JUNIOR ACHIEVEMENT CAMPAIGN MANAGEMENT SYSTEM
Sally W. Drew and Alen D. Baker
Duke Power Company

ABSTRACT

Junior Achievement (JA) is a non-profit organization which supports youth in the exploration of the free enterprise system. A national organization with local chapters forms a management shell with local companies providing the remainder of the volunteer manpower. One company each year provides the leadership of a campaign drive to raise money for the entire year. The campaigns are only four weeks long and raise large sums very quickly when successful. Solid campaign management strategy is essential in raising over $100,000 in four weeks from over 2,000 contributors.

This paper outlines the design and use of a SAS Campaign Management System, an excellent example of the flexible uses of SAS. The power of solving business problems through the features of SAS have lead to possibilities of broader user support from any type of non-profit organization. The development of the system details: (1) the history and evolution of the system, (2) the structure and purpose of each system component, (3) use of SAS/GRAPH for management reporting, (4) background on the outcome of selecting SAS as the support language, and (5) directions the system concepts may take in the future. SAS was endorsed as a permanent tool to quickly provide the JA leadership company with programming power for solid management strategy support.

HISTORY AND EVOLUTION

Roger Taylor (First Union National Bank) is the original author who developed the core of SAS programs which form the Campaign Management System. He was asked to use his knowledge to control the Junior Achievement records and statistics on the computer. His work was geared toward converting an antiquated, card oriented system previously written by a contracted DP service bureau. As the responsibility of the JA campaign was moved from one company to another, the programming had to be rewritten about everytime. Having been an avid user of SAS, Roger naturally applied his proven techniques and rewrote the system using SAS exclusively. Due to time constraints and the goals of the 1980 campaign drive, many concepts were aborted or not converted.

He developed the basic transaction master concept and provided several reports during the campaign. The primary goal was to generate pledge cards based on the contributor data. With pledge cards delivered, the programming halted and a manual process of posting, reporting, and controlling the campaign was necessary. Forms were filled out to collect the results of the campaign for future posting.

When Duke Power inherited the system and the pile of data forms, work began immediately to save all historical data. The 1981 campaign chairman pursued the use of history to project campaign goals. Data for 1980 and some data from prior years was collected and the master file was redesigned to maintain five years of history. Concepts to maintain Capital, Project Business, and General contributors were also maintained per contribution. Both pledges and payments were maintained. Thus, any contribution recorded from the past or currently could be used for projection in the next campaign. For example, one who contributed for Capital one year was considered a potential for General Contribution every year.

As the kick-off of the 1981 campaign drew closer, additional concepts were added to code groups of individuals to a company or an individual to multiple companies. This provided control over embarrassing, redundant pledge solicitation. Finally, during the campaign, progress was reported through the use of SAS/GRAPH and percent of goal charts for computing elements of the campaign organization. Weekly luncheons were held to review progress based on supplementary reports and to stimulate competition based on the percent of goal charts. As a result, the largest total contribution to date was achieved.

STRUCTURE AND COMPONENTS

The JA Campaign Management System consists of ten (10) programs. Seven (7) of the programs are report type programs indicating the emphasis toward management information. The following is a list of the programs and the respective purpose:

1. Date Entry - A transaction file is created, edited, and validated. The following transaction types were necessary to minimize data entry designed for specific users during the campaign:
   a. Delete - Removes a contributor and all history.
b. Add or Update - Provides easy addition of a contributor or updating of name, address, phone, company, and/or contact.

c. Prior Payment or Pledge - Provides posting of historical contributions by year and by contribution type (Operating, Capital, Project Business).

d. Current Payment or Pledge - Provides posting of present campaign contributions by contribution type. Both Prior and Current Pledges are replacement operations whereas the Prior and Current Payments are summation operations.

Delete transactions are used to remove contributors who want to be dropped totally and to correct extreme clerical errors.

Prior Payment or Pledge transactions are used to correct errors discovered while the current campaign is underway. Better control over double posting partial payments is presently needed.

2. Update Master - The transaction file is processed in the priority sequence of the list in Item 1 (Data Entry). The master file is updated with the data from the transactions appropriately. A report is produced which lists the updated master and last transaction type worked, sorted by contributor number, name, contact, and group.

A special organizational transaction may be processed to assign the contributor to the responsible area of the JA campaign organization. A code is used to designate the Division, Group, and Section of the organization. Additional codes may be used to designate clusters of contributors (individuals in a company) or clusters of companies with the same contact.

3. History Roll-up - Before each campaign is executed to move the campaign data back one year in history. The fifth year is lost as the current year is zeroed (reset) for the upcoming campaign. The current then becomes last year and so forth. A report is produced which lists the updated master and last transaction type worked, sorted by contributor number, name, contact, and group.

4. Pledge Card - For each campaign kick-off, a program is executed which will output a contributor contact form to be used in organizing the manual data flow during the campaign. The form is produced in organizational and contributor number order for easy distribution.

5. Reports - Six programs have been developed for various reporting needs before, during, and after the campaign. The following lists the reports and when they are used most:

a. Five-year Report - Prior to the campaign for strategy and planning.

b. Standard Pledge Reports - During the campaign a separate report for General, Project Business, and Capital pledges and payments is used.

c. Work Reports - Two primary reports along with updating reports are used throughout the year after the campaign to maintain data. The sorting and data reported varies, but one report is oriented toward funds the other toward contributor.

Major SAS PROC's incorporated into the JA Campaign Management System are PRINT, SORT, UPDATE.

Formatted output was used in many reports. However, one of the problems encountered involved placing the $ symbol in the output. Zeros were not desirable to print and the campaign chairman wanted the $ symbol in pledges and payments that were not zero only. This was accomplished by utilizing formatted output DOLLAR$ and SET OPTIONS MISSING = ' '; and assigning all variables that were to be zero to missing (var=.;).

SAS/GRAPH was used to produce the percent of goal chart (Figure 1) in the campaign organization.

Use of SAS/GRAPH

During the campaign luncheons, outputs utilizing SAS/GRAPH were used to compare the performance results of sections, groups and divisions. Without SAS/GRAPH the campaign
staff would have expended a great deal of
time creating a bar chart. An atmosphere
of competition was used to stimulate progress
ward achieving the goals set. The "turtle
award" was presented to the losers at the end
of the campaign in good humor of course.
Junior Achievement products were awarded to
the winners as a token of success.

Reading statistics would not have created
the impressive picture of the competition
at each luncheon. Exhibiting statistics as
a series of bar charts was most effective.
The groups set goals toward their bar higher
relative to others (a clear vision).

SAS AS A SUPPORT LANGUAGE

Due to the user friendly capability of SAS,
this project was conceived and developed by
a non-programmer type person. Currently,
the programs are being turned over to IBM and
a non-programming group for the next campaign.
Personnel at Junior Achievement have been
training to some degree and understand SAS
concepts well. The next campaign will be
interesting since the evolution of the system
is in the hands of non-programming type
people. The SAS Institute has generously
worked out a contract with Junior Achievement
for continued support in the future. The
programming is now in the hands of those who
know a great deal about the campaign and, as
users, have the most potential to improve the
system.

CONCEPTS OF THE FUTURE

The campaign management concept has an excel-
rent future under the support of SAS. The
user friendly capability provides the
potential for any non-profit organizations
to develop better strategy and control for
contribution solicitation. Most impressive
is the potential to prevent redundant
management reporting. The statistical
capabilities and graphics capabilities of
SAS have been under-utilized in this system,
but the potential in these areas are unlimited.
In summary, much of the computer appli-
cations in today's society are oriented
toward business, research, and education.
But, non-profit organizations have one of the
greatest needs for computer assistance. The
conclusion is that SAS has made it possible
to see and satisfy the need for Junior
Achievement, and thousands of organizations
await.
JUNIOR ACHIEVEMENT FUND DRIVE
DIVISION THREE

PCT_GOAL

09 10 11 12 13 14 15

SECTION

GROUP