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RE:Alum for Alumni Tracking

The optional module *RE:Alum* is designed specifically for schools, colleges, and universities. The *RE:Alum* facility helps you reach, solicit, and better manage your alumni. In addition, you can access and list your alumni by maiden name if needed.

The **Educate** button on the Bio 1 tab in *Constituent Management* allows you to enter current and past education information. On each education record, you can store detailed information including the degree earned, GPA, and year of graduation. You can also define attributes and store other data about the constituent's education. You define the attributes in *Configuration*.

In This Chapter

- Defining the Alumni School/College
- Establishing the Class Of Year Format
- Defining Education Attributes
- Entering an Alumni
- Tracking Relationships with *RE:Alum*

Defining the Alumni School/College Code

In order for *The Raiser's Edge for Windows* (from here on referred to as *The Raiser's Edge*) to properly track your alumni, you must enter your school's name. This is done in *Configuration*, at the **Alumni School/College** prompt. The program also allows you to track the relatives of your students. The program can create a new constituent record, including an education record, for these relations. To do this, the relative must have a **Class Of** field (or other Alumni Information) entered in the Relation tab of the student's record. You may then opt to enter the relation as a constituent, and the program creates the new record in the database. The school name in the newly created education record is the one set in the **Alumni School/College** prompt on the General 1 tab in *Configuration*.

➤ **To define the Alumni School/College:**

1. Open *Configuration*. The General 1 screen appears.

The Raiser's Edge - Configuration

File Edit Help

Tables Security General Ledger Attributes International Letters

General 1 General 2 Preferences Membership Cat Financial Inst Addr/Sal

Name: Blackbaud Demo

Address: 4401 Belle Oaks Drive

City: Charleston

State: SC ZIP: 29405

Country: United States

Phone: (800) 468-8996

Fiscal Year Ends: January

Volunteer Year Starts: 1/1/98


Alumni School/College: St. Mary's

Company ID

☒ Federal Tax ID ☐ User Defined

ID:

The **Alumni School/College** prompt lists the name of your organization.

2. Next to the **Alumni School/College** prompt select  to choose the name of your organization. If your organization's name does not appear in the list, press **F7** to add the name. The program uses the school name entered at this prompt and creates a new constituent record with an education record.
3. When finished, select **File, Exit** from the menu bar.

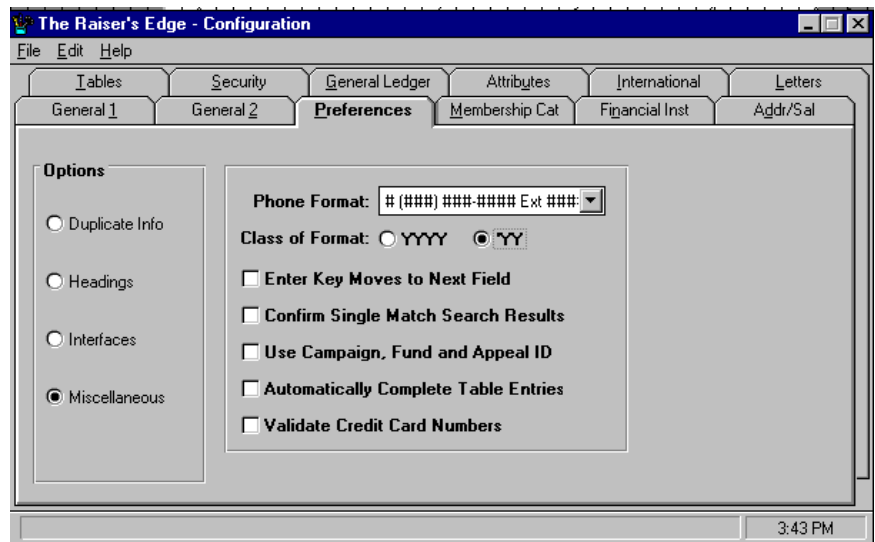
Establishing the Class Of Year Format

To begin tracking alumni, it is important you define the format for the **Class Of** field since it appears on reports and in the constituent's record. The two formats available for the **Class Of** field are explained below.



To define the Class Of format:

1. Open *Configuration*. Select the Preferences tab.
2. In the **Preferences Option** box, select **Miscellaneous**. The following screen appears.



3. Select the format for the **Class Of** field by clicking on the circle next to your choice. You can choose either a four- (YYYY) or two- (*YY) year format.
4. When finished, select **File, Exit** from the menu bar.

Defining Education Attributes

Attributes add flexibility to *The Raiser's Edge* by allowing you to define and store special information about your constituents. For example, you can enter your constituent's college major and minor as well as keep a record of their extracurricular activities. Education attributes appear on the Education screen of the constituent's record in *Constituent Management*.



To define Education Attributes:

1. Open *Configuration*. Select the Attributes tab.
2. In the **Attribute Types** box select **Education**. The following screen appears.

Description	Data Type	Table Name
Major	Table	Majors/Minors
Honor/Awards	Text	
Clubs	Text	
Minor	Table	Majors/Minors
Athletics	Text	

4. Define the constituent's attributes in the **Attributes** box. Under **Description**, type in a description for the attribute category. This appears in the education record under **Category**. Some examples of attribute descriptions include major, minor, sports activities, clubs, honors, scholarships, etc.

Note: We recommend using the **Data Type** Table to ensure consistency in data entry.

5. In the **Data Type** column, select the format you want in the attribute field:
 - **Text:** For entry of free-form text.

- **Number:** For entry of numbers.
- **Date:** For entry of dates.
- **Currency:** For entry of a monetary value.
- **Yes/No:** For entry of yes or no.
- **Table:** To link to a table of possible choices.

Note: If the **Data Type** is defined as **Table**, you can select from a list of existing tables or create a new one for the link. To delete an Attribute Table, choose **Edit, Delete Tables** from the menu bar in *Configuration*.

6. Enter all of the **Attribute Types** you want available in the attributes record. You can add attributes at any time.
7. The **Sort** button allows you to arrange the attribute descriptions in ascending or descending order. You can also arrange the descriptions using the **Up** and **Down** buttons.
8. When finished, select **File, Exit** from the menu bar.

Entering an Alumni

You can save the educational history of a constituent or a constituent's spouse on the Bio 1 tab in *Constituent Management*. The **Educate** button allows you to **Add** and **Edit** this information.



To add an alumni:

1. Open *Constituent Management*.
2. Follow the steps for Adding a Constituent found in the Constituent Management chapter in *The Raiser's Edge for Windows User's Guide*.

- On the Bio 1 tab, select the **Educate** button. The Constituent Education screen appears. Select the **Add** button to enter a new record. The following screen appears.

You must select this prompt so the program knows the education information relates to your organization, otherwise the constituent will not appear on Alumni Reports.

Add Constituent Education for Elizabeth A. Tiller

☒ **Primary Alumni Information**

School Information

School Name: Denison College

Type: Four Year College

Class Of: 1997

Date Entered: 8/28/93

Date Left:

Date Graduated:

Known Name: Lizzi Tiller

Campus: Main

Frat/Sorority: Alpha Mu Tao

Degree: BA

GPA: 4.00

Attributes


Category	Description	Comment
Athletics	Girls Soccer	Partial Athletic Scholarship
Clubs	Honor Society	4.0
Honors/Awards	Dean's List	For all semesters

OK Cancel

- Select the **Primary Alumni Information** prompt to indicate the information on this record is related to your organization. Once this prompt is selected on one education record, it does not appear again.

Note: You can add multiple education screens for each individual, but the program uses the record marked as **Primary Alumni Information** on alumni reports.

- Select your organization's name in the **School Name** field. Click to select from a list.
- Indicate the **Type** of educational institution (i.e., private school, university, law school, etc.).
- Enter the year of graduation in the **Class Of** prompt. The program formats this field based on the format defined on the Preferences tab in *Configuration*.
- Indicate when the alumni began attending your organization in the **Date Entered** field.
- Enter the **Date Left** if the student left your school before graduating. Leave this field blank if the student did not leave prior to graduation.
- Indicate when the alum graduated in the **Date Graduated** field.

11. If the alum used another name while in school, enter it in the **Known Name** field.
12. If your organization has more than one campus, indicate the **Campus** where the alum attended.
13. Enter any fraternity or sorority information in the **Frat/Sorority** field.
14. If the alum earned a **Degree**, click  to access a list of possible entries.
15. You may include the **GPA**.
16. Use the **Attributes** box to enter additional information about the alum. For example, indicate a major, a minor, honors or awards, extracurricular activities, etc.
17. When finished, select **OK**.

Note: To change an existing constituent's education record, select **Edit** in the Constituent Education screen. Make the necessary changes to the record and select **OK**.

Tracking Relationships with RE:Alum

The optional module *RE:Alum* allows you to track children of alumni and their various classes. In addition, with *RE:Alum*, the Relationship tab supplies the perfect means to track your past and/or current parents.



To indicate an alumni is the parent of a current student:

1. Open *Constituent Management*. Open the alum's record.

- Click the Relation tab and select **Add**. The following screen appears.

- The by the **Last Name** allows you to access the Constituent Search Criteria screen. If the student's constituent record is found, all of the appropriate data defaults to the Add a Relationship screen. If the relative does not have a record, you can enter the information.
- The **Relationship** and **Reciprocal** fields define the relationship between the alum and the current student. The example below shows the current student is the daughter of an alum. The alum's **Reciprocal** relationship is father of the student.

Note: You can reciprocate relationships between two records in the program if the alum is already in the program. When you save the relationship record, a window appears asking, "Do you wish to reciprocate?" Click **Yes** to reciprocate the records.

- In the **Alumni Information** box, enter the **Class Of** or year the student graduates.

6. Enter the **Date Left** if the student left the school before graduating. Leave this field blank if the student did not leave prior to graduation.
7. Enter the **Date of Graduation** if the student has already graduated from the school.
8. Enter any fraternity or sorority information in the **Frat/Sorority** field.
9. When finished, click **OK**.

Alumni Reports

RE:Alum comes with several prepared reports designed to analyze and track your former students. These reports provide information about donations made by alumni, prepare lists and directories, and analyze donations.

Note: For information on CFAE Reports, see the CFAE Report chapter in this manual.

In This Chapter

- Alumni Class List
- Parent Directory
- Grandparent Directory
- Professional Directory
- Alumni Class Analysis
- Parent Class Analysis
- Running Alumni Reports

Alumni Class List

The Alumni Class List generates a list of alumni with their class year. You can use up to two columns to display address and telephone information and include one class, several classes, or all classes in the report.

This report provides a list of alumni for all class years or selected class years. You can break the report down by class year or alphabetically based on alumni names.

Note: To appear on the Alumni Class List the **Primary Alumni Information** field must be marked on the constituent's education record.

Parent Directory

The Parent Directory generates a list of the parents of alumni. You can use up to two columns to display address and telephone information and include one class, several classes, or all classes in the report.

A parent-child relationship must exist in the constituent records for the parent to appear in the directory. You establish relationships in *Constituent Management*. You can break the report down by class years or alphabetically, based on the parent's name.

Grandparent Directory

The Grandparent Directory generates a list of grandparents of alumni. You can use up to two columns to display address and telephone information and include one class, several classes, or all classes in the report.

A grandparent-child relationship must exist in the constituent records for the grandparent to appear in the directory. You establish relationships in *Constituent Management*. You can break the report down by class years or alphabetically based on the grandparent's name.

Professional Directory

The Professional Directory generates a list of constituents based on their professions. You can use up to two columns to display address and telephone information and include one profession, several professions, or all professions in the report.

Alumni Class Analysis Report

Found under Analytical Reports, the Alumni Class Analysis tracks donations made by alumni. The detailed report shows each constituent's name, arranged by class year, with either the individual amounts given or the total amounts given during a specified date range. A summary report -- showing each class year with total donations, the number of gifts, and the percentage of participation -- is also available. This report provides giving information for all constituents or for a selected query group.

Note: To appear on the Alumni Class Report, you must mark the **Primary Alumni Information** field on the constituent's education record, and the Bio 2 tab must have a Constituent Code of AL (alumni) entered.

Note: The preferences set for Anonymous gifts affects this report. For example, if a donor gives \$100 to the Annual fund and then gives \$500 anonymously to the Building Fund, the report shows two donors if you selected the **Use Anonymous** preference.

Parent Class Analysis

Found under Analytical Reports, the Parent Class Analysis tracks donations made by the parents of alumni. The detailed report shows each parent's name and is arranged by class year with the individual amounts given or the total given during a specified date range. A summary report -- showing each class year with total donations, the number of gifts, and the percentage of participation -- is also available. This report provides parental giving information for all constituents or for a selected query group.

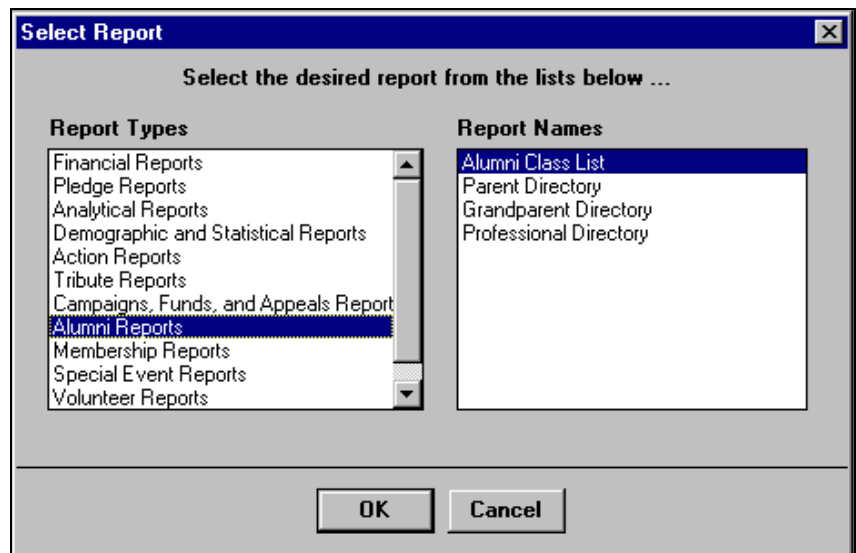
Note: To appear on the Parent Class Analysis Report, there must be a parent-child relationship established in the constituent records, and the parent must have an AL (alumni) **Constituency Code** entered on the Bio2 tab of their record. Relationships are established in *Constituent Management*. In addition, the child's education record must be marked **Primary Alumni Information**.

Note: The preferences set for Anonymous gifts affects this report. For example, if a donor gives \$100 to the Annual fund and then gives \$500 anonymously to the Building Fund, the report shows two donors if you selected the **Use Anonymous** preference.

Running Alumni Reports

➤ **To run a report:**

1. Open *Reports*. The following screen appears.




2. Under the column **Report Types**, highlight Alumni Reports.

Note: Alumni Class Analyses and Parent Class Analyses reports are found under Analytical Reports. For more information on these reports, refer to the Analytical Reports chapter in *The Raiser's Edge for Windows User's Guide*.

3. A list of related reports appears under **Report Names**. Highlight the name of the report you want to run and select **OK**.
4. Fill in the appropriate parameters.

Note: For specific information on parameters, see the Understanding Alumni Report Parameters in this manual or the chapter on the report type you are running in *The Raiser's Edge for Windows User's Guide*.

5. Once you have filled in the parameters, select **File, Print Report** from the menu bar, or select **File, Preview** to review the report before printing.

Note: If you chose to print preview the report, the menu bar options are disabled. You must select  at the bottom of your screen to print the report.

Understanding Alumni Report Parameters

One of the advantages of using *The Raiser's Edge* is the consistency of the program. This is particularly true of the report parameters. Each report has a set of parameters, allowing you to define the output. As you work with the program, you will find that not all reports contain the same parameter tabs, but all of the reports share common parameters. This section describes all parameters specific to alumni reports.

Note: For more information and examples of the alum reports, refer to *The Raiser's Edge for Windows Reports Manual*.

In This Chapter

- Address tab
- Alumni Codes
- Attributes tab
- Children Codes
- Class Years
- Constituency tab
- Format tab
- Grandparent Codes
- Grandchildren Codes
- Parent Codes
- Profession Codes

Address Tab

If you select the Address tab in the Alumni Class List report, the following screen appears.

The screenshot shows the 'Alumni Class List' window with the 'Address' tab selected. The window has three main sections: 'Address Column', 'Address Criteria', and 'Address to Print'. The 'Address Column' section has a dropdown menu set to 'Address Col 1'. The 'Address Criteria' section has a list of mail types on the left (Newsletter, Christmas Appeal, Receipts, Birthday Card, Annual Appeal, Board mailings) and a list of criteria on the right (Acknowledgement Letters, Annual Giving Solicitation, Pledge Reminders, Capital Campaign Solicitation). Arrows between the lists allow for selection. The 'Address to Print' section has radio buttons for 'Base on Criteria' (selected), 'Primary Address', 'Business Address', and 'None'. There is a checkbox for 'Print Phone' (checked) and a dropdown for 'Type' set to 'Home'. At the bottom, there is a checkbox for 'Print Phone Only' and a dropdown for 'If No Address is Found' set to 'Print with no Address'.

Address Column

In the **Address Column** prompt, indicate the column in which you want the address to print.

Address to Print


The **Address to Print** frame defines which address to print for the report you selected.

- **Base on Criteria:** If you choose this option, the program selects the appropriate address based on the information found under the **More** button in the address section of a constituent record.
- **Primary Address:** This option prints the address found on the Bio 1 tab of the individual or organization record.

- **Business Address:** This option prints the address found under the **Business** button of an individual record and prints the address found on the Bio 1 tab of an organization.
- **None:** Selecting this option tells the program not to print addresses.

Note: For more information on understanding how the program selects addresses, see the section on Address Processing in the RE:Mail chapter of *The Raiser's Edge for Windows User's Guide*.

Print Phone

This option allows you to include the constituent's phone number. When you select the **Print Phone** option, the **Type** prompt appears enabling you to define which phone number to print. Click  to access possible choices. If you want to print the first phone listed for the constituent, leave **Type** blank. You can also have the program **Print Phone Only** by selecting the checkbox next to this prompt.

'As Of' Date for Alternate Addresses

This option is only available if you select **Base on Criteria** in the **Address to Print** frame. It enables you to determine which address to print based on the **Seasonal From** and **Seasonal To** fields in the Alternate Address screen. The program compares the dates entered in this field to the ones entered in the Alternate Address screen and selects the appropriate address.

If No Address is Found

If No Address is Found matching the criteria you defined, additional information is required. You must tell the program to Use the Primary Address (address found on Bio 1), Use the Business Address, or Print with No Address.

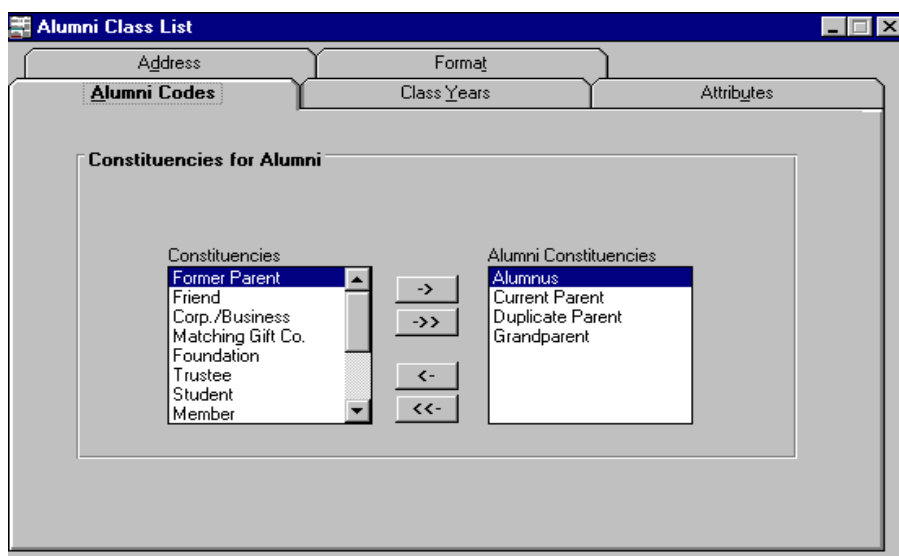
Type of Mail

This option is only available if you select **Base on Criteria** in the **Address to Print** frame; it enables you to determine which address to include based on the **Type of Mail**. Mail Types should only be assigned to addresses stored for a special purpose. For example, you can tell the program to pull the address to receive only Newsletters. Only addresses with the Mail Types you select are included in your mailing.

Note: The program pulls this information from the **All Mail**, **Selected Mail**, or **No Mail** option found on the **More** or **Alt** buttons on the constituent's record.

Alumni Codes

If you select the Alumni Codes tab in the Alumni Class List report, the following screen appears.



Select the **Constituencies** that identify alumni for the report. Move them to the **Alumni Constituencies** box.

Attributes Tab

If you select the Attributes tab in the Alumni Class List report, the following screen appears.


The screenshot shows a window titled "Alumni Class List" with several tabs: "Address", "Format", "Alumni Codes", "Class Years", and "Attributes". The "Attributes" tab is selected. Inside this tab, there are two main sections: "Include Attributes" and "Exclude Attributes". Each section contains a table with two columns: "Category" and "Description".

In the "Include Attributes" section, the table has the following data:

Category	Description
Interests	Golf
Interests	sailing

In the "Exclude Attributes" section, the table has the following data:

Category	Description
Special Mailing Types	No mail solicitations

The attributes tab allows you to include or exclude constituents in your report based on the attribute information entered on the Attribute tab of a constituent record. In the **Include Attributes** box, select the attributes you want to include. The program includes the gifts of any constituents with the defined attributes. If you prefer to eliminate gifts based on attributes in the constituent record, use the **Exclude Attributes** box to select the ones you wish to exclude. Click  to select from a list of available choices.

Children Codes

Select the **Relation Codes** that identify **Children Codes to Include** in the report. Move them to the **Children Code** box.

Class Years

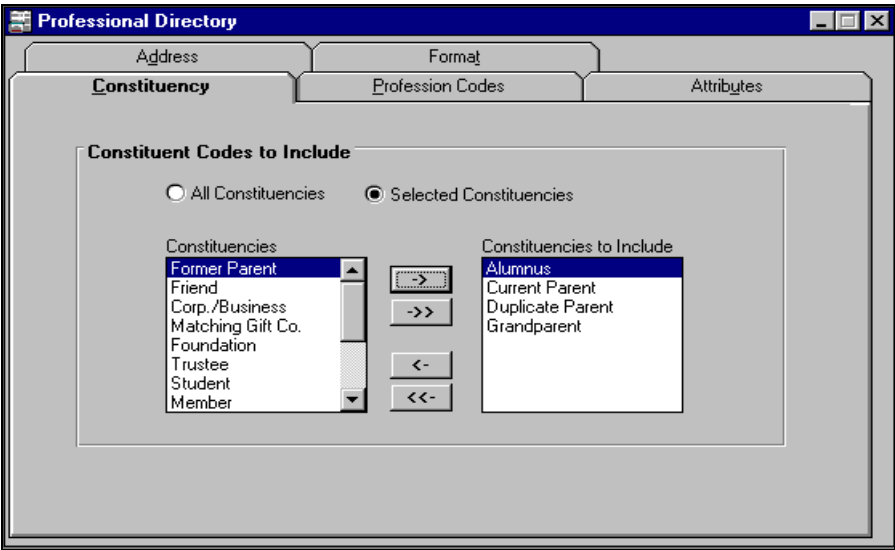
If you select the Class Years tab in the Alumni Class List report, the following screen appears.

The screenshot shows a window titled "Alumni Class List" with a menu bar containing "Address", "Format", and "Attributes". The "Class Years" tab is selected. Below the tab, there is a checkbox labeled "Show Reunion Years" which is checked. Underneath, there is a section titled "Reunion Years to Include" with two radio buttons: "All Years" (unselected) and "Selected Years" (selected). Below the radio buttons, there are two list boxes. The left list box is titled "Reunion Years" and contains the following items: "Year Ends With 0", "Year Ends With 1", "Year Ends With 2", "Year Ends With 3", "Year Ends With 4", "Year Ends With 5", "Year Ends With 6", and "Year Ends With 8". The right list box is titled "Reunion Years to Include" and contains the item "Year Ends With 7". Between the two list boxes are four buttons: ">", "->>", "<-", and "<<-".

You can decide which **Class Years to Include** in your report at this prompt. Select either **All Years** or **Selected Years**. The **Show Reunion Years** prompt changes the **Class Years to Include** box to **Reunion Years to Include**. This allows you to choose the years ending with a particular digit for your report. For example, you can choose years ending with a 7, and the program processes every reunion class ending with a 7.

Constituency Tab

If you select the Constituency tab in the Professional Directory, the following screen appears.




In the **Constituent Codes to Include** box, determine whether to use **All Constituencies** or **Selected Constituencies**. If you choose **Selected Constituencies**, you then need to choose your **Constituencies to Include**, moving them from the **Constituencies** box.

Format Tab

If you select the Format tab in the Professional Directory, the following screen appears.

The screenshot shows a window titled "Professional Directory" with a blue header bar. Below the header are three tabs: "Address", "Profession Codes", and "Attributes". The "Format" tab is currently selected. Inside the "Format" tab, there is a "From Group:" label followed by a text box containing "constituents in added in 1998" and a small upward-pointing arrow icon. Below this is a section titled "Addressee" containing three radio buttons: "From Constituent Record" (which is selected), "From Addressee Table", and "Use Key Name". Under the "From Constituent Record" option, there are two dropdown menus. The first is labeled "Use:" and has "Primary Addressee" selected. The second is labeled "if present otherwise use" and has "Key Name" selected. Below the "Addressee" section is a checkbox labeled "Include Spouse Information" which is checked. To the right of this is a section titled "Report Order" containing two radio buttons: "Profession" (selected) and "Alphabetical". Below these is a checkbox labeled "Print on Separate Page" which is unchecked. At the bottom of the window is a "Subheading:" label followed by an empty text box.

From Group

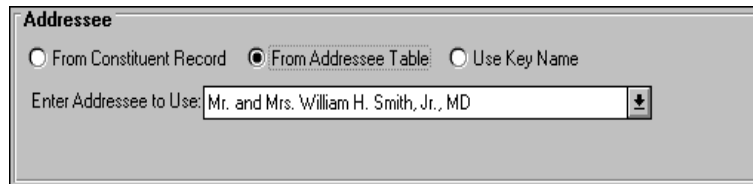
The **From Group** prompt lets you limit the report to records in a query. If you want to process all records, leave this field blank. To select a query, click  and choose a group from your query list.


Addressee

Indicate the format of the **Addressee** or names of the constituents.

If you choose **From the Constituent Record**, you need to identify the addressee/salutation to use for the constituent as well as an alternative to use if the first choice is not there. If neither addressee exists, the program defaults to the **Key Name** (First Name, Middle Initial, Last Name for individuals and Organization Name for organizations). Use **Key Name** to increase the speed of the report.

If you choose **From Addressee Table**, the following appears.



Click  to select an addressee from the table.

Note: For information on the Addressee Table, see the section on Configuring Addressee/Salutations in the Configuration chapter of *The Raiser's Edge for Windows Administrator's Guide*.

If you choose to use **Key Name**, the names of the individual constituents appear as First Name, Middle Initial, Last Name (i.e., John M. Jones). For organization records, the Key Name is the Organization Name (i.e., ABC Corporation).

Deceased Attribute

Available in the Alumni Class List report, the **Deceased Attribute** allows you to flag a record as Deceased. Any record with this entry appears with the word Deceased below the name.

Base Report On

Available in the Alumni Class List report, the **Base Report On** prompt determines which name the program uses to alphabetize the report. Indicate whether you want to base the report on **Last Name** or **Maiden Name** by selecting the circle next to your choice.

Report Order

Indicate the order for the report. Your choices are: **Class**, **Alphabetical**, and **Profession**, depending on which report you chose. If you want each new entry to print a new page, select the **Print on Separate Page** prompt.

Include Spouse Information

You can elect to include spouse information on the report by selecting this prompt.

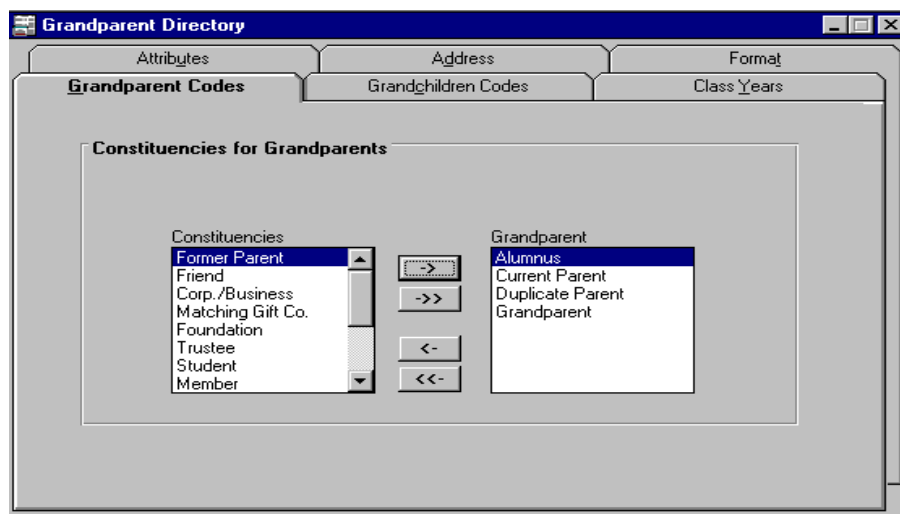
Subheading

Use the **Subheading** field to enter a subtitle to appear just below the name of the report.

Create Output Query

Available on the Alumni Class List report and the Parent and Grandparent Directories, the **Create Output Query** prompt groups the constituents included in the report. You can then use the query in another function in *The Raiser's Edge*.

Grandparent Codes



Select the **Constituencies for Grandparent** from the **Constituencies** box. Move them to the **Grandparent** box.

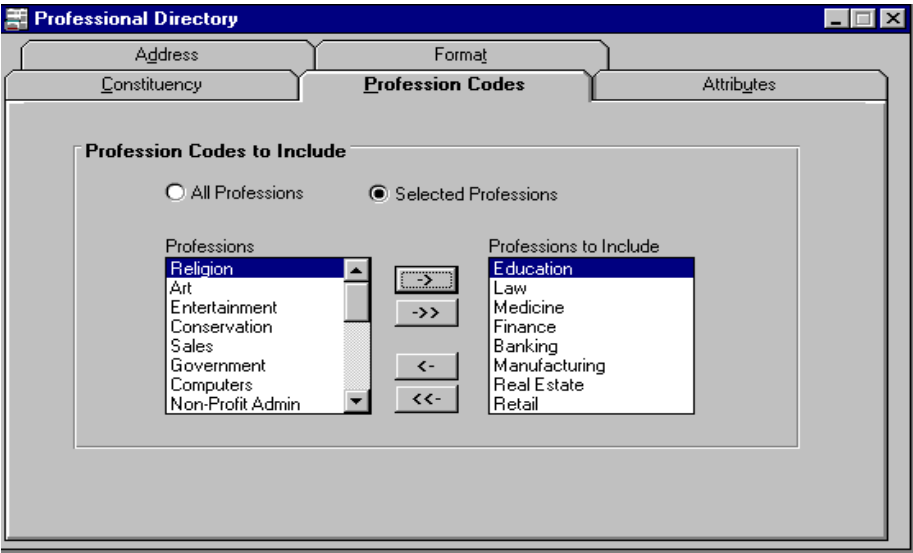
Grandchildren Codes

Select the **Grandchildren Codes to Include** from the **Relation Codes** box. Move them to the **Grandchildren Codes** box.

Parent Codes

Select the **Constituencies for Parents** from the **Constituencies** box. Move them to the **Parent Constituencies** box.

Profession Codes



Select the **Profession Codes to Include** for your report. You can select **All Professions** or **Selected Professions**. If you choose **Selected Professions**, you then need to pick your **Professions to Include** from the **Professions** box.

CHAPTER 4

CFAE Report

Listed under Analytical Reports, the CFAE (Council for Aid to Education) Report is a questionnaire issued by the CFAE to survey private giving. The report searches *The Raiser's Edge* data and compiles the information necessary to complete the survey. You cannot use the report prepared by *The Raiser's Edge* in place of the official CFAE Report, but you can use it to gather the information needed to complete the official report. Note that the report prepares the data based on the answers you provide, therefore, great care should be taken to ensure the responses are accurate.

The CFAE Report can be prepared for an independent school or for colleges. The prompts differ between these two reports.

Note: For more information and examples of the alum reports, refer to *The Raiser's Edge for Windows Reports Manual*.

In This Chapter

- CFAE Report General Information
- CGAE Report Parameters

CFAE Report General Information

The CFAE Report does not check any of the information entered at the prompts except to make sure you use the right query type. The program requires only the **Report Start Date** and **Report End Date** on the General tab.

The program automatically attributes matching gifts to the matching gift company and not the constituent, and it rounds all dollar amounts to the nearest whole dollar, in accordance with CFAE requirements.

In order to assign gifts properly, be careful when assigning constituencies. In order for a constituent to be considered in a particular category, they must have a valid constituency on their record. The alumni constituency takes priority over the others. Therefore, if a constituent has two of the defined constituencies and one is an alum, their donations are calculated in the Alumni column. Constituents with a Board Member/Trustee constituency are reported in a separate section. The board member can be listed anywhere in the constituency box on the their record.

CFAE Report Parameters

General Parameters

The screenshot shows a software window titled "CFAE Report". It has a menu bar with "Part III B", "Part IV", "Part IV - Alumni", and "Format". Below the menu bar are tabs for "General", "Part II", "Part III", and "Part III A". The "General" tab is selected. The main content area contains the following text: "The CFAE Report will provide information necessary to complete the SURVEY OF VOLUNTARY SUPPORT OF EDUCATION as dictated by the Council For Aid To Education. You may use the report values produced to fill in appropriate parts of the questionnaire." Below this text are two sections: "Report Format" and "Report Gift Filter". The "Report Format" section has two radio buttons: "Independent School" (selected) and "College". The "Report Gift Filter" section has three radio buttons: "Campaigns" (selected), "Funds", and "Fund Categories". At the bottom, there are two date input fields: "Report Start Date:" with the value "1/1/97" and "Report End Date:" with the value "12/31/97".

Report Format

Indicate whether you are preparing the CFAE Report for an **Independent School** or for a **College**. Select the circle next to your choice.

Report Gifts Filters

Indicate whether you want to base your report on **Campaigns**, **Funds**, or **Fund Categories**. Select the circle next to you choice.

Report Start Date/Report End Date

Enter the date range for your report. You should base the range on your fiscal year. For example, if your fiscal year is Jan. 1 through Dec. 31, select 1/1/9x for your **Report Start Date** and 12/31/9x for you **Report End Date**.

Part II


This tab lets you define information about your **Capital Campaigns**.

The screenshot shows the 'CFAE Report' window with the 'Part II' tab selected. The window has a menu bar with 'Part III B', 'Part IV', 'Part IV - Alumni', and 'Format'. Below the menu bar are sub-tabs: 'General', 'Part II', 'Part III', and 'Part III A'. The 'Part II' sub-tab is active, showing the 'Capital Campaigns' section. On the left, under 'Report Section', there are two prompts: 'Last Capital Campaign Completed' (highlighted) and 'Currently Active Campaign'. On the right, the 'Last Capital Campaign Completed' section contains a 'Gift Query' dropdown menu set to 'all gifts in date order', 'Start Date' (2/15/97), and 'End Date' (6/1/97). Below these is a 'Campaigns To Include' section with a list box containing 'The Campaign for Excellence', 'Endowment - Restricted', 'Endowment - Unrestricted', and 'Membership Campaign'. To the right of this list are navigation buttons: '>', '>>', '<<', and '<'. A second list box on the right contains 'Annual Campaign'.

Report Section

In the **Report Section** box there are two prompts: **Last Capital Campaign Completed** and **Currently Active Campaign**. When you highlight an option, the prompts on the right side of the screen change slightly. For example, if you select **Currently Active Campaign**, the title on the right changes to also read **Currently Active Campaign**.

Gift Query

If you choose to use a **Gift Query**, select  to select from a list of available queries. You should create all the queries you need for your CFAE Report before you start composing the report. If you do not want to use a query, leave this field blank.

Start Date/End Date

Enter the campaign's date range.

Campaigns/Funds/Fund Categories to Include

This prompt's title depends on what you selected in the **Report Gift Filer** prompt on the General tab. Select the Campaigns/Funds/Fund Categories that make up the Capital Campaign. Move your selections to the box on the right.

Part III

Part III breaks down all of your giving based on constituency or what CFAE calls sources. According to CFAE, all of your gift income should appear somewhere in this section.

Reports Section

In the **Report Section** box classify the sources of your gifts. When you highlight one of the sources, the prompts on the right side of the screen change slightly. For example, when you highlight Alumni, the title on the right changes to also read **Alumni**. Select the **Report Section** you want to define. Refer to the Survey Instructions from CFAE for definitions of the sources.

Constituencies to Include

Indicate which constituencies make up the source you highlighted in the **Report Section** box. You should assign constituencies for each of the sources listed by moving the constituencies listed in the box on the left to the box on the right.

Part IIIA

In Part IIIA you identify the **Funds for Current Operations**.

Report Section

In this section there are two prompts: **Unrestricted** and **Restricted**. When you highlight the option, the prompts on the right side of the screen change slightly. For example, when you highlight Unrestricted, the title on the right changes to also read **Unrestricted**. Select the **Report Section** you want to define.

Campaigns/Funds/Fund Categories to Include

This prompt depends on what you selected in the **Report Gift Filter** prompt on the General tab. Select the Campaigns/Funds/Fund Categories that make up the current operations and move them from the box on the left to the box on the right.

Part IIIB

Part IIIB includes information about **Funds for Capital Purposes**, including Property, Buildings, and Equipment; Endowment Funds; and Loan Funds.

Report Section

In the **Report Section** box there are four options requiring you to identify the campaigns making up the section. When you highlight the option, the prompts on the right side of the screen change slightly. For example, when you highlight Loan Funds, the title on the right changes to also read **Loan Funds**. Select the **Report Section** you want to define.

Campaigns/Funds/Fund Categories to Include

This prompt depends on your choice in the **Report Gift Filter** prompt on the General tab. Select the Campaigns/Funds/Fund Categories that make up the section. Move them from the box on the left to the box on the right.


Part IV

Part IV includes selected details about some of the gifts reported in Part III.

Report Section

In the **Report Section** box you have several options requiring you to identify the campaigns making up the section. When you highlight an option, the prompts on the right side of the screen change slightly. For example, when you select Planned Gifts, the title on the right changes to also read **Planned Gifts**. Select the **Report Section** you want to define.

Gift Queries

If you choose to use a **Gift Query**, select  to select from a list of available queries. You should create all queries you need for your CFAE report before you start composing the report.

Campaigns to Include

This prompt depends on what you selected in the **Report Gift Filter** prompt on the General tab. Select the campaigns that make up the section. Move them from the box on the left to the box on the right.


Part IV – Alumni

Report Section

In the **Report Section** box you have two options, both requiring you to identify the constituencies making up the section. When you highlight the option, the prompts on the right side of the screen change slightly. For example, when you highlight **Gifts**

for **All Purposes**, the title on the right changes to also reads **Gifts for All Purposes**. Select the **Report Section** you want to define.

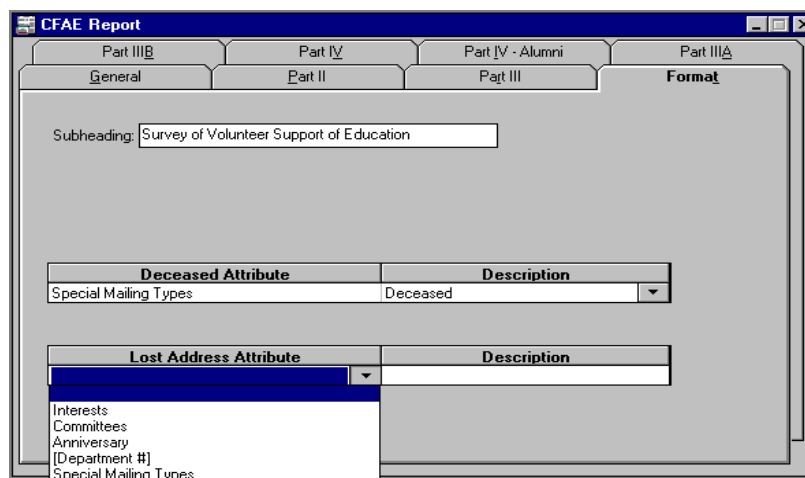
Alumni Query

If you choose to use a query, select  to select from a list of available queries. You can only choose Individual, Organization, or Constituent queries. You should create all queries you need for your CFAE report before you start composing the report. If you choose to not use a query, leave this field blank.

Constituencies to Include

Indicate which constituencies make up the **Report Section**. You should assign constituencies for each of the sections listed. Move your choices from the box on the left to the box on the right.

Format



The screenshot shows the 'CFAE Report' application window with the 'Format' tab selected. The interface includes a subheading field containing 'Survey of Volunteer Support of Education'. Below this are two tables for defining report sections.

Deceased Attribute	Description
Special Mailing Types	Deceased

Lost Address Attribute	Description
Interests	
Committees	
Anniversary	
[Department #]	
Special Mailing Types	

Subheading

You can enter a subheading to print just below the report title. Use this field to further define the report.

Deceased Attribute

To identify deceased constituents, we recommend assigning a constituent attribute in a deceased constituent's record. On the Format tab, you can identify the attribute used to identify deceased constituents.

Lost Address Attribute

To identify constituents with whom your organization has lost contact, we recommend assigning a constituent attribute in the constituent's record. On the Format tab, you can identify the attribute used to identify constituents with lost addresses.

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