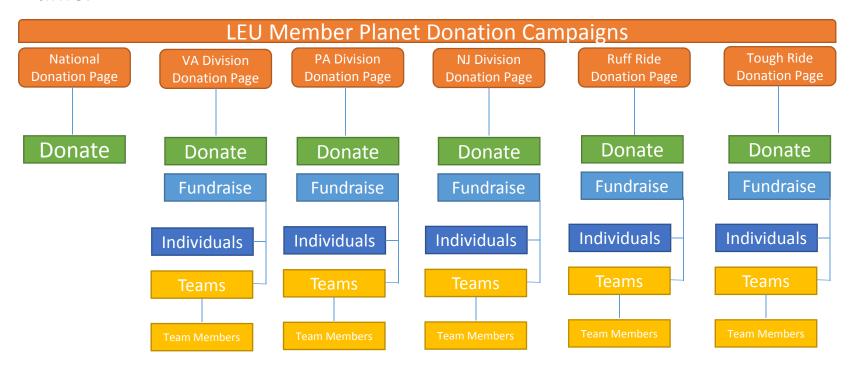


With membership operating on the National Level there is two purposes

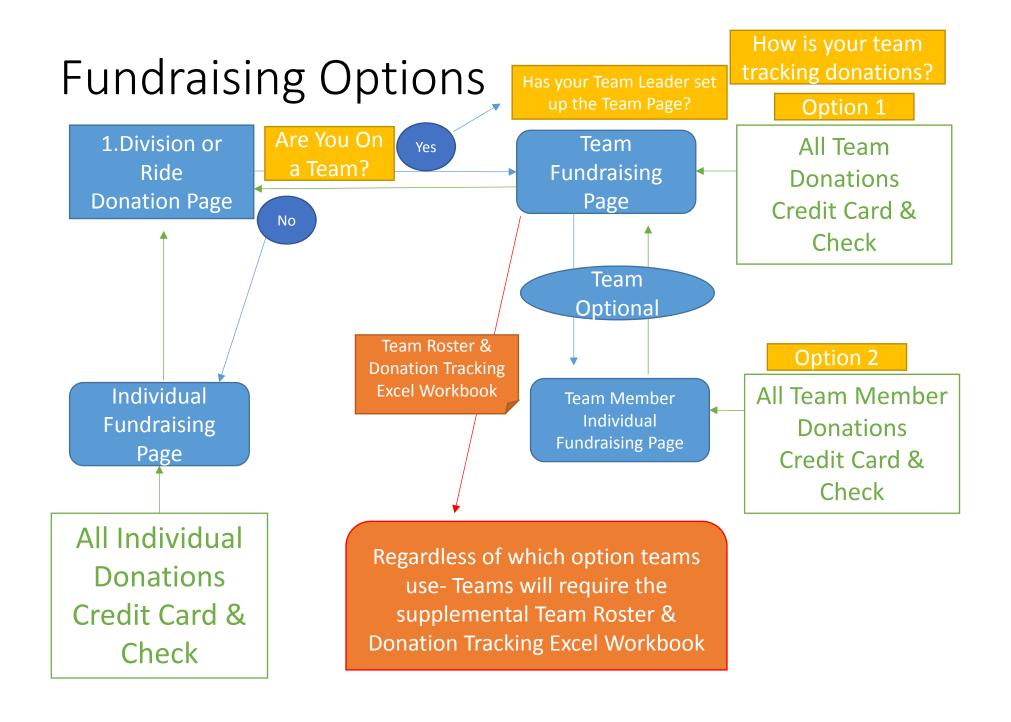
- 1. For Growth: Growing membership beyond the limitations of events and grow our programs and capabilities
- 2. For Events: The intent (per survey results) was to give our members the option of which ride they wanted to register for after renewing or joining. If one became full they could easily transition to an alternative event without having to login to another site.

Member Planet Fundraising Platform

LEU has discontinued use of Razoo and My Event crowd funding platforms.
 Using Member Planet streamlines not only our membership management
 but fundraising and donations as well. Increases capabilities for members
 and teams to have more control of their fundraising and see results real
 time.



- Fundraising Capabilities: Individual and Team Fundraising Accounts
- Collect and deposit Credit Cards and E-Checks directly to your site
- Auto-Email receipts upon submission of donation
- Track your goals

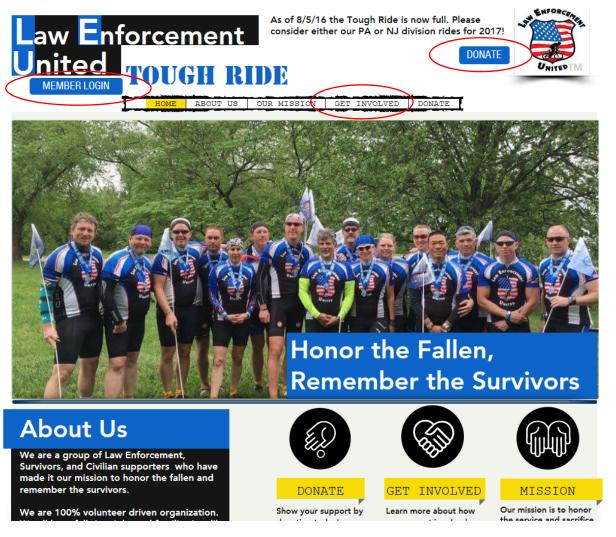


Confused yet?

It is ok... We will help walk you through all of the steps and options to ensure you and your team are successful!

Lets take it from the top...

Pictorial Example Website Homepage



Donate Button or link in menu bar: Takes you to the Tough Ride Donation Page

Member Login Button: Takes you to the Member Planet
Site for your membership business needs

Get Involved: Sub-Menu includes membership page about membership and join link that takes you to the new Member Application.

All websites are set up the same way. This example shows the Tough Ride Website Home Page Leunited-toughride.org as an example. You should use your own website to follow along.

Pictorial Example Step 1



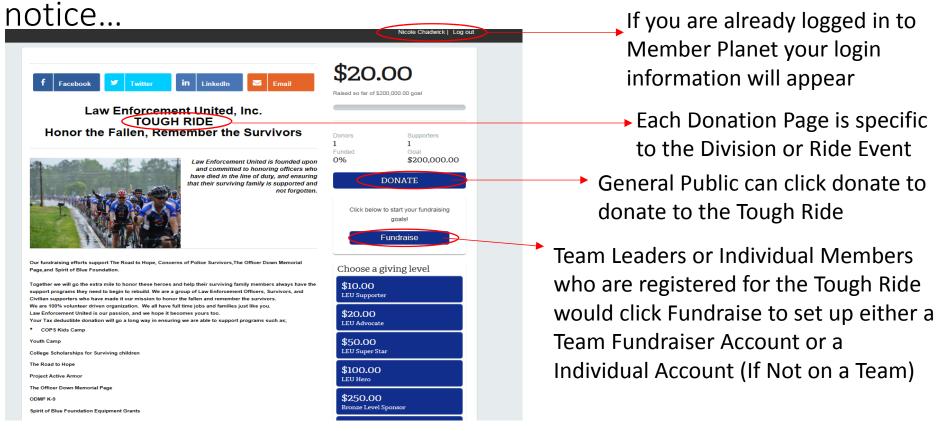
On your website home page

Click DONATE
Use any one of the areas
circled to get to your donation
page.

All websites are set up the same way. This example shows the Tough Ride Website Home Page Leunited-toughride.org as an example. You should use your own website to follow along.

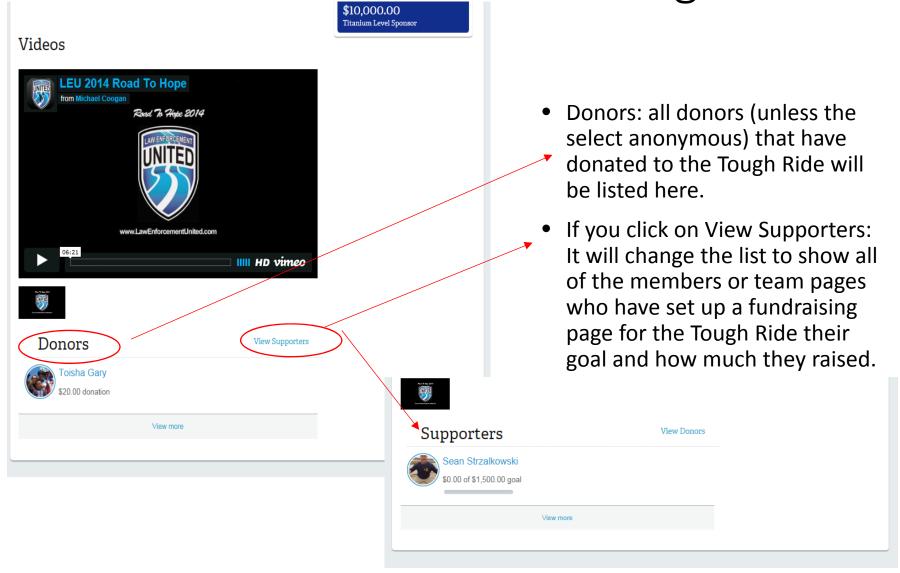
Pictorial Example Step 2
When I Clicked Donate from the Home Page it takes me to

When I Clicked Donate from the Home Page it takes me to the Tough Ride Donation Page. Here are some features to



- This page is linked directly to our Member Planet Group site and all funds go directly to Tough Ride's bank account.
- Each donation page is linked to each division/ride bank account.

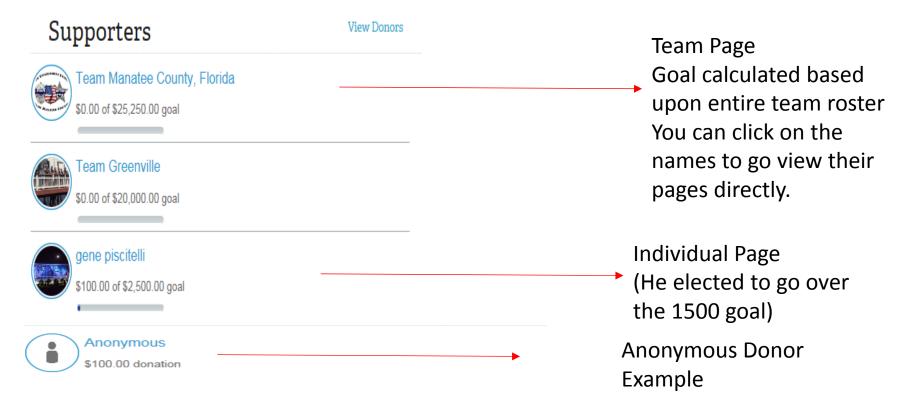
Pictorial Example Step 2a Bottom of the Main Donation Page



Pictorial Example Step 2b

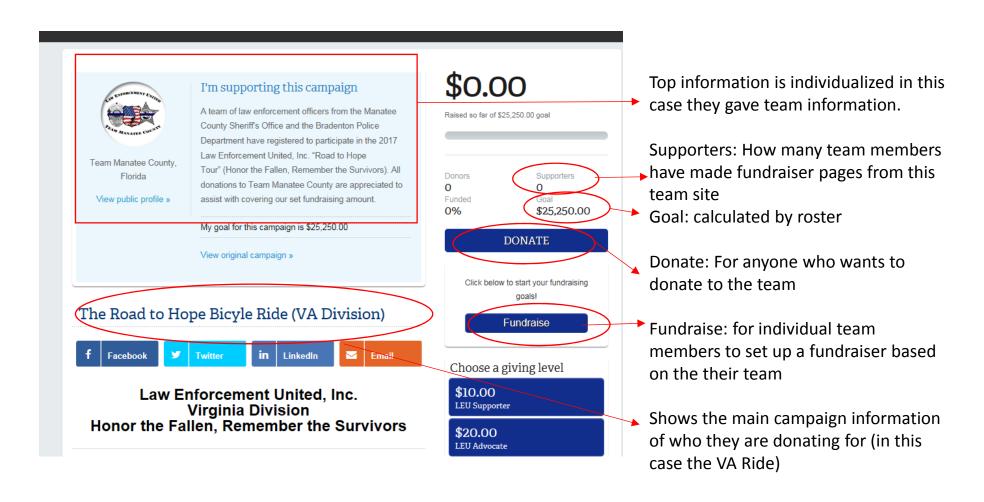
Example of Team VS Individual Pages





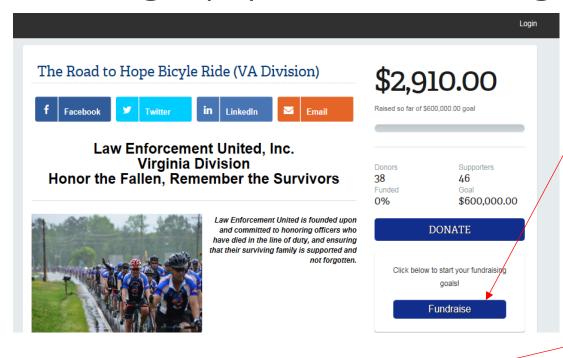
Pictorial Example Step 2c

Team Fundraising Site Example Set up by Team Leader



Pictorial Example Step 3

Setting up your Team Page



How will you support this campaign?

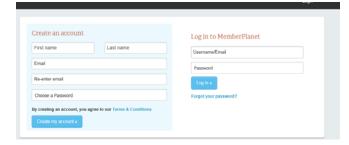
As myself

As a group

Law Enforcement United, Inc.

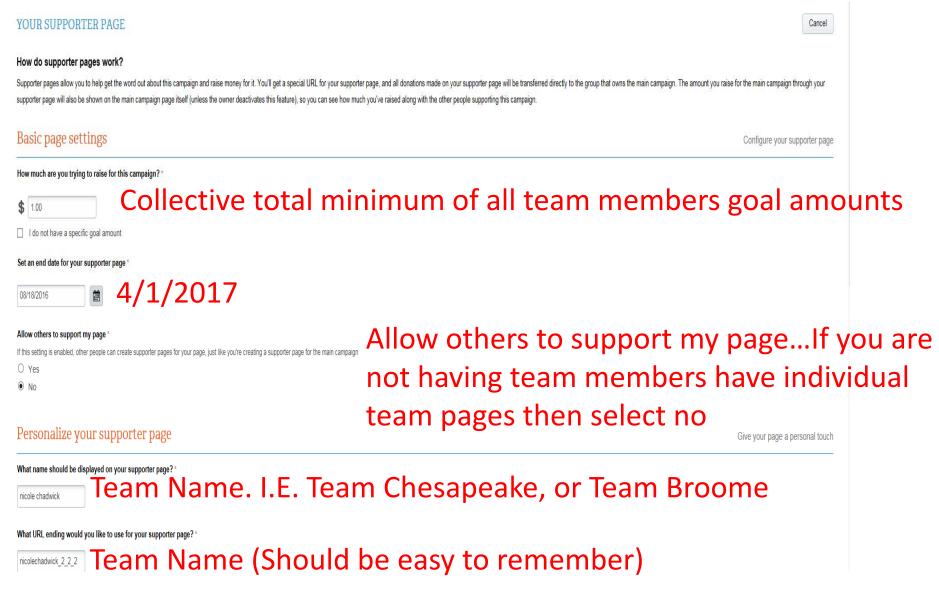
Continue

- Go to your division/ride website
- Click Donate (Top of the home screen)
- Then click FUNDRAISE
- If you are not already logged in to MP then it will ask you to LOGIN

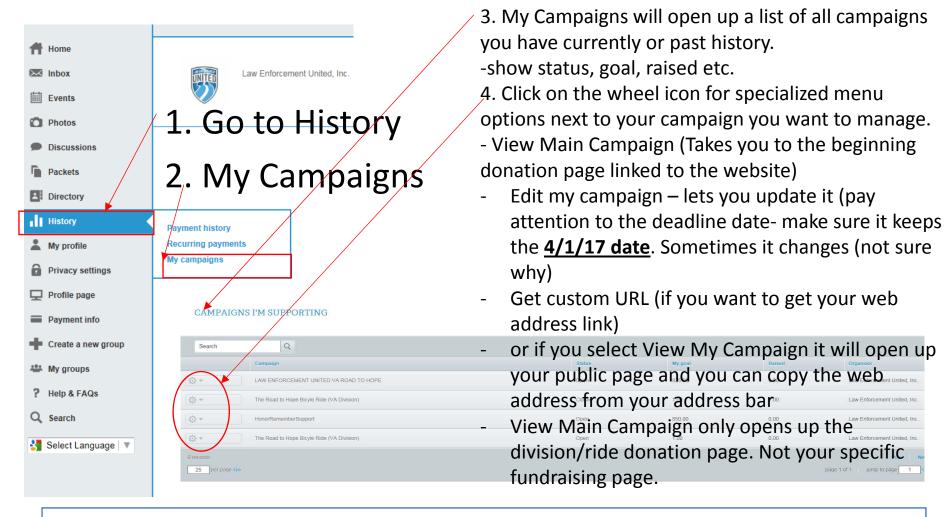


- Once logged in it will ask you How will you support this campaign. SELECT AS MYSELF!
- (Previous instructions in my first email were wrong and it will not allow you to set up as group.)
- Then select Continue

Pictorial Example Step 4 Setting up your page...

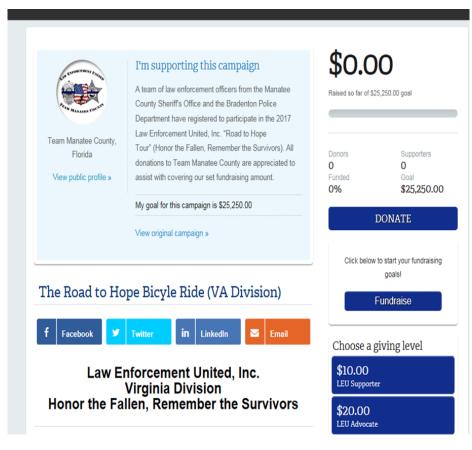


Pictorial Example Step 5 Management of your Fundraising Account



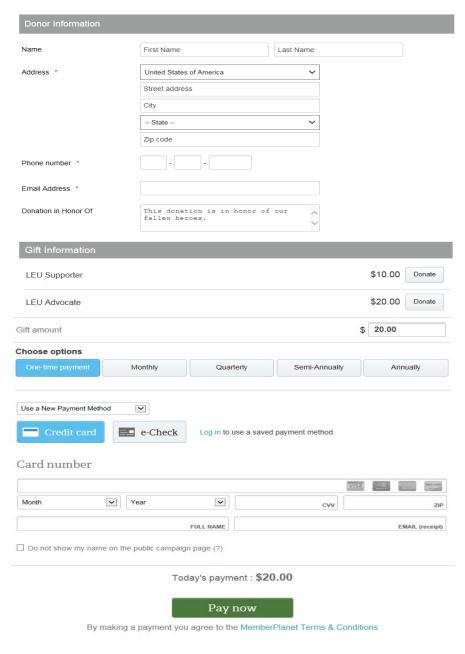
If you opened an account in error, just click on edit and then change your deadline date to tomorrow. Then save. This will allow the page to close once the date has passed.

Collecting and Entering Donations on your team or individual site...



- Share your team or individual page with friends and family via email or social media. Use the web address in the address bar of your browser to get your custom link. Or you can find it in your History Menu option (My Campaigns) and click on the icon for your custom link
- 2. They can click DONATE and it will take them to the page to enter all of their information
- 3. If you receive a CHECK donation from someone you can enter it on your site directly. These campaigns take check or credit card.
- 4. Make sure you have a valid contact information including email address to send their receipt to for tax purposes. The site automatically sends tax receipts when it accepts the donation (see next page)

Donor Information Page



- Ensure you have all of the donor information
- Please note required fields must be valid to ensure any failed donations can be tracked.
- Donation in honor of can be used for a memory or a team member or the group etc. (free text it just has a default option in it)
- Select gift amount or at the bottom is the option to enter your own amount.
- Gift options are allowed, but must have approval from donor. If you didn't discuss it up front select one time payment.
- Select Payment Type Credit Card or E-Check
- Enter all payment information
- If they wish to remain anonymous, click on the button that says do not show my name on the public campaign page.
- When all information is entered. Click PAY NOW
- When complete as long as the transaction was approved, it will show up as a donor on the bottom of your main donation page.

Do I still mail in checks?

- No. Checks Should be submitted to your fundraising account
 - Endorse on the back
 - "E-DEPOSIT to Law Enforcement United"
 - Keep the original checks and submit to treasurers either via mail or turn in upon arrival on May 9th.
 - Do not throw away or shred!
 - What happens if my donor mails LEU a check?
 - LEU will deposit the check to your fundraiser account as long as you are identified as the recipient. (Working on a printable slip to include if they do, however would really prefer them go to your site or if you collect the check to deposit directly to the account). Saves time and postage!!
 - If you or your team is not identified then they will deposit in the main account

Team Roster, Donation & Disbursement Workbook

- Provides Treasurer or Donation Coordinator list of applicable team members
- Gives Team leader ability to provide oversight disbursement of team funds to meet team fundraising goals
- Flexibility to be team oriented or a hybrid of team and individual fundraising requirements
- Puts onus back on Team Leaders (not treasurers) to manage their teams, goals, disbursements and ensuring goals and deadlines are met.

Team Roster and Disbursement

Workbook

				2016-2017 LEU Team &	Roster Inform	nation				Date			
			TEAM	NFOR MATION	Indep	endent Non-Profit o	Information (If Applicable)						
			LEU 1	TEAM NAME		Business Name		Tax ID Number					
				Contact Information		Business Address City State Zi							
⊢	First Na		am Leader	Contact Information Last N	В	usiness Address	Cit		State	Zip			
	1.130 140			Last II		Team Social Media Sites							
		E	mail		Pho	ne	Website/Blog FaceBool						
	Team Bank Acco	es enter ba	ank name below (Drop Do	own ->)			Instagram			Othe	sr .		
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	Fu	nd raising	Goals (Au	to populate based on Ros	iter)			Te	am Accou	int			
	Туре	Otty		Fundraising Goal	Tot		Tea	m Account Beginnin					
	Rider	0	\$	1,500.00	\$	•		Team Disbursem				-	
	Support Other*	0	\$	850.00	\$	-		Remaining Accoun	t Balance tal Raised	\$		-	
—	Member Only		5	-	5	÷			eam Goal				
\vdash	Total			Team Goal		-			nder Goal			-	
					Team Ro	ster							
	First Name	Last	Name	Participation	Goal	Indv. Fo	unds	Team Disbursement	Total R	aised	Rema	ining Goal	
1		0				\$		\$ -	\$	-	\$		
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- Workbook is team leaders management tool for fundraising and disbursements
- Provide to Treasurer or donation coordinator on specific dates or periodicity as directed by Treasurer/Donation Coordinator and also if there are any changes to the roster. i.e. someone drops as soon as possible
- Should actively track all team members and their status

Teams broken up among different ride events:

If your team is participating in more than one ride event, then there should be a separate workbook for each event.

i.e. If you have members participating in

Ruff and PA then you should have 2 team fundraising accounts from the Ruff and PA websites and 2 workbooks listing the team members and their disbursements.

Why? Funds go in different bank accounts and tracked by ride event, and different treasurers. Cannot be responsible for tracking multiple event/personnel and transferring out of one bank account to another.

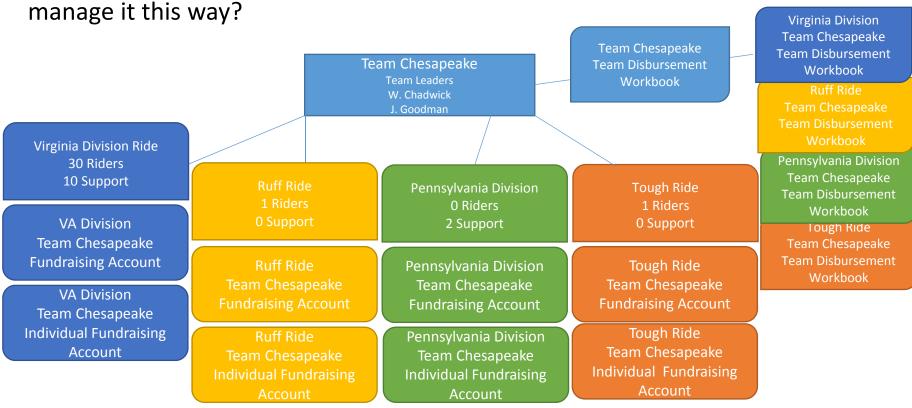
If you have a large team fundraiser in which it is impossible to disburse funds equally at the time of the fundraiser, we will need to work out an alternative fundraising page just for that event. Please give advanced notice so we can work out site set up and details. (Minimum 10 days please!) Donations made to Law Enforcement United should not go in any other payment repository other than our active LEU Member Planet Fundraising accounts.

											Date	Date 8/11/2016	
			TEAM I	NFORMATION	Independent Non-Profit or Business Information (If Applicable					Applicable)			
			LEU	TEAM NAME				Business Name			Tax ID Number		
			T	est Team				LAW ENFORCEMENT UNITED, INC					
		m Leader	Contact Information					Address	Cit	у	State	Zip	
First Name Last Na					Name			10	084 ROKEBY AVE	CHESAP	EAKE	VA	23325
JOE LEADE						DER			Team S	dia Sites			
		E	mail		Phone			Website/Blog				FaceB	ook
	ENT	ER VALID	EMAIL AD	DRESS		757-555-	1234		LEUNITED.ORG		LAWE	VFORCEN	IENTUNITED
	Team Bank Acc	ount *If y	es enter b	ank name below (Drop Do	own -	->)	No		Instagram		Other		
				N/A					IG @LEUNITED.OR	G			
	Team Fundraising Information												
T	eam Account Fun	draising ()ption	Team F	Fundraising Account Page URL (Web Address)						Date Opened		
	Basic Team F	undraiser	•	ME	MBERPLANET/LEUNITED/VA/TESTTEAM						8/1/2016		
	Fu	ndraising	Goals (Au	to populate based on Ros	ter) T					am Account			
	Туре	Qty		Goal		Tota		Tea	am Account Beginnin	g Balance	\$		6,000.00
	Rider	2	\$	1,500.00	\$		3,000.00		Team Disbursem	ent Total	\$		-
	Support	1	\$	850.00	\$		850.00		Remaining Account Balance		\$		6,000.00
	Other*	1	\$	-	\$ -			Total Raised		, ,			
	Member Only	1	\$	-	\$		-			eam Goal			3,850.00
	Total	5		Team Goal	\$		3,850.00		Over/U	nder Goal	\$		2,150.00
						Team Ro	ster						
#	First Name	Last	Name	ame Participation (Drop Down)		Goal (DD) Indv. F		unds Team Disbursement Total		Total R	Raised Rema		ining Goal
1	JOE	LEADER		Rider		\$ 1,500.00 \$		-	\$ -	\$		\$	(1,500.00)
2	JILL	LEADER		Support		\$ 850.00 \$		-	\$ -	\$	-	\$	(850.00)
3	BILL	MOTORO	YCLE	Mechanic/Medic/Motor		-	\$	-	\$ -	\$	-	\$	-
4	4 JANE RIDER Rider \$		\$	1,500.00	\$	-	\$ -	\$	-	\$	(1,500.00)		

- Workbook is auto-populated with formulas and drop down menu options.
- Enter your team information above.
- Select your fundraising account information
- Enter your roster information
- Do not try to populate any items in fundraising goals. That is all populated based on your selections in the roster.
- Enter the Team Account beginning balance.
- Then update your team member information about their individual account total and any disbursement amounts you want to add. This will populate the total raised column and the amount left until goal. It will auto deduct from your team account balance.
- Team account fields will show your total raised, and team goal etc.
- Save the Workbook with your team name and date.
- Submit to the treasurer/donation coordinator as applicable
- Disbursements should be in total amounts, not specific donations as it is too cumbersome to track and frankly not required for disbursements.
- You can do a even split among team members or you can determine who gets what amount. As long as everyone meets their goals. If they are not pulling their weight, you can notify us of intent to drop due to lack of fundraising.
- If they have not met benchmark dates, you can notify them of intent to drop.
- Team expectations must be set up front so there
 is not the expectation that because the team
 has funds they do not have to fundraise if that is
 the way your team operates or if you guys all
 pull in to one account and do even
 disbursement. Its your team, your option

My team is split up between rides

 Because each ride event is tracked separately by the division or ride coordinators and funds are deposited into separate division/ride banking accounts, teams will have to split out their donation tracking so that funds are properly allocated where they belong. However this can become confusing and difficult to manage. Why do we need so many accounts? Do we have to



How do I manage all of this?

Teams Split Between Rides Management

If these scenarios apply to your team, you will need separate team accounts for each ride event. These scenarios are not all inclusive, but may require a closer look to your unique team dynamics in order to set up effective donation management.

We only fundraise as a team

We have to disburse team funds

We fundraise individually and disburse team funds

We hold a team fundraiser

We only have 1-2 team members on another ride

We travel together but do not fundraise together

We do not host any team fundraisers

Our team is their own 501c3 we donate to LEU not fundraise

We just want one team account and then disburse funds later

There are multiple scenarios that could apply to any number of teams. How do we effectively set up fundraising when there are so many variables?

Let's discuss your individual team situation and select the right mix of options for you to be able to manage while still ensuring donations are correctly tracked and managed.

In Kind Donations

 We have In Kind Donation Forms for each division/ride to submit if you or your team receive a In-kind Donation.
 Found on the MemberPlanet Site (Packets)

If you received a donation of goods to support the ride, you are eligible to receive a credit towards your donation goal. While we cannot upload that amount to your Donation Page, we can track it using our supplemental goal sheet. In order to receive credit for your in-kind donation it must meet the following criteria:

- 1. Item/Goods must benefit LEU (the ride) as a whole, not just an individual or team. (Example: a pallet of water donated should be turned in to the food team leaders upon arrival to utilize as needed, not just kept in a team trailer for team use).
- 2. Item/Goods must be non-expired (if perishable) and un-opened
- 3. Gift Cards are a wonderful in-kind donation. Please make sure they are of use in the area your ride is in. Example: a local grocery store gives you a gift card, but there is not that particular grocery store in the area of your ride. Contact your Division or Food Team Leader to see if there is something they can use that you can purchase with the gift card and transport or send to the ride. National Chains are the easiest but we won't turn anything away! Gas Stations, Grocery Stores, Home Improvement Stores, etc. all have great use for us!
- 4. In Kind Donations must include quantity and documentation of the value for individual and total. (Example: A Pallet of water donated. Pallet contains 25 cases of water. Each case is valued at 3.99 so the total value is 99.75. If the donation was made from Walmart the store should provide you with a letter or documentation as to what the value of the donation is.)
- 5. In Kind Donations need to include all donor information specifically the Name of the Organization, Point of Contact, Email, Phone, Address. If a store has a number assigned also include that so we can be specific in documenting the donation, and sending them a receipt.
- 6. If they require a receipt upon receiving the donation, please make arrangements to obtain with your treasurer prior to picking up. Advanced notice is appreciated!

 Otherwise we can email them a donation receipt after it is processed.

Business Name *	
Business Address *	United States of America
	Street address
	City
	State V
	Zip code
Business Website	
Dusiness Website	
What is the Donation *	
Departies Overtile *	
Donation Quantity *	
Value of the Donation per unit *	
Total Value of the Donation *	
Do you have documentation of the donation value *	Select One V

Missing Donations

If you believe you have a donation that is missing from your individual or team MP fundraising account or know that a donation was made on the wrong site, or the main campaign you can submit the form below. The treasurer or designee will have to research and then if it is confirmed will have to begin or continue to track your fundraising goals with a supplemental tracking form. We are unable to transfer funds from one account to another. You will continue to fundraise using your donation page, and the treasurer will follow up with you concerning the status of this donation and will track your final goal with the supplemental spreadsheet.

Donor Business (If Applicable)			
Donor Name *	First Name	Last Name	
Donor Address *	United States of America	~	
	Street address		
	City		
	State	~	
	Zip code		
Donor Phone Number *			
Donor Email *			
What site page was the donation made on?			
Donation Amount *			

Treasurers & Donation Coordinator Responsibilities

- Will receive your workbooks and ensure you do not have any errors or discrepancies
- Notify you if any donations come in to the main donation page that is supposed to be for your team so you can update your team account total
- If they receive any checks by mail for your team will enter it on your team site and notify you of the donation.
- Will let you know how often they want your workbooks/disbursements
- Will notify you if a team member drops (reports to us)
- Will provide you with directions as to what to do with your hard copy checks (send them or bring with you to check-in)
- Will report to division leadership if teams do not provide up to date workbooks and disbursements.
- Provide direction on in-kind donations
- Provide a hard copy donation form (printed) with directions
- Assist with providing any financial documentation or gift matching paperwork requirements

Team Leader Responsibilities

- Set up team fundraising account (s)*
- Determine method team will use for collecting donations
- Provide direction to team members and set clear expectations
- Provide a up to date roster and workbook when requested
- Notify us of any drops
- Ensure that individual and team accounts are tracked accurately
- Help team members (especially new ones) know what to expect, remind of deadlines, forms and how the events operate. Many are new and this event is very unique.
- Liaison with Division or ride leadership to ensure there are no questions or help facilitate information back and forth as needed. Help to resolve issues and be the voice of the team. It is helpful to have 1 email w/ many questions than 15 emails from your team.
- Let us know your ideas, issues, questions, and know we are here to help you!

Questions Received

- 1. Can a team member still get personal donations to their personal accounts, while team donations are spread to all of the team members accounts? Yes.
- 2. Where does a person making a donation label it to Team Frederick? Is it in the honor of box? Yes. The honor of has a auto default already in there but anyone can add their own message
- 3. When can we start raising money in to the team account? Do we wait for the excel sheet to get set up or can we start now? You can set up your team account and start now
- 4. Our team typically submits one check to meet the first deadline and the second on the deadline date. Do we still need to set up a fundraising account? Yes you should set up your team fundraising account
- 5. My team is split up between multiple rides how do we track this? Separate Team accounts for each ride and separate team workbooks
- 6. Do we have to use the team workbook? Yes. This is to help not only you stay organized but our donation coordinators stay organized as well. You may have a team of 100, they are tracking the entire group. Team work!
- 7. How do I decide who gets what donation? You need to predetermine what your criteria is and communicate that to your team
- 8. I had a team member drop, what do I do? What are my options? Pull funds back into team account and re-disburse
- 9. I want a report of all of my donations and status, where can I get it? You can request from the treasurer or donation manager
- 10. Will we still have the donation spreadsheet? No. The only spreadsheets we are using is the teamwork books and individual supplemental pages. Onus is on the member/team to see where they are. If a supplemental workbook is used for individuals, then a copy of that will be provided to the member. However we do not anticipate a lot of donations using the supplemental. We want the members to take corrective actions to follow procedures. Only exception is in-kind donations
- 11. One of my team members did not meet a deadline, what do I do? Communicate their options to them, fundraise or drop. Communicate with treasurers/donation coordinators status
- 12. My donor mailed LEU a check, how is it added to my fundraiser? If it is designated for you or your team, the Treasurer or donation coordinator will go to your fundraising site and E-Deposit
- 13. I am missing a donation- what do I do?- Submit a Missing Donation Credit Application (Found on MP Packets)
- 14. My team members already set up individual fundraising pages can these be linked to my team account page? No they cannot be linked. You will need to use your team workbook to track and update
- 15. All of my team is responsible for their own fundraising, do we need a team page? What if you hold a fundraiser how will you split up funds? What if you end up receiving a team donation. Yes...set up one

Questions Received

- 1. A donor sent in a donation to the wrong donation site how can we transfer it? You will need to submit a Missing Donation Application and the Treasurer or Donation Coordinator will have to start a supplemental goal tracking workbook for you. We are unable to transfer funds.
- 2. I set up my personal or team fundraising page using the wrong site, what can I do? Go to History and My Campaigns. Edit Campaign and change your deadline date.
- 3. A donor came up to a team member and wanted to make a donation to the team. The team member gave the donor their personal donation page, how can that be transferred to the team? Team Workbook will have to resolve
- 4. How can I take a donation check and disburse it among some but not all of my team? Donation should be submitted to the team account. Use the workbook to disburse funds.
- 5. Only some members participated in a team fundraiser how do I spread out those donations to the team members who worked the event? Use the team workbook to disburse funds.
- 6. I have a team member who went over their goal amount, can I transfer that overage to other team members? \$250 Transfer limit still applies. No changes to this policy.
- 7. I have a donor that wants business information for LEU where can I find it? Check your division/ride website under financial information. Or if there is a form to fill out, submit to your division/ride treasurer.
- 8. What do I do with the hard copy checks once they have been deposited in my team account? Endorse the back E-Deposit to Law Enforcement United. Then either mail a group of checks or bring with you to check-in and provide to the treasurer. Do not throw away or shred. We need the originals.
- 9. I do not want to use your site, Where can I mail in checks? If you or your team does not have a team or individual account, donations are going to be deposited into the general fund. Please set up and utilize your account.
- 10. Where are the donation slips? We are working on updating those and will provide on the websites soon.
- 11. How do we track-in kind donations? Submit In Kind donation form found on the MP Packets
- 12. What information do I need from a donor? Name/Address/Business/Email/Phone at a minimum

Questions Received

- 1. What do donors get? Donors starting at 250 and up will receive a donation plaque. We are working on updating the site for donor packages
- 2. My donor wants a receipt how do they get one? Once their donation is received into the site, as long as they have provided a valid email address, it will automatically send them a receipt.
- 3. Can we use Razoo, My Event? Like we used before? No, those accounts are no longer active and should not be utilized.
- 4. Can we set up a GoFundMe? No. Law Enforcement United does not use GoFundMe
- 5. I want to track individual donations that are in the team account that go directly to that member, how do I do that in the workbook? If you want to get into that level of detail, I can provide you a supplemental tracker.
- 6. How often to I have to submit the team workbook? Who does it go to? Treasurers/Donation Coordinators will determine the periodicity. Workbooks will go to them. Each workbook needs to go to the applicable treasurer/coordinator.
- 7. Who do I talk to for updates or questions? Treasurer or donation coordinator
- 8. If a team member goes over the goal and pushes over the team goal, and not everyone on the team has met their goals, does that mean we do not have to fundraise anymore? While it helps your overall team goal it does not mean your individuals have met their goals. 250 transfer limit is still applicable.
- 9. When do donors get their awards? How do I get them? Donor awards are available at registration on May 9th
- 10. I want to make my own awards, can I do that and LEU pays for them? Talk to you Treasurer
- 11. I have funds left over in my team account, can I carry them over to next year? No. Fundraising ends June 30th and starts again July 1st. Any remaining funds get rolled into adding to the overall donation and or general fund.
- 12. I have funds left over in my team account, can I use that for other things? No. Those funds will be rolled into the general fund and used to add additional donation amounts to those we support or go towards ride bills
- 13. Can I set up my own team bank account and have my fundraiser go directly there? No. Talk to Brian Woolever, CFO if you need further details.

Individual Supplemental Goal Tracker

Managed by the treasurer or donation coordinator

				2016-201	7 Individual Supplen	nen tal Go	alTr	acker			Date	
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	FirstNa	eme	Le	ast Name	E	mail			Phone	Ride	Particip	ation Type
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								racking		Remaining Goal		
Goal Rundraiser Account Total				Individual Goal Tr	racker Tot	al	-	Total Raised	st Updated			
#	Date	First	Lest	Business	Add ress	City	ST	\$ Zip	Email	\$ - Sponsor	Type	Amount
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Issues discovered

- Be the first to donate automatically goes to the main campaign
 - Hide the Donors at the bottom until you get your first donation
- Team leader unable to generate their personal fundraising page linked to their team account
 - Working on a way to make this happen...

Points of Contact

- National Membership/MemberPlanet Site issues
 - Nicole Chadwick (<u>Nicole.Chadwick@leunited.org</u>)
- National Chief Financial Officer
 - BrianWoolever (brian.woolever@leunited.org)
- VA Division Treasurer
 - Ronny Watts (<u>ronny.watts@leunited.org</u>)
 - Donation Coordinator: Tina Mapes (<u>tina.mapes@leunited.org</u>)
- PA Division Treasurer
 - Bob Heger (bob.heger@leunited.org)
- NJ Division Treasurer
 - Chuck Super (<u>chuck.super@leunited.org</u>)
- Tough Ride Treasurer
 - Juan Romero (<u>juan.romero@leunited.org</u>)
- Ruff Ride Coordinator (financial TBD)
 - Scott Humphrey (<u>scott.Humphrey@leunited.org</u>)