MicroEdge

GIFTS® Alta

Using Reports

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Welcome to the GIFTS Alta Reports Library

Thank you for choosing GIFTS Alta!™ In addition to the reporting features available in the GIFTS Alta Workspace, GIFTS Alta includes a library of more than 200 reports that have been designed to meet the needs of most grant makers.

This manual describes how to run these reports and includes sample reports that you can use to find the GIFTS Alta reports that best meet your needs.

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Where to Find the Information You Need

The information you need depends within your organization's workflow for using GIFTS Alta. Please use the following descriptions to determine how to best use this manual.

All users: All users should read "How to Use the Sample Reports" on page xi for an important overview of the terms used in this manual. Then, read "About GIFTS Alta Reporting" on page 2 for an explanation of the GIFTS Alta reporting options.

If you want to find out what reports are available: You can browse through the report listings in "About GIFTS Alta Reporting" on page 2 for descriptions of the available reports. Each report listing includes a cross-reference to the sample report that you can look at to see exactly what data is included in the report.

In addition, you can look for reports in the index at the end of this manual.

If you want to know how to run a GIFTS Alta report: Read "How to Use the Sample Reports" on page xi for an important overview of the terms used in this manual. Then, refer to "Running GIFTS Alta Reports" on page 31 for complete instructions for running reports from the GIFTS Alta Report Library.

If you want to run a Budget report, please refer to the *Budget Module User's Guide* for information about running the Budget reports.

If you're responsible for setting up the GIFTS Alta Report Library:

Read "About GIFTS Alta Reporting" on page 2 and decide which reports are the most useful for your organization. Then, read the "Managing the GIFTS Alta Report Library" chapter of the *Administrator's Guide* to find out how you can tailor the Report Library to meet your organization's needs.

How to Use the Sample Reports

The sample reports in this document are divided into the categories in which they appear in the GIFTS Alta Report Library. You can browse through the lists beginning on page 5 to find reports that meet your needs.

Each sample report includes information about the *fixed criteria* that apply to the report and, if the report belongs to a *series*, the available variations of the report. Series and fixed criteria are described in the following sections.

About Series of Reports

For many reports, the report library includes several grouping variations that comprise a *series* of reports. For example, the 'Declinations - Alpha List' series of reports includes the following reports:

Declinations - Alpha List
Declinations - Alpha List by Fund
Declinations - Alpha List by Geographical Area 1
Declinations - Alpha List, by Program Area 1
Declinations - Alpha List by Reason
Declinations - Alpha List by Staff
Declinations - Alpha List by Type

These reports include identical information; the only difference is the way in which the records are *grouped*. For report series, this document includes one variation of the report as an example and lists the other variations in the series.

About Report Names

As described in the *Administrator's Guide*, your GIFTS Alta Administrator can modify the names of the standard report. The report names in this document are the names shipped with the GIFTS Alta product; the names in your system may be different if your Administrator has edited them.

The GIFTS Alta Administrator can add and remove reports from your Report Library, so not all of the reports in this document may be available. If

you would like to use a report and cannot find it in your system, please contact your GIFTS Alta Administrator.

About Fixed Criteria

Many reports have been designed to include only specific information. For example, the 'Declinations - Alpha List' reports only include Requests with a Disposition of Declined. Pending Requests and Approved Requests are not included in the report.

These *fixed criteria* always apply to the report, regardless of the search criteria that you choose when you run the report. If a report has fixed criteria, they are noted in the sample report.

About Saved Search Criteria

Your Administrator can create new reports by attaching saved searches from GIFTS Alta to the standard reports described in this publication.

Example: The standard reports library includes an "Alpha List of Grantee Organizations" report that lists all Organizations in the GIFTS Alta database that have received funding. By attaching a saved search for Organizations coded as 'Arts & Culture' to this report, your Administrator can create an "Alpha List of Arts Grantees" report.

Refer to the *Administrator's Guide* if you want to attach a saved search to a standard report. Note that you can also specify search criteria when you run reports, as described in "Running GIFTS Alta Reports" on page 31.

How Records are Sorted

Unless otherwise noted, all reports sort records alphabetically by Organization Sort as Name.

Currency and Date Formats

The currency and date formatting of the reports is determined by Regional Settings Control Panel of Microsoft Windows. The sample reports in this

document were produced on a system with the Regional Settings set to "English (United States)."

Conventions Used in This Manual

Before you read *Using GIFTS Alta 1.6 Standard Reports*, it is helpful to familiarize yourself with the conventions used throughout this manual. Doing so will enhance the usefulness of the documentation.

Procedural and Typographic Conventions

Procedural conventions help identify procedures and tasks you'll perform.

- Important procedures are always given as a numbered set of tasks.
- Check marks indicate a checklist of general items or tasks.
- Characters given in this font are examples of data that you should enter, such as the directory path to a file.
- Data elements within the GIFTS Alta system are presented with an Initial Capital Letter. For example, the word "request" is capitalized when it is used to refer to a Request record within GIFTS Alta.

Different Types of Notes

When appropriate, notes provide additional information or warnings that may apply to you. *Using GIFTS Alta 1.6 Standard Reports* uses four types of notes. Each type of note serves a unique purpose as defined below.

Note: A note with this format and the heading "Note" provides information that applies to some users. Notes apply to special situations. For example, a Note might explain minor differences in setup procedures among network and standalone systems.

Important: A note with this format and the heading "Important" provides information that applies to all users. This type of note provides information that is essential to the completion of a task. Unlike a Note, Important notes should not be disregarded.

Caution: A note with this format and the heading "Caution" provides important information that applies to all users. Pay special attention to these notes.

Tip: A note with this format and the heading "Tip" provides useful information that applies to most users. Although Tips are not essential to the completion of a task, they provide alternative methods, shortcuts, or special applications relating to the procedures in the text.

Maintenance and Support Program

Members of MicroEdge's Maintenance and Support Program receive unlimited telephone consultation on the use of the software, assistance in error isolation and correction, prompt furnishing of any available problem solutions relating to the currently supported versions of GIFTS Alta, and software updates.

Our toll free Technical Support hotline is available Monday through Friday, 9:00 A.M. to 8:00 P.M. Eastern time. You may contact MicroEdge's Technical Support Specialists as follows:

Phone	1-877-704-3343
Fax	(212) 757-1784
E-mail	*helpdesk@microedge.com*
Web	Login to the PowerME site at www.microedge.com and create a new Case.

Note: To access the Web, you must have an Internet connection (either a LAN connection or a dial-up connection) and a frames-enabled browser (Microsoft Internet Explorer 8.0 or later).

For details about our support policies, please refer to the MicroEdge *Client Resource Guide*. If you have any questions regarding the Maintenance and Support Program, please contact our Client Administration Representative at 1-800-899-0890, option 6, then 2, who will be happy to assist you.

Using the Documentation Included with GIFTS Alta

MicroEdge provides you with the GIFTS Alta documentation in Portable Document Format (PDF). To view these files, you will need to install Adobe®'s Acrobat® Reader, which is available for free from Adobe Systems, Inc. at *http://www.adobe.com*.

You can print out selected pages, sections, chapters, or the entire book. You can also install the files on your computer or network so you can access them online, and take advantage of features such as a "hot" table of contents, index, and cross-references within books.

Note: Acrobat Reader's other features are described in the Reader's online Help. Note that MicroEdge does not provide technical support for the Acrobat Reader. We cannot assist you with the installation, configuration, or use of this product.

1 About the GIFTS Alta Report Library

This chapter introduces the Report Library and lists each of the reports shipped with the GIFTS Alta product. You can browse through these lists to find the reports that meet your needs.

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About GIFTS Alta Reporting

One of the most important functions of any database system is the ability to arrange and present the data you have entered in useful ways. GIFTS Alta include an extensive library of standard reports.

The GIFTS Alta Report Library includes two types of reports:

- **Standard Reports**—More than 200 pre-built standard reports designed to meet the needs of most grant making organizations are installed with your system. These reports have been designed to complement the functionality of GIFTS Alta in a way that is beneficial to the largest number of users. Standard reports answer common queries, some of which are general in nature and some of which are more specific.

  Example: The "Alphabetical List of Grants" report lists grants in alphabetical order to answer the query "Which projects have we funded?" When you run this report, you can further define it to answer a more specific query, such as "Which projects have we funded *in Arts and Culture*?" You can choose the specific data you wish to see for all reports.

- **Saved Workspace Reports**—Saved Workspace reports are ad hoc reports designed by individual users, with a large degree of control over formatting and layout. As with saved views and searches, saved Workspace reports may be either public or private. For details on creating and saving Workspace reports, you should refer to the *GIFTS Alta User's Guide*.

In order for you to make the best use of your data, it is helpful to have a thorough understanding of the available standard reports and how the data you enter is reflected in these reports. Reviewing the sample reports may provide you with ideas about using areas of GIFTS Alta that you haven't yet explored. It will also allow you to determine what types of Workspace reports you will want to create.

Ad Hoc Reporting

You can use the GIFTS Alta Workspace as an *ad hoc* reporting tool to print and export data, as described in the *GIFTS Alta User's Guide*. Once you have set up an ad hoc report, you can save the content, sort order, grouping,

formatting, and print options as an Ad Hoc report in the Report Library. Then, you can run the report quickly from the Report Library.

Custom Reports

GIFTS Alta provides you with great flexibility for creating and saving customized reports. However, if you need help customizing specific reports or creating new reports, you can retain MicroEdge to accomplish this. The cost of this service varies depending on the level of complexity of the required reports. For more information, please refer to our *Client Resource Guide* or contact our Programming Services Department at 1-800-899-0890.

About Report Categories

In order to provide the most intuitive access to reports, the Report Library is divided into Record Type tabs. You should note that not all categories will be available to all users, as some depend on your system configuration.

Tip: Categories with no reports defined for them will be hidden in the Report Library. Affiliations and Reviews are initially hidden, for instance, because they contain no standard reports when GIFTS Alta is first installed. Categories will also be hidden if you remove all of their reports through the GIFTS Alta Administrator.

Any combination of the following categories may be available in your Report Library:

Category	Description
Favorites	For convenience, you can add the reports that you use most often to the Favorites category. A Favorites list is maintained for each GIFTS Alta user.

Category	Description
Organizations	Organization reports are designed to provide information on the organizations in your database. These reports are useful for displaying address, tax status, and other details about Organizations. Since organizations are attached to the funding requests they have made, information about an Organization's funding history is also available on several Organization reports.
Requests	Reports about the requests for funding in your system. Some reports display detailed information on each Request, while others summarize Request information in meaningful ways. Request reports include information on grants, declinations, and proposals—though many Request reports are designed to include only specific information. For instance, the 'Declinations by Reason' report only lists Requests that have been Declined.
Financial/ Payments	A variety of ways to look at your financial data. Most reports detail Payment information that you can use to review your financial history or plan future commitments.
Contacts	Detailed information about your contacts, and special reports for printing comprehensive lists of contacts for projects or organizations.
Affiliations	Used to save user-defined reports created in the Workspace. Affiliation reports can provide details about your contacts' relationships with various organizations and grant requests.
Activities	To-do and scheduling reports.
Requirements	Reports on requirements due from grantee organizations.
Documents	*Hidden for Essential GIFTS users without* both *the Correspondence Module* and *the Document Manager option.*
Budget	Budget reports can be run from GIFTS Alta. They contain detailed and summary information on budget figures, as well as comparisons between the budget vs. actual information.
Matching	*For users of Matching GIFTS only.* Reports related to matching gifts programs, including detailed and summary lists of gifts, donors, and recipients.
Volunteer	*For users of Volunteer GIFTS only.* Reports related to volunteer gifts programs, including detailed and summary lists of gifts, donors, and recipients.

Category	Description
Donors	*For users of Employee GIFTS only.* Reports related to donors participating in either Volunteer GIFTS or Matching GIFTS programs.
Reviews	*For users of the Reviewers Module and/or ReviewerCONNECT only.* Used to save user-defined reports created for Reviews in the Workspace.

About Fixed Criteria

Many reports have been designed to include only specific information. For example, the 'Declinations - Alpha List' reports only include Requests with a Disposition of Declined. Pending Requests and Approved Requests are not included in the report.

These *fixed criteria* always apply to the report, regardless of the search criteria that you choose when you run the report. If a report has fixed criteria, they are noted in the sample report.

Organization Reports

The following standard reports are included in the Organization folder of the GIFTS Alta Report Library.

Report Name	Page
Alpha List of Grantee Organizations An alphabetical listing of all organizations associated with grants, including the total amount granted to the organization and the grant year span.	46
Alpha List of Organizations An alphabetical listing of all organizations, including Request information	47
Duplicate Organizations (by Name) Identifies duplicate organization entries to assist with data cleanup. Only organizations with the exact same name are included.	48

Report Name	Page
Organization Mailing Labels 5160 **Organization Mailing Labels by Zip Code - Avery 5160** Mailing Labels addressed to the Primary Contact of each Organization, formatted for Avery #5160 labels.	49
Organization Mailing Labels 5162 **Organization Mailing Labels by Zip Code - Avery 5162** Mailing Labels addressed to the Primary Contact of each Organization, formatted for Avery #5162 labels.	49
Organization Profile Report **Organization Profile Report (with Graph)** A summary sheet for each organization, displaying their address and background information, and both the detail and summary information of their funding history as entered in the Requests file.	51 50
Simple Organization Listing A simple list of all organizations in GIFTS Alta, with no request information included.	52
Top 20 Organizations by Total Grant Amount This report lists the organizations receiving the top 20 highest cumulative grant amounts within the search criteria specified.	53
Top 20 Organizations by Total Number of Grants This report lists the organizations receiving the top 20 highest number of cumulative awards within the search criteria specified.	55

Request Reports

The following standard reports are included in the Requests folder of the GIFTS Alta Report Library

Report Name	Page
Board Meeting Agenda **Board Meeting Agenda by Docket Number** **Board Meeting Agenda by Program Area 1** Organization name, long project description, requested amount and recommended amount, designed for an agenda for a Board Meeting.	59
Board Meeting Minutes **Board Meeting Minutes by Docket Number** **Board Meeting Minutes by Program Area 1** Requests with their current Disposition and Status, showing the action taken by the board.	60
Contact Affiliations by Request A list of Requests, grouped by Organization, that shows the affiliated Contacts for each Request.	61
Data Entry Edit Report by Organization **Data Entry Edit Report by Date** A comprehensive summary of individual Requests, including all classifications, for data entry verification.	62
Declinations - Alpha List by Program Area 1 **Declinations - Alpha List** **Declinations - Alpha List (Portrait)** **Declinations - Alpha List by Fund** **Declinations - Alpha List by Geo. Area 1** **Declinations - Alpha List by Internal Program** **Declinations - Alpha List by Staff** **Declinations - Alpha List by Grant Type** A detailed listing of Declined requests, including the reason for declination and the staff person assigned. The “Portrait” variation of this report is printed with the Portrait paper orientation; all other variations are Landscape reports. *Fixed Criteria:* Requests with a Disposition of Declined.	63

Report Name	Page
Declinations - Alpha List by Fund (including Request Amount) **Declinations - Alpha List by Program Area (including Request Amount)** A detailed listing of Declined requests, including subtotals of the amount requested. *Fixed Criteria:* Requests with a Disposition of Declined.	64
Declinations - Summary by Reason A summary of declinations by the reason declined, including totals for each reason and the corresponding percentage of the total, both for the number of declines and the amount requested. *Fixed Criteria:* Requests with a Disposition of Declined.	66
Foundation Center Export Report A data export for the Foundation Center. Please contact MicroEdge Technical Support for detailed information.	67
Grant Profile Report A summary of a single grant, including payment and grant amendment information. *Fixed Criteria:* Requests with a Disposition of Approved.	70
Grant Summary - by Support Type **Grant Summary - by Fund** **Grant Summary - by Geographical Area** **Grant Summary - by Grant Type** **Grant Summary - by Program Area 1** **Grant Summary - by Program Areas 1 and 2** **Grant Summary - by Program Areas 1, 2 and 3** **Grant Summary - by Staff** A summary of approved requests showing the total amount granted and the percentage of the total for each item. *Fixed Criteria:* Requests with a Disposition of Approved.	71
Grant Summary - Granted and Paid by Program Area For each Program Area, this report shows the total amount granted and the amount and percentage of Payments made for that Program Area. *Fixed Criteria:* Requests with a Disposition of Approved.	72

Report Name	Page
Grants - Alpha List **Grants - Alpha List by Fund** **Grants - Alpha List by Geo. Area Level 1** **Grants - Alpha List by Geo. Area Levels 1 to 5** **Grants - Alpha List by Grant Type** **Grants - Alpha List by Internal Program** **Grants - Alpha List by Population Served** **Grants - Alpha List by Program Area 1** **Grants - Alpha List by Program Area 1 & 2** **Grants - Alpha List by Program Area 1, 2, & 3** **Grants - Alpha List by Program Areas 1 through 5** **Grants - Alpha List by Primary Contact** **Grants - Alpha List by Staff** **Grants - Alpha List by Support Type** Alphabetical listing of grants, including Reference Number, amount granted, and amount paid. Grants are listed in alphabetical order by organization name. *Fixed Criteria:* Requests with a Disposition of Approved.	73
Grants - Alpha List (Portrait) Same as the Alpha List of Grants report, but with the paper orientation designed to print portrait rather than landscape. *Fixed Criteria: Requests* with a Disposition of Approved.	74
Grants - Alpha List, by Geographic Area Served including Secondary Codes **Grants - Alpha List, by Program Area Served including Secondary Codes** Alpha list of grants, grouped by all levels of the Geographic Area Served or Program Area table. These reports include both primary and secondary coding, so that one grant may appear several times (once for each code). Thus, the totals in this report may not reflect the actual amount granted. *Fixed Criteria:* Requests with a Disposition of Approved, and which have been assigned a classification in the table on which the report groups.	74

Report Name	Page
Grants - Chronological List **Grants - Chron. List by Fund** **Grants - Chron. List by Geographical Area 1** **Grants - Chron. List by Grant Type** **Grants - Chron. List by Program Area 1** **Grants - Chron. List by Program Area 1 and 2** **Grants - Chron. List by Program Area 1, 2, & 3** **Grants - Chron. List by Staff** **Grants - Chron. List by Support Type** Listing of grants, including Reference Number, amount granted, and amount paid. Grants are listed in date order by Grant Date. *Fixed Criteria: Requests* with a Disposition of Approved.	76
Incomplete Proposals **Incomplete Proposals by Date** A listing of Pending items which are marked as incomplete, including the current Status of the Request and the Complete/Incomplete Notes. *Fixed Criteria:* Requests with a Disposition of Pending that are also marked as 'incomplete' on Page 1 of their Request record.	77
Proposals - Alpha List by Staff **Proposals - Alpha List** **Proposals - Alpha List, by Fund** **Proposals - Alpha List, by Geographical Area 1** **Proposals - Alpha List, by Grant Request Type** **Proposals - Alpha List, by Internal Program** **Proposals - Alpha List, by Program Area 1** **Proposals - Alpha List, by Program Areas 1 and 2** **Proposals - Alpha List, by Primary Contact** **Proposals - Alpha List, by Status** A listing of Pending items, including Project Title, Request and Recommended Amounts, Request Type and Status. *Fixed Criteria: Requests* with a Disposition of Pending.	78
Proposals - Alpha List (Portrait) Same as the Alpha List of Proposals report, but with the paper orientation designed to print portrait rather than landscape. *Fixed Criteria: Requests* with a Disposition of Pending.	79

Report Name	Page
Proposals - Complete/Incomplete A listing of Pending items, including Project Title, Request Date, and Staff, and whether the Request is complete, along with any relevant notes. *Fixed Criteria:* Requests with a Disposition of Pending.	80
Recommendations by Organization This report shows the approved amount for the previous year, and the approved amount for the current year per organization, and the Project Description (Long). *Fixed Criteria:* Requests for Organizations that have at least one Pending Request in the current calendar year.	81
Renewable Grants Lists basic grant information about grants that have been flagged as renewable. *Fixed Criteria:* Approved Requests that have been flagged as renewable (on Page 2 of their Request records).	82
Repeat Grants For each Organization with repeat grants, this report shows the granted and paid figures for the current and previous calendar years. *Fixed Criteria:* Organizations that have received grants in both the current year and the previous year.	83
Request Fact Sheet *For users of Essential GIFTS* - For each request, a single-page write-up that includes the applicant's background, the Project Title, the project's Program Area, the requested and recommended amounts, and a history of the applicant's previous grants.	84
Request History by Organization The Request History by Organization report is very similar to the Organization Profile report listed in the Organization report library. The key difference is, the Request History by Organization report is sensitive to Request criteria.	85

Report Name	Page
Request Labels (Primary Contact) - Avery 5160 **Request Labels (Primary Contact) by Zip Code - Avery 5160** **Request Labels (Primary Contact) - Avery 5162** **Request Labels (Primary Contact) by Zip Code - Avery 5162** Avery Labels 5162 for the Request's Primary Contact only (the person entered on Page 1 of the Request record). One label will print for each Request selected.	86
Request Labels (All Affiliated Contacts) - Avery 5162 **Request Labels (All Affiliated Contacts) by Zip Code - Avery 5162** **Request Labels (All Affiliated Contacts) - Avery 5160** **Request Labels (All Affiliated Contacts) by Zip Code - Avery 5160** Avery Labels 5162 for all of the contacts affiliated directly with the Request. One label will print for each affiliation.	86
Request Statistics A report showing statistical information such as the total number of Approved, Pending, and Declined Requests and the minimum, maximum and average grant amounts.	87
Requests by Sponsor A list of Requests, grouped by the Contact identified as the "Sponsor" of each Request. Includes the Disposition, Grant Amount, and Paid Amount of each Request. *Fixed Criteria:* Requests that have an affiliated Contact with the Role of "Sponsor."	88
Status of Requests Received by Staff, Including Sponsor **Status of Requests Received by Staff** A comprehensive listing of Requests grouped by staff, including the contact designated as the Sponsor (using the system-defined "Sponsor" Contact Role)	92
Summary of Requests by Type, Disposition, and Status A summary of Requests grouped by Type, Disposition, and then Status; includes subtotals of the requested and granted amounts for each Request.	90
Tax Status Verification Shows tax status information for organizations associated with Requests, and displays a warning message for organizations with no tax status on file. Includes: Organizations associated with Requests.	91

Report Name	Page
Top 20 Grants by Grant Amount The largest 20 grants in the search criteria provided, listed in descending order by grant amount.	92

Financial Reports

The following standard reports are included in the Financial folder of the GIFTS Alta Report Library

Report Name	Page
Cash Flow Analysis **Cash Flow Analysis by Program Area** A listing of Scheduled Payments for the next six months, including the Organization Name, total amount granted, and remaining balance at the end of six months. *Fixed Criteria:* Payments for Requests that have any outstanding Payments.	95
Check Request Report by Fund A listing of Scheduled Payments, including the legal name and address of the payee Organization, for the purpose of providing information for cutting checks. Grouped by Payment Fund. *Fixed Criteria:* Payments with a Status of Scheduled.	96
Contingent Payments by Staff **Contingent Payments by Date** A listing of payments with a Status of Contingent, grouped by the Staff person assigned to the contingency. The type of contingency, due date, and notes are included. *Fixed Criteria:* Payments with a Status of Contingent.	97
Current Year Paid and Future Commitments **Current Year Paid and Future Commitments - by Program Area** A listing of grants including the total amount paid on the grant to date, future commitments by year for the next three years and the remaining balance. *Fixed Criteria:* Approved Requests with an unpaid balance or a Payment Paid within the current Fiscal Year.	98

Report Name	Page
Deferred Payments A listing payments with a Status of “deferred” (payments which have been placed on Hold). *Fixed Criteria:* Payments with a Status of Hold.	100
Five Year Payment History Report **Five Year Payment History Report by Program Area** A summary report per organization, showing the total amount paid to that organization in each of the last five years, including the current year. *Fixed Criteria:* Payments with a Status of Paid, Refund, or Void.	101
Grant Amendment Report Provides detailed information on all of the amendments for each grant, and includes both the Original Grant Amount and the Current Grant Amount. *Fixed Criteria:* Approved Requests that have amended Grant Amounts.	102
Grant Commitments Schedule A summary of payment information by Request, for those Requests with any outstanding payments. Information shown includes the grant amount, the amount paid in the current year and prior years, payments scheduled in the next three years, and any remaining balance. *Fixed Criteria:* Payments for Requests with an unpaid balance.	103
Grant Commitments Schedule (6 years) **Grant Commitments Schedule (6 Years) by Program Area** Shows payments scheduled in the next six years, including the total of any payments remaining after that time. *Fixed Criteria:* Payments for Requests with an unpaid balance.	104
Grant Continuity Schedule in Local Currency **Grant Continuity Schedule in Local Currency by Fund** If you use GIFTS Alta multi-currency features to track grant amounts in other currencies (based on currency exchange rates saved in the Administrator Module), the Grant Continuity Schedule reports provide information about grants’ balances, Payments, Amendments, and other changes in either your functional currency or the grants’ local/other currencies.	105

Report Name	Page
Grant Continuity Schedule in Functional Currency **Grant Continuity Schedule in Functional Currency by Fund** If you 1) keep a historical record of previous exchange rates and 2) allow some or all multi-currency Requests and Payments to adjust their functional amounts when GIFTS Alta system exchange rates are updated, you can use this report to see—in addition to the other data—the net increase or decrease in the functional grant amount during the current year due to exchange rate changes.	110
Grant Payment Confirmation by Staff A list of Payments with a Status of Scheduled, Contingent, or Hold, grouped by the staff member associated with the Request, and including information on any Requirements due for the Payment or Request. *Fixed Criteria:* Payments with a Status of Scheduled, Contingent, or Hold, and Requirements with a Schedule Date in the current year.	116
Grant Payment Summary **Grant Payment Summary - by Payee** A comprehensive summary of Payment information for Approved Requests, including the total number of Payments, the amount granted, the amount scheduled (payments with a Status of Scheduled, Hold, or Contingent), paid, and any unscheduled balance. It also includes the Payment Schedule Date and amount of the next payment due. The “by Payee” variation summarizes the data by the payee Organization instead of the grantee. Since grants that include Payments to more than one payee are listed more than once (one listing per payee), this report does not include totals for the Grant Amounts and Grant Balances. *Fixed Criteria:* Payments for Approved Requests.	117
Grant Planning Worksheet by Grant Fund **Grant Planning Worksheet** **Grant Planning Worksheet by Program Area** For year-end planning, this report displays in worksheet format the giving for the current year, any commitments for the next year, a space to write in the proposed amount for next year, per organization. *Fixed Criteria:* Organizations with Requests Approved in the current Fiscal Year, payments Paid in the current Fiscal Year, or Payments Scheduled for the coming Fiscal Year.	118

Report Name	Page
In-Kind Payments Made by Payment Fund Donor **In-Kind Payments Made** **In-Kind Payments Made by Program Area** A report of paid payments including fields specific to in-kind payments: fair market value, tax value, book value, and in-kind notes. Payments are grouped and subtotaled by the Payment Fund Donor. *Fixed Criteria: Payments* with a Status of Paid or Void.	119
Payment Status Summary - by Program Area **Payment Status Summary - by Payment Fund** **Payment Status Summary - by Year** A summary of all payments entered in GIFTS Alta, totaled by their respective Payment Status. Includes columns for the total amount scheduled, and then breaks this out by Paid, Scheduled, Hold, Contingent Payments.	120
Payments Due Schedule, **by Payment Support Type** **Payments Due Schedule, by Grantee Organization** **Payments Due Schedule, by Month** **Payments Due Schedule, by Program Area 1** **Payments Due Schedule, by Program Area 1 and 2** **Payments Due Schedule, including Other Currency** **Payments Due Schedule, by Country, including Other Currency** **Payments Due Schedule, by Payment Fund** A listing of outstanding Payments, including the Grant Amount, Project Description and Reference Number, the Payment Due Date and Amount, and the Payment Fund. If the Payment has a Status of Contingent or Hold, a column displays this information, along with notes entered for the Payment. *Fixed Criteria: Payments* with a Status of Scheduled, Hold, or Contingent.	121

Report Name	Page
Payments Made - by Month **Payments Made - by Grantee Organization** **Payments Made - by Payment Support Type** **Payments Made - by Program Area 1** **Payments Made - by Program Area 1 and 2** **Payments Made - by Payment Fund** **Payments Made - by State** **Payments Made - including Other Currency** **Payments Made - by Country, including Other Currency** A listing of payments which have been marked as paid in the system, including the payment date and check number, if available. *Fixed Criteria:* Payments with a Status of Paid, Refund, or Void.	122
Payments Made - Charitable vs. Non Charitable Deductions For those organizations that capture "Quid Pro Quo" information, this report lists the deductible and non-deductible amounts as entered for each payment. Also included is the check number and the payment date. Fixed Criteria: Payments with a Status of Paid or Void.	123
Payments Made - OBRA Report This report shows whether or not a receipt is required on each Payment, and the Schedule Date and Done Date of the receipt. The full name and address of the payee Contact is included for easy follow-up. The report also includes the deductible and non-deductible amount for each Payment and the Organization's tax status. *Fixed Criteria:* Payments with a Status of Paid or Void, and Requirements associated with Payments that have been specified as "Receipt Required."	125
Payment Reconciliation Report Lists Payments by status, and then by Check Number, including the payee's legal name, the Payment Fund, the Payment Type, and Paid Date. *Fixed Criteria:* Payments with a Status of Paid, Refund, or Void.	126

Report Name	Page
Schedule of Appropriations and Payments (version 6) **Schedule of Appropriations and Payments, by Program Area (version 6)** Schedule of Appropriations and Payments This is a new version of the old Schedule of Appropriations and Payments (the new versions is still available). For details on changes made in the new version, see page 133. For Approved Requests, this report lists the balance as of the beginning of the current Fiscal Year, any money newly allocated in the current Fiscal Year (which will include grants made in the current year), the amount paid in the current Fiscal Year, and the amount outstanding for the current Fiscal Year. *Fixed Criteria:* Approved Requests with an unpaid balance or for which appropriations were made during the Fiscal Year.	127
Schedule of Appropriations and Payments **Schedule of Appropriations and Payments, by Program Area** Schedule of Appropriations and Payments showing Population Served For Approved Requests, this report lists the balance as of the beginning of the current Fiscal Year, any money newly allocated in the current Fiscal Year (which will include grants made in the current year), the amount paid in the current Fiscal Year, and the amount outstanding for the current Fiscal Year. *Fixed Criteria:* Approved Requests with an unpaid balance or for which appropriations were made during the Fiscal Year.	133
Summary of Paid Payments - by Payment Type **Summary of Paid Payments - by Payment Fund** **Summary of Paid Payments - by Geo. Area 1** **Summary of Paid Payments - by Prog. Area** **Summary of Paid Payments - by Staff** **Summary of Paid Payments - by Payment Support Type** A summary of payments paid, including number of items and percentages. *Fixed Criteria:* Payments with a Status of Paid, Refund, or Void.	136
Top 20 Payments by Payment Amount The largest 20 Payments in the search criteria provided, in descending order by amount. *Fixed Criteria:* Payments for Approved Requests.	137

Contact Reports

The following standard reports are included in the Contacts folder of the GIFTS Alta Report Library

Report Name	Page
Contact Mailing Labels #5160 **Contact Mailing Labels #5160 by Zip Code** Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5160 labels.	140
Contact Mailing Labels #5162 **Contact Mailing Labels #5162 by Zip Code** Mailing Labels addressed to the Contact at their Primary Organization, formatted for Avery #5162 labels.	140
Contact Phone Book Report A simple listing of Contacts by last name, with telephone, fax, and e-mail information for each Contact.	141
Contacts - Alpha List An alphabetical list of Contacts by name, including full address information	142
Duplicate Contacts by Last Name **Duplicate Contacts by Zip Code** A report that shows Contacts with the same last name, to help identify duplicates for data cleanup.	143

Activity Reports

The following standard reports are included in the Activities folder of the GIFTS Alta Report Library.

Report Name	Page
Activities Verification Report A report showing all of the Activities for each request, including audit trail information such as who created, last changed, and marked the activity as complete.	146

Report Name	Page
Pending Proposal Checklist A report listing the requirements due on Pending Requests only. The Project Title, Request Date and the Meeting Date are included for each Request. *Fixed Criteria:* Requirements associated with Requests with a Disposition of Pending.	147
Requirements Completed - by Staff **Requirements Completed - by Date** **Requirements Completed - by Organization** **Requirements Completed - by Program Area** A list of completed Requirements, grouped by the staff member assigned to the Requirement. *Fixed Criteria:* Requirements with a Status of Done.	148
Requirements Due by Date **Requirements Due by Organization** **Requirements Due by Staff** **Requirements Due by Program Area** A chronological list of Requirements with a Status of Scheduled. *Fixed Criteria:* Requirements with a Status of Scheduled.	149
To Do Completed by Date **To Do Completed by Staff** A list of completed To Do Activities, sorted by the done date. *Fixed Criteria: Activities* with a Class of To Do and a Status of Done.	150
To Do Listing by Staff **To Do Listing by Date** A list of all outstanding To Do Activities for specific staff members, including pertinent information on related Requests. *Fixed Criteria:* Activities with a Class of To Do and a Status of Scheduled.	151

Budget Reports

The following reports can be run from the GIFTS Alta Budget Module is installed..

Report	Page
Budget vs. Actual A report that compares your budgeted dollars against your actual Payments for the current Budget Year.	154
Reserve Fund Report A report that lists Reserve Funds, including their Original Budget Amount and their current balance. For each Reserve Fund, all transfers and resolved Payments are listed.	157
Line Item Status Report **- by Alphabetical Order** **- by Budget Committee** **- by Fund** **- by Program Area 1** **- by Program Area 1 and 2** **- by Program Area 1, 2, and 3** A report that shows the amount paid in the prior year, and the budget vs. actual information for the current year for Line Item Organizations. This report can be grouped by various Coding Sheet codes (please note that the Coding Sheet information refers to the Requests associated with the Line Items).	158
Budget Worksheet Report A report that helps project your budget for the coming year, including budgeted and paid information for the current year, and any payments scheduled for the next year. Organizations are listed alphabetically.	159
Line Item Index A report showing the original budget, current budget, awarded and paid amounts for each Line Item. Line Items are listed *alphabetically* for quick reference; the Category/Reserve under which the Line Item resides is listed in a separate column.	160

Report	Page
Payments Paid (including Budget Information) **- by Payment Fund** **- by Program Area 1** **- by Payment Date** A listing of Paid Payments, including the amount of each payment and the check number, and information as to whether or not the payment was included in the budget, and if not, the Reserve Fund from which the funds were drawn to cover the payment.	162
Recurring Grants Report A report that includes *only* organizations budgeted in the previous year and in the current year.	164
Five Year Budget Summary **- by Budget Committee** **- by Fund** **- by Geographical Area 1** **- by Program Area 1** **- by Program Area 1 and 2** **- by Program Area 1, 2, and 3** A summary report comparing budget vs. actual total figures over the last five years. This report can be grouped by various Coding Sheet codes (please note that the Coding Sheet information refers to the Requests associated with the Line Items).	165
Budget Cash Flow Report **- by Alphabetical Order** **- by Budget Committee** **- by Fund** **- by Geographical Area 1** **- by Program Area 1** A report listing scheduled payments over the next six months. This report can be grouped by various Coding Sheet codes (please note that the Coding Sheet information refers to the Requests associated with the Line Items).	166

Matching GIFTS Reports

For users of Matching GIFTS. The following reports are included in the Matching folder of the GIFTS Alta Report Library.

Report Name	Page
20 Largest Contributing Donors by Gift Amount A list of the top 20 Donors ranked by the cumulative award amount of gifts made on their behalf. You can use the selection criteria available before running the report to show the top 20 Donors within a particular date range, for a specific period-end batch, and so forth. The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Donors. *Fixed Criteria:* GIFTS with a Disposition of Approved.	169
20 Largest Matching Gifts by Amount A list of the top 20 largest single gift awards. You can use the selection criteria available before running the report to show the largest gifts within a particular date range, for a specific period-end batch, and so forth. The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 awards. *Fixed Criteria:* GIFTS with a Disposition of Approved.	171
20 Largest Matching Gift Recipient Organizations by Award Amount A list of the top 20 Organizations ranked by the cumulative amount awarded. You can use the selection criteria available before running the report to show the top 20 recipients within a particular date range, for a specific period-end batch, and so forth. The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Organizations. *Fixed Criteria:* GIFTS with a Disposition of Approved.	172
Alpha List of Matching Gifts Donors A list of all Donors sorted by last name, including their Social Security Number and/or Employee ID, Division, and Class. *Fixed Criteria:* Donors associated with matching or volunteer gifts.	173

Report Name	Page
Alpha List of Matching Gift Recipient Organizations A list of recipient Organizations, sorted alphabetically, including the Organization ID number, full address, Tax Status, State, and Match Class. *Fixed Criteria:* Organizations associated with matching gifts.	174
Matching Gifts by Donor - Detail A detailed listing of gifts grouped by Donor. The Donor's name, Social Security Number and/or Employee ID are displayed, followed by a listing of all the gifts associated with that Donor. Gift Date, Payment Date, Award Amount, and Gift Type information are provided for each gift.	175
Matching Gifts by Donor - Summary A summary of matching gifts for each Donor, by Year. Included for each year are the total number of gifts, total gift amount, and total award amount.	176
Matching Gifts by Donor Class A summary report by Donor class, showing the total number of Donors and GIFTS for that class, as well as the total gift and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	177
Matching Gifts by Donor Division A summary report by Donor division, showing the total number of Donors and GIFTS for that division, as well as the total gift and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	175
Matching Gifts by Gift Type A summary report by the type of gift, showing the total number of GIFTS for that type, as well as the total gift and award amounts, and percentages for each figure. Gift type classifications typically represent the actual form of the gift, such as “Cash”, “Product”, “Stock”, and so forth. The specific Gift Type codes for your Matching GIFTS system are defined during the implementation process. *Fixed Criteria:* GIFTS with a Disposition of Approved.	178
Matching Gifts by Recipient Organization - Detail A detailed list of gifts grouped by the recipient Organization. Information includes the recipient Organization ID and Vendor Number, and the Gift Date, Payment Date, Award Amount and Gift Type for each gift.	179

Report Name	Page
Matching Gifts by Recipient Organization - Summary by Organization A summary of matching gifts for each recipient Organization. Included for each Organization are the total number of gifts, total gift amount, and total award amount.	180
Matching Gifts by Recipient Organization - Summary by Year A summary of matching gifts for each recipient Organization, by Year. Included for each year are the total number of gifts, total gift amount, and total award amount.	181
Matching Gifts by Recipient Organization Class A summary report by recipient Organization class, showing the total number of organizations and gifts for that class, as well as the total gift and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	183
Matching Gifts by Recipient Organization State A summary report by the State of the organization's address, showing the total number of organizations and gifts for that state, as well as the total gift and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	184
Matching Gifts by Recipient Organization State - Summary A summary of gifts for each recipient Organization, by the State of the Organization’s address. Included for each Organization are the total number of gifts, total gift amount, and total award amount.	184
Matching Gifts Statistics The statistics report provides summary information for the gifts that you've selected. Figures are provided for the total number of recipient Organizations, Donors and gifts, the total amount awarded and the total amount of gifts. In addition to these totals, the statistics report provides information such as the average match rate, average award amount, largest award, smallest award, average number of gifts and average gift amount. *Fixed Criteria:* GIFTS with a Disposition of Approved.	186
Schedule of Matching Gifts by Amount A list of gifts, sorted by the award amount, including the Gift ID, recipient and donor information, Paid Date, Award Amount, and Gift Type.	187

Report Name	Page
Schedule of Matching Gifts by Donor A list of gifts, sorted by the Donor's last name, including the Gift ID, recipient and donor information, Paid Date, Award Amount, and Gift Type.	188
Schedule of Matching Gifts by Recipient Organization A list of gifts, sorted by the name of the recipient Organization, including the Gift ID, recipient and donor information, Paid Date, Award Amount, and Gift Type.	189

Volunteer GIFTS Reports

For users of Volunteer GIFTS. The following standard reports are included in the Volunteer folder of the GIFTS Report Library.

Report Name	Page
20 Largest Participating Donors by Volunteer Hours A list of the top 20 Donors ranked by the cumulative number of gift hours made on their behalf. You can choose search criteria before running the report to show the top 20 Donors within a particular date range, for a specific period-end batch, and so forth. The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Donors. *Fixed Criteria:* GIFTS with a Disposition of Approved.	192
20 Largest Volunteer Gifts by Amount A list of the top 20 largest single gift awards. You can choose search criteria before running the report to show the largest gifts within a particular date range, for a specific period-end batch, and so forth. The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 awards. *Fixed Criteria:* GIFTS with a Disposition of Approved.	193

Report Name	Page
20 Largest Volunteer Gift Recipient Organizations by Award Amount A list of the top 20 Organizations ranked by the cumulative amount awarded. You can choose search criteria before running the report to show the top 20 recipients within a particular date range, for a specific period-end batch, and so forth. The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Organizations. Fixed Criteria: GIFTS with a Disposition of Approved.	194
Alpha List of Donors A list of Donors sorted by last name, including their Social Security Number and/or Employee ID, Division, and Class. *Fixed Criteria:* Donors associated with matching or volunteer gifts.	195
Alpha List of Volunteer Gift Recipient Organizations A list of recipient Organizations, sorted alphabetically, including the Organization ID number, full address, Tax Status, State, and Match Class. *Fixed Criteria:* Organizations associated with volunteer gifts.	196
Schedule of Volunteer Gifts by Amount A list of gifts, sorted by the award amount, including the Gift ID, recipient and donor information, Paid Date, and Award Amount.	197
Schedule of Volunteer Gifts by Donor A list of gifts, sorted by the Donor's last name, including the Gift ID, recipient and donor information, Paid Date, and Award Amount.	198
Schedule of Volunteer Gifts by Recipient Organization A list of gifts, sorted by the name of the recipient Organization, including the Gift ID, recipient and donor information, Paid Date, and Award Amount.	199
Volunteer Gifts by Donor - Detail A detailed listing of gifts grouped by Donor. The Donor's name, Social Security Number and/or Employee ID are displayed, followed by a listing of all the gifts associated with that Donor. Gift Date, Payment Date, and Award Amount information are provided for each gift.	200
Volunteer Gifts by Donor - Summary A summary of volunteer gifts for each Donor, by Year. Included for each year are the total number of gifts, total gift hours, and total award amount.	201

Report Name	Page
Volunteer Gifts by Donor Class A summary report by Donor class, showing the total number of Donors and GIFTS for that class, as well as the total gift hours and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	202
Volunteer Gifts by Donor Division A summary report by Donor division, showing the total number of Donors and GIFTS for that division, as well as the total gift hours and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	203
Volunteer Gifts by Recipient Organization - Detail A detailed list of gifts grouped by the recipient Organization. Information includes the recipient Organization ID and Vendor Number, and the Gift Date, Payment Date, and Award Amount for each gift.	204
Volunteer Gifts by Recipient Organization - Summary by Organization A summary of volunteer gifts for each recipient Organization. Included for each Organization are the total number of gifts, total gift amount, and total award amount.	205
Volunteer Gifts by Recipient Organization - Summary by Year A summary of volunteer gifts for each recipient Organization, by Year. Included for each year are the total number of gifts, total gift hours, and total award amount.	207
Volunteer Gifts by Recipient Organization Class A summary report by recipient Organization class, showing the total number of organizations and gifts for that class, as well as the total gift hours and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	208
Volunteer Gifts by Recipient Organization State A summary report by the State of the organization's address, showing the total number of organizations and gifts for that state, as well as the total gift hours and award amounts, and percentages for each figure. *Fixed Criteria:* GIFTS with a Disposition of Approved.	208

Report Name	Page
Volunteer Gifts by Recipient Organization State - Summary A summary of volunteer gifts for each recipient Organization, by the State of the Organization's address. Included for each Organization are the total number of gifts, total gift hours, and total award amount.	208
Volunteer Gifts Statistics The statistics report provides summary information for the gifts that you've selected. Figures are provided for the total number of recipient Organizations, Donors and gifts, the total amount awarded and the total gift hours. In addition to these totals, the statistics report provides information such as the average award amount, largest award, smallest award, average number of gifts and average gift hours. *Fixed Criteria:* GIFTS with a Disposition of Approved.	210

2 Running GIFTS Alta Reports

This chapter describes how to run a report from the GIFTS Alta Report Library.

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Step 1: Choosing a Report **33**

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Step 3: Setting the 'as of' Date for Financial Reports **39**

Step 4: Editing the Title of the Report **40**

Step 5: Running the Report **41**

Time Saving Tips **43**

Reporting at a Glance

The following are the basic steps for choosing and running a report.

1 **Choose a report.**

From the list of available reports on your system, choose a report. For example, the "Grants – Alpha List."

2 **Specify the search criteria.**

In most cases, you want to limit the amount of data included in your report. For example, you might want to show only grants that were approved during the current quarter instead of all the grants in your database.

You can use Quick Find, an Advanced search, or your saved searches to specify the *search criteria* that limit the data included in the report.

3 **For Financial reports, choose the 'as of' date.**

Many financial reports produce information specific to the date in which they are run. For instance, the "Schedule of Appropriations and Payments" reports are used to generate year-end tax reports. To run these reports for the year 2000, you would run them 'as of' December 31, 2000.

4 **Edit the report title.**

Each report has a default title that is displayed at the top of the report. You should edit the title to ensure that it properly reflects the search criteria and, if applicable, the 'as of' date you have used to generate the report.

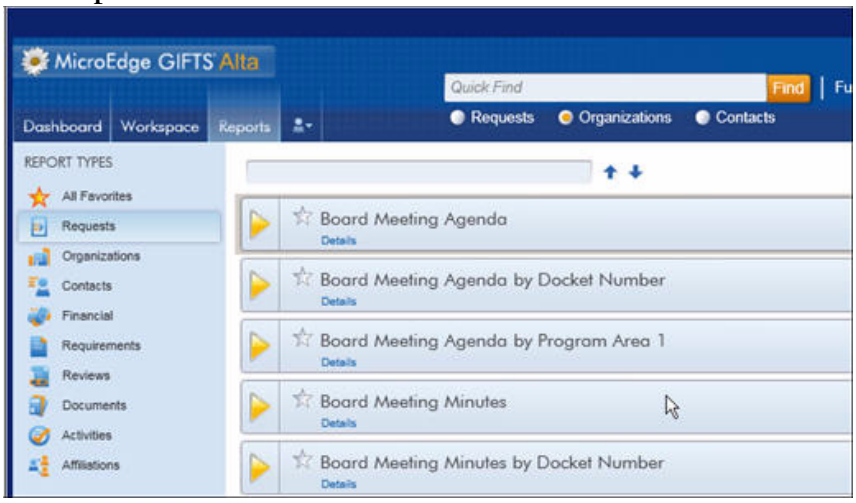
5 **Run the report.**

The report is displayed in the report viewer. You can print it or export the report data in a variety of data formats.

Step 1: Choosing a Report

The first step in running a report is to choose the report that provides the information you need. You can use the list of reports in "About GIFTS Alta Reporting" on page 2 on the sample reports in this publication to find the reports that best suit your needs.

The standard reports are organized into separate Categories, each of which is represented by a folder in the Report Library. To access the Report Library click **Reports** in the main header.



You can switch back and forth between the Workspace and the Report Library using the toggle buttons in the header area of Alta.

Folder	Description
Favorites	You can add frequently-run reports to this folder by selecting a reports and choosing Favorites ➤ Add to Favorites from the Report Library menu. GIFTS Alta maintains a list of favorites for each user.
Organizations	Reports that list and profile Organizations. You can also create mailing labels for Organizations. For samples of these reports, please refer to "Organization Reports" on page 45.

Folder	Description
Requests	Reports that contain detailed information on your Requests, including status reports and reports that can be used to prepare the agenda or minutes for your Board meetings. Most Requests reports include Requests of a specific Disposition: For example, "grants" reports include Approved Requests only. For samples of these reports, please refer to "Request Reports" on page 57.
Financial	Reports that detail Payment information for financial purposes. Reports for both scheduled and paid Payments are included, as well as long-range financial analysis reports. For samples of these reports, please refer to "Financial Reports" on page 93.
Contacts	Reports that provide detailed information on Contacts, including comprehensive lists of Contacts for projects or Organizations. You can also create mailing labels for a particular project, Organization, or mailing list.
Activities	The Activities reports encompass To Do Activities like telephone calls and meetings, and reports on Requirements that are due or completed. Note that for Essential GIFTS Alta systems without the Activity Tracking option, this folder is for 'Requirements' only.
Matching	*For users of Matching Gifts only.* Reports related to matching gifts programs, including detailed and summary lists of gifts, donors, and recipients. For samples of these reports, please refer to "Matching GIFTS Reports" on page 167.
Volunteer	*For users of Volunteer GIFTS only.* Reports related to volunteer gifts programs, including detailed and summary lists of gifts, donors, and recipients. For samples of these reports, please refer to "Volunteer GIFTS Reports" on page 191.

Note: The reports and report titles in this publication do not necessarily match those on your system. Your Administrator may have chosen to omit the reports that your Organization doesn't use, or he or she may have added reports to your library.

Tip: If you run a report frequently, click the Add to Favorites star to add it to the Favorites list. GIFTS Alta maintains a separate list of favorites for each user.

After you choose a report from the list, the report options are enabled. The following sections describe these options in the order in which they should be approached.

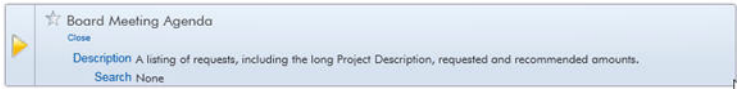
Option	Description
Run Report	Yellow arrow. Runs the report and display the results.
Details	View the Description and
Edit Report Title	Modify the title of the report. Each report has a three-line title that includes the main title, which appears in large, bold letters at the top of the report, and two subtitles. By default, the main title is set to the name of the report you chose, and—if your Administrator has set up the system to do so—the first subtitle displays the search criteria, if any, that you specified.
Add to Favorites	Clicking the gray star on a listed report will make it turn yellow and adding it to your Favorites list.

Step 2: Specifying Search Criteria

Many report templates have *fixed search criteria* that select only specific records to include in the report. For instance, the "Alpha List of Grants" report only selects Requests that are Approved. By providing additional search criteria, you can further limit the scope of a report.

The search criteria tell GIFTS Alta that out of all the records in your database, you only wish to see a specific subset. For instance, only the grants with a Grant Amount greater than $50,000.

Note: Your Administrator can "attach" saved searches to reports in the Report Library. When you select a report, click Details and see if the Search field has any criteria applied..



If you do not want to use the search criteria shown, you can choose **Run Report** and then click **Set Search** in the Run Report window. This will open the Search form where you can use the Query Builder to add filters.

About Search Criteria

To create your search criteria, you can use the same search features that you use in the Workspace. The principles are the same—the only difference is that instead of choosing the records to be displayed in the Workspace grid, you're choosing the records to be included in a printed report.

Tip: The search criteria do not modify the format or structure of Standard Reports; they determine which records appear in the report.

Note: If you use branch security, your reports do not include data that you do not have permission to see.

About Financial Reports and Search Criteria

Many Financial reports display a summary of the payment history for your grants. To be accurate, these reports must include the entire history of the grant's payments.

If your search criteria limit the report to payments within a specific date range or within a Fiscal Year—and only part of a grant's payments fall within your search criteria—GIFTS Alta includes the grant's entire payment history in the report even if not all of the grant's payments meet your search criteria.

Example: The Five Year Payment History report shows, for each grant in the report, the Payments made within the last five years (see page 101). If you use

the 2001 Fiscal Year as your search criteria and a grant is included in the report because you made payments on it in 2001, payments made in prior years are also included in the report. Therefore, the payment history is accurate even though not all of the grant's payments were made in the 2001 Fiscal Year.

The following Financial reports, which summarize payment information by grant, are designed to work in this manner; in contrast, *reports that list individual payments instead of a grant's payment history only include payments that meet your search criteria*.

- ✔ Cash Flow Analysis
- ✔ Five Year Payment History Report
- ✔ Grant Commitment Schedule
- ✔ Grant Payment Summary
- ✔ Grant Planning Worksheet
- ✔ Schedule of Appropriations and Payments

About Saved Searches

You may find that you spend time composing a complex search query, and then find that you need to build it all over again when you need to run the same query again later that day or the next day. Alternatively, you may choose records for a Standard Report and then decide that you'd like to work with the same group of records in the Workspace.

GIFTS Alta allows you to save search queries for use at any time, and you can share Query Buildersearches between the Report Library and the Workspace. In addition, you can make your saved searches available to other users.

Saved searches are specific to the folder in which they were created because there is different information available in each folder.

When you share a saved search it is available in the same record type list in which it was created.

For detailed information about saving, modifying, renaming, and deleting saved searches, please refer to the *GIFTS Alta User's Guide*.

Note: Because the search information is different for each folder, you cannot cut and paste Advanced search criteria between folders, and you cannot share Advanced searches between the Organizer and the Report Library.

Choosing the Search Criteria for a Report

To create or edit the search criteria for a report, choose Edit ➤ Search ➤ New Search or Edit ➤ Search ➤ Edit Search from the Report Library menu. The Search form is displayed.

Use Query Builder or the Advanced search to create your criteria, just as you would in the Workspace. For an overview of the Query Builder and Advanced search facilities, please refer to the *GIFTS Alta User's Guide*.

When you are finished creating your search criteria, click Search to return to the Report Library.

Note that the Query Builder filters available for each record type are different.

If you select another report in the same Report Library record type, the search criteria you created are not cleared; this allows you to run more than one report without having to re-enter your search criteria.You can clear the search criteria at any time by choosing Reset from the Search form.

Applying Saved Criteria to a Report

To use saved search criteria for a report, choose Save from the Search form to open the Search Properties form. Note that the GIFTS Alta Administrator can attach a saved search to a report so that it is automatically used when you choose the report.

Note: If you select another report in the same Report Library folder, the search criteria are not cleared; this allows you to run more than one report without having to re-enter your search criteria.You can clear the search criteria at any time by choosing Edit ➤ Search ➤ Clear Search from the Report Library menu.

Step 3: Setting the 'as of' Date for Financial Reports

Many financial reports produce information specific to the date in which they are run. For instance, the "Schedule of Appropriations and Payments" reports present a picture of your financial history for the current year.

In many cases, you may want to produce financial reports of this kind after you have closed out a particular year. For instance, in the first few months of any new year, you may wish to produce reports on last year's giving for the IRS.

For this reason, an 'As of' date setting is available for all of the financial reports in the Standard Report Library.

When you set 'As of' date to a date other than the current date, your reports are affected in the following ways:

- If the report automatically selects information relevant in the "Current Year," the current year is based on the 'as of ' date, not the current date.
- If the report includes columns for future or past years, or future or past months, these columns are automatically adjusted based on the 'as of' date.
- Reports that include 'Scheduled' Payments include payments that have a Status of Paid, but for which the Payment Date is after the 'as of' date.
- Reports that include 'Paid' and 'Refund' Payments exclude these Payments if their Payment Date is after the 'as of' date.
- Payments for Requests that were approved after the 'as of' date are excluded from the report, regardless of their actual Schedule or Paid dates.
- Payments that were voided after the 'as of' date are reported as being 'Paid.'

The financial reports have been designed to recreate your data based on the 'as of' date, but some data—once it is altered in GIFTS Alta—cannot be restored to its past condition; therefore, the results of reports run with the 'as of' date may not completely represent a version of the financial data as of

that date. The following data cannot be accurately recovered based on 'as of' date.

- Payments that have been deleted are not reflected.
- Payments for which the amount changed between the 'as of' date and the current date report the current amount, not the previous amount.

Important: Custom reports created by MicroEdge, the Report Designer, or any third-party report writer may not have been designed to take advantage of the 'As of' date functionality.

Step 4: Editing the Title of the Report

The GIFTS Alta reports have three-line titles: a large heading in bold and two subheadings, as shown in the following sample.

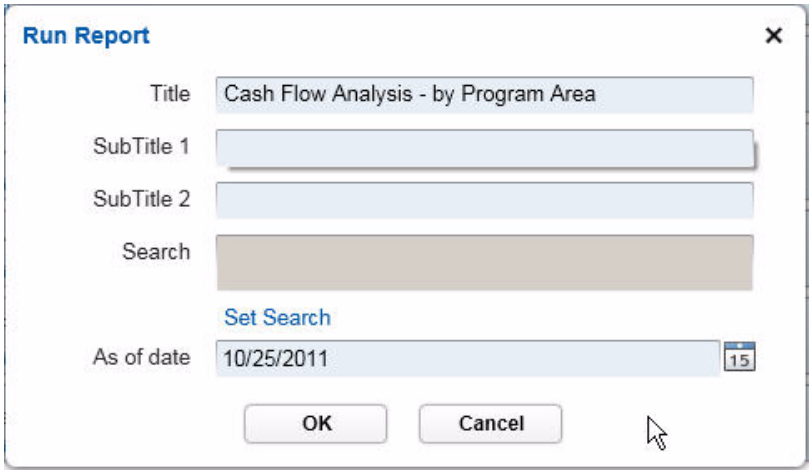
Declinations - Alpha List
Proposals Declined in Calendar Year 1999
Grouped by Staff
5/9/00

Organization Project Title	Primary Contact	Reason

GIFTS Alta provides a default title for the report based on its title in the Standard Report Library, and—if your Administrator has set up the system to do so—defaults the first subtitle to the search criteria you have chosen.

You can alter the main title and enter the subtitles necessary to reflect the search criteria that you use when running the report. Therefore, anyone who reads the report will know exactly what he or she is looking at.

Simply click Run Report and the Run Report form will have fields to change the titles as desired. Click **OK** when done..



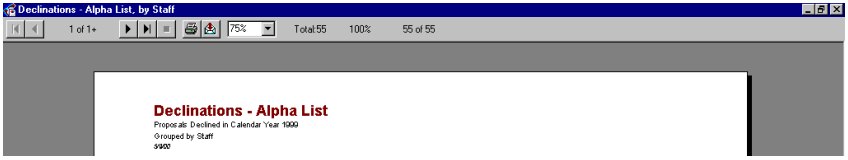
Having chosen a report, your search criteria, and the report title—you are ready to run the report.

Step 5: Running the Report

Before You Begin: Be sure that you have completed the preceding four steps, and that the report title properly reflects your search criteria.

Viewing the Report

To view your report after you have specified the necessary options, choose **Run Report**. The report is generated and displayed in the report viewer.



Note: The total number of records displayed on the viewer toolbar is based on the internal structure of the report. This total often differs from the

"Grand Total" count in the report itself, which may be based on different criteria.

You can use the viewer's toolbar to navigate within the report.

Icon	Name	Description
	Beginning of Report	Go to the first page of the report.
	Previous Page	Go to the previous page.
	Next Page	Go to the next page.
	End of Report	Go to the end of the report.
100%	View	Set the percentage of the zoom.

Important Note to Client/Server Users: The End of Report button *terminates* the report if you click it while the report is still processing. For instance, if you click this button while an alphabetically-sorted report is in progress, it truncates the report so that only records between A and F (for example) are shown. Note that the report is not necessarily finished processing when the first page is displayed; wait until the toolbar indicates that the report is "100%" complete.

Printing the Report

When the report has finished processing, you can print it by clicking the Print button on the viewer toolbar.

Exporting the Report

When the report has finished processing, you can export it to a variety of file formats appropriate for word processors, spreadsheets, Internet browsers, and other applications.

To export a report, click the export button on the report viewer toolbar. You are prompted to choose an export format and a filename for the exported data.

Note: GIFTS Alta reports have been created using Crystal Reports®, and the export function of the report viewer is a function of Crystal Reports. Business Objects, the maker of Crystal Reports, documents many limitations to the export feature due to the significant differences between Crystal Reports and the software packages to which it can export.

In particular, reports that are exported to Microsoft Word® may require extensive reformatting. If this is the case, consider exporting your report to another format, such as Microsoft Excel, that may retain more of the formatting that you need.

Time Saving Tips

Use the following GIFTS Alta features to make reporting fast and easy:

The Favorites List Add frequently used reports to the Favorites list for easy access.

Save Your Searches If you frequently use the same search criteria for your reports, don't forget to save your searches for later use.

Attach Saved Searches If you always run a report with the same saved search, ask your Administrator to add a report to the library that has the saved search attached to it. Then, you won't have to choose the saved search when you run the report.

Reporting from the Workspace Don't forget that you can also print and export reports from the GIFTS Alta Workspace. Use the Workspace Views to save your own *ad hoc reports*.

3 Organization Reports

This chapter describes the standard reports that you can run from the Organizations folder of the GIFTS Report Library.

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Alpha List of Grantee Organizations

An alphabetical listing of Organizations that are associated with grants (Approved Requests). The report includes the total amount granted by the Organization and the grant year span.

Fixed Criteria

Organizations that have Approved Requests.

Alpha List of Grantee Organizations

3/22/00

Organization Name	Grant Year Span	Number of Grants	Total Amount	Tax Status Type
Adventure Club of Manhattan New York, NY	1996 - 1999	5	$42,100.00	501c(3) Community
American Foundation for Children New York, NY	1996 - 1999	16	$269,325.00	501c(3) Community
Arlington School of Dentistry Los Angeles, CA	1996 - 1999	16	$231,220.00	Education
The Children's Fund Washington, DC	1996 - 1999	16	$171,650.00	501c(3) Health & Welfare
Kids With AIDS Research Center New York, NY	1996 - 1999	5	$263,600.00	501c(3) Health & Welfare
Lower West Side Child Care Center New York, NY	1996 - 1999	4	$119,500.00	501c(3) Health & Welfare
National Institute for Technical Learning Coalition New York, NY	1996 - 1999	5	$246,800.00	501c(3) Education
Ryan School of Medicine Los Angeles, CA	1996 - 1999	11	$480,600.00	501c(3) Education
Shea Dance Company New York, NY	1996 - 1999	8	$32,550.00	501c(3) Arts & Culture
Teen Aid Center New York, NY	1996 - 1999	9	$117,100.00	501c(3) Health & Welfare
United Federation Inc. New York, NY	1996 - 1999	5	$86,700.00	501c(3) Community
University of America Los Angeles, CA	1996 - 1999	9	$139,050.00	509a(1) Education
West Side Center New York, NY	1996 - 1999	4	$41,975.00	501c(3) Community
		Grand Total (13 items)	$2,242,170.00	

1

Alpha List of Organizations

An alphabetical listing of Organizations that are associated with Requests of any Disposition. The report includes the total amount granted by the Organization and the grant year span.

Alpha List of Organizations

3/22/00

Organization Name	Request Year Span	Number of Requests	Total Granted	Tax Status Type
Adventure Club of Manhattan New York, NY	1996 - 1999	6	$42,100.00	501c(3) Community
American Foundation for Children New York, NY	1996 - 2000	21	$321,825.00	501c(3) Community
Arlington School of Dentistry Los Angeles, CA	1996 - 2000	19	$235,340.00	Education
The Children's Fund Washington, DC	1996 - 2000	21	$197,900.00	501c(3) Health & Welfare
Kids With AIDS Research Center New York, NY	1996 - 1999	7	$263,600.00	501c(3) Health & Welfare
Lower West Side Child Care Center New York, NY	1996 - 1999	5	$119,500.00	501c(3) Health & Welfare
National Institute for Technical Learning Coalition New York, NY	1996 - 1999	6	$246,800.00	501c(3) Education
Ryan School of Medicine Los Angeles, CA	1996 - 2000	14	$635,100.00	501c(3) Education
Shea Dance Company New York, NY	1996 - 2000	10	$37,800.00	501c(3) Arts & Culture
Teen Aid Center New York, NY	1996 - 1999	10	$117,100.00	501c(3) Health & Welfare
United Federation Inc. New York, NY	1996 - 2000	7	$86,700.00	501c(3) Community
University of America Los Angeles, CA	1996 - 1999	10	$139,050.00	509a(1) Education
West Side Center New York, NY	1996 - 1999	6	$41,975.00	501c(3) Community
		Grand Total	$2,484,790.00	

1

Duplicate Organizations (by Name)

This diagnostic report identifies Organizations with the *exact* same name, and should be run without any selection criteria so that all duplicates will be listed. For information about consolidating duplicate records, please refer to the *Administrator's Guide.*

Duplicate Organizations (by Name)

4/3/00

Legal Name	Primary Address	Telephone Number Fax Number	Organization ID
EAST SIDE LEARNING CENTER			
East Side Learning Center	14 East 83rd Street Suite 10 New York, NY		23

Requests:	Disposition	Date	Granted	Project Title (Truncated)
5	Approved	3/7/96	$2,500.00	The Support for the "Fall Formal Gala"

East Side Learning Center	14 East 83rd Street Suite 10 New York, NY 10024	(212) 555-3444	6

Requests:	Disposition	Date	Granted	Project Title (Truncated)
37	Approved	6/3/96	$2,000.00	Donation of used computers
54	Approved	12/27/96	$120,000.00	The School to Work Transition Program
119	Declined	3/11/97	$0.00	The sponsorship for the "Fall Formal" event
101	Approved	12/8/97	$10,000.00	The support for general operating expenses
149	Declined	1/19/98	$0.00	The support of the "Fall Festival" Celebration
199	Declined	6/8/98	$0.00	Support for Janet's 50th birthday celebration
209	Declined	6/8/98	$0.00	Toward Early Childhood Development Program
132	Approved	6/9/98	$15,000.00	support for general operating expenses
243	Approved	3/29/99	$4,000.00	Used Computers
303	Pending	2/3/00	$15,750.00	Support for general operating expenses
278	Pending	2/10/00	$0.00	New Books, New Horizons

Organization Mailing Labels #5160

This report prints mailing labels for Avery's #5160 label template to the Primary Contact of each Organization at the Organization's mailing address. Two versions of this report are available: one sorts the labels by the author's last name and the other by the Organization's postal code.

Mr. Ronald Younge
Kids With AIDS Research Center
345 1st Avenue
New York, NY 10016

Mr. Lawrence Johnson
Longwood State University
1204 Avenue of the Americas
Suite 300
New York, NY 10019

Mr. David Moore
Lower West Side Child Care Center
118 West 18th Street
New York, NY 10014

Ms. Sarah Florentine
Model Foundation
612 N. Eyeland Avenue
New York, NY 10024

Ms. Joanne Collins
The National Children's Project
629 West 58th Street
New York, NY 10019

Mr. Oscar B. Syrius
National Institute for Technical Learning
612 N. Eyeland Avenue
Suite 1009
New York, NY 10019

Organization Mailing Labels #5162

This report prints mailing labels for Avery's #5162 label template to the Primary Contact of each Organization at the Organization's mailing address.Two versions of this report are available: one sorts the labels by the author's last name and the other by the Organization's postal code.

Mr. Oscar B. Syrius
National Institute for Technical Learning Coalition
612 N. Eyeland Avenue
Suite 1009
New York, NY 10019

Mr. Jack K. Ryan
Ryan School of Medicine
142 Pennington Ave.
Olin Hall
Los Angeles, CA 34253

Mr. Johnathan J. Smith
Shea Dance Company
400 East 57th Street
New York, NY 10018

Ms. Shawna Dawn
Sunflower House for Youth in Distress
34 Palmetto Drive
San Francisco, CA 98073

Organization Profile (with Graph)

The Organization Profile (with Graph) report generates a summary sheet for each Organization that includes the Organization's address, background and both detailed and summary information about its funding history.

Organization Profile (with Graph)

3/22/00

Sunflower House for Youth in Distress

ADDRESS
Sunflower House for Youth in Distress
34 Palmetto Drive
San Francisco, CA 98073

CONTACT
Shawna Dawn, Executive Director
(4050 767-3450

BACKGROUND

The Sunflower House is a social service agency which has served the Bay area for over 5 years. The center started as a food pantry and soup kitchen but has since devoted more of its resources towards the support and rehabilitation of our homeless children.

The center provides shelter, food and education to teenagers and youths who have made the street their home. Their goal is to re-unite the youths with family members whenever the situation permits it.

Organization Type: Health & Welfare/Agency

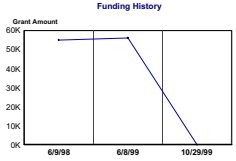
Disposition Date and Disposition	Requested/ Granted	Paid to Date/ Balance	Fund
6/9/98 Approved *General Operating Support*	$55,000.00	$55,000.00 $0.00	Foundation
6/8/99 Approved *General Operating Support*	$56,100.00	$56,100.00 $0.00	Foundation
10/29/99 Declined *To Support the Buldout for a New Gymnasium*	$45,000.00	$0.00 $0.00	Foundation

Sunflower House for Youth in Distress Summary

Span: 1998 - 1999

Total Amount: $ 111,100.00
Total Grants: 2

Amount Declined: $ 45,000.00
Total Declined: 1



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Organization Profile Report

The Organization Profile Report generates a summary sheet for each Organization that includes the Organization's address, background and both detailed and summary information about its funding history.

Organization Profile Report

Organization ID is '19'
4/6/00

Adventure Club of Manhattan

Adventure Club of Manhattan
800 West 103th Street
New York, NY 10021

Adrienne Vittori, Executive Director
(212) 323-8767

TYPE: **Civic & Community/Recreational Organizations**

BACKGROUND:

The Adventure Club of Manhattan promotes outdoor adventure programs for children and youths of all ages. There are currently 150 members of the club who primarily enjoy "extreme" outdoor sports activities. The club promotes safety along with exhilaration.

Disposition Date and Disposition	Requested/ Granted	Paid to Date/ Balance	Fund
3/20/96	$12,000.00	$12,000.00	Foundation
Approved		$0.00	
Capital Campaign Support			
6/9/97	$10,000.00	$10,000.00	Foundation
Approved		$0.00	
The support of "Adventure for Kids" project			
6/9/98	$5,000.00	$5,000.00	Foundation
Approved		$0.00	
General Operating Support			
1/5/99	$5,500.00	$0.00	Foundation
Declined		$0.00	
Support for Board Member's son to attend a summer science program in Australia			
6/7/99	$5,100.00	$5,100.00	Foundation
Approved		$0.00	
General Operating Support			
12/21/99	$10,000.00	$0.00	Foundation
Approved		$10,000.00	
Extreme Sport Marathon			
2/9/00	$10,000.00	$0.00	Foundation
Pending		$0.00	
Extreme Sport Marathon			

Adventure Club of Manhattan Summary

Span:	1996 - 2000	**Amount Declined:**	$5,500.00
Total Amount:	$42,100.00	**Total Declined:**	1
Total Grants:	5		

7

Simple Organization Listing

A list of all Organizations in GIFTS. This report includes the Organization Name, Primary Contact, address, and tax status information. No Request information is included.

Simple Organization Listing

4/6/00

Organization Name Primary Contact	Address	Tax Status Organization Type
Adventure Club of Manhattan Ms. Adrienne Vittori	800 West 103th Street New York, NY 10021	501c(3) Civic & Community
Brooklyn Ballet Ms. Margaret Neff	14 West 108th Street New York, NY 10012	501c(3) Arts & Culture
Computers for Kids Ms. Virginia Appleton	111 E 57th Street Suite 200 New York, NY 10021	501c(3) Civic & Community
East Side Learning Center Ms. Janet Austin	14 East 83rd Street Suite 10 New York, NY 10024	501c(3) Civic & Community
Kids With AIDS Research Center Mr. Ronald Younge	345 1st Avenue New York, NY 10016	501c(3) Health & Human Services
Longwood State University Mr. Lawrence Johnson	1204 Avenue of the Americas Suite 300 New York, NY 10019	509a(1) Education
Lower West Side Child Care Center Mr. David Moore	118 West 18th Street New York, NY 10014	501c(3) Health & Human Services
Model Foundation Ms. Sarah Florentine	612 N. Eyeland Avenue New York, NY 10024	
The National Children's Project Ms. Joanne Collins	629 West 58th Street New York, NY 10019	501c(3) Civic & Community
National Institute for Technical Learning Coalition Mr. Oscar B. Syrius	612 N. Eyeland Avenue Suite 1009 New York, NY 10019	501c(3) Education
Shea Dance Company Mr. Johnathan J. Smith	400 East 57th Street New York, NY 10018	501c(3) Arts & Culture
Teen Aid Center Mr. George Notingham	534 Broadway New York, NY 10016	501c(3) Health & Human Services
United Federation Inc. Mr. Doug Smith	1004 Third Ave. New York, NY 10023	501c(3) Civic & Community
West Side Center Ms. Kathleen Crispen	11 West End Ave. New York, NY 10011	501c(3) Civic & Community
Grand Total *(14 items)*		

1

Top 20 Organizations by Total Grant Amount

A list of Organizations in GIFTS with the 20 highest cumulative Grant Amounts. As with all reports, keep in mind that your search criteria also

determine which Organizations—and which grants—are included in the report.

Top 20 Organizations by Total Grant Amount

4/6/00

Total Amount Awarded	Organization Name City, State	Grant Year Span	Number of Grants	Most Recent Award Date	Most Recent Award Amount
$ 1,100,900.00	**Ryan School of Medicine** Los Angeles, CA	1996 - 2000	13	4/4/00	$900.00
$ 692,480.00	**The National Children's Project** New York, NY	1996 - 2000	7	3/15/00	$28,560.00
$ 663,900.00	**Hiller State University** Boston, MA	1996 - 2000	18	4/4/00	$200.00
$ 611,100.00	**Sunflower House for Youth in Distress** San Francisco, CA	1996 - 1999	3	6/8/99	$56,100.00
$ 498,600.00	**Kids With AIDS Research Center** New York, NY	1996 - 1999	5	12/21/99	$3,000.00
$ 481,220.00	**Arlington School of Dentistry** Los Angeles, CA	1996 - 2000	17	3/15/00	$50,000.00
$ 421,800.00	**National Institute for Technical Learning Coalition** New York, NY	1996 - 1999	5	12/21/99	$50,000.00
$ 392,100.00	**Abuse Prevention and Rehabilitation Fund** Washington, DC	1996 - 2000	11	3/15/00	$66,300.00
$ 386,625.00	**American Foundation for Children** New York, NY	1996 - 2000	19	4/4/00	$2,000.00
$ 228,100.00	**The Children's Fund** Washington, DC	1996 - 2000	18	2/17/00	$26,250.00
$ 192,200.00	**Brooklyn Ballet** New York, NY	1996 - 2000	24	4/4/00	$800.00
$ 168,450.00	**Longwood State University** New York, NY	1996 - 1999	10	6/30/99	$47,250.00
$ 151,000.00	**East Side Learning Center** New York, NY	1996 - 1999	5	3/29/99	$4,000.00
$ 139,050.00	**University of America** Los Angeles, CA	1996 - 1999	9	12/7/99	$100,000.00
$ 138,300.00	**Computers for Kids** New York, NY	1996 - 2000	14	4/4/00	$100.00

1

Top 20 Organizations by Total No. of Grants

A list of Organizations in GIFTS with the 20 highest number of Approved Requests. As with all reports, keep in mind that your selection criteria also

determine which Organizations—and which grants—are included in the report.

Top 20 Organizations by Total Number of Grants

4/7/00

Number of Grants	Organization Name City, State	Total Amount Awarded	Grant Year Span	Most Recent Award Date	Most Recent Award Amount
24	**Brooklyn Ballet** New York, NY	$192,200.00	1996 - 2000	4/4/00	$800.00
19	**American Foundation for Children** New York, NY	$324,125.00	1996 - 2000	4/4/00	$2,000.00
19	**The Children's Fund** Washington, DC	$340,600.00	1996 - 2000	3/15/00	$142,500.00
18	**Hiller State University** Boston, MA	$663,900.00	1996 - 2000	4/4/00	$200.00
17	**Arlington School of Dentistry** Los Angeles, CA	$281,220.00	1996 - 2000	3/15/00	$50,000.00
14	**Computers for Kids** New York, NY	$113,300.00	1996 - 2000	4/4/00	$100.00
13	**Ryan School of Medicine** Los Angeles, CA	$636,000.00	1996 - 2000	4/4/00	$900.00
11	**Teen Aid Center** New York, NY	$120,800.00	1996 - 2000	2/25/00	$3,500.00
11	**Abuse Prevention and Rehabilitation Fund** Washington, DC	$259,500.00	1996 - 2000	3/15/00	$66,300.00
11	**Girl Scouts of America** Youngstown, CA	$50,303.00	1996 - 1999	12/29/99	$200.00
10	**Shea Dance Company** New York, NY	$38,000.00	1996 - 2000	4/3/00	$5,250.00
10	**California Children's Theatre** San Francisco, CA	$133,409.00	1996 - 2000	3/15/00	$10,609.00
10	**Longwood State University** New York, NY	$168,450.00	1996 - 1999	6/30/99	$47,250.00
9	**University of America** Los Angeles, CA	$139,050.00	1996 - 1999	12/7/99	$100,000.00
7	**The National Children's Project** New York, NY	$513,920.00	1996 - 2000	3/15/00	$28,560.00
6	**West Side Center** New York, NY	$45,975.00	1996 - 2000	4/4/00	$1,000.00

1

4 Request Reports

This chapter describes the Reports reports that you can run from the Reports folder of the GIFTS Alta Report Library.

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Board Meeting Agenda

You can use this report to generate an agenda for a Board meeting. For each Request, the report includes the Organization Name, Long Project Description, Requested Amount, and Recommended Amount.

To limit the contents of this report to the agenda for your meeting, you can use the Meeting Date or other date fields as your search criteria.

Variations

Versions of this report group by:

- Docket Number
- Program Area 1

Board Meeting Agenda

Meeting Date is in next quarter

3/23/00

Organization Project Description (Long)	Request Date	Requested Amount	Recommended Amount	Staff
American Foundation for Children The American Foundation for Children's "After school program" dedicated its resources towards the education and supervision of children for working parents before and after school The program includes a story-time session and computer access to children ages 5-11.	2/5/00	$25,000.00	$25,000.00	Terry Brown
East Side Learning Center In response to the School to Work Act of 1998, The East Side Learning Center has embarked on the creation of a specialized program to assist individuals in making and implementing informed educational and occupational choices.	2/10/00	$10,000.00	$10,000.00	Sarah Sullivan
Longwood State University The nature of the study is to assess current methods of medical care and to evaluate the benefit of adding holistic approaches to the more conservative allopathic methods. The study uses clinical reviews of trials of acupuncture and discusses the complexities of research design in formulating hypothesis based on these standard methods of evaluation. The challenge is to design conditions that more closely mimic the application of acupuncture in clinical practice, as individualized treatment informed by its own diagnostic traditions.	2/1/00	$500,000.00	$500,000.00	Colette Rogers
	Grand Total (3 items)	$535,000.00	$535,000.00	

1

Board Meeting Minutes

You can use this report to review minutes from a Board meeting. For each Request, the report includes the Organization Name, Project Title, Recommended Amount, the amount awarded, and Meeting Minutes.

To limit the contents of this report to the agenda for your meeting, you can use the Meeting Date or other date fields as the search criteria.

Variations

Versions of the report group by:

- Docket Number
- Program Area 1

Board Meeting Minutes by Program Area 1

Meeting Date is this month
3/31/00

Organization Project Title	Recommended Amount	Awarded	Disposition	Status/ Reason	Meeting Minutes
Arts and Culture					
Shea Dance Company *The 2000 Annual Banquet*	$5,250.00	$5,250.00	Approved	Tables to be filled	Marsha is responsibe for filling this table
Total Arts and Culture (1 items)	$5,250.00	$5,250.00			
Community					
Girl Scouts of America *Supporting funding for new uniforms*	$10,000.00	$0.00	Declined	Outside of Guidelines	Mr. Humphries requested that we call Joyce and explain why we cannot support her with the purchase of new uniforms in addition to sending the standard Decline letter.
Total Community (1 items)	$10,000.00	$0.00			
Education					
Arlington School of Dentistry *Funding for new instruments*	$250,000.00	$250,000.00	Approved	Active Grant	Board Voted Unanimously 9-0 in favor of the program officer recommendation.
Total Education (1 items)	$250,000.00	$250,000.00			
Grand Total (3 items)	$265,250.00	$255,250.00			

1

Contact Affiliations by Request

A list of Requests, grouped by Organization, that shows the affiliated Contacts for each Request.

Contact Affiliations by Request

For Organizations in California
2000 Calendar Year Only
5/19/00

Primary Organization / Grant Amount	Disposition / Date	Request ID / Reference No.	Affiliated Contacts: Name	Role	Notes
Arlington School of Dentistry	Pending 4/4/00	275	Anita Rayce	Primary Contact	
Funding for new instruments					
Arlington School of Dentistry	Pending 2/3/00	305	Anita Rayce	Primary Contact	
To sponsor the "Annual Leadership Award Dinner"					
California Children's Theatre	Pending 3/1/00	277	Tom Alexander	Sponsor	
			David Anderson	Primary Contact	
			Jane Levi	Technical Advisor	
Building materials for sets					
California Children's Theatre	Pending 2/3/00	306	David Anderson	Primary Contact	
The "2000 Career Fair"					
California Children's Theatre	Declined 5/16/00	319	David Anderson	Primary Contact	
Grand Total - 5 item(s)					

1

Data Entry Edit Report

This report displays basic information about each, and is intended to help you review and verify the accuracy of your data entry.

Variations

Versions of the report list Requests by:

- Date
- Organization

Contact Affiliations by Request
For Organizations in California
2000 Calendar Year Only
5/19/00

Primary Organization / Grant Amount	Disposition / Date	Request ID / Reference No.	Affiliated Contacts: Name	Role	Notes
Arlington School of Dentistry	Pending 4/4/00	275	Anita Rayce	Primary Contact	
Funding for new instruments					
Arlington School of Dentistry	Pending 2/3/00	305	Anita Rayce	Primary Contact	
To sponsor the "Annual Leadership Award Dinner"					
California Children's Theatre	Pending 3/1/00	277	Tom Alexander	Sponsor	
			David Anderson	Primary Contact	
			Jane Levi	Technical Advisor	
Building materials for sets					
California Children's Theatre	Pending 2/3/00	306	David Anderson	Primary Contact	
The "2000 Career Fair"					
California Children's Theatre	Declined 5/16/00	319	David Anderson	Primary Contact	
Grand Total - 5 item(s)					

1

Declinations - Alpha List

A detailed listing of Declined Requests that includes the applicant name, Project Title, Primary Contact, the Declination Reason, and the staff person assigned to the Request.

Fixed Criteria

Requests with a Disposition of Declined.

Variations

Versions of the report group by:

- Fund
- Geographic Area 1
- Internal Program
- Program Area 1
- Staff
- Grant Type

Declinations - Alpha Listing, by Grant Type

3/31/00

Organization Project Title	Primary Contact	Reason Staff	Decline Date
Cash Grants			
Abuse Prevention and Rehabilitation Fund Washington, DC *To support the program lecture series; "1999 An Informative Approach to an Unapproachable Subject, Domestic Violence in America"*	Laden, Elizabeth	Limited Resources Lee Williamson	11/30/99
The Children's Fund Washington, DC *To Sponsor a Summer Science Camp*	Roberts, Charles	Limited Resources Kelly Goldberg	12/21/99
Kids With AIDS Research Center New York, NY *The printing and distribution costs of media material*	Younge, Ronald	Limited Resources Colette Rogers	11/30/99
Sunflower House for Youth in Distress San Francisco, CA *To Support the Buldout for a New Gymnasium*	Dawn, Shawna	Limited Resources Kelly Goldberg	10/29/99
Total Cash Grants (4 items)			
Dinners and Events			
California Children's Theater San Francisco, CA *The "1999 Career Fair"*	Anderson, David	Limited Resources Kelly Goldberg	12/21/99
Total Dinners and Events (1 item)			
Grand Total (5 items)			

1

Declinations - Alpha List with Request Amount

A detailed listing of Declined Requests that includes the applicant name, Project Title, Primary Contact, the Declination Reason, Request Amount,

and the staff person assigned to the Request.

Fixed Criteria

Requests with a Disposition of Declined.

Variations

Versions of the report group by:

- Fund
- Program Area 1

Declinations - Alpha List by Fund (including Request Amount)

3/31/00

Organization Project Title	Primary Contact	Reason Staff	Request Amount	Decline Date
Corporation				
California Children's Theater San Francisco, CA *The "1999 Career Fair"*	Anderson, David	Limited Resources Kelly Goldberg	$10,609.00	12/21/99
		Total Corporation (1 item)	$10,609.00	
Foundation				
Abuse Prevention and Rehabilitation Fund Washington, DC *To support the program lecture series; "1999 An Informative Approach to an Unapproachable Subject, Domestic Violence in America"*	Laden, Elizabeth	Limited Resources Lee Williamson	$15,000.00	11/30/99
The Children's Fund Washington, DC *To Sponsor a Summer Science Camp*	Roberts, Charles	Limited Resources Kelly Goldberg	$15,450.00	12/21/99
Kids With AIDS Research Center New York, NY *The printing and distribution costs of media material*	Younge, Ronald	Limited Resources Colette Rogers	$15,000.00	11/30/99
Sunflower House for Youth in Distress San Francisco, CA *To Support the Buldout for a New Gymnasium*	Dawn, Shawna	Limited Resources Kelly Goldberg	$45,000.00	10/29/99
		Total Foundation (4 items)	$90,450.00	
		Grand Total (5 items)	$101,059.00	

1

Declinations - Summary by Reason

A summary of declinations grouped by their Declination Reason. For each reason, the report lists the number of declinations, the percent of the total declination count, as well as the total and percentage of the requested amounts.

Fixed Criteria

Requests with a Disposition of Declined.

Declinations - Summary by Reason

3/31/00

Declination Reason	Request Count	% of Total Count	Request Amount	% of Total Amount
Limited Resources	26	48.15 %	$1,235,450.00	78.21%
No Funding to Individuals	13	24.07 %	$201,100.00	12.73%
Outside of Guidelines	7	12.96 %	$66,450.00	4.21%
Outside Operating Area	8	14.81 %	$76,609.00	4.85%
Grand Total	54	100.00 %	$1,579,609.00	100.00%

Foundation Center Export

You can use this report to export your grants information to an electronic file for submission to the Foundation Center.

What Data is Exported to the Foundation Center?

This report is formatted according to the center's requirements, and includes the following information about each grant (Approved Request) included in the report. For each grant, the following information is exported about the grantee Organization:

❖ Organization Name	❖ Organization A.K.A. Name
❖ Organization Mailing Address (Note: This includes Street Address, City, State, and Postal Code. Country is included if Organization is located outside of the U.S.)	❖ Organization telephone number
❖ Organization Type	❖ Organization Tax ID
❖ Organization WWW Address	

The following information is exported about each grant:

❖ Request Project Title	❖ Request ID
❖ Grant Fiscal Year	❖ Grant Amount
❖ Grant Term (in months)	❖ Whether or not the grant is renewable
❖ The Department or Division of the grantee Organization to which the grant was made (as indicated in the Subdivision field of the grant's Request record).	❖ Payee Organizations

In addition, the export includes all levels from each of the following classifications on the Request's Coding Sheet:

❖ Program Area	❖ Population Served
❖ Geographic Area Served	❖ Type of Support

❖ Gender	❖ Age
❖ Ethnicity	

To Run the Foundation Center Export Report

To create an export file for the Foundation Center:

1. Go to View ➤ Reports.
2. From the Requests folder, choose the Foundation Center Export Report.
3. If necessary, specify the grants you wish to include in the export using the New Search or Select Search buttons.
4. Click the Run selected report icon. The report is generated and displayed using the Crystal Reports viewer. Please note that since this file is intended for export, it is not formatted for printing.

5. When the report has finished processing, click the Export Report button on the Crystal Reports viewer toolbar located at the top of the report. You are prompted to choose a file format and destination for the export.
6. Choose 'Tab Separated Text (TTX)' as the format, and 'Disk file' as the destination. Click OK. You are prompted to provide the file name and location for the export file.
7. Enter the file name and location, and click Save. The export file is saved, and you can transmit it to the Foundation Center.

Grant Profile Report

A profile of a grant that includes coding, payment, grant amendment, and requirements information.

Fixed Criteria

Requests with a Disposition of Approved.

Grant Profile Report

3/31/00

Grantee:	Arlington School of Dentistry	**Req. ID:**	237
Department:	School Library	**Ref. No:**	99-F237
Contact:	Anita Rayce - Associate Professor		
Project Title:	The Support for the Restoration of the School of Dentistry Library		
Meeting Date:	6/7/99	**Grant Date:**	6/7/99
Grant Amount:	$ 60,000.00	**Tax Status:**	501c(3)
Total Paid:	$ 25,000.00	**Last Verified On:**	3/5/95
Grant Term:	24 months		

Project Desc: This library restoration project is scheduled to be completed by June 2000. It was originally scheduled for completion in January, but due to inclement weather the start date has had to be pushed back to July, 1999.

The library that is being restored was built in 1965. Although it served the school well to date a recent earthquake has destroyed a portion of the facility making it unsafe for use.

Although the school does have another library for the students to use this project remains important not only for the historic preservation of the building but also to allow the dental students access to a library designed specifically for their use.

Staff: Lee Williamson

Type: Cash Grants
Status: Active Grant

Coding:

Age Group	Adults
Fund	Foundation
Geographical Area Served	Northwest
Model Foundation Rating	B
Program Area	Education\Adult/Continuing Education\Restoration & Buildings
Type of Support	Capital/Renovation

Amendments:

10/22/99	Grant Amount was increased by 10,000 (from 50,000 to 60,000). Board approved increase due to Construction delay.

Payments:

6/11/99	$ 25,000.00	Paid
6/7/00	$ 35,000.00	Contingent

Reports:

3/6/00	Progress Report	Received
6/7/00	Progress Report	Not Received
7/2/01	Final Report	Not Received

1

Grant Summary

A summary of Approved Requests showing the total amount granted for each item.

Fixed Criteria

Requests with a Disposition of Approved

Variations

Versions of this report group by:

- Fund
- Geographic Area 1
- Grant Type
- Population Served
- Program Area 1
- Program Area 1 and 2
- Program Area 1, 2, and 3
- Staff
- Support Type

Grant Summary - By Program Area 1 and 2

3/31/00

Program Area	Grant Count	Grant Amount
Arts and Culture		
No Code Specified	15	$53,150.00
Media Communications	2	$25,300.00
Performing Arts	16	$184,400.00
Visual Arts	3	$2,200.00
Total Arts and Culture	36	$265,050.00
Community		
Civil Rights/Civil Liberties	4	$281,378.00
Community Issues/Events	26	$262,900.00
Economic Development	6	$450,100.00
Public Affairs/Society Benefit	2	$7,150.00
Total Community	38	$1,001,528.00
Education		
Adult/Continuing Education	7	$495,200.00
College/University	29	$1,383,100.00
Elementary & Secondary Education	7	$215,800.00
Total Education	43	$2,094,100.00
Health & Welfare		
Emergency Medical Services	3	$87,900.00
General & Rehabilitative	4	$54,560.00
Public Health & Wellness Education	7	$170,400.00
Support Services	5	$62,900.00
Total Health & Welfare	19	$375,760.00
Other		
No Code Specified	2	$8,500.00
Total Other	2	$8,500.00
Grand Total	138	$3,744,938.00

1

Grant Summary - Granted and Paid by Program Area

For each Program Area, this report shows the total amount granted and the amount of Payments made for that Program Area. The Payment data included in this report is based upon the Requests that meet the search criteria that you use when running the report.

Fixed Criteria

Requests with a Disposition of Approved.

Grant Summary - Granted and Paid by Program Area

Criteria = Approval Date was in last year

4/6/00

Program Area	Grant Amount	Payment Paid
Arts and Culture (6 items - 12.77% of total count)	$46,000.00	$43,500.00
Civic and Community (16 items - 34.04% of total count)	$435,928.00	$413,428.00
Education (16 items - 34.04% of total count)	$1,045,870.00	$923,620.00
Health and Human Services (9 items - 19.15% of total count)	$221,610.00	$195,360.00
Grand Total (47 items)	$1,749,408.00	$1,575,908.00

Grants - Alpha List

An alphabetical listing (by grantee Organization name) of grants, including their reference numbers, project description, grant amount, amount paid to-date, and grant date.

Fixed Criteria

Requests with a Disposition of Approved.

Variations

Versions of the report group by:

- Fiscal Year
- Fund
- Geographic Area 1
- Geo. Area Levels 1–5
- Grant Type
- Internal Program
- Population Served
- Primary Contact
- Program Area 1
- Program Areas 1 and 2
- Program Areas 1, 2, and 3
- Program Area Levels 1–5
- Staff
- Support Type

Grants - Alpha List, by Geographic Area 1

3/31/00

Organization Project Description	Grant Amount	Paid To Date	Type Status	Grant Date
Northeast				
Hiller State University Boston, MA *2nd Quarter Matching Gifts, 1999*	$9,000.00	$9,000.00	Matching Gifts	6/30/99
Longwood State University New York, NY *In support of the "Healing with Laughter" lecture series*	$47,250.00	$47,250.00	Cash Grants *Closed Grant*	6/30/99
Total Northeast (2 items)	$56,250.00	$56,250.00		
Southwest				
Arlington School of Dentistry Los Angeles, CA *To sponsor the "Annual Leadership Award Dinner"*	$4,120.00	$4,120.00	Dinners and Events *Attended*	7/6/99
Ryan School of Medicine Los Angeles, CA *2nd Quarter Matching Gifts, 1999*	$6,000.00	$6,000.00	Matching Gifts	6/30/99
Total Southwest (2 items)	$10,120.00	$10,120.00		
Grand Total (4 items)	$66,370.00	$66,370.00		

Grants - Alpha List (Portrait)

An alphabetical listing (by grantee Organization name) of grants, including their reference numbers, project description, grant amount, amount paid to-date, and grant date.

Fixed Criteria

Requests with a Disposition of Approved.

Grants - Alpha List (Portrait)

3/31/00

Organization Project Description	Request ID Ref. No.	Grant Amount	Paid To Date	Type Status	Grant Date
American Foundation for Children New York, NY *The Donation of a vehicle equipment with a wheelchair access ramp.*	249	$23,000.00	$23,000.00	In-Kind *Services Completed*	6/10/99
Arlington School of Dentistry Los Angeles, CA *To sponsor the "Annual Leadership Award Dinner"*	216	$4,120.00	$4,120.00	Dinners and Events *Attended*	7/6/99
Brooklyn Ballet New York, NY *Donation of Electronic Goods*	245	$7,000.00	$7,000.00	In-Kind *Services Completed*	6/10/99
The Children's Fund Washington, DC *sponsorship of the "The 1999 Annual Conference"*	271	$26,250.00	$0.00	Cash Grants *Active Grant*	6/30/99
Hiller State University Boston, MA *2nd Quarter Matching Gifts, 1999*	258	$9,000.00	$9,000.00	Matching Gifts	6/30/99
Longwood State University New York, NY *2nd Quarter Matching Gifts, 1999*	259	$6,500.00	$6,500.00	Matching Gifts	6/30/99
Longwood State University New York, NY *In support of the "Healing with Laughter" lecture series*	268	$47,250.00	$47,250.00	Cash Grants *Closed Grant*	6/30/99
Lower West Side Child Care Center New York, NY *To support the renovation project for the centers roof*	251	$2,000.00	$2,000.00	Cash Grants *Active Grant*	6/10/99
Ryan School of Medicine Los Angeles, CA *2nd Quarter Matching Gifts, 1999*	257	$6,000.00	$6,000.00	Matching Gifts	6/30/99
University of America Los Angeles, CA *To support The University of America "Big Brothers/Big Sisters" Chapter*	250	$5,000.00	$5,000.00	Cash Grants *Active Grant*	6/10/99
University of America Los Angeles, CA *To sponsor a table for the 1999 "Citizen of the Year Dinner"*	269	$5,150.00	$0.00	Cash Grants *Active Grant*	6/16/99
	Grand Total (11 items)	$141,270.00	$109,870.00		

1

Grants - Alpha List with Secondary Codes

The "Program Area Served with Secondary Codes" and "Geographical Area Served with Secondary Codes" variations of the "Grants - Alpha List" report include both primary and secondary coding for all levels of the Program Area or Geographical Area Served table.

A grant may be listed in the report several times—once for each code. Note that since reports may be listed more than once, the totals in this report may not reflect the actual amount granted.

Fixed Criteria

Requests with a Disposition of Approved and which have classifications in the tables on which the report groups.

Variations

Versions of the report group by:

- Program Area
- Geographic Area Served

Grants - Alpha List, by Geographical Area Served including Secondary Codes
4/6/00

Organization Project Description	Grant Amount	Paid To Date	Type Status	Grant Date
Northeast				
Boston				
The National Children's Project New York, NY *To help sponsor "The Children of the World" Conference*	$28,560.00	$0.00	Cash Grants *Active Grant*	3/15/00
Total Boston (1 item)	$28,560.00	$0.00		
New York				
American Foundation for Children New York, NY *Endowment Campaign*	$52,500.00	$25,000.00	Cash Grants *Active Grant*	4/3/00
The National Children's Project New York, NY *To help sponsor "The Children of the World" Conference*	$28,560.00	$0.00	Cash Grants *Active Grant*	3/15/00
Total New York (2 items)	$81,060.00	$25,000.00		
Washington				
The National Children's Project New York, NY *To help sponsor "The Children of the World" Conference*	$28,560.00	$0.00	Cash Grants *Active Grant*	3/15/00
Total Washington (1 item)	$28,560.00	$0.00		

Grants - Chronological List

A chronological listing of grants, including their reference numbers, Project Description, Grant Amount, amount paid to-date, and grant date.

Fixed Criteria

Requests with a Disposition of Approved.

Variations

Versions of the report group by:

- Fund
- Geographic Area 1
- Grant Type
- Program Area 1
- Program Areas 1 and 2
- Program Areas 1, 2, and 3
- Staff
- Support Type

Grants - Chronological Listing, by Program Area 1

4/3/00

Grant Date	Organization / Project Description	Grant Amount	Paid To Date	Type / Status
Education				
6/30/99	**Hiller State University** Boston, MA *2nd Quarter Matching Gifts, 1999*	$9,000.00	$9,000.00	Matching Gifts
6/30/99	**Longwood State University** New York, NY *In support of the "Healing with Laughter" lecture series*	$47,250.00	$47,250.00	Cash Grants *Closed Grant*
6/30/99	**Ryan School of Medicine** Los Angeles, CA *2nd Quarter Matching Gifts, 1999*	$6,000.00	$6,000.00	Matching Gifts
7/6/99	**Arlington School of Dentistry** Los Angeles, CA *To sponsor the "Annual Leadership Award Dinner"*	$4,120.00	$4,120.00	Dinners and Events *Attended*
	Total Education (4 items)	$66,370.00	$66,370.00	
Health & Welfare				
6/30/99	**The Children's Fund** Washington, DC *sponsorship of the "The 1999 Annual Conference"*	$26,250.00	$0.00	Cash Grants *Active Grant*
	Total Health & Welfare (1 item)	$26,250.00	$0.00	
	Grand Total (5 items)	$92,620.00	$66,370.00	

1

Incomplete Proposals

A list of Pending Requests that have been marked as 'incomplete.' Includes the grantee Organization Name, Project Description, Request Date, Staff member, Requested Amount, Status, and any notes regarding the reason that the Request has been marked as incomplete.

Fixed Criteria

Requests with a Disposition of Pending that are also marked as 'incomplete' on Page 1 of their Request record.

Variations

There is another versions of this report that lists the proposals by date.

Incomplete Proposals

4/3/00

Organization Project Description	Request Date Staff	Requested Amount	Status Complete Notes
American Foundation for Children *After school program at local libraries*	2/5/00 Terry Brown	$25,000.00	Initial Review *Missing total project Budget*
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	2/3/00 Colette Rogers	$5,250.00	Invited *Requested more information about the Deductable vs Non-deductable portion of this dinner.*
East Side Learning Center *New Books, New Horizons*	2/10/00 Sarah Sullivan	$10,000.00	Initial Review *Missing Audited Financial Statement, List of Active Board Members and Total Project Budget.*
Shea Dance Company *Tots on Stage*	2/14/00 Kelly Goldberg	$10,000.00	Staff Review *Missing list of other project funders.*
	Grand Total (4 items)	$50,250.00	

1

Proposals - Alpha List

A listing of Pending Requests that includes the Project Title, Request Amount, Recommended Amount, Staff member, Request Type, and Request Status for each proposal.

Fixed Criteria

Requests with a Disposition of Pending.

Variations

Versions of the report group by:

- Fund
- Geographic Area 1
- Request Type
- Internal Program
- Program Area 1
- Program Areas 1 and 2
- Primary Contact
- Staff
- Request Status

Proposals - Alpha List, by Fund

4/6/00

Organization Project Title	Request Date Staff	Requested Amount	Recommended Amount	Type Status
Corporation				
Shea Dance Company New York, NY *Tots on Stage*	2/14/00 Terry Brown	$10,000.00	$10,000.00	Cash Grants *Considered for Board*
	Total Corporation (1 item)	$10,000.00	$10,000.00	
Foundation				
Brooklyn Ballet New York, NY *2000 Fall season*	3/13/00 Colette Rogers	$24,000.00	$20,000.00	Cash Grants
California Children's Theatre San Francisco, CA *Building materials for sets*	3/1/00 Kelly Goldberg	$2,500.00	$2,500.00	Cash Grants *Initial Review*
East Side Learning Center New York, NY *New Books, New Horizons*	2/10/00 Kelly Goldberg	$10,000.00	$10,000.00	Cash Grants *Initial Review*
	Total Foundation (3 items)	$36,500.00	$32,500.00	
	Grand Total (4 items)	$46,500.00	$42,500.00	

1

Proposals - Alpha List (Portrait)

An alphabetical listing (by grantee Organization name) of Pending Requests that includes the Project Title, Request Amount, Recommended Amount, Staff member, Request Type, and Request Status for each proposal.

Fixed Criteria

Requests with a Disposition of Pending.

Proposals - Alpha List (Portrait)

Request Date is in this year
4/6/00

Organization Project Title	Request Date Staff	Requested Amount	Recommended Amount	Type Status
Adventure Club of Manhattan New York, NY *Extreme Sport Marathon*	2/9/00 Colette Rogers	$10,000.00	$10,000.00	Cash Grants *Initial Review*
Brooklyn Ballet New York, NY *2000 Fall season*	3/13/00 Colette Rogers	$24,000.00	$20,000.00	Cash Grants
California Children's Theatre San Francisco, CA *Building materials for sets*	3/1/00 Kelly Goldberg	$2,500.00	$2,500.00	Cash Grants *Initial Review*
East Side Learning Center New York, NY *New Books, New Horizons*	2/10/00 Kelly Goldberg	$10,000.00	$10,000.00	Cash Grants *Initial Review*
Longwood State University New York, NY *Funding for sports complex renovation*	2/1/00 Lee Williamson	$500,000.00	$500,000.00	Cash Grants *Considered for Board*
Lower West Side Child Care Center New York, NY *Summer School Program*	4/4/00 Kelly Goldberg	$50,000.00	$45,000.00	Cash Grants
Shea Dance Company New York, NY *Tots on Stage*	2/14/00 Terry Brown	$10,000.00	$10,000.00	Cash Grants *Considered for Board*
United Federation Inc. New York, NY *Millenium Project*	1/20/00 Sarah Sullivan	$150,000.00	$150,000.00	Cash Grants *Considered for Board*
	Grand Total (8 items)	$756,500.00	$747,500.00	

1

Proposals - Complete/Incomplete

An alphabetical listing (by grantee Organization name) of Pending Requests that includes the Project Title, Requested Amount, Request Date, Staff member, and an indication of whether the Request is complete, including any relevant notes.

Fixed Criteria

Requests with a Disposition of Pending.

Proposals - Complete/Incomplete

4/3/00

Organization Project Description	Request Date Staff	Requested Amount	Complete? Notes
American Foundation for Children *After school program at local libraries*	2/5/00 Terry Brown	$25,000.00	No *Missing total project Budget*
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	2/3/00 Colette Rogers	$5,250.00	No *Requested more information about the Deductable vs Non-deductable portion of this dinner.*
California Children's Theater *Building materials for sets*	3/1/00 Lee Williamson	$2,500.00	Yes
East Side Learning Center *New Books, New Horizons*	2/10/00 Sarah Sullivan	$10,000.00	No *Missing Audited Financial Statement, List of Active Board Members and Total Project Budget.*
Longwood State University *holistic medicine study*	2/1/00 Colette Rogers	$500,000.00	Yes
Shea Dance Company *Tots on Stage*	2/14/00 Kelly Goldberg	$10,000.00	No *Missing list of other project funders.*
	Grand Total (6 items)	$552,750.00	

1

Recommendations by Organization

By Organization, this report shows the total amount granted in the previous year and the total recommended amount for the current year. It also includes the Long Project Description of the latest Request.

Fixed Criteria

This report includes Organizations that have at least one Pending Request in the current calendar year.

Recommendations by Organization

4/3/00

Name of Organization	1999 Granted	2000 Recommended	2000 Project Description (Long)
American Foundation for Children	$75,500.00	$80,000.00	The AFC "After school program" dedicated its resources towards the education and supervision of children for working parents before and after school. The program includes a story-time session and computer access to children ages 5-11.
California Children's Theater	$7,000.00	$12,500.00	The "2000 Career Fair" introduces High school students to active members of the theater both in Hollywood and on Broadway. Students get to ask questions directly about life in the theater. Over 150 industry professionals are scheduled to make an appearance this year including Kevin Bacon, Bill Cosby, Sandy Duncan, Julia Roberts, and Matthew Perry. The event is scheduled for Saturday, September 09, 2000.
The Children's Fund	$73,950.00	$26,250.00	
Computers for Kids	$40,300.00	$8,000.00	To provide 10 computers, 4 Printers along with support for consulting services for internet integration. The foundation computer supplier has reviewed their purchase request and has agreed to provide the necessary equipment at a discounted rate.
East Side Learning Center	$4,000.00	$10,000.00	In response to the School to Work Act of 1998, The ESLC has embarked on the creation of a specialized program to assist individuals in making and implementing informed educational and occupational choices.
Longwood State University	$58,250.00	$500,000.00	The nature of the study is to assess current methods of medical care and to evaluate the benefit of adding holistic approaches to the more conservative allopathic methods. The study uses clinical reviews of trials of acupuncture and discusses the complexities of research design in formulating hypothesis based on these standard methods of evaluation.

1

Renewable Grants

A listing of renewable grants, by each grant's renewal date, that includes the renewal date (the date on which the grant is eligible for renewal), grantee Organization, Project Description, Request ID or Reference Number, Grant Amount, Type, Status, and Grant Date.

Fixed Criteria

This report includes Approved Requests that have been flagged as renewable (on Page 2 of their Request records).

Renewable Grants

4/3/00

Renewal Date	Organization Project Description	Request ID Ref. No.	Grant Amount	Type Status	Grant Date
1/6/00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	219	$154,500.00	Cash Grants *Active Grant*	6/8/99
1/19/00	**Hiller State University** Boston, MA *The university scholarship fund for post graduate studies*	225	$35,700.00	Cash Grants *Active Grant*	6/7/99
6/15/00	**Girl Scouts of America** Youngstown, CA *Assistance towards general operating costs*	224	$12,878.00	Cash Grants *Active Grant*	6/8/99
9/14/00	**The National Children's Project** New York, NY *To help sponsor "The Children of the World" Conference*	273	$28,560.00	Dinners and Events *Attended*	9/21/99
11/15/00	**Brooklyn Ballet** New York, NY *Snowflake Ball*	290	$1,000.00	Cash Grants *Active Grant*	12/7/99
11/15/00	**Hiller State University** Boston, MA *Undergraduate scholarship program*	291	$500,000.00	Cash Grants *Active Grant*	12/7/99
11/15/00	**University of America** Los Angeles, CA *Graduate Sudies Program*	296	$100,000.00	Cash Grants *Active Grant*	12/7/99
		Grand Total (7 items)	$832,638.00		

1

Repeat Grants

An alphabetical listing of Organizations that have received grants both the current and the previous calendar year. Includes the Organization name and the total granted and paid figures for the previous and current calendar year.

Fixed Criteria

This report includes Organizations that received grants in both the previous and current calendar years.

Repeat Grants

4/3/00

Organization City, State	1999 Granted	1999 Paid	2000 Granted	2000 Paid
American Foundation for Children New York, NY	$75,500.00	$75,500.00	$52,500.00	$25,000.00
The Children's Fund Washington, DC	$73,950.00	$62,700.00	$26,250.00	$0.00
Lower West Side Child Care Center New York, NY	$52,000.00	$2,000.00	$2,500.00	$52,500.00
Ryan School of Medicine Los Angeles, CA	$161,900.00	$160,500.00	$154,500.00	$1,400.00
Shea Dance Company New York, NY	$12,250.00	$12,250.00	$5,250.00	$5,250.00
Teen Aid Center New York, NY	$36,000.00	$36,000.00	$3,500.00	$3,500.00
West Side Center New York, NY	$25,000.00	$25,000.00	$3,000.00	$3,000.00
Grand Total (7 items)	$436,600.00	$870,708.00	$247,500.00	$964,650.00

1

Request Fact Sheet

For each request, a single-page write-up that includes the applicant's background, the Project Title, the project's Program Area, the requested and recommended amounts, and a history of the applicant's previous grants.

Request ID 308

Applicant:
Abuse Prevention and Rehabilitation Fund
440 Third Street
Washington, DC 20001

Contact:
Elizabeth Laden
Program Director
(202) 555-2343

Project Title: The continued support for the center's Strategic Action Plan for abuse prevention programs

Amount Requested: $ 66,300.00
Amount Recommended: $ 66,300.00

Program Area:

Organization Background:
The Abuse Prevention and Rehabilitation Fund is a national organization which provides support for programs which promote rehabilitation and education of domestic abuse victims.

Many of their programs focus on the development and evaluation of projects aimed at fostering the families ethical, social and nurturing development.

Prior Grants: See Attached List

Total Amount: $ 193,200.00
Span: 1996 - 1999
Total Grants: 10

Date Last Grant: 12/31/99
Amount: $ 10,000.00

Abuse Prevention and Rehabilitation Fund

Schedule of Grants

Year	Purpose of Grant	Amount
1996	The Support for their Annual Conference	$10,000.00
1997	The support and implementation of the center's Strategic Action Plan for abuse prevention programs	$26,300.00
1997	4th Quarter Matching Gifts, 1997	$100.00
1998	To support the second phase of the center's Strategic Action Plan for abuse prevention programs	$65,000.00
1998	2nd Quarter Matching Gifts, 1998	$2,300.00
1998	To assist in the support for projects for 1998.	$75,000.00
1998	3rd Quarter Matching Gifts, 1998	$4,000.00
1998	3rd Quarter Volunteer Gifts, 1998	$300.00
1998	4th Quarter Volunteer Gifts, 1998	$200.00
1999	Children's Retreat	$10,000.00

Meeting Date: **Action:** _____

Request History by Organization Report

The Request History by Organization report is similar to the Organization Profile report on page 51. It's the same except for one key difference: The Request History by Organization report is sensitive to Request criteria. For example, the report below was limited to matching and volunteer gifts.

Request History by Organization

6/21/2001

Abuse Prevention and Rehabilitation Fund

Abuse Prevention and Rehabilitation Fund
440 Third Street
Washington, DC 20001

Elizabeth Laden, Program Director
(202) 555-2343

TYPE: **Health & Human Services**

BACKGROUND:

The Abuse Prevention and Rehabilitation Fund is a national organization which provides support for programs which promote rehabilitation and education of domestic abuse victims.

Many of their programs focus on the development and evaluation of projects aimed at fostering the family's ethical, social and nurturing development.

Disposition Date and Disposition	Requested/ Granted	Paid to Date/ Balance	Fund
12/30/1997 Approved *4th Quarter Matching Gifts, 1997*	$100.00	$100.00 $0.00	Foundation
6/29/1998 Approved *2nd Quarter Matching Gifts, 1998*	$2,300.00	$2,300.00 $0.00	Foundation
9/28/1998 Approved *3rd Quarter Volunteer Gifts, 1998*	$300.00	$300.00 $0.00	Corporation
9/30/1998 Approved *3rd Quarter Matching Gifts, 1998*	$4,000.00	$4,000.00 $0.00	Foundation
12/30/1998 Approved *4th Quarter Volunteer Gifts, 1998*	$200.00	$200.00 $0.00	Corporation
7/11/2000 Approved *2Q 2000 - Matching Gifts*	$1,500.00	$1,500.00 $0.00	

Abuse Prevention and Rehabilitation Fund Summary

Span:	1997 - 2000	**Amount Declined:**	$0.00
Total Amount:	$8,400.00	**Total Declined:**	0
Total Grants:	6		

1

Request Labels (Primary Contact)

This series of reports prints mailing labels to the Primary Contact of each Request included in the report. The Organization's mailing address is used.

Variations

Versions of this report sort the labels either by the Contact's last name or the Postal Code in the address, and print labels for the following Avery templates:

- 5160
- 5162

Ms. Kathleen Crispen
West Side Center
11 West End Ave.
New York, NY 10011

Ms. Margaret Neff
Brooklyn Ballet
14 West 108th Street
New York, NY 10012

Mr. David Moore
Lower West Side Child Care Center
118 West 18th Street
New York, NY 10014

Mr. George Notingham
Teen Aid Center
534 Broadway
New York, NY 10016

Ms. Joanne Collins
The National Children's Project
629 West 58th Street
New York, NY 10019

Mr. Lawrence Johnson
Longwood State University
1204 Avenue of the Americas
Suite 300
New York, NY 10019

Request Labels (All Affiliated Contacts)

This series of reports prints mailing labels to all affiliated Contacts for each Request included in the report. The Organization's mailing address is used.

Variations

Versions of this report sort the labels either by the Contact's last name or the Postal Code in the address, and print labels for the following Avery templates:

- 5160
- 5162

Ms. Joanne Collins
The National Children's Project
629 West 58th Street
New York, NY 10019

Mr. Lawrence Johnson
Longwood State University
1204 Avenue of the Americas
Suite 300
New York, NY 10019

Mr. Patrick O'Neill
The National Children's Project
629 West 58th Street
New York, NY 10019

Mr. Oscar B. Syrius
National Institute for Technical Learning
612 N. Eyeland Avenue
Suite 1009
New York, NY 10019

Ms. Virginia Appleton
Computers for Kids
111 E 57th Street
Suite 200
New York, NY 10021

Mr. Raymond C. Austin
Computers for Kids
111 E 57th Street
Suite 200
New York, NY 10021

Mr. Doug Smith
United Federation Inc.
1004 Third Ave.
New York, NY 10023

Mr. Stanley Cohen
Hiller State University
785 42nd Street
2nd Floor
Boston, MA 14325

Professor Edward Riley Ph.D.
Hiller State University
785 42nd Street
2nd Floor
Boston, MA 14325

Mr. John Clayton
The Children's Fund
3400 Wisconsin Avenue
N. W.
Washington, DC 20016

Mr. Charles Roberts
The Children's Fund
3400 Wisconsin Avenue
N. W.
Washington, DC 20016

Dr. Anita Rayce M.D.
Arlington School of Dentistry
122 South Ave.
Arlington Hall
Los Angeles, CA 34253

Request Statistics

This report includes the following statistics for the Requests included in the report: total, minimum, maximum, and average Grant Amount; the total number of Approved, Declined, and Pending Requests; and the percentage of Requests that are Approved, Declined, and Pending.

Request Statistics
4/3/00

Total Grant Amount:	$ 4,971,733.00
Maximum Grant Amount:	$ 500,000.00
Minimum Grant Amount:	$ 100.00
Average Grant Amount:	$ 16,910.66
Total Number of Grants:	224
Percentage of Requests Approved:	76.19%
Total Number of Declines:	53
Percentage of Requests Declined:	18.03%
Total Number of Pending:	17
Percentage of Requests Pending:	5.78%

Requests by Sponsor

A list of Requests, grouped by the Contact identified as the "Sponsor" of each Request. Includes the Disposition, Grant Amount, and Paid Amount of each Request.

Fixed Criteria

Requests that have an affiliated Contact with the Role of "Sponsor."

Requests by Sponsor

4/3/00

Primary Organization Project Title	Disposition and Date	Grant Amount	Paid Amount
Terry Brown			
Sunflower House for Youth in Distress San Francisco, CA *General Operating Support*	Approved 6/8/99	$56,100.00	$56,100.00
	Total Terry Brown (1 item)	$56,100.00	$56,100.00
Mortimer Humphries			
Brooklyn Ballet New York, NY *For General Operating Support*	Approved 6/7/99	$25,000.00	$25,000.00
National Institute for Technical Learning Coalition New York, NY *Y2K Educational Outreach*	12/21/99	$50,000.00	$0.00
	Total Mortimer Humphries (2 items)	$75,000.00	$25,000.00
	Grand Total (3 items)	$131,100.00	$81,100.00

1

Status of Requests Received by Staff

A comprehensive list of Requests grouped by the Staff member to which they are assigned.

Variations

A version of this report (shown here) includes the Contact designated as the Sponsor of the Request by an affiliation with the "Sponsor" Contact Role.

Status of Requests Received by Staff, including Sponsor

Requests from February 2000

5/23/00

Request Date and Amount	Organization Project Title	Disposition and Date	Type Status	Grant Amount	Payment Paid	Sponsor
Kelly Goldberg						
2/14/00 $10,000.00	**Shea Dance Company** Tots on Stage	Pending	Cash Grants	$0.00	$0.00	Jones, Janet
2/3/00 $5,250.00	**Shea Dance Company** The 2000 Annual Banquet	Pending	Cash Grants *Budgeted Line Item*	$5,250.00	$0.00	
$15,250.00			*Total for Kelly Goldberg* (2 items)	$5,250.00	$0.00	
Sarah Sullivan						
2/3/00 $66,300.00	**Abuse Prevention and Rehabilitation Fund** The continued support for the center's Strategic Action Plan for abuse prevention programs	Pending	Cash Grants *Budgeted Line Item*	$66,300.00	$0.00	Hollingsworth, Lamar
2/3/00 $28,560.00	**The National Children's Project** To help sponsor "The Children of the World" Conference	Pending	Cash Grants *Budgeted Line Item*	$28,560.00	$0.00	
$94,860.00			*Total for Sarah Sullivan* (2 items)	$94,860.00	$0.00	
$110,110.00			**Grand Total** (4 items)	$100,110.00	$0.00	

1

Summary of Requests by Type, Disposition, and Status

A summary of Requests grouped by their Request Type, Disposition, and Request Status, including subtotals of the Requested Amount and Grant Amount for each group.

Summary of Requests by Type, Disposition and Status

4/6/00

Type, Disposition, and Status	Request Amount	Grant Amount
Cash Grants		
Approved		
Active Grant (30 items)	$1,545,938.00	$1,295,938.00
Closed Grant (66 items)	$2,603,125.00	$2,616,125.00
Total Approved (96 items)	$4,149,063.00	$3,912,063.00
Declined		
Board Declined (7 items)	$235,000.00	$0.00
Immediate Declination (17 items)	$220,150.00	$0.00
Staff Declined (23 items)	$1,082,000.00	$0.00
Total Declined (47 items)	$1,537,150.00	$0.00
Pending		
Budgeted Line Item (2 items)	$19,870.00	$19,870.00
Considered for Board (6 items)	$697,000.00	$0.00
Initial Review (3 items)	$22,500.00	$0.00
Total Pending (11 items)	$739,370.00	$19,870.00
Total Cash Grants (154 items)	$6,425,583.00	$3,931,933.00
Dinners and Events		
Approved		
Accepted (11 items)	$68,100.00	$68,100.00
Attended (2 items)	$19,420.00	$19,420.00
Invited (1 items)	$28,560.00	$28,560.00
Tables to be filled (1 items)	$26,250.00	$26,250.00
Tickets Donated (1 items)	$15,300.00	$15,300.00
Total Approved (16 items)	$157,630.00	$157,630.00
Declined		
Declined (2 items)	$6,000.00	$0.00
Total Declined (2 items)	$6,000.00	$0.00
Total Dinners and Events (18 items)	$163,630.00	$157,630.00
Grand Total (172 items)	$6,589,213.00	$4,089,563.00

Tax Status Verification

Shows tax status information for charitable Organizations that are associated with Requests. If no tax status is on file, "Tax status not on file!" is shown in the Tax Status and Date column of the report.

Fixed Criteria

Organizations that are flagged as Charitable and associated with Requests.

Tax Status Verification

4/3/00

Organization Project Title	Request ID Reference No.	Type, Disposition and Status	Requested/ Granted	Tax ID Reg. Date	Tax Status and Date	Next Verify Date
American Foundation for Children New York, NY *Endownment Campaign*	300	Cash Grants Approved Active Grant	$52,500.00		501c(3) 7/1/65	3/6/02
The Children's Fund Washington, DC *The sponsorship of the "The 1999 Annual Conference"*	302	Dinners and Events Approved Tables to be filled	$26,250.00	10-000647 4/29/78	501c(3) 9/1/92	1/3/01
Lower West Side Child Care Center New York, NY *After school program*	313	Cash Grants Approved Active Grant	$2,500.00	65-895742	501c(3) 12/6/95	
Ryan School of Medicine Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	307	Cash Grants Approved Active Grant	$154,500.00	12-486932	501c(6) 2/2/91	
Shea Dance Company New York, NY *The 2000 Annual Banquet*	304	Cash Grants Approved Active Grant	$5,250.00	57-200193	501c(3) 2/22/84	2/1/01
Teen Aid Center New York, NY *Counseling program for school violence victims*	312	Cash Grants Approved Active Grant	$3,500.00	13-584568	501c(3) 1/15/88	1/3/01
West Side Center New York, NY *Computer lab update*	311	Cash Grants Approved Active Grant	$3,000.00	34-958344	501c(3) 1/1/89	9/1/00
		Grand Total (7 items)	$247,500.00			

1

Top 20 Grants by Grant Amount

Lists the top 20 grants, according to their Grant Amount, in descending Grant Amount value. As with all reports, keep in mind that your search criteria also determine which grants are included in this report.

Top 20 Grants by Grant Amount

4/3/00

Grant Amount	Organization Project Description	Grant Date	Paid To Date
$ 500,000.00	**Hiller State University** Boston, MA *Undergraduate scholarship program*	12/7/99	$500,000.00
$ 250,000.00	**The National Children's Project** New York, NY *Funding for new daycare center*	12/21/99	$250,000.00
$ 250,000.00	**Sunflower House for Youth in Distress** San Francisco, CA *The construction of a new halfway house for pregnant teens*	6/3/96	$250,000.00
$ 235,000.00	**Kids With AIDS Research Center** New York, NY *Camp Hope Summer Program*	6/9/98	$235,000.00
$ 154,500.00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	6/8/99	$154,500.00
$ 154,500.00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	3/24/00	$0.00
$ 150,000.00	**Ryan School of Medicine** Los Angeles, CA *The establishment of the "Charles S. Godin" Scholarship program*	6/9/98	$150,000.00
$ 150,000.00	**The National Children's Project** New York, NY *The "Children of the next Millenium" project*	3/21/96	$150,000.00
$ 125,000.00	**National Institute for Technical Learning Coalition** New York, NY *"Building Bridges" Program*	6/9/98	$125,000.00
$ 125,000.00	**Ryan School of Medicine** Los Angeles, CA *The expansion of the child abuse treatment program.*	6/11/97	$125,000.00
$ 120,000.00	**East Side Learning Center** New York, NY *The School to Work Transition Program*	12/27/96	$120,000.00
$ 100,000.00	**University of America** Los Angeles, CA *Graduate Sudies Program*	12/7/99	$100,000.00

1

5 Financial Reports

This chapter describes the Financial reports that you can run from the Financial folder of the GIFTS Alta Report Library.

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Cash Flow Analysis

A listing of Payments due for each Request that has Payments due, including the Organization name, total amount granted, and the remaining balance at the end of six months.

Fixed Criteria

Payments for Requests that have any outstanding Payments.

Cash Flow Analysis

1/6/2012

Payee Organization Project Title, Grant Amount	Sched. Before January	Due January	Due February	Due March	Due April	Due May	Due June	Sched. after June
Abuse Prevention and Rehabilitation Fund *Children Refuge from Abusive Homes* $350,000.00	$175,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Abuse Prevention and Rehabilitation Fund *Training Program for Social Workers* $20,000.00	$10,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Children International *Housing Program for Impoverished Families* $770,000.00	$385,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Children International *Adopt-A-Dream program support* $10,000.00	$10,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
East Side Learning Center *Donation of 10 Used Computers* $5,000.00	$5,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Fundación Brasil de Niños *test* *multi* *line* *this is a long project title* $599.49	$99.49	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Girl Scouts of America *Donation of Used Computers* $2,500.00	$2,500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

1

Check Requests Report by Fund

A list of Scheduled Payments, including the legal name and address of the payee Organization, for the purpose of providing information for cutting checks. Grouped by Payment Fund. If no legal name is on file for the payee, its Organization Name is shown.

Fixed Criteria

Payments with a Status of Scheduled.

Check Requests Report - By Fund

Schedule Date is this month
4/1/00

Check Payable to Comments	Request ID Ref No.	Grant Payment Amount	Number	Schedule Date	Payment Amount
Corporation					
Brooklyn Ballet 14 West 108th Street New York, NY 10012	301	$5,250.00	1	4/5/00	$5,250.00
California Children's Theatre 2234 South St. Suite 913 San Francisco, CA 98078	306	$10,609.00	1	4/14/00	$10,609.00
				Total Corporation (2 items)	$15,859.00
Foundation					
Abuse Prevention and Rehabilitation Fund 440 Third Street Washington, DC 20001	308	$66,300.00	1	4/14/00	$22,100.00
Arlington School of Dentistry 122 South Ave. Arlington Hall Los Angeles, CA 34253	275	$50,000.00	1	4/12/00	$12,500.00
National Institute for Technical Learning Coalition 612 N. Eyeland Avenue Suite 1009 New York, NY 10019	294	$50,000.00	1	4/5/00	$20,000.00
				Total Foundation (3 items)	$54,600.00

1

Contingent Payments

A listing of Payments with a Status of Contingent, grouped by the Staff person assigned to the contingency or the contingency date. The type of contingency, due date, and notes are included.

Fixed Criteria

Payments with a Status of Contingent.

Variations

Versions of the report group by:

- Staff
- Date

Contingent Payments - by Staff

4/3/00

Payee Organization / Project Title	Schedule Date	Payment Amount	Requirement Information: Sch. Date / Notes	Requirement Information: Type
Colette Rogers				
Computers for Kids *For the Purchase of Graphics Software and Scanner Equipment*	1/7/00	$12,500.00	1/7/00	Progress Report
National Institute for Technical Learning Coalition *Y2K Educational Outreach*	4/5/00	$20,000.00	4/5/00 *NITLC is required to Raise $250,000 in order for payments to be released*	Challenge
Total Colette Rogers (2 items)		$32,500.00		
Kelly Goldberg				
Ryan School of Medicine *Charles S. Godin Scholarship program*	5/19/00	$50,000.00	5/19/00 *Progress report must include student GPA. Any Student with a GPA under 2.5 must be sent probation letter*	Progress Report
Total Kelly Goldberg (1 item)		$50,000.00		
Lee Williamson				
Arlington School of Dentistry *The Support for the Restoration of the School of Dentistry Library*	6/7/00	$25,000.00	6/7/00	Progress Report
Total Lee Williamson (1 item)		$25,000.00		
Grand Total (4 items)		$107,500.00		

1

Current Year Paid and Future Commitments

Comprehensive report including the Organization's legal name, the total amount paid on the grant to date, future commitments by year for the next

three years, and the remaining balance. If no legal name is on file for an Organization, it's Organization Name is shown.

Fixed Criteria

Approved Requests with a balance or a Payment Paid within the current Fiscal Year.

Variations

A version of this report groups by Program Area 1.

Current Year Paid and Future Commitments

5/15/00

Organization Grant Total and Term (in Months) Request ID/Ref. Num.	Grant Total	Paid Prior Years	Paid YTD	Scheduled Payments 2000	2001	2002	Remaining Balance
1999							
Arlington School of Dentistry Los Angeles, CA Awarded $50,000 over 24 months *The Support for the Restoration of the School of Dentistry Library* 237	$50,000.00	$25,000.00	$0.00	$25,000.00	$0.00	$0.00	$0.00
Total 1999 (1 item)	$50,000.00	$25,000.00	$0.00	$25,000.00	$0.00	$0.00	$0.00
2000							
American Foundation for Children New York, NY Awarded $52,500 over 12 months *Endowment Campaign* 300	$52,500.00	$0.00	$25,000.00	$27,500.00	$0.00	$0.00	$0.00
Arlington School of Dentistry Los Angeles, CA Awarded $50,000 over 12 months *Funding for new instruments* 275	$50,000.00	$0.00	$0.00	$12,500.00	$12,500.00	$12,500.00	$12,500.00
Total 2000 (2 items)	$102,500.00	$0.00	$25,000.00	$40,000.00	$12,500.00	$12,500.00	$12,500.00
Grand Total (3 items)	$152,500.00	$25,000.00	$25,000.00	$65,000.00	$12,500.00	$12,500.00	$12,500.00

1

Deferred Payments

A listing of Payments with a Status of Hold, including the payee Organization, Grant Amount, Request ID and/or Reference Number, Payment Amount, and any notes for the Payment.

Fixed Criteria

Payments with a Status of Hold.

Deferred Payments

4/1/00

Due Date	Payee Organization	Grant Amount	Request ID Ref. No.	Payment Amount	Notes
2/3/00	**Ryan School of Medicine**	$154,500.00	307	$54,500.00	Payment on hold due to recent change in personnel
4/5/00	**Brooklyn Ballet**	$5,250.00	301	$5,250.00	Payment on hold to prevent movement to A/P Module. Await Approval from Mr. Humphries.
4/14/00	**Abuse Prevention and Rehabilitation Fund**	$66,300.00	308	$22,100.00	Per Colette
5/5/00	**National Institute for Technical Learning Coalition**	$50,000.00	294	$30,000.00	Payment is on Hold until NITLC meets Challenge
			Grand Total (4 items)	$111,850.00	

1

Five Year Payment History

A summary report per Organization, showing the total amount paid to that Organization in each of the last five years, including the current year.

Fixed Criteria

Payments with a Status of Paid, Refund, or Void.

Variations

A version of this report groups by Program Area 1.

Five Year Payment History Report

4/3/00

Payee Organization	Paid 1996	Paid 1997	Paid 1998	Paid 1999	Paid 2000
Arlington School of Dentistry	$45,800.00	$86,200.00	$41,100.00	$33,120.00	$0.00
Brooklyn Ballet	$18,000.00	$113,900.00	$13,800.00	$39,250.00	$1,000.00
California Children's Theatre	$12,500.00	$10,000.00	$93,300.00	$4,500.00	$0.00
Hiller State University	$34,800.00	$35,800.00	$36,000.00	$57,100.00	$500,000.00
Longwood State University	$28,700.00	$32,000.00	$49,500.00	$11,000.00	$0.00
National Institute for Technical Learning Coalition	$15,000.00	$56,800.00	$62,500.00	$62,500.00	$0.00
Ryan School of Medicine	$35,500.00	$125,000.00	$158,200.00	$160,500.00	$1,400.00
Shea Dance Company	$2,400.00	$7,000.00	$10,900.00	$12,250.00	$5,250.00
University of America	$13,000.00	$10,900.00	$5,000.00	$10,150.00	$100,000.00
Grand Total	$205,700.00	$477,600.00	$470,300.00	$390,370.00	$607,650.00

1

Grant Amendment Report

Provides detailed information on all of the amendments for each grant, and includes both the Original Grant Amount and the Current Grant Amount.

Fixed Criteria

Grants that have been amended.

Grant Amendment Report

5/15/00

Organization Name Project Title, Request ID	Grant Amount Original	 Current	Start Date End Date	Done Date Done User	Amendment Amount	Amendment Notes
Abuse Prevention and Rehabilitation Fund						
Children's Retreat	$10,000.00	$12,000.00	12/31/99-12/31/00			
				3/24/00 ADMIN	$2,000.00	Grant Amount was increased by 2,000 (from 10,000 to 12,000).
Computers for Kids						
For the Purchase of Graphics Software and Scanner Equipment	$25,000.00	$25,000.00	3/10/99-3/10/00			
				9/7/99 CR	$0.00	Grant Start date changed from '12/7/1999' to '9/7/1999'. Grant End date changed from '12/7/2000' to '9/7/2000'.
				9/21/99 CR	$0.00	Grant Start date changed from '9/7/1999' to '3/10/1999'. Grant End date changed from '9/7/2000' to '3/10/2000'.
United Federation Inc.						
The Support for Anti-drug Media Campaign	$12,500.00	$25,500.00	3/20/96-3/20/97			
				10/21/96 ADMIN	$13,000.00	Grant Amount was increased by $13,000.00 (from $12,500.00 to $25,500.00). The campaign has expanded nationwide and the project required additional funding. Approved by Co-Chairperson.
Grand Total (3 items)	$47,500.00	$62,500.00			$15,000.00	

1

Grant Commitments Schedule

A summary of Payment information by Request, for those Requests with any outstanding Payments. Information shown includes the grant amount, the amount paid in the current year and prior years, Payments scheduled in the next three years, and any remaining balance.

Fixed Criteria

Requests with an unpaid balance.

Grant Commitments Schedule

4/6/00

Organization Request ID/Ref. Num.	Grant Total	Paid Prior Years	Paid YTD	Scheduled Payments 2000	2001	2002	Remaining Balance
1999							
Arlington School of Dentistry 237	$50,000.00	$25,000.00	$0.00	$25,000.00	$0.00	$0.00	$0.00
National Institute for Technical Learning Coalition 294	$50,000.00	$0.00	$0.00	$50,000.00	$0.00	$0.00	$0.00
Total 1999 (2 items)	$100,000.00	$25,000.00	$0.00	$75,000.00	$0.00	$0.00	$0.00
2000							
American Foundation for Children 300	$52,500.00	$0.00	$25,000.00	$27,500.00	$0.00	$0.00	$0.00
Arlington School of Dentistry 275	$50,000.00	$0.00	$0.00	$12,500.00	$12,500.00	$12,500.00	$12,500.00
The National Children's Project 310	$28,560.00	$0.00	$0.00	$28,560.00	$0.00	$0.00	$0.00
Total 2000 (3 items)	$131,060.00	$0.00	$25,000.00	$68,560.00	$12,500.00	$12,500.00	$12,500.00
Grand Total (5 items)	$231,060.00	$25,000.00	$25,000.00	$143,560.00	$12,500.00	$12,500.00	$12,500.00

1

Grant Commitments Schedule (6 Years)

Shows Payments scheduled in the next six years, including the total of any Payments remaining after that time.

Fixed Criteria

Requests with an unpaid balance.

Variations

A version of this report groups by Program Area 1.

Grant Commitment Schedule (6 years)

4/6/00

Organization Grant Amount	Total Paid	Scheduled Payments 2000	2001	2002	2003	2004	2005	Remaining Balance
American Foundation for Children $ 52,500.00 *Endownment Campaign*	$25,000.00	$27,500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Arlington School of Dentistry $ 50,000.00 *The Support for the Restoration of the School of Dentistry Library*	$25,000.00	$25,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Arlington School of Dentistry $ 50,000.00 *Funding for new instruments*	$0.00	$12,500.00	$12,500.00	$12,500.00	$12,500.00	$0.00	$0.00	$0.00
The National Children's Project $ 28,560.00 *To help sponsor "The Children of the World" Conference*	$0.00	$28,560.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
National Institute for Technical Learning Coalition $ 50,000.00 *Y2K Educational Outreach*	$0.00	$50,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Grand Total (5 items)	$50,000.00	$143,560.00	$12,500.00	$12,500.00	$12,500.00	$0.00	$0.00	$0.00

1

Grant Continuity Schedule in Local Currency

If you use GIFTS Alta multi-currency features to track grant amounts in other currencies (based on currency exchange rates saved in the Administrator Module), the Grant Continuity Schedule reports provide information about grants' balances, Payments, Amendments, and other changes in either your functional currency or the grants' local/other currencies.

About the Report

This report is somewhat similar to the Schedule of Appropriations and Payments report. For each grant, the report lists its original amount, the opening balance at the beginning of the current fiscal year ("current" as determined by the "as of" date), as well as any Payments and/or grant amendments made in that fiscal year by the "as of" date. From these data, the report then calculates the closing (or remaining) balance on the "as of" date.

The key difference in the Grant Continuity Schedule by Local Currency is that it reports only grants with a local/other currency specified, and the amounts shown are the local/other amounts.

Important: Throughout the section describing this report, the phrase "current year" refers to the fiscal year of the "as of" date chosen at the time the report is run.

About the Report Data

In order the understand the data found in the Continuity Schedule reports, you should understand the calculations used in each column of the report:

Column	Contents
Grant #	The Request ID number.
Name	The name of the grantee Organization.

Column	Contents
Decision Date	The Request's Disposition Date.
Currency	The local/other currency in which the grant has been calculated.
Original Grant	The grant's original local/other amount.
Opening Balance	*If* the Request's Fiscal Year is prior to the current year, the amount is equal to: ❖ the Request's original Local/Other Amount *plus* ❖ the sum of all Local/Other Amendment Amounts for grant amendments done before the beginning of the current year *minus* ❖ the sum of all Local/Other Payment Amounts paid before the beginning of the current year. If the Request was approved during the current year, zero.
Approvals	The original local/other amount for the Request, *if* it was approved during the current year (on or before the "as of" date). Otherwise, zero.
Payments	The sum of local/other amounts of all Payments paid, voided, or refunded during the current year (on or before the "as of" date).
Amendments	The sum of local/other amounts of all grant amendments done during the current year (on or before the "as of" date).
Closing Balance	= Opening Balance + Approvals + Payments + Amendments. In effect, it shows the current remaining balance of the grant (in the local/other currency) as of the "as of" date.

Running the Report

When you run this report, setting the "as of" date is key to reporting data correctly. When you set "as of" date to a date other than the current date, your report is affected in the following ways:

❖ When the report selects information relevant in the "current year," the current year is based on the "as of" date, not the current date.

- To be included in the report, the Request must have been approved on or before the "as of" date.
- For the report to consider a Payment paid (rather than scheduled), the Payment Date must be on or before the "as of" date.
- Report calculations that consider void and refunded Payments exclude these voids and refunds if their Payment Dates are after the "as of" date.

This report has been designed to recreate your data based on the "as of" date, but some data—once it is altered in GIFTS Alta—cannot be restored to its past condition; therefore, the results of reports run with the "as of" date may not completely represent a version of the financial data as of that date. The following data cannot be accurately recovered based on "as of" date.

- Payments that have been deleted are not reflected.
- Payments for which the amount changed between the "as of" date and the current date report the current amount, not the previous amount.

Which Grants Are Included in the Report?

Only Requests with a local/other currency—and which were approved on or before the "as of" date—are included in the report. In addition, those Requests are included only if they *also* meet *at least one* of the following criteria:

- The approval date (i.e., the Disposition Date of the approved Request) falls within the current year.
- The Request was amended in the current year. (That is, it is associated with at least one Grant Amendment Activity with a Done Date within the current year.)
- The Request has at least one Payment within the current year. (That is, the Request has at least one Payment with a status other than Canceled with a Budget Fiscal Year within the current year.)
- The Request still had some unpaid balance at the beginning of the current fiscal year.

You can further refine these criteria by selecting or creating a search before running the report.

To view your report after you have specified the necessary options, choose File ➤ Run Report from the Report Library menu. The report is generated and displayed in the Active Report Viewer:

Variations

A version of this report is grouped by:

❖ Fund

Grant Continuity Schedule in Local Currency **Fiscal Year 2004**

11/26/2004

Grant #	Name	Decision Date	Currency	Original Grant	Opening Balance 2004	Approvals 2004	Payments 2004	Amendments 2004	Closing Balance 2004
504	Atlantic Foundation	8/31/2003	EUR	145,000	72,500	0	(72,500)	0	0
506	Model Company Foundation	12/31/2003	EUR	145,000	145,000	0	(146,394)	0	(1,394)
507	Atlantic Foundation	1/31/2004	EUR	91,000	0	91,000	(68,250)	9,750	32,500
Total EUR (3 items)				381,000	217,500	91,000	(287,144)	9,750	31,106
503	Cancer Research Institute	1/31/2003	GBP	82,500	20,625	0	(20,625)	0	0
Total GBP (1 item)				82,500	20,625	0	(20,625)	0	0
505	California Children's Theatre	11/30/2003	JPY	380	285	0	(285)	0	0
Total JPY (1 item)				380	285	0	(285)	0	0
Grand Totals (5 items)				463,880	238,410	91,000	(308,054)	9,750	31,106

Note: The Grant Continuity Schedule in Local Currency report uses ActiveReports from Data Dynamics, not Crystal Reports, to render your results. The navigation options in ActiveReports are a little different

Icon	Name	Description
	Table of Contents	Open a left pane called Contents in the report viewer. Allows the use to click a particular grantee Organization and go to its first record in the report.
	Copy	Copy the contents of the page you are currently viewing, which can then be pasted into another program (e.g., MS Word).
	Find	Search for a word or phrase in the report.

Icon	Name	Description
	Single Page	If you are viewing multiple pages of the report, click this button to view single pages.
	Multiple Pages	View multiple pages of the report at once. When you click the button, you can then choose the number and layout of pages you want to view at once.
	Zoom In	Zoom in on the report text.
	Zoom Out	Zoom out from the report text.
100 %		Set the zoom percentage.
	Previous Page	Move to the previous page of the report.
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Printing the Report When the report has finished processing, you can print it by clicking the Print button on the viewer toolbar.

Exporting the Report When the report has finished processing, you can export it to a variety of file formats appropriate for word processors, spreadsheets, and other applications.

To export a report, select Export from the report viewer main menu. In the subsequent menu, select the file format to which you would like to export.

Grant Continuity Schedule in Functional Currency

If you use GIFTS Alta multi-currency features to track grant amounts in other currencies (based on currency exchange rates saved in the Administrator Module), the Grant Continuity Schedule reports provide information about grants' balances, Payments, Amendments, and other changes in either your functional currency or the grants' local/other currencies.

Caution: If any Payment for a Request with one local/other currency has been calculated into a different local/other currency, the data for that Request will be incorrect.

About the Report

The report for Functional Currency displays much the same data as the Local Currency version found on page 105. It is only available, however, if you track historical exchange rates. Exchange rates change and can be updated in GIFTS Alta over time; if you 1) keep a historical record of previous exchange rates and 2) allow some or all multi-currency Requests and Payments to adjust their *functional* amounts when GIFTS Alta system exchange rates are updated, you can use this report to see—in addition to the other data—the net increase or decrease in the functional grant amount during the current year due to exchange rate changes.

Important: Throughout the section describing this report, the phrase "current year" refers to the fiscal year of the "as of" date chosen at the time the report is run.

About the Report Data

In order the understand the data found in the Continuity Schedule reports, you should understand the calculations used in each column of the report:

Column	Contents
Grant #	The Request ID number.
Name	The name of the grantee Organization.
Decision Date	The Request's Disposition Date.
Currency	The local/other currency in which the grant has been calculated.
Original Grant	The grant's original local/other amount.
Opening Balance	*If* the Request's Fiscal Year is prior to the current year, the amount is equal to: ❖ the Request's original Local/Other Amount *plus* ❖ the sum of all Local/Other Amendment Amounts for grant amendments done before the beginning of the current year *minus* ❖ the sum of all Local/Other Payment Amounts paid before the beginning of the current year. The result of these calculations is then converted to your *functional* currency, based on the exchange rate in effect on the last day of the year before the current year. If the Request was approved during the current year, zero.
Approvals	The original functional amount for the Request, *if* it was approved during the current year (on or before the "as of" date). Otherwise, zero.
Payments	The sum of functional amounts of all Payments paid, voided, or refunded during the current year (on or before the "as of" date), *shown as a negative number.*
Amendments	The sum of functional amounts of all grant amendments done during the current year (on or before the "as of" date).

Column	Contents
Translation G/L	This shows your gain/loss based on exchange rate changes between the first day of the current year and the "as of" date, by performing the following calculation: = Closing Balance - (Opening Balance + Approvals + Payments + Amendments) This may be a positive or negative number.
Closing Balance	This figure is calculated as: ❖ the Request's original Local/Other Amount *plus* ❖ the sum of all Local/Other Amendment Amounts for grant amendments done on or before the "as of" date *minus* ❖ the sum of all Local/Other Payment Amounts paid, voided, or refunded on or before the "as of" date The result of these calculations is then converted to your *functional* currency, based on the exchange rate in effect on the "as of" date. In effect, it shows the current remaining balance of the grant (in the local/other currency) as of the "as of" date.

Running the Report

When you run this report, setting the "as of" date is key to reporting data correctly. When you set "as of" date to a date other than the current date, your report is affected in the following ways:

- When the report selects information relevant in the "current year," the current year is based on the "as of" date, not the current date.
- To be included in the report, the Request must have been approved on or before the "as of" date.
- For the report to consider a Payment paid (rather than scheduled), the Payment Date must be on or before the "as of" date.
- Report calculations that consider void and refunded Payments exclude these voids and refunds if their Payment Dates are after the "as of" date.

This report has been designed to recreate your data based on the "as of" date, but some data—once it is altered in GIFTS Alta—cannot be restored to its past condition; therefore, the results of reports run with the "as of" date may not completely represent a version of the financial data as of that date. The following data cannot be accurately recovered based on "as of" date.

- Payments that have been deleted are not reflected.
- Payments for which the amount changed between the "as of" date and the current date report the current amount, not the previous amount.

Which Grants Are Included in the Report?

Only Requests with a local/other currency—and which were approved on or before the "as of" date—are included in the report. In addition, those Requests are included only if they *also* meet *at least one* of the following criteria:

- The approval date (i.e., the Disposition Date of the approved Request) falls within the current year.
- The Request was amended in the current year. (That is, it is associated with at least one Grant Amendment Activity with a Done Date within the current year.)
- The Request has at least one Payment within the current year. (That is, the Request has at least one Payment with a status other than Canceled with a Budget Fiscal Year within the current year.)
- The Request still had some unpaid balance at the beginning of the current fiscal year.

You can further refine these criteria by selecting or creating a search before running the report.

To view your report after you have specified the necessary options, choose File ➤ Run Report from the Report Library menu. The report is generated and displayed in the Active Report Viewer:

Variations

A version of this report is grouped by:

❖ Fund

Grant Continuity Schedule in Functional Currency **Fiscal Year 2004**

11/23/2004

Grant #	Name	Decision Date	Currency	Original Grant	Opening Balance 2004	Approvals 2004	Payments 2004	Amendments 2004	Translation G/L 2004	Closing Balance 2004
504	Atlantic Foundation	8/31/2003	EUR	145,000	51,786	0	(51,786)	0	0	0
506	Model Company Foundation	12/31/2003	EUR	145,000	103,571	0	(107,555)	0	2,951	(1,033)
507	Atlantic Foundation	1/31/2004	EUR	91,000	0	66,852	(50,000)	7,500	(278)	24,074
Total EUR (3 items)				381,000	155,357	66,852	(209,341)	7,500	2,673	23,041
503	Cancer Research Institute	1/31/2003	GBP	82,500	11,458	0	(11,458)	0	0	0
Total GBP (1 item)				82,500	11,458	0	(11,458)	0	0	0
505	California Children's Theatre	11/30/2003	JPY	380	29,082	0	(28,984)	0	(98)	0
Total JPY (1 item)				380	29,082	0	(28,984)	0	(98)	0
Grand Totals (5 items)				463,880	195,897	66,852	(249,783)	7,500	2,575	23,041

Note: The Grant Continuity Schedule in Functional Currency report uses ActiveReports from Data Dynamics, not Crystal Reports, to render your results. The navigation options in ActiveReports are a little different

Icon	Name	Description
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Exporting the Report When the report has finished processing, you can export it to a variety of file formats appropriate for word processors, spreadsheets, and other applications.

To export a report, select Export from the report viewer main menu. In the subsequent menu, select the file format to which you would like to export.

Grant Payment Confirmation by Staff

A list of Payments with a Status of Scheduled, Contingent or Hold, grouped by staff member, and including information on any requirements due for the current year, on the specific Payment or the grant in general.

Fixed Criteria

Payments with a Status of Scheduled, Contingent or Hold, and Requirements with a Scheduled Date in the current year.

Grant Payment Confirmation by Staff

4/3/00

Payee Organization / Project Title	Approved Amount	Project Start	Project End	Payment Amount	Schedule Date	Payment Status
Colette Rogers						
Arlington School of Dentistry *Funding for new instruments*	$50,000.00	6/30/00	6/30/01	$12,500.00	4/12/00	Scheduled
Requirements Due Schedule: Type: Progress Report; Due Date: 12/29/00; Date Rec'd: ; Notes:						
California Children's Theatre *The "2000 Career Fair"*	$10,609.00	3/15/00	3/15/01	$10,609.00	4/14/00	Scheduled
Requirements Due Schedule: Type: Progress Report; Due Date: 9/15/00; Date Rec'd: ; Notes:						
National Institute for Technical Learning Coalition *Y2K Educational Outreach*	$50,000.00	12/21/99	12/21/00	$20,000.00	4/5/00	Contingent
Requirements Due Schedule: Type: Challenge; Due Date: 4/5/00; Date Rec'd: ; Notes: NITLC is required to Raise $250,000 in order for payments to be released						
Total Colette Rogers (3 items)				$43,109.00		
Kelly Goldberg						
Ryan School of Medicine *Charles S. Godin Scholarship program*	$154,500.00	3/24/00	3/24/01	$29,500.00	4/19/00	Scheduled
Requirements Due Schedule: Type: Site Visit; Due Date: 2/2/00; Date Rec'd: 2/2/00; Notes: Completed Successfully						
Requirements Due Schedule: Type: Progress Report; Due Date: 5/19/00; Date Rec'd: ; Notes: Progress report must include student GPA. Any Student with a GPA under 2.5 must be sent probation letter						
Requirements Due Schedule: Type: Progress Report; Due Date: 9/25/00; Date Rec'd: ; Notes:						

1

Grant Payment Summary

A comprehensive summary of Payment information for Approved Requests, including the total number of Payments, the amount granted, the amount scheduled (including held and contingent Payments), the amount paid, and any unscheduled balance. It also includes the next Payment's Schedule Date and the amount of the next Payment due.

Fixed Criteria

Scheduled, Contingent and Hold Payments for Approved Requests.

Variations

The "by Payee" variation of this report lists grants by the payee Organization instead of the grantee. Grants with Payments to more than one payee are listed more than once (once per each payee), so the Grant Amount and Balance Amount totals are not included

Grant Payment Summary
5/23/00

Grantee Organization Project Title, Payee(s)	Request ID Ref. No.	Granted Amount	# of Pmts	Payments Paid	Payments Remaining	Balance Unscheduled	Next Pmt Sch. Date	Next Pmt Amount
Kids With AIDS Research Center *Camp Hope Summer Program*	164	$235,000.00	2	$235,000.00	$0.00	$0.00		
Kids With AIDS Research Center *2nd Quarter Volunteer Gifts, 1998*	188	$300.00	1	$300.00	$0.00	$0.00		
Kids With AIDS Research Center *4th Quarter Volunteer Gifts, 1998*	194	$300.00	1	$300.00	$0.00	$0.00		
Teen Aid Center *The support of the "When Saying No Doesn't Work" project*	104	$23,500.00	1	$23,500.00	$0.00	$0.00		
Teen Aid Center *4th Quarter Volunteer Gifts, 1997*	111	$200.00	1	$200.00	$0.00	$0.00		
Teen Aid Center *The Aids Awareness Project*	146	$35,000.00	1	$35,000.00	$0.00	$0.00		
Teen Aid Center *1st Quarter Volunteer Gifts, 1999*	261	$300.00	1	$300.00	$0.00	$0.00		
Teen Aid Center *General Operating Support*	274	$35,700.00	2	$0.00	$35,700.00	$0.00	5/30/00	$15,700.00
Teen Aid Center *3rd Quarter Volunteer Gifts, 1997*	97	$200.00	1	$200.00	$0.00	$0.00		
	Grand Total (9 items)	$330,500.00		$294,800.00	$35,700.00	$0.00		

1

Grant Planning Worksheet

For year-end planning, this report displays in worksheet format the giving for the current year, any commitments for the next year and a space to write in the proposed amount for next year, per organization.

Fixed Criteria

Organizations with Requests Approved in the current year, Payments Paid in the current year or Payments Scheduled for the coming year.

Variations

Versions of the report group by:

- Grant Fund
- Program Area 1

Grant Planning Worksheet

4/6/00

Grantee Organization City, State	Granted 2000	Paid 2000	Scheduled Plan 2001	2001
Abuse Prevention and Rehabilitation Fund Washington, DC *Children's Retreat*	$0.00	$10,000.00	$0.00	_____
American Foundation for Children New York, NY *Endownment Campaign*	$52,500.00	$25,000.00	$0.00	_____
Arlington School of Dentistry Los Angeles, CA *Funding for new instruments*	$50,000.00	$0.00	$12,500.00	_____
Brooklyn Ballet New York, NY *Snowflake Ball*	$0.00	$1,000.00	$0.00	_____
Brooklyn Ballet New York, NY *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	$5,250.00	$0.00	$0.00	_____
California Children's Theatre San Francisco, CA *The "2000 Career Fair"*	$10,609.00	$0.00	$0.00	_____
The Children's Fund Washington, DC *"The 1999 Annual Conference"*	$26,250.00	$26,250.00	$0.00	_____
Computers for Kids New York, NY *The sponsorship of their Annual Benefit Dinner*	$15,300.00	$0.00	$0.00	_____

1

In-Kind Payments Made

A report of paid payments including fields specific to in-kind payments: fair market value, tax value, book value and in-kind notes. Note that the report does not automatically exclude Payments without in-kind giving information. You can use search criteria, such as the Payment Type or Support Type, to restrict the report to your in-kind Payments.

Fixed Criteria

Payments with a Status of Paid or Void.

Variations

Versions of the report group by:

- Payment Fund Donor
- Program Area 1

In-Kind Payments Made

Type is 'In-kind'
4/6/00

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Fair Market Value	Tax Value	Book Value	In-Kind Description
American Foundation for Children *The donation of computers* $ 300.00	147	6/9/98	$300.00	$0.00	$200.00	1 - 386 computer
Brooklyn Ballet *Donation of Electronic Goods* $ 7,000.00	245	6/11/99	$7,000.00	$0.00	$4,000.00	
East Side Learning Center *Donation of used computers* $ 2,000.00	37	6/3/96	$2,000.00	$0.00	$1,500.00	3 pentium computers with Monitors and One HP laserjet II Printer
East Side Learning Center *Used Computers* $ 4,000.00	243	3/26/99	$4,000.00	$1,000.00	$2,400.00	4 computers with monitors that were 3 Years old. Pentium 60
Teen Aid Center *The donation of office furniture for a building expansion project* $ 1,200.00	78	6/27/97	$1,200.00	$240.00	$1,000.00	3 Chairs, 1 desk and a computer cart. 80% depreciated.
West Side Center *The donation of new computers in their expanded facility* $ 25,000.00	263	12/22/99	$25,000.00	$10,000.00	$12,000.00	
		Grand Total (6 items)	$39,500.00	$11,240.00	$21,100.00	

1

Payment Status Summary

A summary of all Payments entered in GIFTS Alta, totaled by their respective Payment Status. Includes columns for the total amount scheduled, and then breaks this out by Paid, Refund, Cancelled, Voided, Scheduled, Hold and Contingent Payments.

Variations

Versions of the report group by:

- Payment Fund
- Program Area 1
- Fiscal Year

Payment Status Summary - by Program Area

5/23/00

Program Area	Total Payment Amount	Paid Payments	Refunds	Cancelled Payments	Voided Payments	Payments Oustanding	Payments on Hold	Contingent Payments	Total Paid	Total Outstanding
No Code Specified	26,600.00	26,600.00	0.00	0.00	0.00	0.00	0.00	0.00	26,600.00	0.00
Arts and Culture	250,300.00	250,300.00	0.00	0.00	0.00	0.00	0.00	0.00	250,300.00	0.00
Civic and Community	1,278,342.21	1,278,342.21	0.00	0.00	-12,500.00	0.00	0.00	12,500.00	1,278,342.21	12,500.00
Education	2,141,620.00	2,066,620.00	0.00	0.00	0.00	50,000.00	0.00	25,000.00	2,066,620.00	75,000.00
Health and Human Services	933,760.00	898,060.00	0.00	0.00	0.00	35,700.00	0.00	0.00	898,060.00	35,700.00
Grand Total	4,630,622.21	4,519,922.21	0.00	0.00	-12,500.00	85,700.00	0.00	37,500.00	4,519,922.21	123,200.00

1

Payments Due Schedule

A listing of outstanding Payments, including the Grant Amount, Project Description, Reference Number, Schedule Date, Payment Amount, and the Payment Fund. If the Payment Status is Contingent or Hold, a separate column displays this information along with any Payment notes.

Fixed Criteria

Payments with a Status of Scheduled, Hold, or Contingent. (Includes Payments for Approved Requests only.)

Variations

Versions of the report group by:

- Payment Support Type
- Grantee Organization
- Month
- Program Area 1
- Program Area 1 and 2
- Payment Fund

Two versions of this report include Payment local/other currency amounts, for those engaged in international grant-giving:

- Payments Due Schedule, including Other Currencies
- Payments Due Schedule - by Country, including Other Currencies

Payments Due Schedule, by Program Area 1
Schedule Date is this month
4/3/00

Payee Organization Project Title, Grant Amount	Request ID Ref. No.	Due Date	Payment Amount	Notes
Arts and Culture				
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event* $ 5,250.00	301	4/5/00	$5,250.00	*Hold* Payment on hold to prevent movement to A/P Module. Await Approval from Mr. Humphries.
California Children's Theatre *The "2000 Career Fair"* $ 10,609.00	306	4/14/00	$10,609.00	
		Total Arts and Culture (2 items)	$15,859.00	
Education				
Arlington School of Dentistry *Funding for new instruments* $ 50,000.00	275	4/12/00	$12,500.00	
National Institute for Technical Learning Coalition *Y2K Educational Outreach* $ 50,000.00	294	4/5/00	$20,000.00	*Contingent*
Ryan School of Medicine *Charles S. Godin Scholarship program* $ 154,500.00	307	4/19/00	$29,500.00	
		Total Education (3 items)	$62,000.00	
		Grand Total (5 items)	$77,859.00	

1

Payments Made

A listing of Payments that have been marked as Paid; includes the Payment Date and Check Number, if available

Fixed Criteria

Payments with a Status of Paid, Refund, or Void.

Variations

Versions of the report group by:

- Payment Support Type
- Grantee Organization
- Month
- State
- Program Area 1
- Program Area 1 and 2
- Payment Fund

Two versions of this report include Payment local/other currency amounts, for those engaged in international grant-giving:

- Payments Made, including Other Currencies
- Payments Made - by Country, including Other Currencies

Payments Made - By Month

Fund/Donor is 'Corporation' AND Paid Date was in last quarter

4/6/00

Payee Organization Project Title, Grant Amount	Grant No. Ref. No.	Payment Date	Payment Amount	Payment Fund	Check Number Notes
January, 2000					
Brooklyn Ballet *Snowflake Ball* $ 1,000.00	290	1/31/00	$1,000.00	Corporation	1236
		Total January, 2000 (1 item)	$1,000.00		
February, 2000					
The Children's Fund *"The 1999 Annual Conference"* $ 26,250.00	302	2/28/00	$26,250.00	Corporation	1244
		Total February, 2000 (1 item)	$26,250.00		
March, 2000					
Teen Aid Center *Counseling program for school violence victims* $ 3,500.00	312	3/22/00	$3,500.00	Corporation	1266
United Federation Inc. *Parks and Rec of Rockland County* $ 10,000.00	295	3/16/00	$10,000.00	Corporation	1256
		Total March, 2000 (2 items)	$13,500.00		
		Grand Total	$40,750.00		

1

Payments Made - Charitable vs. Non Charitable

If your organization tracks "quid pro quo" information for Payments, this report lists the deductible and non-deductible amounts entered for each

Payment. Also includes the Check Number and Payment Date.

Fixed Criteria

Payments with a Status of Paid or Void.

Payments Made - Charitable Vs. Non Charitable Deduction

Dinners & Events
4/3/00

Payee Organization Project Title	Paid Date Check #	Deduct Amount	Non Deduct Amount	Payment Amount
Arlington School of Dentistry *To sponsor the "Annual Leadership Award Dinner"*	1/19/98 0012411	$3,000.00	$1,000.00	$4,000.00
Brooklyn Ballet *The sponsorship of a table for the "Flights of Fantasy" Gala*	1/19/98 0012385	$3,500.00	$1,500.00	$5,000.00
California Children's Theatre *The Annual "Leadership Awards" Dinner*	3/21/96 0010123	$2,000.00	$500.00	$2,500.00
The Children's Fund *The sponsorship of the "98 Annual Conference"*	1/19/98 0012387	$17,000.00	$8,000.00	$25,000.00
East Side Learning Center *The Support for the "Fall Formal Gala"*	3/21/96 0010131	$2,000.00	$500.00	$2,500.00
Shea Dance Company *The Sponsorship for "Gala 96- 14th Annual Fundraiser"*	3/21/96 0010166	$1,900.00	$500.00	$2,400.00
Shea Dance Company *The 1999 Annual Banquet*	6/11/99 00110	$4,000.00	$1,250.00	$5,250.00
United Federation Inc. *The Annual Benefit*	3/21/96 0010169	$900.00	$300.00	$1,200.00
University of America *To sponsor a table for the 1998 "Citizen of the Year Dinner"*	1/19/98 0012419	$4,000.00	$1,000.00	$5,000.00
	Grand Total (9 items)	$38,300.00	$14,550.00	$52,850.00

1

Payments Made - OBRA Report

This report shows whether or not a receipt is required on each Payment, and the Schedule Date and Done Date of the receipt. The full name and address of the payee Contact is included for easy follow-up. The report also includes the deductible and non-deductible amount for each Payment and the Organization's tax status.

Fixed Criteria

Payments with a Status of Paid or Void, and "Receipt Required" Activities associated with these Payments.

Payments Made - OBRA Report

4/3/00

Payee Organization Request Primary Contact Project Title	Staff	Amount Check # Paid Date	Deduct Amount	Non Deduct Amount	Tax Status	Receipt Sched. Date	Receipt Rec. Date
Arlington School of Dentistry Rayce, Anita 122 South Ave. Arlington Hall Los Angeles, CA 34253 *To sponsor the "Annual Leadership Award Dinner"*	Colette Rogers	$4,000.00 0012411 9/8/98	$3,000.00	$1,000.00		10/8/98	11/12/98
Arlington School of Dentistry Rayce, Anita 122 South Ave. Arlington Hall Los Angeles, CA 34253 *To sponsor the "Annual Leadership Award Dinner"*	Kelly Goldberg	$4,120.00 7/7/99	$4,040.00	$80.00		7/7/99	7/21/99
Brooklyn Ballet Neff, Margaret 14 West 108th Street New York, NY 10012 *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	Lee Williamson	$5,250.00 00113 6/11/99	$5,000.00	$250.00	501c(3)	6/11/99	6/9/99
Shea Dance Company Smith, Johnathan J. 400 East 57th Street New York, NY 10018 *The 1999 Annual Banquet*	Lee Williamson	$5,250.00 00110 6/11/99	$4,000.00	$1,250.00	501c(3)	6/11/99	6/11/99
Grand Total (4 items)		$18,620.00	$16,040.00	$2,580.00			

1

Payments Reconciliation Report

Lists Payments by Status and then by Check Number. Includes the payee's legal name, the Grant Amount, Payment Fund, Payment Type, and Paid Date. If no legal name is on file for the payee, it's Organization Name is shown.

Fixed Criteria

Payments with a Status of Paid, Refund, or Void

Payments Reconciliation Report

5/23/00

Check Number	Check Payable to:	Grant Amount	Payment Date	Payment Amount	Payment Fund Payment Type	Request ID Ref. No.
Paid						
1403	Lower West Side Child Care Center	$50,000.00	5/15/00	$50,000.00	Foundation *Charitable Contribution*	293
1404	University of America	$100,000.00	5/15/00	$100,000.00	Foundation *Charitable Contribution*	296
1405	Adventure Club of Manhattan	$10,000.00	5/15/00	$10,000.00	Foundation *Charitable Contribution*	298
1406	United Federation Inc.	$10,039.21	5/15/00	$10,039.21	*Charitable Contribution*	295
1407	The National Children's Project	$250,000.00	5/15/00	$250,000.00	Foundation *Charitable Contribution*	297
2346	West Side Center	$25,000.00	12/22/99	$25,000.00	Foundation *Charitable Contribution*	263
2347	Hiller State University	$7,500.00	12/22/99	$7,500.00		288
2348	Shea Dance Company	$7,000.00	12/22/99	$7,000.00		285
2349	Brooklyn Ballet	$2,000.00	12/22/99	$2,000.00		286
2350	California Children's Theatre	$4,500.00	12/22/99	$4,500.00		287
			Total Paid (10 items)	$466,039.21		
Void						
2345	Ryan School of Medicine	$1,400.00	12/22/99	$0.00		284
			Total Void	$0.00		

1

Schedule of Appropriations and Payments (version 6)

This is a newer version of the Schedule of Appropriations and Payments report—sometimes called the IRS 990 report— which was introduced with the release of GIFTS 6. The previous version of the report is still available, and is described on page 133.

The new version of the Schedule of Appropriations and Payments report offers the following improvements and changes:

- *The report runs* much *faster now.*

  Previously, clients with large databases often found that the Schedule of Appropriations and Payments report could take several hours to run. The new report significantly reduces report run time.

- *Calculation methods have been changed to provide more accurate reporting.*

  If you are going to be running or reading the new Schedule of Appropriations and Payments report, you need to understand the calculations that went into the data within it. For details, please see "About the Report Data" on page 128.

- *The report uses a new report control, ActiveReports.*

  Other standard GIFTS Alta reports are generated using Crystal Reports. This new report uses a new reporting control, ActiveReports from Data Dynamics, Ltd. This reporting tool is also used for ad hoc reporting.

About the Report Data

In order the understand the data found in the new Schedule of Appropriations and Payments report, you should understand the calculations used in each column of the report:

Column	Contents
Recipient and/or Purpose	This column draws from a number of GIFTS Alta fields to provide data about the grantee Organization and the Request for which Payments were made: ❖ First is the Legal Name of the grantee Organization. (If the Legal Name is blank, the Organization Name is used.) This is followed by the grantee Organization's Address, City, State, Zip code, and Country. ❖ Information about the grant follows: the approved Request's Project Title, Grant Amount, and Fiscal Year.
Tax Status	The Tax Status of the grantee Organization.
Beginning Balance	This column shows the unpaid balance of the approved Request at the beginning of the "current" fiscal year (based on the "as of" date). It is calculated as follows: ❖ If the Request was approved during the current fiscal year, the beginning balance is zero ($0.00). (The grant amount will be included in the next column, Newly Allocated.) ❖ If the Request was approved before the "current" fiscal year, the beginning balance is the original grant amount plus the amount of any grant amendments made *before* the current fiscal year minus the total amount of any Payments made *before* the current fiscal year. (The total amount of any grant amendments made *during* the current fiscal year will be included in the Amended column (see below).)
Newly Allocated	If the Request was approved during the current fiscal year, the original grant amount is shown here. Otherwise, the Newly Allocated amount is zero ($0.00).
Amended	The sum of the amounts of all grant amendments made during the current fiscal year. If the Request had no grant amendments made during the current fiscal year, the Amended amount is zero ($0.00).

Column	Contents
Amount Paid	The sum of the amounts of all paid, refunded, and voided Payments that meet the following criteria: ❖ The Fiscal Year of the Payment is the current fiscal year. ❖ The Payment Date falls before the report's "as of" date.
Ending Balance	The Beginning Balance plus the Newly Allocated amount plus the Amended column amount minus the Amount Paid.
Population Served	The Population Served indicated in the Request Coding Sheet. If no Population Served code is included, the column is blank. NOTE: This columns appears only if you run the Schedule of Appropriations and Payments Showing Population Served version of the report.

Running the Report

When you run this report, setting the "as of" date is key to reporting data correctly. When you set "as of" date to a date other than the current date, your report is affected in the following ways:

- When the report selects information relevant in the "current year," the current year is based on the "as of" date, not the current date.
- To be included in the report, the Request must have been approved on or before the "as of" date during the "current" fiscal year.
- For the report to consider a Payment paid (rather than scheduled), the Payment Date must be on or before the "as of" date.
- Report calculations that consider void and refunded Payments exclude these voids and refunds if their Payment Dates are after the "as of" date.

This report has been designed to recreate your data based on the "as of" date, but some data—once it is altered in GIFTS Alta—cannot be restored to its past condition; therefore, the results of reports run with the "as of" date may not completely represent a version of the financial data as of that date. The following data cannot be accurately recovered based on "as of" date.

- Payments that have been deleted are not reflected.

- Payments for which the amount changed between the "as of" date and the current date report the current amount, not the previous amount.

Which Grants Are Included in the Report?

Only Requests that were approved on or before the "as of" are included in the report. In addition, those Requests are included only if they *also* meet *at least one* of the following criteria:

- The approval date (i.e., the Disposition Date of the approved Request) falls within the current year. (Note that the "current year" is the fiscal year within which the "as of" date falls.)
- The Request was amended in the current year. (That is, it is associated with at least one Grant Amendment Activity with a Done Date within the current year.)
- The Request has at least one Payment within the current year. (That is, the Request has at least one Payment with a status other than Canceled with a Budget Fiscal Year within the current year.)
- The Request still had some unpaid balance at the beginning of the current fiscal year.

As noted in the report instructions, you can further refine these criteria by selecting or creating a Payments search before running the report.

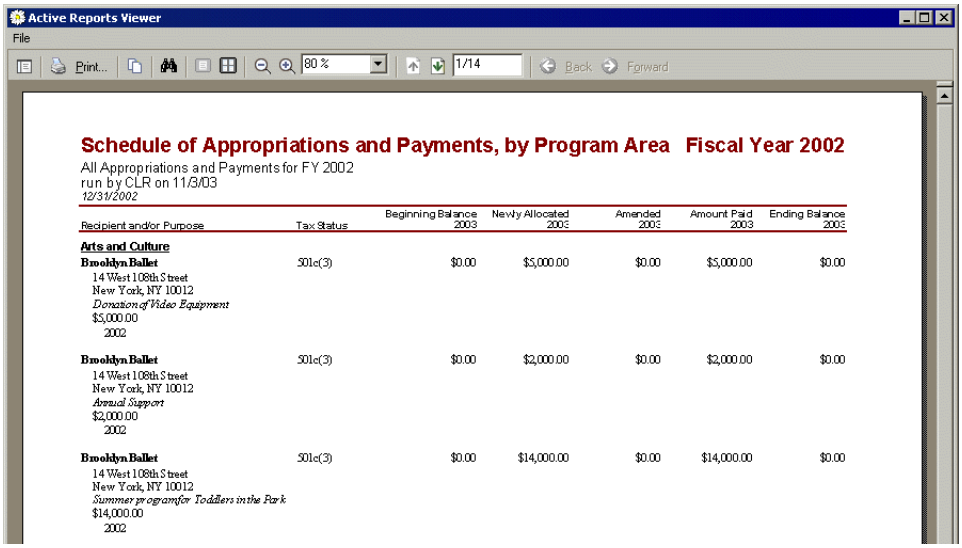
The cumulative effect of these criteria is to find only those approved Requests (grants) that saw decreases (i.e., payments) or increases (i.e., original grants and/or grant amendments) in their balances during a given fiscal year. The report then calculates the amounts of these payments and appropriations.

To view your report after you have specified the necessary options, choose File ➤ Run Report from the Report Library menu. The report is generated and displayed in the Active Report Viewer:

Variations

Versions of this report group by:

- Population Served
- Program Area 1



Note: The new Schedule of Appropriations and Payments (version 6) report, uses ActiveReports from Data Dynamics, not Crystal Reports, to render your results. The navigation options in ActiveReports are a little different

Icon	Name	Description
	Table of Contents	Open a left pane called Contents in the report viewer. Allows the use to click a particular grantee Organization and go to its first record in the report.
	Copy	Copy the contents of the page you are currently viewing, which can then be pasted into another program (e.g., MS Word).

Icon	Name	Description
	Find	Search for a word or phrase in the report.
	Single Page	If you are viewing multiple pages of the report, click this button to view single pages.
	Multiple Pages	View multiple pages of the report at once. When you click the button, you can then choose the number and layout of pages you want to view at once.
	Zoom In	Zoom in on the report text.
	Zoom Out	Zoom out from the report text.
100 %		Set the zoom percentage.
	Previous Page	Move to the previous page of the report.
	Next Page	Move to the next page of the report.
Back		Go back to the last page you viewed before the current page.
Forward		If you click Back to view the last page viewed, you can click Forward to the return to that page.

Printing the Report When the report has finished processing, you can print it by clicking the Print button on the viewer toolbar.

Exporting the Report When the report has finished processing, you can export it to a variety of file formats appropriate for word processors, spreadsheets, and other applications.

To export a report, select Export from the report viewer main menu. In the subsequent menu, select the file format to which you would like to export.

Schedule of Appropriations and Payments

You can use the Schedule of Appropriations and Payments reports to generate your IRS 990 reports. These reports show your commitments at the beginning of the year, the amount appropriated during the course of the year, the amount paid during the year, and your outstanding commitments at the end of the year.

About the Report Data

The report includes the following information for grants within a given year.

Column	Description
Recipient	The legal name and address of the recipient Organization, the Project Title of the grant, the total Grant Amount, and the grant's Fiscal Year. (In GIFTS Alta, a grant's Fiscal Year is based on the date on which it was Approved.) If no legal name is on file for the Organization, it's Organization Name is shown.
Tax Status	The tax status of the recipient, as indicated on the Tax Status tab of its Organization record.
Beginning Balance	The amount that you have committed to pay for the grant as of the beginning of the year. For grants made in previous years, this is the remaining balance. For grants made during the current year, this amount is always zero.
Newly Allocated	The amount appropriated to the grant during the current year. If the grant was approved in the current year, this value is the total grant amount.
Amended	If the grant was amended during the current year, this value reflects the amount of the amendment.

Column	Description
Amount Paid	The amount paid during the current year. Note that this amount is calculated based on the Fiscal Year specified in the grant's payments, not on the Scheduled Date or Paid Date of the Payments. **Note:** If you "pre-pay" grants when you have extra funds in your budget at the end of a year, be careful to ensure that the Fiscal Year indicated in the Payment record properly reflects the year in which you wish to report it to the IRS. **Example:** If you pay a Payment that was scheduled for February 2001 in December 2000 because you have available funds, this report reflects the Fiscal Year assigned to the Payment, not the Paid Date.
Ending Balance	The remaining commitments for this grant, including Payments scheduled in future years and Payments scheduled for the current year that have not been paid.

Running the Report

When you run this report, you should set the 'as of' date of the report to the end of the year on which you wish to report. If you want, for example, to generate a report for your 2000 IRS reporting, set the 'as of' date to December 31, 2000. Thus, the report generates data for 2000—even if you are running the report while you prepare your taxes in April 2001.

You should always set the 'as of' date to December 31 of the year on which you want to report. The 'as of' date ensures that the report reflects only what you have done up to that date. With an 'as of' date of 12/31/00, Payments that your organization paid in 2001 would be shown as outstanding in the report because they were outstanding *as of* 12/31/00.

Which Grants are Included in the Report?

The report includes grants that have an open balance or for which appropriations were made during the year. Specifically, the report includes:

- Grants that are approved or amended within the year.

- Grants with Payments that have been scheduled or paid within the year. (**Reminder:** the reported date of the Payment is based on the Payment's Fiscal Year, not its Paid Date.)
- Grants with a balance as of the beginning or end of the year. Only grants with Scheduled Payments are included.

  Note: The report uses Payment data to make its calculations. If a grant does not have any Payments, it is not included in the report—even if it has an open balance within the year.

Note that future grants are not included. If you run the report 'as of' December 31, 2000, grants approved in 2001 or later are not included.

Fixed Criteria

Requests that have an unpaid balance or for which appropriations were made during the year.

Variations

Versions of this report group by:

- Population Served
- Program Area 1

Schedule of Appropriations and Payments **Fiscal Year 2000**

12/31/00

Recipient and/or Purpose	Tax Status	Beginning Balance 2000	Newly Allocated 2000	Amended 2000	Amount Paid 2000	Ending Balance 2000
Adventure Club of Manhattan 800 West 103th Street New York, NY 10021 *Extreme Sport Marathon* $ 10,000.00 1999	501c(3)	$10,000.00	$0.00	$0.00	$20,000.00	($10,000.00)
Lower West Side Child Care Center 118 West 18th Street New York, NY 10014 *Summer School Program* $ 50,000.00 1999	501c(3)	$50,000.00	$0.00	$0.00	$100,000.00	($50,000.00)
The National Children's Project 629 West 58th Street New York, NY 10019 *Funding for new daycare center* $ 250,000.00 1999	501c(3)	$250,000.00	$0.00	$0.00	$750,000.00	($500,000.00)
Ryan School of Medicine 142 Pennington Ave. Olin Hall Los Angeles, CA 34253 *3rd Quater MG - 1999* $ 1,400.00 1999	501c(3)	$1,400.00	$0.00	$0.00	$1,400.00	$0.00

1

Summary of Paid Payments

A summary of Payments that have been marked as Paid, including number of items and percentages.

Fixed Criteria

Payments with a Status of Paid, Refund, or Void.

Variations

Versions of this report group by:

- Payment Type
- Payment Fund
- Geographical Area 1
- Program Area 1
- Staff
- Payment Support Type

Summary of Paid Payments - by Program Area

Paid Date was in last year

12/31/00

Program Area 1	Payment Count	% of Total Count	Payment Amount	% of Total Amount
Arts and Culture	4	11.11 %	$42,500.00	5.03%
Civic and Community	11	30.56 %	$140,428.00	16.61%
Education	11	30.56 %	$334,720.00	39.59%
Health and Human Services	10	27.78 %	$327,860.00	38.78%
Grand Total	36	100.00 %	$845,508.00	100.00%

1

Top 20 Payments by Payment Amount

The largest 20 Payments in the search criteria provided, in descending order by Payment Amount.

Fixed Criteria

Payments for Approved Requests.

Top 20 Payments by Payment Amount

12/31/00

Payment Amount	Payee Organization Project Title, Grant Amount	Status Schedule/Paid Date	Payment Fund Payment Type
$ 154,500.00	**Ryan School of Medicine** *The support of the "Charles S. Godin" Scholarship program* $ 154,500.00	Paid 6/11/99	Foundation Charitable Contribution
$ 117,500.00	**Kids With AIDS Research Center** *Camp Hope Summer Program* $ 235,000.00	Paid 6/11/99	Foundation Charitable Contribution
$ 62,500.00	**National Institute for Technical Learning Coalition** *"Building Bridges" Program* $ 125,000.00	Paid 6/24/99	Foundation Charitable Contribution
$ 56,100.00	**Sunflower House for Youth in Distress** *General Operating Support* $ 56,100.00	Paid 6/11/99	Foundation Charitable Contribution
$ 52,500.00	**American Foundation for Children** *Endowment Campaign* $ 52,500.00	Paid 6/11/99	Foundation Charitable Contribution
$ 47,500.00	**The Children's Fund** *General Operating Support* $ 47,500.00	Paid 6/11/99	Foundation Charitable Contribution
$ 35,700.00	**Hiller State University** *The university scholarship fund for post graduate studies* $ 35,700.00	Paid 6/11/99	Foundation Charitable Contribution
$ 35,700.00	**Teen Aid Center** *General Operating Support* $ 35,700.00	Paid 12/30/99	Foundation
$ 28,560.00	**The National Children's Project** *To help sponsor "The Children of the World" Conference* $ 28,560.00	Paid 9/21/99	Corporation Charitable Contribution
$ 25,000.00	**Brooklyn Ballet** *For General Operating Support* $ 25,000.00	Paid 6/11/99	Foundation Charitable Contribution
$ 25,000.00	**Arlington School of Dentistry** *The Support for the Restoration of the School of Dentistry Library* $ 50,000.00	Paid 6/11/99	Foundation Charitable Contribution

1

6 Contact Reports

This chapter describes the standard reports that you can run from the Contacts folder of the GIFTS Alta Report Library.

In This Chapter

Contact Mailing Labels #5160 ..... **140**
Contact Mailing Labels #5162 ..... **140**
Contact Phone Book Report **141**
Contacts - Alpha List **142**
Duplicate Contacts **143**

Contact Mailing Labels #5160

Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5160 labels.

Variations

A version of this report groups by Zip Code.

Ms. Carol Albright
Teen Aid Center
534 Broadway
New York, NY 10016

Mr. Tom Alexander
294 Chestnut Street
Wayne, NJ 07470

Dr. Tom Alexander
Model Foundation
612 N. Eyeland Avenue
New York, NY 10024

Mr. David Anderson
California Children's Theatre
2234 South St.
Suite 913
San Francisco, CA 98078

Ms. Rose Anderson
Model Foundation
612 N. Eyeland Avenue
New York, NY 10024

Ms. Kim Andrews
612 N. Eyeland Avenue
New York, NY 10019

Ms. Virginia Appleton
Computers for Kids
111 E 57th Street
Suite 200
New York, NY 10021

Ms. Janet Austin
East Side Learning Center
14 East 83rd Street
Suite 10
New York, NY 10024

Mr. Raymond C. Austin
Computers for Kids
111 E 57th Street
Suite 200
New York, NY 10021

Contact Mailing Labels #5162

Mailing Labels addressed to the contact at their Primary Organization formatted for Avery #5162 labels.

Variations

A version of this report groups by Zip Code.

Ms. Carol Albright
Teen Aid Center
534 Broadway
New York, NY 10016

Mr. Tom Alexander
294 Chestnut Street
Wayne, NJ 07470

Dr. Tom Alexander
Model Foundation
612 N. Eyeland Avenue
New York, NY 10024

Mr. David Anderson
California Children's Theatre
2234 South St.
Suite 913
San Francisco, CA 98078

Ms. Rose Anderson
Model Foundation
612 N. Eyeland Avenue
New York, NY 10024

Ms. Kim Andrews
612 N. Eyeland Avenue
New York, NY 10019

Contact Phone Book Report

A simple listing of Contacts by last name, with telephone, fax and e-mail information for each Contact.

Contact Phone Book Report

Mailing List is 'Newsletter', 'Holiday Cards' or 'Annual Reports'
4/3/00

Contact Name	Primary Organization	Primary Telephone	Primary Fax	Email Address
Albright, Carol	Teen Aid Center	(212) 555-4050	(212) 555-4000	albrightcarol@teenaidcenter.org
Anderson, David	California Children's Theatre	(405) 555-5544		anderson@cct.org
Appleton, Virginia	Computers for Kids	(212) 522-4000	(212) 522-3945	appletonv@cfk.org
Austin, Janet	East Side Learning Center	(212) 555-3444		austin_j@eastsidelearning.org
Brennan, Elaine	East Side Learning Center			elaine@eastsidelearning.org
Clayton, John	The Children's Fund	(202) 432-5000	(202) 432-5010	
Heilman, Anthony	Arlington School of Dentistry	(203) 771-1265	(203) 771-1233	heilmananthony@arlington.org
Henderson, Sarah	Model Foundation	(212) 555-2344		sarah.he@model.org
Laden, Elizabeth	Abuse Prevention and Rehabilitation Fund	(202) 555-2343	(202) 555-2300	ladene@abuseprevention.org
Moore, David	Lower West Side Child Care Center	(212) 394-9885	(212) 394-9888	moored@lwsccc.org
Neff, Margaret	Brooklyn Ballet	(212) 555-3874	(212) 555-3457	neffm@bklynballet.org
Reynolds, Michael	Hiller State University	617-335-1432		mreynolds@hillerstate.edu
Roberts, Charles	The Children's Fund	(202) 432-5000	(202) 432-5010	robertsc@tcf.org
White, Ronald	Hiller State University	(617) 555-3847		rwhite@hillerstate.edu

Grand Total
(14 items)

1

Contacts - Alpha List

An alphabetical list of Contacts by name, including full address information.

Contacts - Alpha List

Mailing List is 'Annual Reports'

4/3/00

Contact Name Primary Organization and Office Address	Telephone(s)	Notes
Albright, Carol Teen Aid Center 534 Broadway New York, NY 10016	Office: (212) 555-4050 Fax: (212) 555-4000	Carol works M,W, F only
Appleton, Virginia Computers for Kids 111 E 57th Street Suite 200 New York, NY 10021	Office: (212) 522-4000 Fax: (212) 522-3945	
Brennan, Elaine East Side Learning Center 14 East 83rd Street Suite 10 New York, NY 10024	Office: Fax:	
Clayton, John The Children's Fund 3400 Wisconsin Ave. N. W. Washington, DC 20016	Office: (202) 432-5000 Fax: (202) 432-5010	
Laden, Elizabeth Abuse Prevention and Rehabilitation Fund 440 Third Street Washington, DC 20001	Office: (202) 555-2343 Fax: (202) 555-2300	Ms. Laden has a hearing impairment which makes it difficult to communicate via Telephone. USE E-MAIL for Best results.
Neff, Margaret Brooklyn Ballet 14 West 108th Street New York, NY 10012	Office: (212) 555-3874 Fax: (212) 555-3457	
Reynolds, Michael Hiller State University 785 42nd Street 2nd Floor Boston, MA 14325	Office: 617-335-1432 Fax: 617-555-0999	
Roberts, Charles The Children's Fund 3400 Wisconsin Ave. N. W. Washington, DC 20016	Office: (202) 432-5000 x 5452 Fax: (202) 432-5010	

1

Duplicate Contacts

A report that shows Contacts with the same last name, to help identify duplicates for data cleanup.

Fixed Criteria

Contacts with the same last name.

Variations

Versions of this report group by:

- Last Name
- Zip Code

Duplicate Contacts (by Last Name)

4/3/00

Contact Full Name	Contact Primary Address	Telephone Number Fax Number	Contact ID
SMITH			
Smith, Mr. Doug	1004 Third Ave. New York, NY 10023	(212) 555-0776 (212) 555-3739	14

Affiliations:	Role	Disposition	Date	Granted	Project Title (Truncated)
United Federation Inc.	Primary Contact				
United Federation Inc.	Employee				
United Federation Inc.	Primary Contact	Approved	3/20/96	$25,500.00	The Support for Anti-drug Media Campa
United Federation Inc.	Primary Contact	Approved	3/7/96	$1,200.00	The Annual Benefit
United Federation Inc.	Primary Contact	Declined	5/29/97	$0.00	The annual support for the organization
United Federation Inc.	Primary Contact	Approved	6/9/98	$25,000.00	General Operating Support
United Federation Inc.	Primary Contact	Approved	12/7/99	$25,000.00	The "Food for Thought" Program
United Federation Inc.	Primary Contact	Approved	12/7/99	$10,000.00	Parks and Rec of Rockland County
United Federation Inc.	Primary Contact	Pending	1/20/00	$0.00	Millenium Project

Smith, Mr. Johnathan J.	400 East 57th Street New York, NY 10018	(212) 555-3872 (212) 555-3849	12

Affiliations:	Role	Disposition	Date	Granted	Project Title (Truncated)
Shea Dance Company	Primary Contact				
Shea Dance Company	Employee				
Shea Dance Company	Matching Gifts C				
Shea Dance Company	Primary Contact	Approved	3/7/96	$2,400.00	The Sponsorship for "Gala 96- 14th Annu
Shea Dance Company	Primary Contact	Approved	12/8/97	$4,500.00	The 1997 "Dance Dynasty" program
Shea Dance Company	Primary Contact	Approved	6/9/98	$5,000.00	The 1998 "Dance Fever" program
Shea Dance Company	Primary Contact	Approved	3/31/98	$5,900.00	1st Quarter Matching Gifts, 1998
Shea Dance Company	Primary Contact	Approved	6/7/99	$5,250.00	The 1999 Annual Banquet
Shea Dance Company	Primary Contact	Approved	12/21/99	$7,000.00	3rd Quater MG - 1999
Shea Dance Company	Primary Contact	Approved	4/3/00	$5,250.00	The 2000 Annual Banquet
Shea Dance Company	Primary Contact	Pending	2/14/00	$0.00	Tots on Stage

1

7 Activity Reports

This chapter describes the standard reports that you can run from the Activities folder of the GIFTS Alta Report Library.

In This Chapter

Activities Verification Report **146**
Pending Proposal Checklist **147**
Requirements Completed **148**
Requirements Due **149**
To-Do Completed **150**
To-Do Listing **151**

Activities Verification Report

A report showing all of the Activities for each Request, including audit trail information such as who created the Activity, who last modified it, and who marked the Activity as complete.

Activities Verification Report

4/3/04

Activity Type	Staff	Sched. Date	Status	Marked as Done User, Date	Last Changed User Date	Created User, Date
Adventure Club of Manhattan (74)						
Approved, 6/9/01						
The support of "Adventure for Kids" project						
Activities:						
Note to File	CR	3/28/01	Done	CR, 6/11/01	CR, 6/11/01	CR, 3/28/01
Financial Report	CR	4/8/01	Done	CR, 9/29/01	CR, 9/29/01	SS, 3/28/01
Write-up	CR	5/5/01	Done	CR, 5/5/01	CR, 5/5/01	CR, 5/5/01
Grant Approval	CR	6/9/01	Done	CR, 6/9/01	CR, 6/11/01	CR, 6/11/01
Grant Payment	SS	6/9/01	Done	SS, 6/27/01	SS, 6/27/01	SS, 6/27/01
Status Change	CR	6/11/01	Done	CR, 6/11/01	CR, 6/11/01	CR, 6/11/01
Mail	KG	6/13/01	Done	KG, 6/13/01	KG, 6/13/01	KG, 6/13/01
Mail	CR	6/13/01	Done	CR, 6/13/01	CR, 6/13/01	CR, 6/13/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Final Report	CR	9/9/02	Done	CR, 10/13/02	CR, 10/13/02	CR, 6/11/01
Status Change	CR	9/21/03	Done	CR, 9/21/03	CR, 9/21/03	CR, 9/21/03
American Foundation for Children (58)						
Approved, 6/11/01						
The support of the study "Using DNA to detect genetic anomalies in the fetus."						
Activities:						
Grant Approval	CR	6/11/01	Done	CR, 6/11/01	CR, 6/11/01	CR, 6/11/01
Grant Payment	SS	6/11/01	Done	SS, 6/27/01	SS, 6/27/01	SS, 6/27/01
Progress Report	CR	12/29/01	Done	CR, 12/31/01	CR, 10/19/01	CR, 1/16/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Status Change	CR	12/31/01	Done	CR, 12/31/01	CR, 12/31/01	CR, 12/31/01
Final Report	CR	9/11/02	Done	CR, 10/19/02	CR, 10/19/02	CR, 6/11/01
Status Change	CR	9/21/03	Done	CR, 9/21/03	CR, 9/21/03	CR, 9/21/03
West Side Center (229)						
Declined, 6/7/03						
Capital Campaign Contribution						
Activities:						
Financial Report	CR	3/15/03	Done	LW, 4/30/03	LW, 4/30/03	CR, 3/9/03
Site Visit	CR	5/10/03	Done	CR, 5/30/03	CR, 5/30/03	CR, 3/9/03
Grant Declination	CR	6/7/03	Done	CR, 6/7/03	CR, 7/6/03	CR, 7/6/03
Status Change	CR	6/10/03	Done	CR, 6/10/03	CR, 6/10/03	CR, 6/10/03
Status Change	CR	7/6/03	Done	CR, 7/6/03	CR, 7/6/03	CR, 7/6/03

Grand Total
(3 items)

1

Pending Proposal Checklist

A report listing the Requirements due on Pending Requests. The Project Title, Request Date and the Meeting Date are included for each Request.

Fixed Criteria

Requirements associated with Requests with a Disposition of Pending.

Pending Proposal Checklist

4/4/04

Organization Name / Project Title	Request Date	Meeting Date	Request ID Ref. No.
Adventure Club of Manhattan	2/9/04		298.01
Extreme Sport Marathon			

Due	Done	Requirement Type	Staff	Notes
2/11/04	2/4/04	Audited Fin'l Statement	Colette Rogers	
2/11/04	2/18/04	Audited Fin'l Statement	Colette Rogers	Financial statement they sent reflected 2001-02 year. CR spoke with Adrienne about this on 2/18/04 and everything is OK.
2/11/04	2/4/04	List of Board Members	Colette Rogers	
2/11/04	2/4/04	List of Other Funders	Colette Rogers	
2/11/04		Organization Operating Budget	Colette Rogers	Sent E-mail reminder on 3/31/04
2/11/04	2/4/04	Project Budget	Colette Rogers	

Brooklyn Ballet	3/13/04		314
2004 Fall season			

Due	Done	Requirement Type	Staff	Notes
3/20/04	3/20/04	Audited Fin'l Statement	Colette Rogers	
3/20/04	3/20/04	List of Board Members	Colette Rogers	
3/20/04		List of Other Funders	Colette Rogers	
3/20/04		Organization Operating Budget	Colette Rogers	
3/20/04	3/20/04	Project Budget	Colette Rogers	Not Needed for GOS grants

The Children's Fund	2/2/04		233.01
General Operating Support			

Due	Done	Requirement Type	Staff	Notes
2/9/04	2/2/04	Audited Fin'l Statement	Lee Williamson	
2/9/04	2/2/04	List of Board Members	Lee Williamson	
2/9/04		List of Other Funders	Lee Williamson	
2/9/04	3/22/04	Organization Operating Budget	Lee Williamson	
2/9/04	2/2/04	Project Budget	Lee Williamson	

Lower West Side Child Care Center	4/4/04		293.01
Summer School Program			

Due	Done	Requirement Type	Staff	Notes
4/11/04		Audited Fin'l Statement	Kelly Goldberg	
4/11/04		List of Board Members	Kelly Goldberg	
4/11/04		List of Other Funders	Kelly Goldberg	
4/11/04		Organization Operating Budget	Kelly Goldberg	
4/11/04		Project Budget	Kelly Goldberg	

Grand Total (4 items)

1

Requirements Completed

A list of completed Requirements.

Fixed Criteria

Requirements with a status of Done.

Variations

Versions of this report group by:

- Staff
- Organization
- Date
- Program Area

Requirements Completed - By Date

Done Date is on or after 2/10/2004

4/4/04

Received Date	Organization Name Project Title	Requirement Received	Payment Requirement	Notes
2/18/04	**Adventure Club of Manhattan** *Extreme Sport Marathon*	Audited Fin'l Statement	No	Financial statement they sent reflected 2001-02 year. CR spoke with Adrienne about this on 2/18/04 and everything is OK.
3/17/04	**National Institute for Technical Learning Coalition** *WWW Educational Outreach*	Challenge	Yes	NITLC is required to Raise $250,000 in order for payments to be released
3/20/04	**Brooklyn Ballet** *2004 Fall season*	Project Budget	No	Not Needed for GOS grants
3/20/04		List of Board Members	No	
3/20/04		Audited Fin'l Statement	No	
3/22/04	**The Children's Fund** *General Operating Support*	Organization Operating Budget	No	
4/3/04	**Ryan School of Medicine** *Charles S. Godin Scholarship program*	Progress Report	Yes	Progress report must include student GPA. Any Student with a GPA under 2.5 must be sent probation letter
Grand Total (7 items)				

1

Requirements Due

A chronological list of Requirements with a Status of Scheduled.

Fixed Criteria

Requirements with a status of Scheduled.

Variations

Versions of this report group by:

- Staff
- Organization
- Date
- Program Area

Requirements Due - By Staff

4/4/04

Organization Name Project Title	Requirement Due	Due Date	Payment Requirement	Notes
Lee Williamson				
Arlington School of Dentistry *The Support for the Restoration of the School of Dentistry Library*	Progress Repor	*6/7/04*	Yes	
The Children's Fund *General Operating Support*	List of Other Funders	*2/9/04*	No	LW - 3/15/04 Left message that we cannot review application until this information is received
Total Lee Williamson (2 items)				
Sarah Sullivan				
Brooklyn Ballet *Snowflake Ball*	Progress Report	*3/31/04*	No	
The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event	Progress Report	*9/15/04*	No	
	Progress Report	*9/15/04*	No	
Total Sarah Sullivan (3 items)				
Grand Total (5 items)				

1

To-Do Completed

A list of completed To Do Activities, sorted by their Done Date.

Fixed Criteria

Activities with a Class of To Do and a Status of Done.

Variations

Versions of this report group by:

- Staff
- Date

To-Do Completed by Staff

4/4/04

Done Date	Activity Type	Organization Name City, State	Request ID Disposition	Contact Name Telephone
Lee Williamson				
3/12/01	Site Visit	National Institute for Technical Learning Coalition New York, NY		(212) 555-2344
3/30/04	Send Ad/Artwork for program *Sent Logo and camera ready artwork to Virginia. Used the same ad that was in the Christmas program from The Museum*	Computers for Kids New York, NY	Approved 309	(212) 522-4000
Total Lee Williamson (2 items)				
Sarah Sullivan				
3/15/04	Phone Call *SS- discussed goals and objectives of the Millenium project and how we feel we can participate in its success.*	United Federation Inc. New York, NY	Pending 281	(212) 555-0776
3/31/04	Meeting *Met with Doug and the 2 Lead Project coordinators, Betsy Johnson and Bernard Scott.*	New York, NY	Pending 281	(212) 555-0776
Total Sarah Sullivan (2 items)				
Grand Total (4 items)				

1

To-Do Listing

A list of all outstanding To Do Activities for specific staff members, including pertinent information on related Requests.

Fixed Criteria

Activities with a Class of To Do and a Status of Scheduled.

Variations

Versions of this report group by:

- Staff
- Date

To-Do Listing by Staff

Schedule Date is this month
4/4/04

Schedule Date	Activity Type	Organization Name City, State	Request ID Disposition	Contact Name Telephone
Colette Rogers				
4/10/04	Phone Call	West Side Center New York, NY		(212) 555-3444
4/12/04	Phone Call	Lower West Side Child Care Center New York, NY		(212) 394-9885
4/18/04 *3:00 - 5:00*	Site Visit	Shea Dance Company New York, NY		(212) 555-3872
4/28/04 *Meeting is with Shawna and Matt*	Site Visit	Sunflower House for Youth in Distress San Francisco, CA		(4050 767-3450
Total Colette Rogers (4 items)				
Sarah Sullivan				
4/14/04	Site Visit	Teen Aid Center New York, NY		(212) 555-4050
Total Sarah Sullivan (1 item)				
Grand Total (5 items)				

1

8 Budget Reports

This chapter describes the reports that you can run from the optional GIFTS Alta Budget Module. For information about running these reports, please refer to the *Budget Module* section in the *GIFTS Alta User's Guide*.

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Reserve Fund Report **157**

Line Item Status Report **158**

Budget Worksheet Report **159**

Line Item Index **160**

Payments Paid (including Budget Information) **162**

Recurring Grants Report **164**

Five Year Budget Summary **165**

Budget Cash Flow Report **166**

Budget vs. Actual

A report that shows your Budgeted dollars against your Committed, Granted, and Paid Payments for the current year.

Budget vs. Actual

California Office...
Fiscal Year 2004
8/19/2004

Organization Name Budget Description	Current Budget	Committed	Granted	Balance	Total Paid
California Office					
Arlington School of Dentistry *To sponsor the "Annual Leadership Award Dinner"*	$4,120.00	$0.00	$0.00	$4,120.00	$0.00
California Children's Theatre *The "2004 Career Fair"*	$10,609.00	$0.00	$10,609.00	$0.00	$0.00
Ryan School of Medicine *The support of the "Charles S. Godin" Scholarship program*	$154,500.00	$0.00	$0.00	$154,500.00	$0.00
California RF					
California RF	$101,160.00	$0.00	$16,400.00	$84,760.00	$16,400.00
Ryan School of Medicine *3rd Quater MG - 2003*	$0.00	$0.00	$1,400.00	$0.00	$1,400.00
California Children's Theatre *Building materials for sets*	$0.00	$0.00	$2,500.00	$0.00	$2,500.00
Computers for Kids *For the Purchase of Graphics Software and Scanner Equipment*	$0.00	$0.00	$12,500.00	$0.00	$12,500.00
Total California RF	$101,160.00	$0.00	$16,400.00	$84,760.00	$16,400.00
Total California Office	$270,389.00	$0.00	$27,009.00	$243,380.00	$16,400.00
Grand Total	$270,389.00	$0.00	$27,009.00	$243,380.00	$16,400.00

1 of 1

Budget vs. Actual Including Authorized Users

A report that shows your Budgeted dollars against your Committed, Granted, and Paid Payments for the current year. This version of the report

includes the authorized users and G/L Accounts for each budget item.

Line Item Status Report (Alpha sort)

Fiscal Year 2004

4/19/04

	2003	2004	2004	2004

Budget vs. Actual including Authorized Users

California Office...
Fiscal Year 2004
8/19/2004

Organization Name Budget Description	Current Budget	Committed	Granted	Balance	Authorized Users	GL Account
California Office						
Arlington School of Dentistry *To sponsor the "Annual Leadership Award Dinner"*	$4,120.00	$0.00	$0.00	$4,120.00	Colette Rogers	
California Children's Theatre *The "2000 Career Fair"*	$10,609.00	$0.00	$0.00	$10,609.00	Kelly Goldberg	000101
Ryan School of Medicine *The support of the "Charles S. Godin" Scholarship program*	$154,500.00	$0.00	$154,500.00	$0.00	Ben E. Factor	
California RF						
California RF	$101,160.00	($10,609.00)	$27,009.00	$84,760.00	Admin	
Ryan School of Medicine *3rd Quater MG - 2003*	$0.00	$0.00	$1,400.00	$0.00		
California Children's Theatre *Building materials for sets*	$0.00	$0.00	$2,500.00	$0.00		
Computers for Kids *For the Purchase of Graphics Software and Scanner Equipment*	$0.00	$0.00	$12,500.00	$0.00		
Total California Office	$270,389.00	$0.00	$170,900.00	$99,489.00		
Grand Total	$270,389.00	$0.00	$170,900.00	$99,489.00		

1 of 1

1

Reserve Fund Report

A report that lists Reserve Funds, including their Original Budget Amount and their current balance. For each Reserve Fund, all transfers and resolved Payments are listed.

Reserve Fund Report

New York Office...
Fiscal Year 2004
4/3/04

Transfer Description Organization Name, Description	Appropriation Date	Appropriated Amount	
New York Office/Discretionary RF			**Original Fund Amount: $127,000.00** **Reserve Fund Balance: $110,500.00**
West Side Center *Computer lab update*	4/3/04	($3,000.00)	
Lower West Side Child Care Center *After school program*	4/3/04	($2,500.00)	
Abuse Prevention and Rehabilitation Fund *Children's Retreat*	4/3/04	($10,000.00)	
Brooklyn Ballet *Snowflake Ball*	4/3/04	($1,000.00)	
New York Office/New York RF			**Original Fund Amount: $200,000.00** **Reserve Fund Balance: $171,500.00**
Transferred 25,000 To 'California RF' (Id 311). disaster relief	4/3/04	($25,000.00)	
Teen Aid Center *Counseling program for school violence victims*	4/3/04	($3,500.00)	

1

Line Item Status Report

For Line Items, this report shows the amount paid in the prior year and the budget vs. actual information for the current year. This report can be grouped by various Coding Sheet codes (please note that the Coding Sheet information refers to the Requests associated with the Line Items).

Variations

Variations of this report group by:

- Alphabetic Order
- Budget Committee
- Fund
- Program Area 1
- Program Area s 1 and 2
- Program Areas 1, 2 and 3

Line Item Status Report (Alpha sort)

Fiscal Year 2004

4/19/04

Organization	2003 Paid	2004 Budget	2004 Appropriated	2004 Paid
Abuse Prevention and Rehabilitation Fund	$0.00	$66,300.00	$76,300.00	$10,000.00
Adventure Club of Manhattan	$5,100.00	$10,000.00	$0.00	$0.00
American Foundation for Children	$54,500.00	$52,500.00	$52,500.00	$25,000.00
Arlington School of Dentistry	$33,120.00	$29,120.00	$12,500.00	$0.00
Brooklyn Ballet	$33,050.00	$5,250.00	$6,250.00	$1,000.00
California Children's Theatre	$4,500.00	$10,609.00	$10,609.00	$0.00
The Children's Fund	$47,500.00	$26,250.00	$73,750.00	$26,250.00
Computers for Kids	$27,900.00	$27,800.00	$15,300.00	$0.00
East Side Learning Center	$0.00	$15,750.00	$0.00	$0.00
Lower West Side Child Care Center	$2,000.00	$50,000.00	$52,500.00	$52,500.00
The National Children's Project	$28,560.00	$278,560.00	$278,560.00	$250,000.00
National Institute for Technical Learning Coalition	$62,500.00	$50,000.00	$50,000.00	$0.00
Ryan School of Medicine	$162,800.00	$154,500.00	$155,900.00	$1,400.00
Shea Dance Company	$12,250.00	$5,250.00	$5,250.00	$5,250.00
Teen Aid Center	$35,700.00	$0.00	$3,500.00	$3,500.00
United Federation Inc.	$25,000.00	$10,000.00	$10,000.00	$10,000.00
University of America	$10,150.00	$100,000.00	$100,000.00	$100,000.00
West Side Center	$1,000.00	$0.00	$3,000.00	$3,000.00
Grand Total	$800,408.00	$891,889.00	$905,919.00	$487,900.00

1

Budget Worksheet Report

A report that helps project your Budget for the coming Fiscal Year, it includes budgeted and paid information for the current Fiscal Year and Payments scheduled for the next Fiscal Year. Organizations are listed alphabetically.

Budget Worksheet Report

California Office...
Fiscal Year 2003
5/26/04

	Current Budget 2003	Appropriated 2003	Paid 2003	Payment Due 2003	Payment Due 2004	Suggested Budget
Arlington School of Dentistry	$4,120.00	$4,120.00	$4,120.00	$0.00	$0.00	$4,120.00
California Children's Theatre	$10,609.00	$0.00	$0.00	$0.00	$0.00	$10,609.00
The Children's Fund	$15,450.00	$0.00	$0.00	$0.00	$0.00	$15,450.00
Ryan School of Medicine	$154,500.00	$154,500.00	$154,500.00	$0.00	$0.00	$154,500.00
University of America	$5,150.00	$0.00	$0.00	$0.00	$0.00	$5,150.00
////California Office/California RF	$105,060.00	$0.00	$0.00	$0.00	$0.00	$105,060.00
University of America	$0.00	$5,000.00	$5,000.00	$0.00	$0.00	$5,000.00
Arlington School of Dentistry	$0.00	$25,000.00	$25,000.00	$0.00	$25,000.00	$25,000.00
Grand Total	$294,889.00	$188,620.00	$188,620.00	$0.00	$25,000.00	$324,889.00

1

Line Item Index

A report showing the original budget; current budget, awarded and paid amounts for each Line Item. Line Items are listed *alphabetically* for quick reference; the Category/Reserve under which the Line Item resides is listed in a separate column.

Variation

Variations of this report are grouped by:

- Authorized Users

Line Item Index
Fiscal Year 2004
8/20/2004

Organization	Original Budget	Current Budget	Committed Amount	Appropriated Amount	Paid Amount	Budget Category/Reserve Fund
Adventure Club of Manhattan*	$0.00	$0.00	$0.00	$2,800.00	$2,800.00	Foundation/Arts and Culture
Arlington School of Dentistry	$25,000.00	$25,000.00	$0.00	$0.00	$0.00	Foundation
Brooklyn Ballet	$6,000.00	$6,000.00	$0.00	$0.00	$0.00	Foundation
Brooklyn Ballet	$35,000.00	$35,000.00	$0.00	$35,000.00	$35,000.00	Foundation
Girl Scouts of America	$5,000.00	$5,000.00	$0.00	$0.00	$0.00	Foundation
Ryan School of Medicine	$50,000.00	$50,000.00	$0.00	$0.00	$0.00	Foundation
Ryan School of Medicine	$2,500.00	$2,500.00	$0.00	$0.00	$0.00	Foundation
Grand Total	$123,500.00	$123,500.00	$0.00	$37,800.00	$37,800.00	

** denotes unbudgeted line item*

1

Line Item and Reserve Fund Index by G/L Account

A report showing the current budget, awarded and paid amounts, and the authorized users for each Line Item. Line Items are listed *alphabetically* for quick reference; the Category/Reserve under which the Line Item resides is listed in a separate column.

Line Item and Reserve Fund Index by G/L Account

Fiscal Year 2004
8/20/2004

Organization	Current Budget	Appropriated Amount	Paid Amount	Authorized Users	Budget Category/Reserve Fund
(No GL Account specified)					
Adventure Club of Manhattan*	$0.00	$2,800.00	$2,800.00		Foundation/Arts and Culture
Arlington School of Dentistry	$25,000.00	$0.00	$0.00	Lee Williamson	Foundation
Brooklyn Ballet	$6,000.00	$0.00	$0.00	Colette Rogers	Foundation
Ryan School of Medicine	$50,000.00	$0.00	$0.00	Lee Williamson	Foundation
Total (No GL Account specified) (4 items)	$81,000.00	$2,800.00	$2,800.00		
000100					
Brooklyn Ballet	$35,000.00	$35,000.00	$35,000.00	Colette Rogers	Foundation
Total 000100 (1 item)	$35,000.00	$35,000.00	$35,000.00		
000102					
Ryan School of Medicine	$2,500.00	$0.00	$0.00	Ben E. Factor	Foundation
Total 000102 (1 item)	$2,500.00	$0.00	$0.00		
000103					
Girl Scouts of America	$5,000.00	$0.00	$0.00	Lee Williamson	Foundation
Total 000103 (1 item)	$5,000.00	$0.00	$0.00		
Grand Total (7 items)	$123,500.00	$37,800.00	$37,800.00		

** denotes unbudgeted line item*

1

Payments Paid (including Budget Information)

A listing of Paid Payments, including the Payment Amount, Check Number, and information as to whether or not the payment was included in the

Budget; if not, the report specifies the Reserve Fund from which the funds were drawn to cover the Payment.

Payments Paid (Including Budget Information) by Program Area 1

New York Office...
Fiscal Year 2000
4/3/00

Payee Organization Project Title	Check Number	Payment Date	Paid Amount	Budgeted Payment	Budget Reserve Fund
Arts and Culture					
Brooklyn Ballet *Snowflake Ball*	1236	1/31/00	$1,000.00	No	New York Office\Discretionary RF
Shea Dance Company *The 2000 Annual Banquet*		3/31/00	$5,250.00	Yes	
Total Arts and Culture			$6,250.00		
Civic and Community					
Abuse Prevention and Rehabilitation Fund *Children's Retreat*	1235	1/14/00	$10,000.00	No	New York Office\Discretionary RF
American Foundation for Children *Endownment Campaign*		2/9/00	$25,000.00	Yes	
The Children's Fund *"The 1999 Annual Conference"*	1244	2/28/00	$26,250.00	Yes	
Teen Aid Center *Counseling program for school violence victims*	1266	3/22/00	$3,500.00	No	New York Office\New York RF
Total Civic and Community			$64,750.00		
Education					
West Side Center *Computer lab update*		3/24/00	$3,000.00	No	New York Office\Discretionary RF

1

Recurring Grants Report

A report that includes *only* Organizations that have grants that draw funds from the previous Fiscal Year and the current Fiscal Year.

Recurring Grants Report

Fiscal Year 2004

4/3/04

Organization Name	2002 Budget	2003 Budget	2004 Original Budget	2004 Current Budget
Abuse Prevention and Rehabilitation Fund	$65,000.00	$66,300.00	$66,300.00	$66,300.00
Adventure Club of Manhattan	$5,000.00	$5,100.00	$10,000.00	$10,000.00
American Foundation for Children	$50,000.00	$52,500.00	$52,500.00	$52,500.00
Arlington School of Dentistry	$4,000.00	$4,120.00	$29,120.00	$29,120.00
Brooklyn Ballet	$5,000.00	$5,250.00	$5,250.00	$5,250.00
California Children's Theatre	$10,300.00	$10,609.00	$10,609.00	$10,609.00
The Children's Fund	$40,000.00	$41,700.00	$26,250.00	$26,250.00
Computers for Kids	$15,000.00	$15,300.00	$27,800.00	$27,800.00
East Side Learning Center	$15,000.00	$15,750.00	$15,750.00	$15,750.00
The National Children's Project	$28,000.00	$28,560.00	$278,560.00	$278,560.00
National Institute for Technical Learning Coalition	$0.00	$62,500.00	$50,000.00	$50,000.00
Ryan School of Medicine	$150,000.00	$154,500.00	$154,500.00	$154,500.00
Shea Dance Company	$5,000.00	$5,250.00	$5,250.00	$5,250.00
University of America	$5,000.00	$5,150.00	$100,000.00	$100,000.00
Grand Total	$579,925.00	$777,717.00	$891,889.00	$891,889.00

1

Five Year Budget Summary

A summary report comparing budget vs. actual total figures over the last five years. This report can be grouped by the Coding Sheet codes from the Requests associated with the Line Items.

Variations

Variations of this report are grouped by:

- Program Area 1
- Budget Committee
- Fund
- Geographical Area 1
- Program Area 1 and 2
- Program Area 1, 2 and 3
- Program Area 1

Five Year Budget Summary by Program Area 1

Fiscal Year 2004

4/3/04

Program Area	2000 Budget	2000 Actual	2001 Budget	2001 Actual	2002 Budget	2002 Actual	2003 Budget	2003 Actual	2004 Budget	2004 Actual
Arts and Culture	$24,900.00	$32,300.00	$110,000.00	$130,000.00	$20,300.00	$35,500.00	$10,500.00	$35,500.00	$21,109.00	$6,250.00
Civic and Community	$102,400.00	$302,400.00	$212,500.00	$276,000.00	$125,625.00	$111,428.00	$90,928.00	$111,428.00	$448,370.00	$349,750.00
Education	$139,000.00	$318,600.00	$251,000.00	$355,700.00	$239,000.00	$311,120.00	$256,820.00	$311,120.00	$868,000.00	$154,400.00
Health and Human Services	$23,700.00	$36,700.00	$101,300.00	$152,400.00	$195,000.00	$312,360.00	$237,860.00	$312,360.00	$198,900.00	$2,500.00
No Code Specified	$0.00	$0.00	$0.00	$0.00	$0.00	$25,000.00	$181,609.00	$25,000.00	$82,670.00	$0.00

1

Budget Cash Flow Report

A report listing scheduled payments over the next six months. This report can be grouped by the Coding Sheet codes from the Requests associated with the Line Items.

Variations

Variations of this report are grouped by

- Alphabetical Order
- Budget Committee
- Fund
- Geographical Area 1
- Program Area 1

Budget Cash Flow Report by Program Area 1
New York Office...
Fiscal Year 2000
4/3/00

Organization Name / Description	Scheduled Apr. '00	May '00	June '00	July '00	Aug. '00	Sept. '00	After Sept. '00
Arts and Culture							
Brooklyn Ballet *The sponsorship of a table for the "Taste of the Orient" Gala Dinner Event*	$5,250.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total Arts and Culture	$5,250.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Civic and Community							
American Foundation for Children *Endowment Campaign*	$0.00	$0.00	$0.00	$27,500.00	$0.00	$0.00	$0.00
Total Civic and Community	$0.00	$0.00	$0.00	$27,500.00	$0.00	$0.00	$0.00
Grand Total	$5,250.00	$0.00	$0.00	$27,500.00	$0.00	$0.00	$0.00

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9 Matching GIFTS Reports

This chapter describes the standard reports that you can run from the Matching folder of the GIFTS Report Library.

Note that the data in the sample reports represents a generic giving program. The classifications used by your organization—like Donor Class and Gift Type—may vary significantly from the sample data.

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20 Largest Contributing Donors by Gift Amount

A list of the top 20 Donors ranked by the cumulative award amount of gifts made on their behalf. You can use the search criteria available before

running the report to show the top 20 Donors within a particular date range, for a specific period-end batch, or both.

Fixed Criteria

GIFTS with a Disposition of Approved.

20 Largest Contributing Donors by Gift Amount

Gift Date was in last year

4/4/00

Rank	Donor Name	Number of Gifts	Percent of Total	Gift Amount	Percent of Total	Award Amount	Percent of Total
1	**Humphries, Mortimer**	4	11.1%	$6,000.00	16.1%	$6,000.00	9.9%
2	**Andrews, Kim**	2	5.6%	$3,000.00	8.0%	$5,000.00	8.2%
3	**Grafton, Dwight**	2	5.6%	$3,000.00	8.0%	$5,000.00	8.2%
4	**Alexander, Tom**	2	5.6%	$3,000.00	8.0%	$5,000.00	8.2%
5	**Masterson, Donna**	3	8.3%	$2,500.00	6.7%	$5,000.00	8.2%
6	**Baxter, Chris**	2	5.6%	$2,500.00	6.7%	$5,000.00	8.2%
7	**Karrington, Michelle**	2	5.6%	$2,500.00	6.7%	$5,000.00	8.2%
8	**Clifton, Andrea**	2	5.6%	$2,000.00	5.4%	$2,500.00	4.1%
9	**Black, Kurtis**	1	2.8%	$2,000.00	5.4%	$2,500.00	4.1%
10	**Clayton, Brian**	3	8.3%	$1,700.00	4.6%	$2,500.00	4.1%
11	**Rubin, Carl**	1	2.8%	$1,500.00	4.0%	$2,500.00	4.1%
12	**Dester, Judy**	1	2.8%	$1,500.00	4.0%	$2,500.00	4.1%
13	**Gray, Lisa**	3	8.3%	$1,400.00	3.8%	$2,800.00	4.6%
14	**Cook, Adam**	2	5.6%	$1,100.00	2.9%	$2,200.00	3.6%
15	**Seta, Lydia**	1	2.8%	$1,000.00	2.7%	$2,000.00	3.3%
16	**Tamus, James**	1	2.8%	$1,000.00	2.7%	$2,000.00	3.3%
17	**Brolins, Jamie**	1	2.8%	$500.00	1.3%	$1,000.00	1.6%

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20 Largest Matching Gifts by Amount

A list of the top 20 largest single gift awards. You can choose search criteria before running the report to show the largest gifts within a particular date range, for a specific period-end batch, and so forth.

The grand total at the end of the report represents their grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 awards.

Fixed Criteria

GIFTS with a Disposition of Approved.

20 Largest Matching Gifts by Amount

Gift Date was in last year

4/4/00

Rank	Recipient Organization Donor Name	Payment Date	Award Amount	Percent of Total
1	**Hiller State University** *Karrington, Michelle*	7/6/99	$4,000.00	6.59%
2	**Longwood State University** *Masterson, Donna*	7/6/99	$4,000.00	6.59%
3	**Hiller State University** *Baxter, Chris*	12/22/99	$4,000.00	6.59%
4	**Hiller State University** *Alexander, Tom*	7/6/99	$3,000.00	4.94%
5	**Ryan School of Medicine** *Grafton, Dwight*	7/6/99	$3,000.00	4.94%
6	**Shea Dance Company** *Andrews, Kim*	12/22/99	$3,000.00	4.94%
7	**Longwood State University** *Dester, Judy*	3/30/99	$2,500.00	4.12%
8	**Longwood State University** *Rubin, Carl*	7/6/99	$2,500.00	4.12%
9	**California Children's Theatre** *Black, Kurtis*	12/22/99	$2,500.00	4.12%
10	**Arlington School of Dentistry** *Alexander, Tom*	3/30/99	$2,000.00	3.29%
11	**Longwood State University** *Grafton, Dwight*	3/30/99	$2,000.00	3.29%
12	**Hiller State University** *Humphries, Mortimer*	7/6/99	$2,000.00	3.29%
13	**Ryan School of Medicine** *Humphries, Mortimer*	7/6/99	$2,000.00	3.29%
14	**Shea Dance Company** *Cook, Adam*	12/22/99	$2,000.00	3.29%
15	**Shea Dance Company** *Clayton, Brian*	12/22/99	$2,000.00	3.29%
16	**Brooklyn Ballet** *Andrews, Kim*	12/22/99	$2,000.00	3.29%

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20 Largest Matching Gift Recipients by Award Amount

A list of the top 20 recipient Organizations ranked by the cumulative amount awarded. You can specify search criteria when you run the report to show the top 20 recipients within a particular date range, for a specific period-end batch, and so forth.

The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Organizations.

Fixed Criteria

GIFTS with a Disposition of Approved.

20 Largest Matching Gifts Recipient Organizations by Award Amount
4/4/00

Rank	Recipient Organization Name	Number of Gifts	Percent of Total	Gift Amount	Percent of Total	Award Amount	Percent of Total
1	**Hiller State University**	27	17.5%	$43,750.00	18.5%	$47,200.00	15.9%
2	**American Foundation for Children**	23	14.9%	$29,500.00	12.5%	$40,200.00	13.6%
3	**Arlington School of Dentistry**	22	14.3%	$33,200.00	14.0%	$39,600.00	13.4%
4	**Ryan School of Medicine**	16	10.4%	$28,450.00	12.0%	$33,400.00	11.3%
5	**Longwood State University**	10	6.5%	$20,350.00	8.6%	$31,700.00	10.7%
6	**Brooklyn Ballet**	15	9.7%	$17,750.00	7.5%	$31,500.00	10.6%
7	**The Children's Fund**	10	6.5%	$24,400.00	10.3%	$26,300.00	8.9%
8	**Shea Dance Company**	9	5.8%	$9,250.00	3.9%	$15,400.00	5.2%
9	**California Children's Theatre**	5	3.2%	$9,400.00	4.0%	$12,500.00	4.2%
10	**Abuse Prevention and Rehabilitation Fund**	7	4.5%	$8,100.00	3.4%	$6,400.00	2.2%
11	**University of America**	3	1.9%	$5,000.00	2.1%	$4,900.00	1.7%
12	**Girl Scouts of America**	1	0.6%	$2,000.00	0.8%	$2,500.00	0.8%
13	**National Institute for Technical Learning Coalition**	1	0.6%	$2,000.00	0.8%	$1,800.00	0.6%
14	**West Side Center**	2	1.3%	$750.00	0.3%	$1,500.00	0.5%
15	**Teen Aid Center**	2	1.3%	$2,000.00	0.8%	$1,000.00	0.3%
16	**Computers for Kids**	1	0.6%	$500.00	0.2%	$100.00	0.0%
	Total Top 16 Recipient Organizations	154	100.0%	$236,400.00	100.0%	$296,000.00	100.0%
	Grand Total	154		$236,400.00		$296,000.00	

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Alpha List of Donors

A list of all Donors sorted by last name, including their Social Security Number and/or Employee ID, Division, and Class.To list the Donors for a specific matching gifts or volunteer gifts program, use the program as the report's search criteria

Fixed Criteria

Donors associated with matching gifts or volunteer gifts.

Alpha List of Donors

5/24/00

Social Security # Employee ID	Donor Name	Donor Class	Division
265-38-9817	Alexander, Tom	Retired	Headquarters Division
773-65-2186	Andrews, Kim	Full Time	New York Division
483-76-1529	Baxter, Chris	Full Time	California Division
251-56-8985	Black, Kurtis	Retired	California Division
221-56-4856	Brolins, Jamie	Part Time	California Division
097-54-3556	Brooks, Larry	Full Time	New York Division
453-62-7396	Carolton, Barton J.	Retired	Headquarters Division
817-26-3568	Clark, Robin	Part Time	New York Division
019-28-3726	Clayton, Brian	Part Time	New York Division
779-92-8371	Clifton, Andrea	Spouse (Retired)	California Division
145-62-3777	Consteel, John	Full Time	New York Division
011-24-3765	Cook, Adam	Retired	New York Division
222-62-1024	Darnell, James	Full Time	California Division
254-41-6679	Dester, Judy	Retired	Headquarters Division
827-61-5235	Florentine, Sarah	Full Time	
991-87-2615	Grafton, Dwight	Full Time	Headquarters Division
983-72-6183	Gray, Lisa	Part Time	Headquarters Division
111-59-7730	Hawkins, Elsie B.	Retired	New York Division
133-24-5677	Henderson, Sarah	Full Time	California Division
459-12-7700	Hope, Joanna	Part Time	New York Division
132-46-5421	Humphries, Mortimer	Full Time	Headquarters Division
918-27-3625	Jackson, Sue	Part Time	Headquarters Division
134-89-7699	Johnson, Mary Beth	Part Time	California Division
132-99-8574	Karrington, Michelle	Full Time	Headquarters Division
342-55-1678	Klein, Martha	Full Time	Headquarters Division

1

Alpha List of Matching Gifts Recipient Organizations

A list of recipient Organizations, sorted alphabetically, including the Organization ID number, full address, Tax Status, State, and Match Class.

Fixed Criteria

Organizations associated with matching gifts.

Alpha List of Matching Gifts Recipient Organizations

4/4/00

ID	Recipient Organization	Tax Status	State	Match Class
22	**Abuse Prevention and Rehabilitation Fund** 440 Third Street Washington, DC 20001	501c(3)	DC	Health
2	**Arlington School of Dentistry** 122 South Ave. Arlington Hall Los Angeles, CA 34253		CA	Education
3	**Brooklyn Ballet** 14 West 108th Street New York, NY 10012	501c(3)	NY	Arts & Culture
4	**California Children's Theatre** 2234 South St. Suite 913 San Francisco, CA 98078		CA	Arts & Culture
5	**Computers for Kids** 111 E 57th Street Suite 200 New York, NY 10021	501c(3)	NY	Education
7	**Girl Scouts of America** 334 Winchester Court Number 345 Youngstown, CA 90233	501c(3)	CA	Education
8	**Hiller State University** 785 42nd Street 2nd Floor Boston, MA 14325	509a(1)	MA	Education
9	**Longwood State University** 1204 Avenue of the Americas Suite 300 New York, NY 10019	509a(1)	NY	Education
20	**Teen Aid Center** 534 Broadway New York, NY 10016	501c(3)	NY	Health

Grand Total 9 Organizations

1

Matching Gifts by Donor - Detail

A detailed listing of gifts grouped by Donor. The Donor's name, Social Security Number and/or Employee ID are displayed, followed by a listing of all the gifts associated with that Donor. Gift Date, Payment Date, Award Amount, and Gift Type information are provided for each gift.

Matching Gifts by Donor - Detail

Division is 'New York Division' AND Gift Date was in last year
4/4/00

Donor Name (SS#\EMP#) / Match ID	Organization Name (ID\VEND#)	Gift Date	Payment Date	Award Amount	Gift Type
Andrews, Kim (773-65-2186)					
252	Shea Dance Company (12\)	8/9/99	12/22/99	$3,000.00	Cash
253	Brooklyn Ballet (3\)	8/13/99	12/22/99	$2,000.00	Cash
			2 Gifts	$5,000.00	
Clark, Robin (817-26-3568)					
234	Ryan School of Medicine (11\)	5/25/99	7/6/99	$1,000.00	Cash
Clayton, Brian (019-28-3726)					
222	Hiller State University (8\)	1/25/99	3/30/99	$400.00	Cash
251	Shea Dance Company (12\)	7/21/99	12/22/99	$2,000.00	Cash
274	Computers for Kids (5\)	11/14/99	4/4/00	$100.00	Cash
			3 Gifts	$2,500.00	
Consteel, John (145-62-3777)					
280	Ryan School of Medicine (11\)	10/13/99	4/4/00	$400.00	Cash
Cook, Adam (011-24-3765)					
250	Shea Dance Company (12\)	7/9/99	12/22/99	$2,000.00	Cash
273	Hiller State University (8\)	10/16/99	4/4/00	$200.00	Cash
			2 Gifts	$2,200.00	
Florentine, Sarah (827-61-5235)					
282	Brooklyn Ballet (3\)	10/15/99	4/4/00	$800.00	Cash
Masterson, Donna (126-98-4092)					
279	Ryan School of Medicine (11\)	10/24/99	4/4/00	$500.00	Cash
Rubin, Carl (726-15-2739)					
233	Ryan School of Medicine (11\)	6/8/99		$0.00	Cash
229	Longwood State University (9\)	6/14/99	7/6/99	$2,500.00	Cash
			2 Gifts	$2,500.00	
Seta, Lydia (928-16-2748)					
256	California Children's Theatre (4\)	7/6/99	12/22/99	$2,000.00	Cash
Tamus, James (243-21-3567)					
259	Hiller State University (8\)	8/20/99	12/22/99	$2,000.00	Cash
		Grand Total 15 Gifts		$18,900.00	

1

Matching Gifts by Donor - Summary

A summary of matching gifts for each Donor, by year. Included for each year are the total number of gifts, total gift amount, and total award amount.

Matching Gifts by Donor - Summary

Division is 'New York Division' AND Gift Date was in last year

4/4/00

Donor Name (SS#\EMP#)	Gift Year	Number of Gifts	Gift Amount	Award Amount
Andrews, Kim (773-65-2186)	1999	2	$3,000.00	$5,000.00
Clark, Robin (817-26-3568)	1999	1	$500.00	$1,000.00
Clayton, Brian (019-28-3726)	1999	3	$1,700.00	$2,500.00
Consteel, John (145-62-3777)	1999	1	$200.00	$400.00
Cook, Adam (011-24-3765)	1999	2	$1,100.00	$2,200.00
Florentine, Sarah (827-61-5235)	1999	1	$400.00	$800.00
Masterson, Donna (126-98-4092)	1999	1	$250.00	$500.00
Rubin, Carl (726-15-2739)	1999	2	$1,600.00	$2,500.00
Seta, Lydia (928-16-2748)	1999	1	$1,000.00	$2,000.00
Tamus, James (243-21-3567)	1999	1	$1,000.00	$2,000.00
	Grand Total	15	$10,750.00	$18,900.00

1

Matching Gifts by Donor Class or Division

A summary report showing the number of Donors and GIFTS, as well as the total gift and award amounts, and percentages for each figure. Two versions of this report are available, grouping by Donor Class or by Donor Division.

Fixed Criteria

GIFTS with a Disposition of Approved.

Variations

Versions of this report group by:

- Donor Class
- Donor Division

Matching Gifts by Donor Class

Approval Date was in last month

4/26/00

Donor Class	Donors Number	Donors Percent	Gifts Number	Gifts Percent	Gift Amount	Gift Percent	Award Amount	Award Percent
Full Time	10	50.0%	19	55.9%	$22,100.00	63.0%	$38,200.00	64.4%
Part Time	5	25.0%	8	23.5%	$5,400.00	15.4%	$9,400.00	15.9%
Retired	4	20.0%	5	14.7%	$5,600.00	16.0%	$9,200.00	15.5%
Spouse (Retired)	1	5.0%	2	5.9%	$2,000.00	5.7%	$2,500.00	4.2%
Grand Total	20		34		$35,100.00		$59,300.00	

1

Matching Gifts by Gift Type

A summary report by the type of gift, showing the total number of gifts for each type, the total gift amount, the total award amount, and percentages for each figure. Gift Type classifications typically represent the actual form of the gift, such as “Cash”, “Product”, “Stock”, and so forth.

Fixed Criteria

GIFTS with a Disposition of Approved.

Matching Gifts by Gift Type

Donor's Social Security No is '453-62-7396'
Barton Carolton
4/26/00

Gift Type	Gifts Number	Gifts Percent	Gift Amount	Gift Percent	Award Amount	Award Percent
Cash	6	85.7%	$3,150.00	61.2%	$4,400.00	63.8%
Stock	1	14.3%	$2,000.00	38.8%	$2,500.00	36.2%
Grand Total	7		$5,150.00		$6,900.00	

1

Matching Gifts by Recipient - Detail

A detailed list of gifts grouped by the recipient Organization. Information includes the recipient Organization ID and Vendor Number, and the Gift Date, Payment Date, Award Amount and Gift Type for each gift.

Matching Gifts by Recipient Organization - Detail

Division is 'New York Division' AND Gift Date was in last year

4/4/00

Recipient Organization (ID\VEND#) Match ID	Donor Name (SS#\EMP#	Gift Date	Payment Date	Award Amount	Gift Type
Brooklyn Ballet (3\)					
253	Andrews, Kim (773-65-2186)	8/13/99	12/22/99	$2,000.00	Cash
282	Florentine, Sarah (827-61-5235)	10/15/99	4/4/00	$800.00	Cash
			2 Gifts	$2,800.00	
California Children's Theatre (4\)					
256	Seta, Lydia (928-16-2748)	7/6/99	12/22/99	$2,000.00	Cash
Computers for Kids (5\)					
274	Clayton, Brian (019-28-3726)	11/14/99	4/4/00	$100.00	Cash
Hiller State University (8\)					
222	Clayton, Brian (019-28-3726)	1/25/99	3/30/99	$400.00	Cash
259	Tamus, James (243-21-3567)	8/20/99	12/22/99	$2,000.00	Cash
273	Cook, Adam (011-24-3765)	10/16/99	4/4/00	$200.00	Cash
			3 Gifts	$2,600.00	
Longwood State University (9\)					
229	Rubin, Carl (726-15-2739)	6/14/99	7/6/99	$2,500.00	Cash
Ryan School of Medicine (11\)					
233	Rubin, Carl (726-15-2739)	6/8/99		$0.00	Cash
234	Clark, Robin (817-26-3568)	5/25/99	7/6/99	$1,000.00	Cash
280	Consteel, John (145-62-3777)	10/13/99	4/4/00	$400.00	Cash
279	Masterson, Donna (126-98-4092)	10/24/99	4/4/00	$500.00	Cash
			4 Gifts	$1,900.00	
Shea Dance Company (12\)					
250	Cook, Adam (011-24-3765)	7/9/99	12/22/99	$2,000.00	Cash
251	Clayton, Brian (019-28-3726)	7/21/99	12/22/99	$2,000.00	Cash
252	Andrews, Kim (773-65-2186)	8/9/99	12/22/99	$3,000.00	Cash
			3 Gifts	$7,000.00	
			Grand Total 15 Gifts	$18,900.00	

1

Matching Gifts by Recipient - Summary by Organization

A summary of matching gifts for each recipient Organization. Included for each Organization are the total number of gifts, the total gift amount, and the total award amount.

Matching Gifts by Recipient Organization - Summary by Organization

Gift Date was in last year

5/15/00

Recipient Organization (ID\VEND#)	Number of Gifts	Gift Amount	Award Amount
American Foundation for Children (1\)	2	$1,300.00	$2,000.00
Arlington School of Dentistry (2\)	5	$5,500.00	$6,500.00
Brooklyn Ballet (3\)	5	$23,400.00	$2,800.00
California Children's Theatre (4\)	2	$3,000.00	$4,500.00
Computers for Kids (5\)	1	$500.00	$100.00
Hiller State University (8\)	11	$11,050.00	$18,600.00
Longwood State University (9\)	4	$6,000.00	$11,000.00
Ryan School of Medicine (11\)	9	$8,250.00	$8,300.00
Shea Dance Company (12\)	4	$4,000.00	$7,000.00
West Side Center (16\)	2	$600.00	$1,000.00
Grand Total	45	$63,600.00	$61,800.00

1

Matching Gifts by Recipient - Summary by Year

A summary of matching gifts for each recipient Organization, by Year. Included for each year are the total number of gifts, total gift amount, and

total award amount.

Matching Gifts by Recipient Organization - Summary

Division is 'New York Division' AND Gift Date was in last year

4/4/00

Recipient Organization (ID\VEND#)	Gift Year	Number of Gifts	Gift Amount	Award Amount
Brooklyn Ballet (3\)	1999	2	$1,900.00	$2,800.00
California Children's Theatre (4\)	1999	1	$1,000.00	$2,000.00
Computers for Kids (5\)	1999	1	$500.00	$100.00
Hiller State University (8\)	1999	3	$1,300.00	$2,600.00
Longwood State University (9\)	1999	1	$1,500.00	$2,500.00
Ryan School of Medicine (11\)	1999	4	$1,050.00	$1,900.00
Shea Dance Company (12\)	1999	3	$3,500.00	$7,000.00
	Grand Total	15	$10,750.00	$18,900.00

1

Matching Gifts by Recipient Class or State

A summary report showing the total number of organizations and gifts, as well as the total gift and award amounts and percentages for each figure. Two versions of this report are available: one grouping by Organization Class and the other by the Organization's State.

Fixed Criteria

GIFTS with a Disposition of Approved.

Variations

Versions of this report group by:

- Organization Class
- Organization State

Matching Gifts by Recipient Organization Class

4/26/00

Organization Match Class	Recipients Number	Recipients Percent	Gifts Number	Gifts Percent	Gift Amount	Gift Percent	Award Amount	Award Percent
Arts & Culture	4	25.0%	31	20.3%	$37,150.00	15.7%	$60,900.00	20.5%
Education	10	62.5%	113	73.9%	$188,950.00	80.0%	$228,800.00	77.0%
Health	2	12.5%	9	5.9%	$10,100.00	4.3%	$7,400.00	2.5%
Grand Total	16		153		$236,200.00		$297,100.00	

1

Matching Gifts by Recipient State - Summary

A summary of matching gifts for each recipient Organization, by the state of the Organization's address. Included for each Organization are the total

number of gifts, total gift amount, and total award amount.

Matching Gifts by Recipient Organization State - Summary

Gift Date was in last year
5/15/00

Recipient Organization (ID\VEND#)		Number of Gifts	Gift Amount	Award Amount
CA				
Arlington School of Dentistry (2\)		5	$5,500.00	$6,500.00
California Children's Theatre (4\)		2	$3,000.00	$4,500.00
Ryan School of Medicine (11\)		9	$8,250.00	$8,300.00
	Total CA (16 items)	16	$16,750.00	$19,300.00
MA				
Hiller State University (8\)		11	$11,050.00	$18,600.00
	Total MA (11 items)	11	$11,050.00	$18,600.00
NY				
American Foundation for Children (1\)		2	$1,300.00	$2,000.00
Brooklyn Ballet (3\)		5	$23,400.00	$2,800.00
Computers for Kids (5\)		1	$500.00	$100.00
Longwood State University (9\)		4	$6,000.00	$11,000.00
Shea Dance Company (12\)		4	$4,000.00	$7,000.00
West Side Center (16\)		2	$600.00	$1,000.00
	Total NY (18 items)	18	$35,800.00	$23,900.00
	Grand Total (45 items)	45	$63,600.00	$61,800.00

1

Matching Gifts Statistics

The statistics report provides summary information for the gifts that you've selected. Figures are provided for the total number of recipient Organizations, Donors and gifts, the total amount awarded and the total amount of gifts.

In addition to these totals, the statistics report provides information such as the average match rate, average award amount, largest award, smallest award, average number of gifts and average gift amount.

Fixed Criteria

GIFTS with a Disposition of Approved.

Matching Gifts Statistics

Gift Date was in last year

4/4/00

Number of Recipient Organizations	10
Number of Donors	21
Number of Gifts	35
Total Corporate Awarded Amount	$63,200.00
Total Employee Donor Gift Amount	$39,300.00
Corporate	
Average Match Rate	1.61:1
Average Award Amount	$1,708.11
Largest Award Amount	$4,000.00
Smallest Award Amount	$100.00
Employee Donors	
Average Number of Gifts	1.76
Average Total Gift Amount	$1,871.43
Recipient Organizations	
Average Number of Gifts	3.70
Average Total Award Amount	$6,320.00
Gifts	
Average Gift Amount	$1,062.16
Largest Gift Amount	$2,000.00
Smallest Gift Amount	$100.00

1

Schedule of Matching Gifts by Amount

A list of gifts, sorted by the award amount, including the match ID, recipient and donor information, Paid Date, Award Amount, and Gift Type.

Schedule of Matching Gifts by Amount

4/26/00

Gift ID	Recipient Organization (ID\VEND#) Donor Name (SS#\EMP#)	Payment Date	Award Amount	Gift Type
190	American Foundation for Children (1\) Watson, Pamela (021-56-8987)	12/30/98	$3,000.00	Cash
227	Hiller State University (8\) Alexander, Tommy B (267-43-3409)	7/6/99	$3,000.00	Cash
232	Ryan School of Medicine (11\) Grafton, Dwight (991-87-2615)	7/6/99	$3,000.00	Cash
252	Shea Dance Company (12\) Andrews, Kim (773-65-2186)	12/22/99	$3,000.00	Cash
169	American Foundation for Children (1\) Consteel, John (145-62-3777)	9/30/98	$3,500.00	Cash
171	American Foundation for Children (1\) Grafton, Dwight (991-87-2615)	9/30/98	$4,000.00	Cash
174	Arlington School of Dentistry (2\) Henderson, Sarah (133-24-5677)	9/30/98	$4,000.00	Cash
180	The Children's Fund (13\) Karrington, Michelle (132-99-8574)	9/30/98	$4,000.00	Cash
189	American Foundation for Children (1\) Tamus, James (243-21-3567)	12/30/98	$4,000.00	Cash
228	Hiller State University (8\) Karrington, Michelle (132-99-8574)	7/6/99	$4,000.00	Cash
230	Longwood State University (9\) Masterson, Donna (126-98-4092)	7/6/99	$4,000.00	Cash
257	Hiller State University (8\) Baxter, Chris (483-76-1529)	12/22/99	$4,000.00	Cash
182	The Children's Fund (13\) Masterson, Donna (126-98-4092)	9/30/98	$5,000.00	Cash
191	American Foundation for Children (1\) Wagner, James (643-21-3678)	12/30/98	$5,000.00	Cash
184	The Children's Fund (13\) Karrington, Michelle (132-99-8574)	12/30/98	$5,000.00	Cash
193	Ryan School of Medicine (11\) Humphries, Mortimer (132-46-5421\Hum1234)	6/30/98	$7,500.00	Cash
		Grand Total 16 Gifts	$66,000.00	

1

Schedule of Matching Gifts by Donor

A list of gifts, sorted by the Donor's last name, including the match ID, recipient and donor information, Paid Date, Award Amount, and Gift Type.

Schedule of Matching Gifts by Donor

Approval Date was in last year AND Gift Amount is more than 1,000

4/26/00

Gift ID	Donor Name (SS#\EMP#) Recipient Organization (ID\VEND#)	Donor Class Division	Gift Date	Gift Amount	Disposition
227	Alexander, Tommy B (267-43-3409) Hiller State University (8\)	Full Time	6/28/99	$2,000.00	Approved
252	Andrews, Kim (773-65-2186) Shea Dance Company (12\)	Full Time	8/9/99	$1,500.00	Approved
253	Andrews, Kim (773-65-2186) Brooklyn Ballet (3\)	Full Time	8/13/99	$1,500.00	Approved
257	Baxter, Chris (483-76-1529) Hiller State University (8\)	Full Time	8/30/99	$2,000.00	Approved
255	Black, Kurtis (251-56-8985) California Children's Theatre (4\)	Retired	8/2/99	$2,000.00	Approved
258	Clifton, Andrea (779-92-8371) Hiller State University (8\)	Spouse (Retired)	8/18/99	$1,500.00	Approved
225	Dester, Judy (254-41-6679) Longwood State University (9\)	Retired	3/18/99	$1,500.00	Approved
232	Grafton, Dwight (991-87-2615) Ryan School of Medicine (11\)	Full Time	6/11/99	$2,000.00	Approved
261	Humphries, Mortimer (132-46-5421\Hum1234) Ryan School of Medicine (11\)	Full Time	8/16/99	$2,000.00	Approved
228	Karrington, Michelle (132-99-8574) Hiller State University (8\)	Full Time	5/18/99	$2,000.00	Approved
230	Masterson, Donna (126-98-4092) Longwood State University (9\)	Full Time	6/7/99	$2,000.00	Approved
229	Rubin, Carl (726-15-2739) Longwood State University (9\)	Part Time	6/14/99	$1,500.00	Approved
			Grand Total 12 Gifts	$21,500.00	

1

Schedule of Matching Gifts by Recipient Organization

A list of gifts, sorted y the name of the recipient Organization, including the match ID, recipient and donor information, Paid Date, Award Amount, and Gift Type.

Schedule of Matching Gifts by Recipient Organization

Gift Date was in last year AND Division is 'California Division'

4/4/00

Organization (ID\Vendor # Address	Award Amount	Donor Name	Gift Amount
Arlington School of Dentistry (2\)			
122 South Ave.			
Arlington Hall			
Los Angeles, CA 34253			
	$1,000.00	Andrea Clifton	$500.00
	$0.00	Mary Beth Johnson	$1,500.00
Total 2 Gifts	$1,000.00		$2,000.00
California Children's Theatre (4\)			
2234 South St.			
Suite 913			
San Francisco, CA 98078			
	$2,500.00	Kurtis Black	$2,000.00
Hiller State University (8\)			
785 42nd Street			
2nd Floor			
Boston, MA 14325			
	$1,000.00	Chris Baxter	$500.00
	$4,000.00	Chris Baxter	$2,000.00
	$1,500.00	Andrea Clifton	$1,500.00
Total 3 Gifts	$6,500.00		$4,000.00
West Side Center (16\)			
11 West End Ave.			
New York, NY 10011			
	$0.00	Chris Baxter	$100.00
	$1,000.00	Jamie Brolins	$500.00
Total 2 Gifts	$1,000.00		$600.00
Grand Total 8 Gifts	$11,000.00		$8,600.00

1

10 Volunteer GIFTS Reports

This chapter describes the reports in the Volunteer folder of the GIFTS Report Library. The data in the sample reports represent a generic giving program; the classifications used by your organization—like Donor Class and Gift Type—may vary significantly from the sample data.

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20 Largest Participating Donors by Volunteer Hours

A list of the top 20 Donors ranked by the cumulative number of gift hours made on their behalf. You can use the selection criteria available before running the report to show the top 20 Donors within a particular date range, for a specific period-end batch, and so forth

The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Donors.

Fixed Criteria

GIFTS with a Disposition of Approved.

20 Largest Participating Donors by Volunteer Hours
4/28/00

Rank	Donor Name	Number of Gifts	Percent of Total	Gift Hours
1	Gray, Lisa	11	10.5%	373
2	Seta, Lydia	7	6.7%	233
3	Grafton, Dwight	7	6.7%	203
4	Florentine, Sarah	8	7.6%	200
5	Humphries, Mortimer	7	6.7%	200
6	Masterson, Donna	7	6.7%	185
7	Baxter, Chris	5	4.8%	169
8	Clark, Robin	6	5.7%	150
9	Rubin, Carl	3	2.9%	110
10	Carolton, Barton J.	4	3.8%	110
11	Karrington, Michelle	4	3.8%	110
12	Wagner, James	4	3.8%	105
13	Ruben, Carl	3	2.9%	100
14	Clifton, Andrea	3	2.9%	99
15	Clayton, Brian	3	2.9%	97
16	Darnell, James	3	2.9%	90
17	Alexander, Tommy B	3	2.9%	90
18	Henderson, Sarah	3	2.9%	85
19	Dester, Judy	3	2.9%	78
20	Jackson, Sue	3	2.9%	75
	Total Top 20 Donors	97	92.4%	2862
	Grand Total	105		3071

20 Largest Volunteer Gifts by Amount

A list of the top 20 largest single gift awards. You can choose search criteria before running the report to show the largest gifts within a particular date range, for a specified period-end batch, and so forth.

The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Donors.

Fixed Criteria

GIFTS with a Disposition of Approved.

20 Largest Volunteer Gifts by Amount

4/27/00

Rank	Recipient Organization Donor Name	Payment Date	Award Amount	Percent of Total
1	**Computers for Kids** *Masterson, Donna*	3/21/96	$100.00	0.95%
2	**Computers for Kids** *Brolins, Jamie*	3/21/96	$100.00	0.95%
3	**Brooklyn Ballet** *Seta, Lydia*	3/21/96	$100.00	0.95%
4	**Brooklyn Ballet** *Rubin, Carl*	3/21/96	$100.00	0.95%
5	**Brooklyn Ballet** *Gray, Lisa*	3/21/96	$100.00	0.95%
6	**The Children's Fund** *Grafton, Dwight*	3/21/96	$100.00	0.95%
7	**The Children's Fund** *Florentine, Sarah*	3/21/96	$100.00	0.95%
8	**Brooklyn Ballet** *Watson, Pamela*	6/28/96	$100.00	0.95%
9	**Computers for Kids** *Watson, Pamela*	6/28/96	$100.00	0.95%
10	**Brooklyn Ballet** *Alexander, Tom*	6/28/96	$100.00	0.95%
11	**Brooklyn Ballet** *Baxter, Chris*	6/28/96	$100.00	0.95%
12	**The Children's Fund** *Brooks, Larry*	6/28/96	$100.00	0.95%
13	**Computers for Kids** *Masterson, Donna*	3/28/97	$100.00	0.95%
14	**Computers for Kids** *Wagner, James*	3/28/97	$100.00	0.95%
15	**Brooklyn Ballet** *Seta, Lydia*	3/28/97	$100.00	0.95%
16	**Brooklyn Ballet** *Ruben, Carl*	3/28/97	$100.00	0.95%
17	**Brooklyn Ballet**	3/28/97	$100.00	0.95%

1

20 Largest Volunteer Gift Recipients by Award Amount

A list of the top 20 recipient Organizations ranked by the cumulative amount awarded. You can choose search criteria before running the report to show the top 20 recipients within a particular date range, for a specific period-end batch, and so forth.

The grand total at the end of the report represents the grand total for all records, not just the top 20 shown. These totals are used to calculate the percentages that appear for each of the top 20 Donors.

Fixed Criteria

GIFTS with a Disposition of Approved.

20 Largest Volunteer Gifts Recipient Organizations by Award Amount

Gift Date was in last year

4/4/00

Rank	Recipient Organization Name	Number of Gifts	Percent of Total	Gift Hours	Percent of Total	Award Amount	Percent of Total
1	**American Foundation for Children**	6	21.4%	165	20.0%	$600.00	21.4%
2	**Teen Aid Center**	5	17.9%	145	17.6%	$500.00	17.9%
3	**Girl Scouts of America**	4	14.3%	115	13.9%	$400.00	14.3%
4	**The Children's Fund**	4	14.3%	110	13.3%	$400.00	14.3%
5	**Abuse Prevention and Rehabilitation Fund**	3	10.7%	90	10.9%	$300.00	10.7%
6	**Adventure Club of Manhattan**	2	7.1%	75	9.1%	$200.00	7.1%
7	**Brooklyn Ballet**	2	7.1%	70	8.5%	$200.00	7.1%
8	**Shea Dance Company**	2	7.1%	55	6.7%	$200.00	7.1%
	Total Top 8 Recipient Organizations	28	100.0%	825	100.0 %	$2,800.00	100.0%
	Grand Total	28		825		$2,800.00	

1

Alpha List of Donors

A list of all Donors sorted by last name, including their Social Security Number and/or Employee ID, Division, and Class. To list the Donors for a specific matching gifts or volunteer gifts program, use the program as the report's search criteria.

Fixed Criteria

Donors associated with volunteer gifts or matching gifts.

Alpha List of Donors

5/24/00

Social Security # Employee ID	Donor Name	Donor Class	Division
265-38-9817	Alexander, Tom	Retired	Headquarters Division
483-76-1529	Baxter, Chris	Full Time	California Division
097-54-3556	Brooks, Larry	Full Time	New York Division
453-62-7396	Carolton, Barton J.	Retired	Headquarters Division
817-26-3568	Clark, Robin	Part Time	New York Division
019-28-3726	Clayton, Brian	Part Time	New York Division
779-92-8371	Clifton, Andrea	Spouse (Retired)	California Division
222-62-1024	Darnell, James	Full Time	California Division
254-41-6679	Dester, Judy	Retired	Headquarters Division
827-61-5235	Florentine, Sarah	Full Time	
991-87-2615	Grafton, Dwight	Full Time	Headquarters Division
983-72-6183	Gray, Lisa	Part Time	Headquarters Division
133-24-5677	Henderson, Sarah	Full Time	California Division
459-12-7700	Hope, Joanna	Part Time	New York Division
132-46-5421	Humphries, Mortimer	Full Time	Headquarters Division
918-27-3625	Jackson, Sue	Part Time	Headquarters Division
132-99-8574	Karrington, Michelle	Full Time	Headquarters Division
342-55-1678	Klein, Martha	Full Time	Headquarters Division
126-98-4092	Masterson, Donna	Full Time	New York Division
726-15-2719	Ruben, Carl	Part Time	New York Division
726-15-2739	Rubin, Carl	Part Time	New York Division
265-38-9817	Rucker, Janet	Full Time	Headquarters Division
928-16-2748	Seta, Lydia	Retired	New York Division
643-21-3678	Wagner, James	Full Time	Headquarters Division
021-56-8987	Watson, Pamela	Full Time	New York Division
Grand Total 25 Donors			

1

Alpha List of Volunteer Gift Recipient Organizations

A list of recipient Organizations, sorted alphabetically, including the Organization ID number, full address, Tax Status, State, and Match Class.

Fixed Criteria

Organizations associated with volunteer gifts.

Alpha List of Volunteer Gifts Recipient Organizations

Gift Date was in last year

4/4/00

ID	Recipient Organization	Tax Status	State	Match Class
22	**Abuse Prevention and Rehabilitation Fund** 440 Third Street Washington, DC 20001	501c(3)	DC	Health
19	**Adventure Club of Manhattan** 800 West 103th Street New York, NY 10021	501c(3)	NY	
1	**American Foundation for Children** 15 Barrow Street New York, NY 10008	501c(3)	NY	Education
3	**Brooklyn Ballet** 14 West 108th Street New York, NY 10012	501c(3)	NY	Arts & Culture
13	**The Children's Fund** 3400 Wisconsin Ave. N. W. Washington, DC 20016	501c(3)	DC	Education
7	**Girl Scouts of America** 334 Winchester Court Number 345 Youngstown, CA 90233	501c(3)	CA	Education
12	**Shea Dance Company** 400 East 57th Street New York, NY 10018	501c(3)	NY	Arts & Culture
20	**Teen Aid Center** 534 Broadway New York, NY 10016	501c(3)	NY	Health

Grand Total 8 Organizations

1

Schedule of Volunteer Gifts by Amount

A list of gifts, sorted by the award amount, including the Gift ID, recipient and donor information, Paid Date and Award Amount.

Schedule of Volunteer Gifts by Amount

Approval Date is any date between 7/1/1999 and 12/31/1999

4/26/00

Gift ID	Recipient Organization (ID\VEND#) Donor Name (SS#\EMP#)	Payment Date	Award Amount
269	American Foundation for Children (1\) Darnell, James (222-62-1024)	12/29/99	$100.00
285	American Foundation for Children (1\) Florentine, Sarah (827-61-5235)	12/29/99	$100.00
270	American Foundation for Children (1\) Karrington, Michelle (132-99-8574)	12/29/99	$100.00
289	Brooklyn Ballet (3\) Baxter, Chris (483-76-1529)	12/29/99	$100.00
288	Brooklyn Ballet (3\) Gray, Lisa (983-72-6183)	12/29/99	$100.00
265	Girl Scouts of America (7\) Clark, Robin (817-26-3568)	12/29/99	$100.00
264	Girl Scouts of America (7\) Florentine, Sarah (827-61-5235)	12/29/99	$100.00
286	Shea Dance Company (12\) Carolton, Barton J. (453-62-7396)	12/29/99	$100.00
287	Shea Dance Company (12\) Humphries, Mortimer (132-46-5421\Hum1234)	12/29/99	$100.00
267	Teen Aid Center (20\) Baxter, Chris (483-76-1529)	12/29/99	$100.00
268	Teen Aid Center (20\) Darnell, James (222-62-1024)	12/29/99	$100.00
271	The Children's Fund (13\) Henderson, Sarah (133-24-5677)	12/29/99	$100.00
272	The Children's Fund (13\) Humphries, Mortimer (132-46-5421\Hum1234)	12/29/99	$100.00
		Grand Total 13 Gifts	$1,300.00

1

Schedule of Volunteer Gifts by Donor

A list of gifts, sorted by the Donor's last name, including the Gift ID, recipient and donor information, Paid Date and Award Amount.

Schedule of Volunteer Gifts by Donor

Approval Date is any date between 7/1/1999 and 12/31/1999

4/26/00

Gift ID	Donor Name (SS#\EMP#) Recipient Organization (ID\VEND#)	Donor Class Division	Gift Date	Gift Hours	Disposition
267	Baxter, Chris (483-76-1529) Teen Aid Center (20\)	Full Time CA Division	8/9/99	30.0	Approved
289	Baxter, Chris (483-76-1529) Brooklyn Ballet (3\)	Full Time CA Division	10/1/99	30.0	Approved
286	Carolton, Barton J. (453-62-7396) Shea Dance Company (12\)	Retired HQ Division	10/13/99	30.0	Approved
265	Clark, Robin (817-26-3568) Girl Scouts of America (7\)	Part Time NY Division	8/9/99	25.0	Approved
269	Darnell, James (222-62-1024) American Foundation for Children (1\)	Full Time CA Division	7/23/99	30.0	Approved
268	Darnell, James (222-62-1024) Teen Aid Center (20\)	Full Time CA Division	7/26/99	35.0	Approved
264	Florentine, Sarah (827-61-5235) Girl Scouts of America (7\)	Full Time NY Division	7/12/99	25.0	Approved
285	Florentine, Sarah (827-61-5235) American Foundation for Children (1\)	Full Time NY Division	11/14/99	25.0	Approved
288	Gray, Lisa (983-72-6183) Brooklyn Ballet (3\)	Part Time HQ Division	10/13/99	40.0	Approved
271	Henderson, Sarah (133-24-5677) The Children's Fund (13\)	Full Time CA Division	8/20/99	35.0	Approved
272	Humphries, Mortimer (132-46-5421\Hum1234) The Children's Fund (13\)	Full Time HQ Division	8/23/99	25.0	Approved
287	Humphries, Mortimer (132-46-5421\Hum1234) Shea Dance Company (12\)	Full Time HQ Division	10/24/99	25.0	Approved
270	Karrington, Michelle (132-99-8574) American Foundation for Children (1\)	Full Time HQ Division	8/30/99	35.0	Approved
			Grand Total 13 Gifts	390.0	

1

Schedule of Volunteer Gifts by Recipient Organization

A list of gifts, sorted by the name of the recipient Organization, including the Gift ID, recipient and donor information, Paid Date and Award Amount.

Schedule of Volunteer Gifts by Recipient Organization

4/4/00

Organization (ID\Vendor # Address	Award Amount	Donor Name	Gift Hours
American Foundation for Children (1\)			
15 Barrow Street			
New York, NY 10008			
	$100.00	James Darnell	30
	$100.00	Sarah Florentine	25
	$100.00	Michelle Karrington	35
Total 3 Gifts	$300.00		90
Brooklyn Ballet (3\)			
14 West 108th Street			
New York, NY 10012			
	$100.00	Chris Baxter	30
	$100.00	Lisa Gray	40
Total 2 Gifts	$200.00		70
The Children's Fund (13\)			
3400 Wisconsin Ave. N. W.			
Washington, DC 20016			
	$100.00	Sarah Henderson	35
	$100.00	Mortimer Humphries	25
Total 2 Gifts	$200.00		60
Girl Scouts of America (7\)			
334 Winchester Court			
Number 345			
Youngstown, CA 90233			
	$100.00	Robin Clark	25
	$100.00	Sarah Florentine	25
Total 2 Gifts	$200.00		50
Shea Dance Company (12\)			
400 East 57th Street			
New York, NY 10018			
	$100.00	Barton Carolton	30
	$100.00	Mortimer Humphries	25
Total 2 Gifts	$200.00		55
Teen Aid Center (20\)			
534 Broadway			
New York, NY 10016			
	$100.00	Chris Baxter	30
	$100.00	James Darnell	35
Total 2 Gifts	$200.00		65
Grand Total 13 Gifts	$1,300.00		390

1

Volunteer Gifts by Donor - Detail

A detailed listing of gifts grouped by Donor. The Donor's name, Social Security Number and/or Employee ID are displayed, followed by a listing of all the gifts associated with that Donor. Gift Date, Payment Date, and Award Amount information are provided for each gift.

Volunteer Gifts by Donor - Detail

4/4/00

Donor Name (SS#\EMP#) Match ID	Organization Name (ID\VEND#)	Volunteer Date	Payment Date		Award Amount
Baxter, Chris (483-76-1529)					
267	Teen Aid Center (20\)	8/9/99	12/29/99		$100.00
289	Brooklyn Ballet (3\)	10/1/99	12/29/99		$100.00
				2 Gifts	$200.00
Carolton, Barton J. (453-62-7396)					
286	Shea Dance Company (12\)	10/13/99	12/29/99		$100.00
Clark, Robin (817-26-3568)					
265	Girl Scouts of America (7\)	8/9/99	12/29/99		$100.00
Darnell, James (222-62-1024)					
269	American Foundation for Children (1\)	7/23/99	12/29/99		$100.00
268	Teen Aid Center (20\)	7/26/99	12/29/99		$100.00
				2 Gifts	$200.00
Florentine, Sarah (827-61-5235)					
264	Girl Scouts of America (7\)	7/12/99	12/29/99		$100.00
285	American Foundation for Children (1\)	11/14/99	12/29/99		$100.00
				2 Gifts	$200.00
Gray, Lisa (983-72-6183)					
288	Brooklyn Ballet (3\)	10/13/99	12/29/99		$100.00
Henderson, Sarah (133-24-5677)					
271	The Children's Fund (13\)	8/20/99	12/29/99		$100.00
Humphries, Mortimer (132-46-5421\Hum1234)					
272	The Children's Fund (13\)	8/23/99	12/29/99		$100.00
287	Shea Dance Company (12\)	10/24/99	12/29/99		$100.00
				2 Gifts	$200.00
Karrington, Michelle (132-99-8574)					
270	American Foundation for Children (1\)	8/30/99	12/29/99		$100.00
				Grand Total 13 Gifts	$1,300.00

1

Volunteer Gifts by Donor - Summary

A summary of Volunteer gifts for each Donor, by Year. Included for each year are the total number of gifts, total gift hours, and total award amount.

Volunteer Gifts by Donor - Summary

Donor Class is 'Full Time' AND Gift Date is any date between 1/1/1998 and 12/31/1999

4/4/00

Donor Name (SS#\EMP#)	Gift Year	Number of Gifts	Gift Hours	Award Amount
Alexander, Tommy B (267-43-3409)	1998	1	25	$100.00
	1999	2	65	$200.00
		3	90	$300.00
Baxter, Chris (483-76-1529)	1999	4	140	$400.00
Brooks, Larry (097-54-3556)	1998	1	25	$100.00
Darnell, James (222-62-1024)	1998	1	25	$100.00
	1999	2	65	$200.00
		3	90	$300.00
Florentine, Sarah (827-61-5235)	1998	1	25	$100.00
	1999	2	50	$200.00
		3	75	$300.00
Grafton, Dwight (991-87-2615)	1998	1	28	$100.00
Henderson, Sarah (133-24-5677)	1998	2	50	$200.00
	1999	1	35	$100.00
		3	85	$300.00
Humphries, Mortimer (132-46-5421\Hum1234)	1998	1	25	$100.00
	1999	4	125	$400.00
		5	150	$500.00
Karrington, Michelle (132-99-8574)	1998	2	50	$200.00
	1999	2	60	$200.00
		4	110	$400.00
Klein, Martha (342-55-1678)	1998	2	55	$0.00
Masterson, Donna (126-98-4092)	1998	2	50	$200.00
	1999	1	25	$100.00
		3	75	$300.00
Wagner, James (643-21-3678)	1998	1	25	$100.00
	Grand Total	33	948	$3,100.00

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Volunteer Gifts by Donor Class or Division

A summary report showing the total number of Donors and GIFTS, as well as the total gift hours and award amounts, and percentages for each figure. Two versions of the report are available, one grouping by Donor Class and the other by Donor Division.

Fixed Criteria

GIFTS with a Disposition of Approved.

Variations

Versions of this report group by:

- Donor Class
- Donor Division

Volunteer Gifts by Donor Class

Division is 'California Division', 'Headquarters Division' or 'New York Division'

4/27/00

Donor Class	Donors Number	Donors Percent	Gifts Number	Gifts Percent	Gift Hours	Gift Percent	Award Amount	Award Percent
Full Time	12	50.0%	49	52.1%	1362	50.1%	$4,900.00	52.1%
Part Time	7	29.2%	28	29.8%	855	31.5%	$2,800.00	29.8%
Retired	4	16.7%	14	14.9%	401	14.8%	$1,400.00	14.9%
Spouse (Retired)	1	4.2%	3	3.2%	99	3.6%	$300.00	3.2%
Grand Total	24		94		2717		$9,400.00	

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Volunteer Gifts by Recipient - Detail

A detailed list of gifts grouped by the recipient Organization. Information includes the recipient Organization ID and Vendor Number, and the Gift Date, Payment Date, and Award Amount for each gift.

Volunteer Gifts by Recipient Organization - Detail

Gift Date was in last year AND Division is 'Headquarters Division'

4/27/00

Recipient Organization (ID\VEND#) Match ID	Donor Name (SS#\EMP#)	Volunteer Date	Payment Date	Award Amount
Abuse Prevention and Rehabilitation Fund (22\)				
244	Carolton, Barton J. (453-62-7396)	4/20/99		$100.00
242	Alexander, Tommy B (267-43-3409)	6/1/99		$100.00
			Total 2 Gifts	$200.00
Adventure Club of Manhattan (19\)				
248	Dester, Judy (254-41-6679)	6/14/99		$100.00
American Foundation for Children (1\)				
245	Carolton, Barton J. (453-62-7396)	4/20/99		$100.00
246	Karrington, Michelle (132-99-8574)	4/30/99		$100.00
247	Carolton, Barton J. (453-62-7396)	5/13/99		$100.00
270	Karrington, Michelle (132-99-8574)	8/30/99	12/29/99	$100.00
			Total 4 Gifts	$400.00
Brooklyn Ballet (3\)				
288	Gray, Lisa (983-72-6183)	10/13/99	12/29/99	$100.00
291	Alexander, Tommy B (267-43-3409)	10/14/99		$100.00
290	Gray, Lisa (983-72-6183)	11/9/99		$100.00
			Total 3 Gifts	$300.00
The Children's Fund (13\)				
272	Humphries, Mortimer (132-46-5421\Hum1234)	8/23/99	12/29/99	$100.00
Girl Scouts of America (7\)				
295	Gray, Lisa (983-72-6183)	9/15/99		$100.00
Shea Dance Company (12\)				
293	Gray, Lisa (983-72-6183)	7/7/99		$100.00
286	Carolton, Barton J. (453-62-7396)	10/13/99	12/29/99	$100.00
287	Humphries, Mortimer (132-46-5421\Hum1234)	10/24/99	12/29/99	$100.00
			Total 3 Gifts	$300.00
Teen Aid Center (20\)				
239	Masterson, Donna (126-98-4092)	1/11/99	3/31/99	$100.00
266	Anderson, Rose (325-69-8565)	9/1/99		$0.00
			Total 2 Gifts	$100.00
			Grand Total 17 Gifts	$1,600.00

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Volunteer Gifts by Recipient - Summary by Organization

A summary of volunteer gifts for each recipient Organization. Included for each Organization are the total number of gifts, total gift amount, and total award amount.

Volunteer Gifts by Recipient Organization - Summary by Organization

Volunteer Date was in last year

5/15/00

Recipient Organization (ID\VEND#)	Number of Gifts	Gift Hours	Award Amount
Abuse Prevention and Rehabilitation Fund (22\)	3	90.00	$300.00
Adventure Club of Manhattan (19\)	2	75.00	$200.00
American Foundation for Children (1\)	6	165.00	$600.00
Brooklyn Ballet (3\)	5	200.00	$500.00
The Children's Fund (13\)	4	110.00	$400.00
Girl Scouts of America (7\)	5	148.00	$500.00
Shea Dance Company (12\)	4	135.00	$400.00
Teen Aid Center (20\)	6	170.00	$500.00
Grand Total	35	1,093.00	$3,400.00

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Volunteer Gifts by Recipient - Summary by Year

A summary of Volunteer gifts for each recipient Organization, by Year. Included for each year are the total number of gifts, total gift hours, and

total award amount.

Volunteer Gifts by Recipient Organization - Summary

Gift Date was in last year

4/4/00

Recipient Organization (ID\VEND#)	Gift Year	Number of Gifts	Gift Hours	Award Amount
Abuse Prevention and Rehabilitation Fund (22\)	1999	3	90	$300.00
Adventure Club of Manhattan (19\)	1999	2	75	$200.00
American Foundation for Children (1\)	1999	6	165	$600.00
Brooklyn Ballet (3\)	1999	5	200	$500.00
The Children's Fund (13\)	1999	4	110	$400.00
Girl Scouts of America (7\)	1999	5	148	$500.00
Shea Dance Company (12\)	1999	4	135	$400.00
Teen Aid Center (20\)	1999	6	170	$500.00
	Grand Total	35	1093	$3,400.00

1

Volunteer Gifts by Recipient Class or State

A summary showing the total number of organizations and gifts, as well as the total gift hours and award amounts, and percentages for each figure. Two versions of this report are available, one grouping by Organization Class and the other by Organization State.

Fixed Criteria

GIFTS with a Disposition of Approved.

Variations

Versions of this report group by:

- Organization Class
- Organization State

Volunteer Gifts by Recipient Organization Class

4/27/00

Organization Match Class	Recipients Number	Recipients Percent	Gifts Number	Gifts Percent	Gift Hours	Gift Percent	Award Amount	Award Percent
Arts & Culture	2	25.0%	29	32.2%	976	36.9%	$2,900.00	32.2%
Education	4	50.0%	46	51.1%	1245	47.1%	$4,600.00	51.1%
Health	2	25.0%	15	16.7%	425	16.1%	$1,500.00	16.7%
Grand Total	8		90		2646		$9,000.00	

1

Volunteer Gifts by Recipient State - Summary

A summary of volunteer gifts for each recipient Organization, by the State of the Organization's address. Included for each Organization are the total

number of gifts, total gift hours, and total award amount.

Volunteer Gifts by Recipient Organization State - Summary

Volunteer Date was in last year
5/15/00

Recipient Organization (ID\VEND#)		Number of Gifts	Gift Hours	Award Amount
CA				
Girl Scouts of America (7\)		5	148.00	$500.00
	Total CA (5 items)	5	148.00	$500.00
DC				
Abuse Prevention and Rehabilitation Fund (22\)		3	90.00	$300.00
The Children's Fund (13\)		4	110.00	$400.00
	Total DC (7 items)	7	200.00	$700.00
NY				
Adventure Club of Manhattan (19\)		2	75.00	$200.00
American Foundation for Children (1\)		6	165.00	$600.00
Brooklyn Ballet (3\)		5	200.00	$500.00
Shea Dance Company (12\)		4	135.00	$400.00
Teen Aid Center (20\)		6	170.00	$500.00
	Total NY (23 items)	23	745.00	$2,200.00
	Grand Total (35 items)	35	1,093.00	$3,400.00

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Volunteer Gifts Statistics

The statistics report provides summary information for the gifts that you've selected. Figures are provided for the total number of recipient Organizations, Donors and gifts, the total amount awarded and the total gift hours. In addition to these totals, the statistics report provides information such as the average award amount, largest award, smallest award, average number of gifts and average gift hours.

Fixed Criteria

GIFTS with a Disposition of Approved.

Volunteer Gifts Statistics

Gift Date was in last year

4/4/00

Number of Recipient Organizations	8
Number of Donors	16
Number of Gifts	34
Total Corporate Awarded Amount	$3,400.00
Total Employee Donor Gift Hours	1068
Corporate	
Average Match Rate	1.00:1
Average Award Amount	$100.00
Largest Award Amount	$100.00
Smallest Award Amount	$100.00
Employee Donors	
Average Number of Gifts	2.13
Average Total Gift Hours	66.75
Recipient Organizations	
Average Number of Gifts	4.25
Average Total Award Amount	$425.00
Gifts	
Average Gift Hours	31
Most Gift Hours	55
Least Gift Hours	25

1

Numerics
20 Largest Donors by Gift Amount 169
20 Largest Donors by Volunteer Hours 192
20 Largest Matching Gift Recipients 172
20 Largest Matching Gifts by Amount 171
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