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RE64-Reports-120498

Chapter 1 — Reports Overview

The Raiser's Edge for Windows (hereinafter referred to as *The Raiser's Edge*) includes numerous standard reports. These reports provide important information to keep you up-to-date with every aspect of your fund raising. You can analyze the giving trends of your constituents, evaluate the financial position of your organization, track all aspects of pledges, report on demographics, and produce reports to provide information for your business or accounting office.

All reports contain default or predefined Gift types; however, you can change the default Gift types. Parameters help to narrow the results of a report.

- *The Raiser's Edge* has numerous standard reports to analyze giving trends, determine the financial position of your organization, track pledges and other specialized Gift types, and evaluate the demographics of your database.
- All reports have predefined Gift types. Some reports allow you to modify the Gift types to customize the results.
- When you set preferences and save your report parameters, re-running the reports is easy - simply open the report and preview, or print the report.
- You can print a hard copy of a report, send the report to another user through electronic mail, export the information to use in another program, or preview the report on the screen.
- Some reports have the option to graph the results. These graphs can be printed or placed in a word processing program for letters, proposals, and annual reports.

Using this Manual

This manual is divided into chapters and is in the same order as the report types in *Reports*. Each chapter lists the reports in that chapter with a brief overview. After the overview page, an example of each report is shown and, in some cases, a detailed, summary, and optional version of a report is included. The page opposite each report gives a general description of the report; a field-by-field description; and a list of required fields, filters, sort orders, and options.

Terminology

Acknowledgee	The person to notify when a gift is received. This might be the person being honored or the family of someone being memorialized.
Action	An assigned task. For example, inviting a potential donor to lunch or making follow-up telephone calls are types of actions assigned to staff members.
Appeal	Used to identify different solicitations and promotions to ask a donor to give. Several different appeals may be operated within a single campaign. For example, an Alumni Book Drive for Children's books might be one appeal within a Homeless Shelter Reading Room campaign.

Campaign	Campaigns represent the overall purpose for raising funds. For example, you might have a Capital Campaign, Twenty-first Century Campaign, and an Annual Giving Campaign. A campaign may include one or more appeals and funds. For example, a Homeless Shelter Reading Room Campaign might be made up of a number of appeals directed toward different groups of constituents.
Constituent	A person or an organization with a record established within <i>The Raiser's Edge for Windows</i> program.
End Member	The number of members at the end of a report date range. This includes active members and lapsed members.
Field	An area of a record where information is entered. For example, the Bio 1 tab of a constituent record has a country field.
Field Value	The information entered in a field. For example, Australia is a value entered in the country field of a constituent record.
Filter	Any field or value used to narrow the results of a report. For example, you can select only constituents with the constituent code CP (Current Parent), and only gifts given to a certain fund, such as Annual Fund 1998. All other constituency codes and funds are filtered out of this report.
Fund	Funds identify where gifts and pledges should be recorded for financial purposes. Funds can be linked to campaigns and appeals. For example, a Children's Book Fund might be set up as part of a campaign to provide books to a homeless shelter reading room.
Membership Category	A membership classification or level established in <i>Configuration</i> . Student, Individual, Lifetime, and Benefactor are examples of membership categories. Membership Categories can help filter the results of reports.
Membership Type	An identification of the action associated with a membership. New, renewal, upgrade, and downgrade are examples of membership types. Membership types can help analyze trends within the constituent database.
Pulled	Indicates the program automatically extracts information from a field or tab within the constituent records. Example: "The target amount is pulled from the Bio 2 tab of the constituent record."
Query	A query is a type of filter used to group records with common characteristics. For example, a query can consist of all constituents from Australia with a class year before 1996. Create and save a query for use with other modules in <i>The Raiser's Edge for Windows</i> .
Start Member	The number of members at the beginning of a report date range, including active and lapsed members.

Chapter 2 — Financial Reports

Financial Reports help you evaluate the financial position of your organization. Both detailed and summary formats provide the fiscal standing of your fund raising efforts. There are also special reports to track specific Gift types. Your business office can use these reports to document cash received. For information on procedures such as processing, printing, and exporting reports, see the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

The *EFT Reports* section lists other Financial Reports.

Section Preview

Most financial reports share similar parameters to narrow the results of the report.

Most financial reports have predefined gift types that can be changed to customize a report. Return the report to the predefined gift types by clicking the default button.

- The **Gift Detail Report** provides detailed information regarding constituents' giving within a date range. Mark the checkbox on the Format tab to print and process the Gift Summary Report.
- The **Gift Summary Report** provides gift amount totals for all Gift types. Mark the checkbox on the Format tab to print and process the Gift Detail at the same time.
- The **Cash Receipts Journal** tracks cash gifts and cash pledge payments within a date range.
- The **Constituent Giving History** provides a detailed listing, for each constituent, of all gifts given within a date range.
- The **Matching Gift Report** provides detailed or summary information regarding gifts matched by a matching gift company.
- The **Stock Gain/Loss Report** provides information required for tracking gifts made in the form of stock.
- The **Gifts in Kind Report** provides information regarding donations made in the form of a gift-in-kind. A gift-in-kind is a donation of goods or services for which a monetary value can easily be assigned.
- The **Other Gifts Report** provides information about donations made in the form of an "other" gift. Other gifts are donations that do not fit in a normal accounting category or are difficult to assign a current cash value.
- The **Gift Entry Validation Report** provides a detailed list of all gifts within a date range. This report is useful as a daily report for checking data entry accuracy.
- The **Account Distribution Report** provides a breakdown by General Ledger accounts of gifts within the specified date range.
- The **Credit Gift Report** tracks reversed or written off donations such as pledge write-offs.
- The **General Ledger Audit Report** tracks gifts posted to Blackbaud's General Ledger, but then deleted.
- The **Annual Statement Report** provides constituent giving histories based on a date range. It is useful as an end-of-year report for constituents who wish to review their giving for tax purposes.

Gift Detail Report

The **Gift Detail Report** provides detailed information for constituent giving within a date range. The report shows cash received, stock gifts, any outstanding pledge balances for each constituent and matching gift pledge balances. Other gifts, gifts in kind, write-offs, and credits can be included. This report is useful as a weekly or monthly report of gift activity.

The report provides detailed constituent gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name, gift date, fund, cash, stocks, pledge balance, matching gift pledge balance, and reference. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns). Generate a **Gift Summary Report** with this report by marking the **Include Summary** checkbox on the Format tab. See the Financial Reports section in *The Raiser's Edge for Windows User's Guide* for more information on relevant fields.

This report is time sensitive. For example, a donor pledge \$20 on 6/2/98 and pays \$10 toward that pledge on 6/20/98. Another payment is made on 8/1/98. If you run the report based on a 6/1-31/98 date range, the report will show a \$10 balance.

Default Gift types:

- Column 1:** Cash (regular cash, pledge payment-cash, and matching gift pledge payment-cash)
- Column 2:** Stocks (stock, sold stock, pledge payment-stock, matching gift payment-stock, and pledge payment-sold stock)
- Column 3:** Pledge balance

Note: If this report is used to calculate pledge balances, the balance can be greatly affected by the filters selected. For example, a donor may pledge \$500 to the Annual Fund, but then send a \$500 check indicating the payment is to go to the Building Fund. In this example, if you filter the report using only the Annual Fund, a \$500 balance still shows for the donor although the donor paid the full amount. The master pledge balance is zero, but the Annual Fund has a \$500 balance because the report is limited to only dealing with money that has come in or is expected for the Annual Fund.

Column 4: Matching gift pledge balance

Filter:

- Gift types
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Alphabetically or date

Options:

- Include gift summary
- Print number of donors
- Print maiden name
- Include organization contact names
- Print telephone number
- Include an address
- Pledge type (master or installment)

12/8/1998

Blackbaud Demo
Gift Detail Report
Reference Manual Sample

Page 1

Start Date: 12/8/1998 End Date: 12/8/1998

Constituent	Date	Fund	Cash	Stocks	PledgeBal	MG Plg Bal	Letter
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	12/8/1998 12/8/1998	JHSCHOLAR ANNUAL98		\$100.00			Stock Thank You General Thank Yo
Abernathy and Sons (Carolyn Murphy) Highway 201 North Suite 385 Charleston, SC 29401	12/8/1998 12/8/1998	ANNUAL99 ANNUAL99		\$100.00		\$50.00	General Thank Yo Matching Gift Ple
Computer Products, Inc. 3215 Landmark Drive Charleston, SC 29420	12/8/1998 12/8/1998	LIBRARY LIBRARY		\$500.00		\$250.00	Matching Gift Ple General Thank Yo
Michael J. Murphy 52 Buckingham Avenue Greenville, SC 29609	12/8/1998 12/8/1998	ANNUAL99 CCPLANT		\$60.00	\$25.00		Pledge Thank You General Thank Yo
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012	12/8/1998 12/8/1998	JHSCHOLAR JHSCHOLAR		\$50.00		\$50.00	Matching Gift Ple Pledge Payment T
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	12/8/1998 12/8/1998	LIBRARY LIBRARY		\$50.00	\$500.00		Pledge Thank You Pledge Payment T
Jonathon P. Smith 1503 Sand Dollar Drive Hilton Head, SC 29489	12/8/1998 12/8/1998	ANNUAL99 KELLOGG		\$50.00	\$500.00		Annual Giving Th Stock Thank You

14 Gifts Listed
7 Constituents Listed

Totals:

\$890.00	\$600.00	\$525.00	\$350.00
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Gift Summary Report

The **Gift Summary Report** provides totals for gifts received in a date range listed by constituency, fund, campaign, or appeal. Totals can be calculated for all Gift types. Process this report with the Gift Detail Report by marking **Include Summary** on the Format tab of the Gift Detail Report. This report is useful for summarizing weekly or monthly gift activity.

The report provides summary gift information for all constituents or for a selected query. By default, you can base the report on fund, campaign, appeal, constituency, or any combination of the four. A start date, end date, or date range can be selected. The report includes number of gifts, total cash, total stocks, total pledge balance, total matching gift balance, and total gift amount. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns). Run the report separately or as part of the **Gift Detail Report** by marking **Include Summary** on the Format tab of the Gift Detail Report.

Default Gift types:

- Column 1:** Cash (regular cash, pledge payment-cash, and matching gift pledge payment-cash)
- Column 2:** Stocks (stock, sold stock, pledge payment-stock, matching gift payment-stock, and pledge payment-sold stock)
- Column 3:** Pledge balance

Note: If this report is used to calculate pledge balances, the balance can be affected by the filters selected. For example, a donor may pledge \$500 to the Annual Fund, but then send a \$500 check indicating the payment is to go to the Building Fund. In this example, if you filter the report using only the Annual Fund, a \$500 balance still shows for the donor although the donor paid the full amount. The master pledge balance is zero, but the Annual Fund has a \$500 balance because the report is limited to only dealing with money that has come in or is expected for the Annual Fund.

Column 4: Matching gift pledge balance

Note: You can graph the Gift Summary Report. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Options:

Pledge type (master or installment)
Summarize by fund
Summarize by campaign
Summarize by appeal
Summarize by constituency
Summarize by any combination of the four

Blackbaud Demo
Gift Summary by Constituency
Reference Manual Sample

Constituency	Description	#Gifts	Cash	Stocks	Plg Balance	MG Plg Bal	Total
AL	Alumnus	21	\$9,725.00	\$3,525.00	\$700.00	\$50.00	\$14,000.00
BM	Board Member	11	\$190,875.00	\$15,000.00	\$560,000.00	\$0.00	\$765,875.00
CO	Corp./Business	11	\$45,750.00	\$10,000.00	\$5,000.00	\$0.00	\$60,750.00
CP	Current Parent	9	\$1,900.00	\$2,000.00	\$5,000.00	\$0.00	\$8,900.00
EMPL	Employee	8	\$2,950.00	\$6,500.00	\$0.00	\$200.00	\$9,650.00
FR	Friend	28	\$6,142.50	\$1,000.00	\$8,197.50	\$750.00	\$16,090.00
Mem	Member	2	\$650.00	\$0.00	\$0.00	\$0.00	\$650.00
PR	Prospect	2	\$1,250.00	\$0.00	\$0.00	\$0.00	\$1,250.00
TR	Trustee	29	\$98,775.00	\$12,650.00	\$25,350.00	\$3,000.00	\$139,775.00
VOL	Volunteer	25	\$10,500.00	\$3,950.00	\$550.00	\$225.00	\$15,225.00
	Unknown	12	\$8,375.00	\$0.00	\$50,075.00	\$0.00	\$58,450.00
		<u>158</u>	<u>\$376,892.50</u>	<u>\$54,625.00</u>	<u>\$654,872.50</u>	<u>\$4,225.00</u>	<u>\$1,090,615.00</u>

Blackbaud Demo
Gift Summary by Campaign
Reference Manual Sample

Campaign	Description	#Gifts	Cash	Stocks	Plg Balance	MG Plg Bal	Total
ANNUAL	Annual Campaign	60	\$22,530.00	\$17,350.00	\$11,020.00	\$50.00	\$50,950.00
CAPITAL	The Campaign for Excellence	71	\$331,287.50	\$36,825.00	\$643,277.50	\$3,950.00	\$1,015,340.00
ENDOWREST	Endowment - Restricted	16	\$13,125.00	\$450.00	\$575.00	\$225.00	\$14,375.00
MEMBER	Membership Campaign	2	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,500.00
	Unknown	9	\$8,450.00	\$0.00	\$0.00	\$0.00	\$8,450.00
		<u>158</u>	<u>\$376,892.50</u>	<u>\$54,625.00</u>	<u>\$654,872.50</u>	<u>\$4,225.00</u>	<u>\$1,090,615.00</u>

Blackbaud Demo
Gift Summary by Appeal
Reference Manual Sample

Appeal	Description	#Gifts	Cash	Stocks	Plg Balance	MG Plg Bal	Total
98PHONE	1998 Phonathon	2	\$100.00	\$0.00	\$200.00	\$0.00	\$300.00
ACMail	ACMail	1	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,500.00
ALUMAPPEA	1997 Alumni Annual Appeal	1	\$0.00	\$0.00	\$50.00	\$0.00	\$50.00
ANNUALFAL	1991 Fall Appeal	1	\$75.00	\$0.00	\$0.00	\$0.00	\$75.00
ANNUALFAL	1992 Fall Appeal	1	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00
ANNUALFAL	1993 Fall Appeal	1	\$250.00	\$0.00	\$0.00	\$0.00	\$250.00
ANNUALFAL	1994 Fall Appeal	2	\$175.00	\$0.00	\$0.00	\$0.00	\$175.00
ANNUALFAL	1995 Fall Appeal	1	\$1,200.00	\$0.00	\$0.00	\$0.00	\$1,200.00
ANNUALSM9	1993 Summer Appeal	1	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00
ANNUALSM9	1994 Summer Appeal	2	\$250.00	\$0.00	\$0.00	\$225.00	\$475.00
ANNUALSM9	1995 Summer Appeal	1	\$300.00	\$0.00	\$0.00	\$0.00	\$300.00
ANNUALSP94	1994 Spring Appeal	1	\$75.00	\$0.00	\$0.00	\$0.00	\$75.00
ANNUALWIN	1993 Winter Appeal	2	\$250.00	\$0.00	\$0.00	\$0.00	\$250.00
ANNUALWIN	1994 Winter Appeal	3	\$750.00	\$0.00	\$500.00	\$0.00	\$1,250.00
ANNUALWIN	1997 Winter Appeal	1	\$0.00	\$150.00	\$0.00	\$0.00	\$150.00
BLACKTIE	Black Tie Gala Invitation	3	\$62.50	\$0.00	\$187.50	\$250.00	\$500.00
CCDIRMAIL	Capital Campaign Direct Mail	11	\$16,050.00	\$17,300.00	\$15,000.00	\$0.00	\$48,350.00
CCKICK	Capital Campaign Kickoff	10	\$98,100.00	\$17,000.00	\$71,500.00	\$0.00	\$186,600.00
GOLF93	4th Annual Golf Tournament	1	\$350.00	\$0.00	\$0.00	\$0.00	\$350.00
HOLIDAY93	1993 Holiday Card	1	\$350.00	\$0.00	\$0.00	\$0.00	\$350.00
LIFEINSUR	Life Insurance Appeal	1	\$0.00	\$0.00	\$50,000.00	\$0.00	\$50,000.00
MAJOR	Major Gifts Appeal	4	\$350.00	\$500.00	\$0.00	\$500.00	\$1,350.00
PLANNED	Planned Giving Appeal	2	\$150,500.00	\$0.00	\$0.00	\$0.00	\$150,500.00
UNSOL	Unsolicited	1	\$150.00	\$0.00	\$0.00	\$0.00	\$150.00
	Unknown	103	\$105,655.00	\$19,675.00	\$517,435.00	\$3,250.00	\$646,015.00
		158	\$376,892.50	\$54,625.00	\$654,872.50	\$4,225.00	\$1,090,615.00

Cash Receipts Journal

The **Cash Receipts Journal** tracks cash gifts and cash pledge payments made within a date range. The Cash Receipts Journal is available in a detailed format showing each donation with the constituent's name or in a summary format showing the total amount of cash for each fund. This report is useful as a daily transmittal of cash receipts.

The report provides cash gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report can be in detail and/or summary format. In the **detail** format, the report includes gift date, constituent name, fund description, amount, check number, and check date. The **summary** report includes number of gifts, amount paid, debit account, and credit account (used by *General Ledger*).

In the summary format, you can base the report on fund, campaign, appeal, constituency, or any combination of the four. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gift Type:

Cash (regular cash, pledge payment-cash, and matching gift payment-cash)

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Alphabetically or date

Options:

Show detail and/or summary
Summarize by fund
Summarize by campaign
Summarize by appeal
Summarize by constituency
Summarize by any combination of the four
Print address
Print maiden name
Print honor/memorial
Print organizational contact name

9/10/98

Blackbaud Demo
Cash Receipts Journal
Reference Manual Sample

Page 1

Date	Constituent Name	Fund Description	Amount	Check	Chk Date
5/23/97	Robert J. Reynolds 348 Senate Lane Charleston, SC 29403	Annual Fund 1997	\$1,000.00		
6/2/97	Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	Annual Fund 1997	\$300.00		
6/15/97	Jean P. Marshall 39 Banyan Drive Hilo, HI 96720	Annual Fund 1997	\$500.00		
3 Gift(s) Listed			<u>\$1,800.00</u>		

Constituent Giving History

The **Constituent Giving History** provides a detailed listing of all gifts given by a constituent within a date range. This report can show any pledge balances and gift write-offs.

The report provides giving information for all constituents or for a selected query. A start date, end date, or date range can be selected. List the report by constituent names alphabetically. The report includes constituent name, date of gift, type of gift, fund name, amount given, reference, and balance. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gift Type:

All Gifts

Note: Credit gifts are not included by default, but can be added through the Gift tab.

Filters:

- Gift types
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

Alphabetically or date

Options:

- Print address
- Print telephone number
- Print maiden name
- Print organizational contact name
- Include non-givers

9/10/98

Blackbaud Demo
Constituent Giving History
Reference Manual Sample

Page 1

Constituent Name	Date	Gift	Fund	Amount	Reference	Balance
Rebecca B. Aaron	3/16/98	Cash	ANNUAL98	50.00		
2344 Ruby Road	3/24/98	Cash	ANNUAL98	5,000.00		
Charleston , SC 29401						
			<i>Total Cash</i>	<u>5,050.00</u>		
Sarah Condon	3/20/98	Cash	ANNUAL98	1,000.00		
76 Deerfield Avenue						
Anderson, SC 29621						
Michael J. Simpson	6/15/98	Cash	ANNUAL98	100.00		
443 Lake Forest Drive						
Country Club Estates						
Kiawah Island, SC 29455-0443						
Jonathon P. Smith	4/25/98	Cash	ANNUAL98	350.00		
1503 Sand Dollar Drive						
Hilton Head, SC 29489						
			Grand Total Cash	<u><u>6,500.00</u></u>		

Matching Gift Report

The **Matching Gift Report** includes information for gifts donated by a matching gift company. The report is available in detailed and summary formats. The **detailed** report lists the matching gift company name, names of constituents whose gifts are being matched, a breakdown of any matching gift cash payments, matching gift stock payments, and matching gift pledge balance. The **summary** report shows a breakdown of gifts by matching gift company name, but without constituent names.

This report provides matching gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report can be in detail and/or summary format. In the **detail** format, the report includes company name, constituent name, matching gift cash, matching gift stocks, matching gift pledge balance, and total. In the **summary** format, company name and totals for each category are included. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gift types:

Column 1: Matching gift pledge payment-cash

Column 2: Matching gift pledge payment-stock (unsold stock and sold stock)

Column 3: Matching gift pledge balance

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Company name

Options:

Detail and/or summary

Pledge type (master or installment)

Print address

Print telephone number

Print maiden name

Print organizational contact name

9/10/98

Blackbaud Demo
Matching Gift Company Detail Report
Reference Manual Sample

Page 1

Company Name	Constituent Name	MG Cash	MG Stocks	MG Plg Bal	Total
Computer Products, Inc. 3215 Landmark Drive Charleston, SC 29420	Michael J. Simpson	\$100.00	\$150.00	\$225.00	\$475.00
	Totals	100.00	150.00	225.00	475.00
Harrison Industries, Inc. 2600 South Main Street Charter Industrial Park Charleston, SC 29402	Jorn S. Chapman	\$0.00	\$300.00	\$0.00	\$300.00
	Jonathon A. Harrison	\$1,000.00	\$0.00	\$0.00	\$1,000.00
	Michael J. Simpson	\$250.00	\$0.00	\$0.00	\$250.00
	Totals	1,250.00	300.00	0.00	1,550.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012	Rebecca B. Aaron	\$500.00	\$0.00	\$50.00	\$550.00
	Anthony M. Carter	\$300.00	\$0.00	\$200.00	\$500.00
	Karen D. Haggard	\$0.00	\$0.00	\$250.00	\$250.00
	Robert L. Norton	\$0.00	\$0.00	\$500.00	\$500.00
	Robert J. Reynolds	\$0.00	\$0.00	\$3,000.00	\$3,000.00
	Totals	800.00	0.00	4,000.00	4,800.00
		<u>\$2,150.00</u>	<u>\$450.00</u>	<u>\$4,225.00</u>	<u>\$6,825.00</u>

Stock Gain/Loss Reports

The **Stock Gain/Loss Report** provides information for tracking gifts made in the form of stock. The report includes information about the acquisition and sale of the stock, including any profit or loss realized from the sale. Details on each stock transaction, including the date the stock was donated, date of sale, and name of the donor are included in the report.

The report provides stock value information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name, gift date, stock value, reference, date sold, sold amount, gain (loss), and totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gifts Type:

All Stock (Stock, Unsold Stock, Pledge Payment-Stock, Pledge Payment-Sold Stock, Matching Gift Payment-Stock, and Matching Gift Payment-Sold Stock)

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Alphabetically or date

Options:

Use sale date for sold stock
Subtract broker fees from sold stock
Print address
Print telephone number
Print maiden name
Print organizational contact name

9/10/98

Blackbaud Demo
Stock Gain/Loss Report
Reference Manual Sample

Page 1

Date	Constituent Name	Stock Value	Reference	Date Sold	Sold Amount	Gain (Loss)
9/1/97	Anthony M. Carter 45 Ashton Street Charleston, SC 29401	\$3,500.00	10 shares of IBM	10/31/97	\$2,500.00	(1,000.00)
2/13/98	Computer Products, Inc. 3215 Landmark Drive Charleston, SC 29420	\$150.00	Ins of 7/20/97			
5/17/98	Victor H. Hanson 951 Dillard Avenue Wheaton, CA 96094	\$10,000.00				
5/19/98	James M. Richards 7500 Richie Lane Brooklyn, NY 30391	\$3,000.00		6/8/98	\$3,112.00	112.00
11/24/98	Maryann Peterson 217 Oak Lane San Rafael, CA 92925	\$500.00	2 Shares of Wal-Mart	12/10/98	\$500.00	
		<u>\$17,150.00</u>			<u>\$6,112.00</u>	<u>(\$888.00)</u>

Gifts in Kind Report

The **Gift In Kind Report** tracks donations made in the form of a gift-in-kind. A gift-in-kind is a donation of goods or services for which a monetary value can easily be assigned, such as school supplies or computer equipment.

The report provides gift-in-kind information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name, gift date, fund name, gift value, and reference. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gift Type:

All gifts-in-kind (regular gift-in-kind, pledge payment-in-kind, matching pledge payment-in-kind)

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Alphabetically or date

Options:

Print address
Print telephone number
Print maiden name
Print organizational contact name

9/10/98

Blackbaud Demo
Gift In Kind Report
Reference Manual Sample

Page 1

Date	Constituent Name	Fund	Gift Value	Reference
4/15/94	Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	KELLOGG	\$5,000.00	Rare Books for the Library
9/14/97	Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	ANNUAL97	\$350.00	Oil Painting
			<u>\$5,350.00</u>	

Other Gifts Report

The **Other Gifts Report** provides information about donations made in the form of an *other* gift. Other gifts are donations that do not fit in a normal accounting category or are difficult to assign a current cash value. For example, planned gifts, annuities, and life insurance policies are considered other gifts.

The report provides Other Gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name, gift date, fund name, gift value, and reference. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gift Type:

All other gifts (regular other gift, pledge payment-other, and matching gift payment-other)

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Alphabetically or date

Options:

Print address
Print telephone number
Print maiden name
Print organizational contact name

Other Gifts Report
 Reference Manual Sample

Date	Constituent Name	Fund	Gift Value	Reference
4/30/92	Elizabeth A. Cooper 2501 Canyon Road Aspen, CO 30398	ANNUAL94	\$250.00	See Thomas Cooper, soft credit
12/15/93	The Smith Foundation 4401 South Bend Avenue Suite 405 Charleston, SC 29401	KELLOGG	\$500.00	
2/24/95	Jonathon A. Harrison 8790 Devon Boulevard Charleston, SC 29401	ANNUAL95	\$200,000.00	
3/11/97	Thomas A. Cooper 2501 Canyon Road Aspen, CO 30398	CCPLANT	\$500.00	See Elizabeth Cooper
			<div> <div></div> <div>\$201,250.00</div> </div>	

Gift Entry Validation Report

The **Gift Entry Validation Report** provides a detailed list of all gifts within a date range. This report is useful as a daily report for checking data entry accuracy.

The report provides detailed gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes gift date, donor name, gift type, fund name, amount given, solicitor name, receipt number, payment type, gift code, post date, added by name, number of gifts, and total amounts for each gift type. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: Mark the **Condensed Format** checkbox on the Format tab to display multiple gifts per page. Leaving the checkbox unmarked lists each gift on a separate page.

Default Gift Type:

All gifts

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Gift date

Options:

Condensed format

Print gifts on separate pages

Display miscellaneous information

Display matching gifts

Display honor/memorials

Display soft credits

Display gift attributes

Display installments – pledges only

Display pledges applied to – payments only

Blackbaud Demo Gift Entry Validation Reference Manual Sample

[illegible]

Type	# Gifts	Total Amount
Cash	1	\$100.00

Account Distribution Report

The **Account Distribution Report** provides a breakdown by *General Ledger* account of gifts within a date range. Generate the report based on the posting status of gifts and provide the total per account.

The report provides *General Ledger* account information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report can include posted and/or unposted gifts, constituent name, gift date, fund, debit amount, credit amount, *General Ledger* account number, and total debits and credits. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Default Gift Type:

All gifts

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Alphabetically or date

Options:

Include posted gifts and/or unposted gifts

Print maiden name

Print organizational contact name

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Blackbaud Demo
Account Distribution Report
Reference Manual Sample

Page 1

<u>Date</u>	<u>Gift</u>	<u>Constituent Name</u>	<u>Fund</u>	<u>DB Amount</u>	<u>CR Amount</u>	<u>GL Account</u>
10/1/94	Cash	Thomas G. Simpson 389 Oak Branch Road Charleston, SC 29401	ANNUAL94	\$125.00		100100
10/1/94		Thomas G. Simpson			\$125.00	420000
1/28/99	Pay-Cash	Mary M. Reynolds 348 Governor Lane Charleston, SC 29403	CCBUILDING	\$20,000.00		100100
1/28/99		Mary M. Reynolds			\$20,000.00	120101
Totals:				<u>\$20,125.00</u>	<u>\$20,125.00</u>	

Credit Gift Report

The **Credit Gift Report** tracks reversed donations. A gift reversal indicates a cash gift was not realized. For example, this report lists returned checks or declined credit card gifts.

The report provides reversed gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name, gift date, credit notes, original gift date, amount, and fund. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Alphabetically or date

Options:

Print address

Print telephone number

Print maiden name

Print organizational contact name

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Blackbaud Demo
Credit Gift Report
Reference Manual Sample

Page 1

Date	Constituent Name	Credit Notes	Original Gift		
			Date	Amount	Fund
12/15/94	Merilux 5200 International Boulevard Suite 236 Charleston, SC 29405		12/1/94	\$500.00	ANNUAL94
12/21/94	Myron Banks 3201 South Bend Avenue North Charleston, SC 29420	Check was sent back from	12/1/94	\$75.00	ANNUAL95
2 Gift(s) Listed				<u>\$575.00</u>	

General Ledger Audit Report

The **General Ledger Audit Report** tracks deleted gifts after being posted to a general ledger program. The report includes the name of the constituent, gift type, post date, gift date, fund name, and any special information about pledges and stocks.

The report provides audit information for posted gifts to Blackbaud's *General Ledger* or another accounting software program and then deleted. A start date, end date, or date range can be selected. The report includes post date, constituent name, gift date, fund, gift type, amount given, stock gain (loss), broker fee, pledge amounts, and totals.

Default Gift types:

All gifts

Filters:

Gift types

Sort Order:

Alphabetically or post date

Blackbaud Demo
General Ledger Audit
Reference Manual Sample Report

Constituent Name	Post Date	Gift Date	Fund	Gift Type	Amount	Stock	Broker	Pledge Amounts	
						Gain (Loss)	Fee	Current	Future
ANTHONY BAKKER	1/1/92	1/1/92	Annual Fund 1992	Pledge	\$0.00	\$0.00	\$0.00	\$10,000.00	\$0.00
	9/22/94	9/22/94	Capital Campaign Plant Fund	Pledge	\$0.00	\$0.00	\$0.00	\$20,000.00	\$0.00
	5/12/98	5/12/98	Annual Fund 1991	Pledge	\$0.00	\$0.00	\$0.00	\$400.00	\$100.00
	Total:				\$0.00	\$0.00	\$0.00	\$30,400.00	\$100.00
COMPUTER PRODUCTS, INC.	7/20/97	7/20/97	Smith Library Fund	MG Pledge	\$0.00	\$0.00	\$0.00	\$375.00	\$0.00
	Total:				\$0.00	\$0.00	\$0.00	\$375.00	\$0.00
HARRISON INDUSTRIES, INC.	1/15/95	7/20/94	Smith Library Fund	MG Pledge	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00
	Total:				\$0.00	\$0.00	\$0.00	\$500.00	\$0.00
MICHAEL SIMPSON	10/30/97	10/30/97	Annual Fund 1997	Pledge	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00
	Total:				\$0.00	\$0.00	\$0.00	\$100.00	\$0.00
Grand Total:					\$0.00	\$0.00	\$0.00	\$31,375.00	\$100.00

Annual Statement Report

The **Annual Statement Report** lists a constituent's giving history based on a date range and includes the receipt amount of each gift. This report is useful as an end of year report for constituents who wish to review their receipt donations for tax purposes. Each constituent's information is printed on a separate page.

The report provides a giving history for all constituents or a selected query. A start date, end date, or date range can be selected. This report includes constituent name, date of gift, type of gift, amount of gift, receipt number, receipt amount, and a total for receipt amounts. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

Constituency

Gift types

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Print fund description

Print address

Print telephone number

Print maiden name

Print organizational contact name

9/10/98

Blackbaud Demo
Annual Statement Report

Page 2

Constituent Name	Date	Gift	Amount	Receipt Number	Receipt Amount
Rebecca B. Aaron	1/10/93	Cash	500.00		500.00
2344 Ruby Road	6/3/93	Cash	100.00		100.00
Charleston , SC 29401	6/14/94	Cash	200.00		200.00
	9/15/94	Pay-Cash	100.00	89791	100.00
	12/21/94	Cash	50.00		50.00
	10/29/96	Pay-Cash	200.00		125.00
	6/2/97	Cash	300.00		140.00
	3/16/98	Cash	50.00		50.00
	3/24/98	Cash	5,000.00		5,000.00
				Total:	6,265.00

Chapter 3 — EFT Reports

Electronic Funds Transfer is the general banking system where transactions, such as deposits or bill payments, are made through computer databases. The EFT process takes place electronically requiring little or no physical paperwork. All or most paperwork and bookkeeping is done online.

Electronic Funds Transfer (or *EFT*) incorporates online capabilities by creating an EFT record, which is a template for recurring gifts/open-ended pledges. From this template, individual transactions are generated. These transactions are then committed to the database to become gift records.

EFT records can be matched, soft credited, split across funds, and linked to honor/memorial records. You also have access to gift attributes.

EFT adds fields and options to *Configuration*, *Constituent Management*, *Batch*, *Query*, *Export*, *Profiles*, *Database Administration*, and *Reports*.

For more information, refer to the *Electronic Funds Transfer User's Guide*.

Section Preview

- The **EFT Participation Report** provides information about constituents who donate gifts electronically and information about their gifts.

Note: Access this report from *Reports*, under the Financial Reports category.

- The **Unpaid EFT Report** provides information about generated (paid) EFT transactions as of a specified date.

Note: Access this report from *Reports*, under the Financial Reports category.

- The **Cash Flow Report** shows the anticipated cash flow for specified periods.

Note: Access this report from *Reports*, under the Pledge Reports category.

- The **Pre-Transmission Report** provides detailed information for all transactions in a transaction set.

Note: Access this report from *EFT* by selecting **File, Print, Pre-Transmission Report**.

- The **EFT Credit Card Report** provides detailed information for all credit card transactions in a transaction set. Use this report when credit card transactions must be handled separately from direct debit transactions.

Note: Access this report from *EFT* by selecting **File, Print, EFT Credit Card Report**.

- The **EFT Transaction Set Log** provides summary information on the creation, contents, and status of Transaction Sets.

Note: Access this report from *EFT* by selecting **File, Print, EFT Transaction Set Log**.

EFT Participation Report

The **EFT Participation Report** provides information about constituents who donate gifts electronically and information about their gifts.

Note: Access this report from *Reports* under the Financial Reports category.

This report provides EFT information for all constituents or for a selected query. You can enter an EFT created after date. The report includes constituent name, created on date, payment type, fund name, payment amount, payment frequency, date of next transaction, total given to date, status, a summary of transactions, and a grand total. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Constituent name

Options:

- Print address
- Print telephone number
- Print maiden name
- Print organizational contact name

9/28/98

Blackbaud Demo
EFT Participation Report
Reference Manual Sample

1

Created After:

Constituent Name	Created On	Payment Type	Fund	Amount	Frequency	Next Transaction	Total to Date	Status
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	9/10/98	Credit Card	Annual Fund 1998	\$500.00	Monthly	9/10/98	\$0.00	Active

Direct Debit Total:	\$0.00
Credit Card Total:	\$500.00
Non-Electronic Total:	\$0.00

Grand Total: \$500.00

Total Transactions:	1
Total Donors:	1

Unpaid EFT Report

The **Unpaid EFT Report** provides information about generated (paid) EFT transactions as of a specified date.

Note: Access this report from *Reports* under the Financial Reports category.

This report provides unpaid EFT information for all constituents or for a selected query. You can enter an unpaid as of date. The report includes constituent name, created on date, payment type, amount, payment frequency, and date of next scheduled transaction. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Constituent name

Options:

- Print address
- Print telephone number
- Print maiden name
- Print organizational contact name

9/28/98

Blackbaud Demo
Unpaid EFT Report
Reference Manual Sample

Unpaid as of:

Constituent Name	Created On	Payment Type	Amount	Frequency	Next Scheduled Transaction
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	9/10/98	Credit Card	\$500.00	Monthly	9/10/98

Cash Flow Report

The **Cash Flow Report** illustrates anticipated cash flow for specified periods. The report reviews pledges due within the date range to calculate the projected cash flow over one or several periods. The detailed report lists the constituent name and pledge balance. The summary report totals the amounts due in each date range, but does not list constituent names.

Note: The **Cash Flow Report** can include recurring gifts to project revenue from future EFT payments. Access this report from *Reports* under the Pledge Reports category.

This report provides a cash flow projection for all constituents or for a selected query. The report can be in detail and/or summary format. You can enter a commitments made after date. Specify up to twelve report periods with at least one period entered. Recurring gifts (including EFT payments), regular pledges, and matching gift pledges can be included in the report. In the **detail** format, the report includes fund, description, amount pledged, past due, amount due in period, and total due. In the **summary** format, the report includes fund name, description, amount past due, amount due in period, and total due. Both formats provide grand totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Include recurring gifts
Include regular pledges
Include matching gift pledges
Select report periods (1 – 12)
Detail and/or summary
Print address
Print telephone number
Print maiden name
Print organizational contact name

9/11/98

Blackbaud Demo
Cash Flow Report
Reference Manual Sample

Page 1

Constituent Name		Fund	Amt Pledged	Past Due	First Half 1998	Total Due
Master Date	Type					
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601						
5/10/98	PLM Q4	ANNUAL98	\$200.00	\$0.00	\$50.00	\$50.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012						
3/16/98	MG PLG	ANNUAL98	\$50.00	\$0.00	\$50.00	\$50.00
Totals:			\$250.00	\$0.00	\$100.00	\$100.00

Pre-Transmission Report

The **Pre-Transmission Report** provides detailed information for all transactions in a transaction set.

Note: Access this report from *EFT* by selecting **File, Print, Pre-Transmission Report**.

This report includes constituent name, payment amount, payment type, bank name, transaction routing number, account number, and reference number. For credit card payments, credit card type, card number, and expiration date are also included. A summary of direct debit, credit card, and non-electronic transactions is provided.

9/28/98

Blackbaud Demo *Pre Transmission Report*

Transactions Due on or Before: 9/28/98
Transaction Set Creation Date: 9/28/98
Transaction Set Number: 1

Sponsoring Bank: Nations Bank - North Office
Account Name: Sample check account
User Number: 6
Account Number: 34543

Name	Amount	Payment Type	Bank - Branch/	Trans/Routing #	Account #	Reference #	Credit Type	ard Number	Expires On
Michael J. Simpson	\$500.00	Credit Card					Master Card	6667788990	
Rebecca B. Aaron	\$500.00	Credit Card					American Ex	555 666 7777	

Total Number of Direct Debits: 0
Total Amount of Direct Debits:

Total Number of Credit Cards: 2
Total Amount of Credit Cards: \$1,000.00

Total Number of Non-Electronic Transactions: 0
Total Amount of Non-Electronic Transactions:

Total Transactions: 2
Total Amount: \$1,000.00

Note: This report lists only those gifts to be included in this transmission. Associated gifts such as Matching Gift Pledges are not listed here but will be created when the Transaction Set is Committed to The Raiser's Edge or Posted from RE:Batch.

EFT Credit Card Report

The **EFT Credit Card Report** provides detailed information for all credit card transactions in a transaction set. Use this report to handle credit card transactions separately from direct debit transactions.

Note: Access this report from *EFT* by selecting **File, Print, EFT Credit Card Report**.

This report provides the information required for processing *EFT* credit card transactions. This report includes credit card type, constituent name, authorization code, credit card number, expiration date, amount, transaction set creation date, and transaction set number.

9/28/98

Blackbaud Demo
EFT Credit Card Report

1

Transaction Set Creation Date: 9/28/98

Transaction Set #: 1

<u>Credit Type</u>	<u>Constituent</u>	<u>Authorization Code</u>	<u>Card Number</u>	<u>Expires On</u>	<u>Amount</u>
American Express	Rebecca B. Aaron		555 666 7777		\$500.00

Total American Express: \$ 500.00

Master Card	Michael J. Simpson		6667788990		\$500.00
-------------	--------------------	--	------------	--	----------

Total Master Card: \$ 500.00

Total Number of Items: 2

Grand Total: \$1,000.00

EFT Transaction Set Log

The **EFT Transaction Set Log** provides summary information about the creation, contents, and status of transaction sets.

Note: Access this report from *EFT* by selecting **File, Print, EFT Transaction Set Log**.

This report provides one-line summaries of each transaction set of the selected type, EFT transaction set number, types of transaction included, set created by, date created, date last changed, changed by, and status.

Note: There are four types of transaction sets: generated sets, transmitted sets, committed sets, and transferred sets. Run the report for any combination of the four types.

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Blackbaud Demo
EFT Transaction Set Log Report

1

Included Sets: Generated, Transmitted, Committed, Transferred

EFT Transaction Set #	Transactions Included	Created By	Date Created	Last Changed	Changed By	Status
1	Credit Card/Direct Debit	Supervisor	9/28/98	9/28/98	Supervisor	Generated

Chapter 4 — Pledge Reports

Pledge Reports provide information for tracking all aspects of pledges, including payments, write-offs, cash flow, and other pledge activity. Select specific group parameters to narrow the report. For information on procedures such as processing, printing, and exporting reports, see the Reports Overview chapter in *The Raiser's Edge for Windows User's Guide*.

Section Preview

Pledge Reports manage all aspects of gifts made as pledges or a promise to make a donation. You can determine who has not fulfilled their pledge, what pledges are outstanding, or the anticipated cash flow from future payments.

- The **Pledge Activity Report** provides a detailed account of all pledge activity including payments, installments, and the balance due within a specified date range.
- The **Cash Flow Report** illustrates the anticipated cash flow for a specified date range.
- The **Past Due Pledge Report** lists past due pledges as of a specified date. Pledges are categorized by the number of days they are past due.
- The **Pledge Journal** provides information regarding pledge activity during a specified date range. It reports payments made and payments still outstanding.
- The **Campaign Pledge Report** tracks pledges made after a certain date. This report is helpful in closing a campaign and verifying the status of all pledges made to the campaign.
- The **Written Off Pledge Report** lists all pledges written off during the specified date range. Writing off a pledge indicates you do not expect the balance of the pledge to be paid.
- The **Pledge Status Report** provides multiple formats to report on pledges made after a specified date with activity in a selected date range.
- The **Pledged But Not Paid Report** lists constituents who have made a pledge but have not made any payments within the selected date range.

Pledge Activity Report

The **Pledge Activity Report** provides a detailed account of all pledge activity including payments, installments, and the balance due within a date range. The report can be limited to specific types of pledges (e.g., regular pledges or outstanding pledges).

This report provides detailed pledge activity information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name, master pledge date, type, amount pledged, fund name, activity type, date, amount, and total balance. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

This report shows activity only. For example, assume a pledge is made on 2/2/98 with installments scheduled from 3/15/98 until 7/15/98, then the report is run using the date range 2/1/98 to 2/28/98. The report will not include this pledge because there was no activity during the specified date range. However, if the report is run again using a date range of 03/01/98 to 03/31/98, then the pledge shows because there is activity of an installment due within that date range.

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Include outstanding pledges only

Print address

Print telephone number

Print maiden name

Print organizational contact name

Pledge Codes:

PLG Regular Pledge

PLM Master Pledge

PLM A2 Master Pledge 2 Annual Installments

PLM A3 Master Pledge 3 Annual Installments

PLM SA3 Master Pledge 3 Semi-Annual Installments

PLM Q4 Master Pledge 4 Quarterly Installments

PLM B5 Master Pledge 5 Bimonthly Installments

PLM M6 Master Pledge 6 Monthly Installments

PLM SM7 Master Pledge 7 Semi-Monthly Installments

PLM BW8 Master Pledge 8 Biweekly Installments

PLM W9 Master Pledge 9 Weekly Installments

PLM I10 Master Pledge 10 Irregular Installments

Blackbaud Demo
Pledge Activity Report
Reference Manual Sample

Constituent Name	Master Pledge				Activity		
	Date	Type	Amount	Fund	Type	Date	Amount
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	5/10/98	PLM Q4	200.00	ANNUAL98			
					Ins	6/1/98	50.00
					Ins	9/1/98	50.00
					Ins	12/1/98	50.00
					Ins	3/1/99	50.00
						Balance	200.00
John Lanning 2600 St. Michael's Boulevard Boston, MA 2110	7/2/98	PLM M2	400.00	ANNUAL98			
					Ins	9/2/98	200.00
					Pay	9/5/98	(80.00)
					Ins	10/2/98	200.00
						Balance	320.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012	3/16/98	MG PLG	50.00	ANNUAL98			
					MG Pledge	3/16/98	50.00
						Balance	50.00
					Total Balance		570.00

Cash Flow Report

The **Cash Flow Report** illustrates anticipated cash flow for specific periods. The report reviews pledges due within the date range to calculate the projected cash flow over one or several periods. The detailed report lists the constituent name and pledge balance. The summary report totals the amounts due in each report period, but does not list constituent names.

This report provides a cash flow projection for all constituents or for a selected query. The report can be in detail and/or summary format. Select a commitments made after date to narrow the report. Specify up to twelve report periods with at least one period entered. Recurring gifts (including EFT payments), regular pledges, and matching gift pledges can be included in the report. In the **detail** format, the report includes fund, description, amount pledged, past due, amount due in period, and total due. In the **summary** format, the report includes fund name, description, amount past due, amount due in period, and total due. Both formats provide grand totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: This is a forward-looking report, therefore, it should not be backdated.

Filters:

Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Include recurring gifts
Include regular pledges
Include matching gift pledges
Select report periods (1 – 12)
Detail and/or summary
Print address
Print telephone number
Print maiden name
Print organizational contact name

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Blackbaud Demo
Cash Flow Report
Reference Manual Sample

Page 1

Constituent Name		Fund	Amt Pledged	Past Due	First Half 1998	Total Due
Master Date	Type					
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601						
5/10/98	PLM Q4	ANNUAL98	\$200.00	\$0.00	\$50.00	\$50.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012						
3/16/98	MG PLG	ANNUAL98	\$50.00	\$0.00	\$50.00	\$50.00
Totals:			\$250.00	\$0.00	\$100.00	\$100.00

Past Due Pledge Report

The **Past Due Pledge Report** lists past due pledges as of a specified date. Categorize pledges by the number of days past due. The detailed report lists the constituent name and amount past due. The summary report totals the past due amounts for each fund.

The report provides past due pledge information for all constituents or for a selected query. You must enter a pledges made as of date and past due as of date. Regular pledges and matching gift pledges can be included in the report. You can specify up to five past due periods. The report can be in detail and/or summary format. The **detail** report includes gift date, pledge type, amount pledged, fund name, and the summary report information. In the detail format, the report is listed by constituent name. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns). In the **summary** format, the report includes fund ID, fund description, amount due for the specified report periods, and totals.

Note: If a pledge, or its installments payment, is partially paid, this report still shows the balance as past due if all other criteria are met. If a pledge has been paid off, it does not appear in this report.

Or if a pledge is written off, or its installment payment is written off, it is not included in this report

Required:

Pledges made after date

Past due as of date

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Detail and/or summary

Select report periods (1 – 5)

Print address

Print telephone number

Print maiden name

Print organizational contact name

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Past Due Pledge Report
Reference Manual Sample

Page 1

Constituent Name				Days Past Due					Total
Date	Type	Pledged	Fund	0-30	31-60	61-90	91-180	Over 180	
Laurie Dunn 3 Sea Street Charleston, SC 29464									
5/16/98	PLM B2	140.00	CCPLANT	70.00	0.00	0.00	0.00	0.00	70.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012									
3/16/98	MG PLG	50.00	ANNUAL98	0.00	0.00	50.00	0.00	0.00	50.00
				70.00	0.00	50.00	0.00	0.00	120.00

Pledge Journal

The **Pledge Journal** provides information about pledges during a specified date range. The detailed report provides the constituent name and pledged amount. The summary report totals pledges by fund. This report is similar to the **Pledge Activity Report** except this report lists the gift types in columns.

This report provides pledge information for all constituents or for a selected query. A start date, end date, or date range can be selected. You can include regular and matching gift pledges. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, fund name, pledge type, amount pledged, payments, amount written off, master pledge date, and master pledge amount. The **summary** report includes fund name, fund description, pledge type, count of pledges, amount pledged, debit account, and credit account. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

This report provides information about the actual pledge. For example, assume a \$500 pledge is made on 2/15/98 with installments due between 4/15/98 and 9/15/98; however, the first installment is actually received on 3/15/98. If the report is run using a date range of 2/1/98 until 2/28/98, only the pledge is shown. If the report is run using a date range of 3/1/98 until 3/31/98, the pledge and the payment are shown, although the initial/master pledge is outside of the date range.

Filters:

Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Include regular pledges
Include matching gift pledges
Detail and/or summary
Print address
Print telephone number
Print maiden name
Print organizational contact name

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Blackbaud Demo
Pledge Journal
Reference Manual Sample

Page 1

Constituent Name	Date	Fund	Type	Pledged	Payments	WrittenOff	Master Pledge	
							Date	Amount
Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	5/10/98	ANNUAL98	PLM Q4	200.00			5/10/98	200.00
Laurie Dunn 3 Sea Street Charleston, SC 29464	5/16/98	CCPLANT	PLM B2	140.00			5/16/98	140.00
Benjamin C. Grant 2301 Palm Parkway Hilton Head, SC 29498	5/1/98	CCPLANT	Pay-Cash		3,500.00		3/15/98	2,000.00
John Lanning 2600 St. Michael's Boulevard Boston, MA 2110	7/2/98	ANNUAL98	PLM M2	400.00			7/2/98	400.00
	9/5/98	ANNUAL98	Pay-Cash		80.00		9/2/98	200.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012	3/16/98	ANNUAL98	MG PLG	50.00			3/16/98	50.00
4 Pledge(s) Listed 2 Payment(s) Listed			Totals:	790.00	3,580.00	0.00		

Campaign Pledge Report

The **Campaign Pledge Report** lists pledges made after a specified date and includes information such as the final payment date (whether future or past), payments made to date, and written off amounts. The detailed report includes the constituent's name. The summary report totals the pledges by fund name. This report is useful for reporting pledges with outstanding balances to a past campaign or for reporting the date of final payment for pledges to a campaign. This report is also helpful in closing a campaign and verifying the status of all pledges made to the campaign.

This report provides campaign pledge information for all constituents or for a selected query. You must specify a pledge made after date. You can select regular pledges, matching gift pledges, and outstanding pledges only. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, pledge type, amount pledged, payments made, amount written off, balance due, and date of final payment. The **summary** report includes fund name, fund description, payments made, amount written off, and balance due. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Required:

Pledges made after date

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Include outstanding pledges only

Detail and/or summary

Print address

Print telephone number

Print maiden name

Print organizational contact name

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Blackbaud Demo
Campaign Pledge Report
Reference Manual Sample

Page 1

Constituent Name	Date	Type	Pledged	Payments	Written Off	Balance	Date Final Payment
John Lanning 2600 St. Michael's Boulevard Boston, MA 2110	7/2/98	PLM M2	400.00	80.00	0.00	320.00	10/2/98
John Malcolm 1215 South Palm Avenue #12 Palm Springs, FL	6/28/98	PLM M10	500.00	0.00	0.00	500.00	5/26/99
James Simpkins 200 Broad Street Charleston, SC 29401	9/14/98	PLM M5	100.00	25.00	0.00	75.00	1/28/99
			<u>1,000.00</u>	<u>105.00</u>	<u>0.00</u>	<u>895.00</u>	

Written Off Pledge Report

The **Written Off Pledge Report** lists all written off pledges during a specified date range. Writing off a pledge indicates the outstanding balance of the pledge is not expected to be paid. The report is available in detailed format with the constituent's name and pledge write-off amount, or as a fund summary showing the total amount written off for each fund.

This report provides written off pledge information for all constituents or for a selected query. A start date, end date, or date range can be selected. This is the written off date, not the pledge date. You can include regular pledges and matching gift pledges. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, amount written off, master pledge date, pledge type, pledge amount, and fund name. The **summary** report includes fund name, fund description, count of written off pledges, and amount written off. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Alphabetically or date

Options:

- Include regular pledges
- Include matching gift pledges
- Detail and/or summary
- Print address
- Print telephone number
- Print maiden name
- Print organizational contact name

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Blackbaud Demo
Written Off Pledge Report
Reference Manual Sample

Page 1

Date	Constituent Name	Written Off	Master Pledge			
			Date	Type	Amount	Fund
1/15/94	Computer Products, Inc. 3215 Landmark Drive Charleston, SC 29420	50.00	9/16/94	MG PLG	150.00	ANNUAL94
10/26/94	Jonathon P. Ashley 1208 Creighton Court Baltimore, MD 21098	2,500.00	5/25/95	PLM M5	5,000.00	CCPLANT
1/15/95	Harrison Industries, Inc. 2600 South Main Street Charter Industrial Park Charleston, SC 29402	250.00	7/20/94	MG PLG	500.00	LIBRARY
1/15/95	Harrison Industries, Inc. 2600 South Main Street Charter Industrial Park Charleston, SC 29402	300.00	1/15/94	MG PLG	600.00	LIBRARY
1/15/95	Harrison Industries, Inc. 2600 South Main Street Charter Industrial Park Charleston, SC 29402	200.00	9/16/94	MG PLG	200.00	ANNUAL93
Totals:		<u>3,300.00</u>			<u>6,450.00</u>	

Pledge Status Report

Format One - Detail

The **Pledge Status Report** provides multiple formats for reports on pledges made after a specified date and paid within a specified date range. For example, use this report to identify payments made during May 1998 toward pledges made after July 1, 1997. The report is available in a detailed format with the constituent's name and pledge information, or in summary format, which totals the pledge information for each fund. This report is based primarily on when the pledge is made rather than on pledge activity.

The **Pledge Status Report** has two formats with each format having a detail and a summary version available.

Format One includes columns for the master or original pledge, payments, and write-offs before the start date of the report, payments, and write-offs within the date range of the report, and the pledge balance.

Format Two includes the amount pledged and the balance before the start date of the report, amounts pledged, paid, and written off during the date range of the report, and the pledge balance.

The **Pledge Status Report** provides pledge status information for all constituents or for a selected query. You must enter a start date, end date, and pledges made after date.* You can select regular pledges, matching gift pledges, and outstanding pledges only. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, pledge type, and pledge amount, fund name, and pledge balance. The **summary** report includes fund ID, fund description, master pledge amount, and pledge balance. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

*The pledges made after date is an important criterion for this report. For example, a donor pledges \$500 on 2/15/98 with installments to begin on 3/10/98. The report has to be run with 2/15/98 in the pledges made after field to list the pledge.

Required:

Report start date

Report end date

Pledges made after date

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Include outstanding pledges only

Detail and/or summary

Format one or two

Print address

Print telephone number

Print maiden name

Print organizational contact name

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Blackbaud Demo
Pledge Status Report
Reference Manual Sample

Constituent			Master Pledge	Prior to 1/1/98		1/1/98 to 12/31/98		Plg Balance
Date	Type	Fund		Payments	Written Off	Payments	Written Off	
Laurie Dunn 3 Sea Street Charleston, SC 29464								
5/16/98	PLM B2	CCPLANT	140.00	0.00	0.00	0.00	0.00	140.00
Benjamin C. Grant 2301 Palm Parkway Hilton Head, SC 29498								
10/1/97	PLM A5	CCPLANT	10,000.00	0.00	0.00	3,500.00	0.00	6,500.00
Karen D. Haggard 1205 Park Place New York, NY 30391								
9/16/97	PLM B4	CCPLANT	250.00	62.50	0.00	0.00	0.00	187.50
Michael J. Murphy 52 Buckingham Avenue Greenville, SC 29609								
1/5/97	PLM A5	CCPLANT	50,000.00	0.00	0.00	0.00	0.00	50,000.00
The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012								
9/16/97	MG PLG	CCPLANT	250.00	0.00	0.00	0.00	0.00	250.00
			60,640.00	62.50	0.00	3,500.00	0.00	57,077.50

Pledge Status Report

Format One - Summary

The **Pledge Status Report** provides multiple formats for reports on pledges made after a specified date and paid within a specified date range. For example, use this report to identify payments made during May 1998 toward pledges made after July 1, 1997. The report is available in a detailed format with the constituent's name and pledge information, or in summary format, which totals the pledge information for each fund. This report is based primarily on when the pledge is made rather than on pledge activity.

The **Pledge Status Report** has two formats with each format having a detail and a summary version available.

Format One includes columns for the master or original pledge, payments and write-offs before the start date of the report, payments, and write-offs within the date range of the report, and the pledge balance.

Format Two includes the amount pledged and the balance before the start date of the report, amounts pledged, paid, and written off during the date range of the report, and the pledge balance.

The **Pledge Status Report** provides pledge status information for all constituents or for a selected query. You must enter a start date, end date, and pledges made after date.* You can select regular pledges, matching gift pledges, and outstanding pledges only. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, pledge type, and pledge amount, fund name, and pledge balance. The **summary** report includes fund ID, fund description, master pledge amount, and pledge balance. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

*The pledges made after date is an important criterion for this report. For example, a donor pledges \$500 on 2/15/98 with installments to begin on 3/10/98. The report has to be run with 2/15/98 in the pledges made after field to list the pledge.

Required:

Report start date

Report end date

Pledges made after date

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Include outstanding pledges only

Detail and/or summary

Format one or two

Print address

Print telephone number

Print maiden name

Print organizational contact name

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Pledge Status Report - Fund Summary
Reference Manual Sample

Page 1

Fund	Description	Master Pledge	Prior to 1/1/98		1/1/98 to 12/31/98		Plg Balance
			Payments	Written Off	Payments	Written Off	
CCPLANT	Capital Campaign Plant Fund	60,640.00	62.50	0.00	3,500.00	0.00	57,077.50
		<u>60,640.00</u>	<u>62.50</u>	<u>0.00</u>	<u>3,500.00</u>	<u>0.00</u>	<u>57,077.50</u>

Pledge Status Report

Format Two - Detail

The **Pledge Status Report** provides multiple formats for reports on pledges made after a specified date and paid within a specified date range. For example, use this report to identify payments made during May 1998 toward pledges made after July 1, 1997. The report is available in a detailed format with the constituent's name and pledge information, or in summary format, which totals the pledge information for each fund. This report is based primarily on when the pledge is made rather than on pledge activity.

The **Pledge Status Report** has two formats with each format having a detail and a summary version available.

Format One includes columns for the master or original pledge, payments and write-offs before the start date of the report, payments, and write-offs within the date range of the report, and the pledge balance.

Format Two includes the amount pledged and the balance before the start date of the report, amounts pledged, paid, and written off during the date range of the report, and the pledge balance.

The **Pledge Status Report** provides pledge status information for all constituents or for a selected query. You must enter a start date, end date, and pledges made after date.* You can select regular pledges, matching gift pledges, and outstanding pledges only. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, pledge type, and pledge amount, fund name, and pledge balance. The **summary** report includes fund ID, fund description, master pledge amount, and pledge balance. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

*The pledges made after date is an important criterion for this report. For example, a donor pledges \$500 on 2/15/98 with installments to begin on 3/10/98. The report has to be run with 2/15/98 in the pledges made after field to list the pledge.

Required:

Report start date

Report end date

Pledges made after date

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Include outstanding pledges only

Detail and/or summary

Format one or two

Print address

Print telephone number

Print maiden name

Print organizational contact name

Pledge Status Report

Format Two - Summary

The **Pledge Status Report** provides multiple formats for reports on pledges made after a specified date and paid within a specified date range. For example, use this report to identify payments made during May 1998 toward pledges made after July 1, 1997. The report is available in a detailed format with the constituent's name and pledge information or in summary format, which totals the pledge information for each fund. This report is based primarily on when the pledge is made, rather than on pledge activity.

The **Pledge Status Report** has two formats with each format having a detail and a summary version available.

Format One includes columns for the master or original pledge, payments and write-offs before the start date of the report, payments, and write-offs within the date range of the report, and the pledge balance.

Format Two includes the amount pledged and the balance before the start date of the report, amounts pledged, paid, and written off during the date range of the report, and the pledge balance.

The **Pledge Status Report** provides pledge status information for all constituents or for a selected query. You must enter a start date, end date, and pledges made after date.* You can select regular pledges, matching gift pledges, and outstanding pledges only. The report can be in detail and/or summary format. The **detailed** report includes constituent name, gift date, pledge type, and pledge amount, fund name, and pledge balance. The **summary** report includes fund ID, fund description, master pledge amount, and pledge balance. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

*The pledges made after date is an important criterion for this report. For example, a donor pledges \$500 on 2/15/98 with installments to begin on 3/10/98. The report has to be run with 2/15/98 in the pledges made after field to list the pledge.

Required:

Report start date

Report end date

Pledges made after date

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Include regular pledges

Include matching gift pledges

Include outstanding pledges only

Detail and/or summary

Format one or two

Print address

Print telephone number

Print maiden name

Print organizational contact name

Pledged But Not Paid Report

The **Pledged But Not Paid Report** lists constituents who have made a pledge, but have never made a payment during the specified date range.

This report provides unpaid pledge information for all constituents or for a selected query. A start date, end date, or date range can be specified. The report includes constituent name, pledge date, pledge type, fund name, reference, first payment due date, and the total pledge amount. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: Partially paid pledges are not shown on this report.

If a pledge, or an installment payment, has been written off it is not shown on this report.

Filters:

- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Alphabetically or date

Options:

- Include regular pledges
- Include matching gift pledges
- Pledge type (master or installment)
- Print address
- Print telephone number
- Print maiden name
- Print organizational contact name

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Pledged But Not Paid Report
Reference Manual Sample

Page 1

Pledge Date	Constituent Name	Type	Amount	Fund	Reference	First Pay Due
3/16/98	The Pinckney Group 2504 East Bay Street Suite 400 Charleston, SC 29401-0012	MG PLG	50.00	ANNUAL98	Aaron, Rebecca	3/16/98
5/10/98	Nancy C. Barry 1300 South Windermere Drive Anderson, SC 29601	PLM Q4	200.00	ANNUAL98		6/1/98
5/16/98	Laurie Dunn 3 Sea Street Charleston, SC 29464	PLM B2	140.00	CCPLANT		5/21/98
6/28/98	John Malcolm 1215 South Palm Avenue #12 Palm Springs, FL	PLM M10	500.00	LIBRARY		8/26/98
4 Constituent(s) Listed		Total:	<u>890.00</u>			

Chapter 5 — Analytical Reports

There are a variety of reports to analyze the giving habits of your constituents, performance of your solicitors, and effectiveness of your appeals. For example, the Non-Contributors Report locates constituents who have not donated to your organization and the Solicitor Performance Analysis helps you monitor your solicitors' fund raising. Select parameters to narrow the report.

Analytical Reports can provide a query of the constituents for further analysis and use in *The Raiser's Edge*. For example, a query from the Non-Contributors Report can help you decide who to send solicitations to for your next mailing using *RE:Mail*. For information on procedures for processing, printing, and exporting reports, see the Reports Overview chapter in *The Raiser's Edge for Windows User's Guide*.

Section Preview

- The **Donor Category Report** places constituents into giving clubs, which are defined in *Configuration* based on their giving levels.
- The **SYBUNT Report** identifies constituents who have given at any time, but not during a specified date range. SYBUNT stands for Some Year But Unfortunately Not This.
- The **LYBUNT Report** identifies constituents who gave last year, but have not given during a specified date range. LYBUNT stands for Last Year But Unfortunately Not This.
- The **Comparative Report** compares two date ranges and reports whether constituent giving has increased, decreased, or stayed the same.
- The **Non-Contributors Report** identifies constituents who have not given a gift during the date range specified.
- The **First/Latest/Greatest Gift Report** provides information about when constituents made their first donation, their latest donation, and their greatest donation.
- The **Actual vs. Target Report** compares the actual donations of constituents with the target amounts in the constituent records.
- The **Solicitor Performance Analysis** tracks the progress of solicitors toward their assigned goals.
- The **Appeals Analysis** provides names of donors and the amount they gave to selected appeals to analyze the success of the appeals.
- The **Alumni Class Analysis** tracks donations made by alumni groups.
- The **Parent Class Analysis** tracks donations made by the parents of alumni.
- The **CFAE Report** collects the information required by the Council For Aid to Education.
- The **Top Donors Report** lists the top donors within a specified date range. The number or percentage of donors can be specified.
- The **New Donors Report** lists all first-time donors. The report finds constituents who have not given before but have given during the defined date range.
- The **Consecutive Years Report** lists constituents who gave at least one gift per year in the specified date range.

Donor Category Report

The **Donor Category Report** divides constituents into giving clubs (e.g., sustainer, benefactor, and patron) based on the total amount given within a specified period. Three Donor Category Tables can be created in *Configuration* to define the giving clubs. Once defined in *Configuration*, select the tables on the Format tab of the Donor Category Report.

Donor category information is provided for all constituents or for a selected query. A start date, end date, or date range can be specified. You must select a Donor Category Table on the Format tab. Category Tables are created in *Configuration*. The report can be in detail format or summary format. The **detailed** report includes constituent name, constituency (e.g., relationship to the organization), and amount given. The **summary** report includes donor category, category giving level, number of constituents in the category, and amount given. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

This report can also create totals within a group based on constituency codes (e.g., the benefactors group). For example, the report can show twelve alumni gave \$50,000 or ten trustees gave \$85,000.

Required:

Donor category table (1, 2, or 3)

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Alphabetically or gift size

Options:

Include regular pledges

Include matching gift pledges

Detail or summary

Print each category on a new page

Print constituency

Print amount given

Print address

Print telephone number

Print maiden name

Print organizational contact name

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Donor Category Report
Reference Manual Sample

Page 1

Constituent Name	Constituency	Amount Given
<u>Sustainer - (\$10,000.00 +)</u>		
Victor H. Hanson 951 Dillard Avenue Wheaton, CA 96094	Trustee	10,000.00
1 Trustee Gave a Total of		10,000.00
<i>1 Sustainer Gave a Total of \$10,000.00</i>		
<u>Friend - (\$1.00 +)</u>		
Anthony E. Bakker 1233 Palm Boulevard Sullivan's Island, SC 29401	Trustee	500.00
Henry W. Thompson 56 Oakdale Avenue Charlotte, NC 29601	Trustee	50.00
2 Trustee Gave a Total of		550.00
<i>2 Friend Gave a Total of \$550.00</i>		
3 Constituent(s) Listed		<hr/> <hr/> 10,550.00

SYBUNT Report

This report identifies donors who have not given anything during the specified date range, but have given to your organization at some other time. The last gift given and the date of that gift appear with the constituent's name. **SYBUNT** stands for Some Year But Unfortunately Not This.

This report provides inactive donor information for all constituents or for a selected query. You must specify start and end dates. The report includes constituent name, address, last gift amount, and date of last gift. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: The date range for this report specifies a period when the donor **did not** give anything. In the phrase Some Year But Not This, "This" means the period specified by the start date and end date.

Required:

Report start date

Report end date

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Print address

Print telephone number

Print maiden name

Print organizational contact name

9/11/98

Blackbaud Demo
SYBUNT Report
Reference Manual Sample

Page 1

Constituent Name	Last Gift	Date
Karen D. Haggard 1205 Park Place New York, NY 30391	62.50	11/19/97
Harold H. Hicks 1233 South Del Norte Drive Loveland, CO 30389	75.00	1/15/94
Michael J. Jones 3401 South Bend Avenue Mt. Pleasant, SC 29484	200.00	2/20/93
Robert L. Norton 35 Beach Walk Lane Fernandina Beach, FL 31209	500.00	12/15/94
Francine M. Romero (Francine M. Garcia) 538 Stonyledge Drive Boston, MA 02110	75.00	4/15/94
5 Constituent(s) Listed	<u>912.50</u>	

LYBUNT Report

This report locates those individuals who donated last year, but not during the specified date range. The report provides the constituent's name, gift amount, and the date of the last gift. **LYBUNT** stands for Last Year But Unfortunately Not This.

This report provides inactive donor information for all constituents or for a selected query. You must specify start and end dates. The report includes constituent name, address, last gift amount, and date of last gift. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: The date range is for the current year. The report uses the date range and reports on the corresponding date range for the previous year.

For example, if you enter 1/1/98 – 12/31/98, the report includes the period 1/1/97 – 12/31/97. If you enter 6/1/98 – 12/31/98, the report includes the period 6/1/97 – 12/31/97.

Required:

Report start date
Report end date

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Print address
Print telephone number
Print maiden name
Print organizational contact name

9/11/98

Blackbaud Demo
LYBUNT Report
Reference Manual Sample

Page 1

Constituent Name	Last Gift	Date
Elizabeth A. Cooper 2501 Canyon Road Aspen, CO 30398	500.00	3/15/97
Mark J. Gaines 1207 Park Avenue Greenville, SC 29606	2,000.00	11/12/97
Michael J. Murphy 52 Buckingham Avenue Greenville, SC 29609	50,000.00	1/5/97
3 Constituent(s) Listed	<u>52,500.00</u>	

Comparative Report

The **Comparative Report** compares giving during two date ranges to determine whether constituent giving has increased, decreased, or stayed the same. The report includes the constituent's name, total given for each period, and variance. The variance can be shown as a percentage or in dollars.

This report compares giving information for all constituents or for a selected query. Two date ranges must be specified. The report includes giving increases and/or decreases, constituent name, address, total given for period 1, total given for period 2, variance between periods, and grand totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: This report can be run to show only increases, which makes it useful for identifying your better donors. It can be run to show only decreases, which is useful for identifying donors for solicitation. The report can show both increases and decreases.

Required:

Period 1 start date
Period 1 end date
Period 2 start date
Period 2 end date

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Variance (by percentage or currency)
Print address
Print telephone number
Print maiden name
Print organizational contact name

9/11/98

Blackbaud Demo
Comparative Report
Reference Manual Sample

Page 1

Constituent Name	12/1/97 12/31/97 Total Given	12/1/96 12/31/96 Total Given	Variance
Kelly Davis # 8 Saint James Avenue Birmingham, AL 99900	750.00	0.00	(750.00)
Jonathon P. Smith 1503 Sand Dollar Drive Hilton Head, SC 29489	175.00	0.00	(175.00)
Dorothy A. Thomas 3601 West View Parkway Apartment 52A Denver, CO 30389	300.00	0.00	(300.00)
3 Constituent(s) Listed	1,225.00	0.00	(1,225.00)
3 Constituents Decreased			

Non-Contributors Report

The **Non-Contributors Report** lists constituents who have not given during a specified date range. A start date, end date, or date range can be selected. The report includes the constituent name and address. A telephone number can be included. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Print address
Print telephone number
Print maiden name
Print organizational contact name

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Blackbaud Demo
Non Contributors Report
Reference Manual Sample

Page 1

Constituent Name

Myron Banks
3201 South Bend Avenue
North Charleston, SC 29420

Harrison Industries, Inc.
2600 South Main Street
Charter Industrial Park
Charleston, SC 29402

The Price Foundation

Romero Construction
617 Millhouse Lane
Boulder, CO 86740

Barbara Simpson
3503 Royal Street
Apartment 3B
Mt. Pleasant, SC 29484

5 Constituents Listed

First/Latest/Greatest Gift Report

The **First/Latest/Greatest Gift Report** provides information about the first, greatest, and latest gifts for constituents within a specified date range.

This report provides gift information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name and address. The report can include first gift amount and date, largest gift amount and date, and latest gift amount and date, or any combination of the three. You must select at least one. A telephone number can be included. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Print first gift
Print greatest gift
Print latest gift
Print address
Print telephone number
Print maiden name
Print organizational contact name

9/11/98

Blackbaud Demo
First Greatest Latest Report
Reference Manual Sample

Page 1

Constituent Name	First	Date	Greatest	Date	Latest	Date
Jonathon P. Ashley 1208 Creighton Court Baltimore , MD 21098	75.00	1/12/98	75.00	1/12/98	75.00	1/12/98
Computer Products, Inc. 3215 Landmark Drive Charleston, SC 29420	150.00	2/13/98	150.00	2/13/98	150.00	2/13/98
Mary M. Reynolds 348 Governor Lane Charleston, SC 29403	80,000.00	1/15/98	80,000.00	1/15/98	80,000.00	1/15/98
3 Constituents Listed	<u>80,225.00</u>		<u>80,225.00</u>		<u>80,225.00</u>	

Actual vs. Target Report

The **Actual vs. Target Report** provides a comparison of the target amount with the amount the donor has actually given within a specified date range. The target amount is pulled from the Bio 2 tab of the constituent record.

This report provides target and actual giving information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report includes constituent name and address, target amount, and actual amount given. A telephone number can be included. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: If no target amount is entered on the Bio 2 tab of the constituent record, the word “unknown” appears in the target amount column.

Filters:

- Gift types
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Constituent name

Options:

- Print address
- Print telephone number
- Print maiden name
- Print organizational contact name

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Blackbaud Demo
Actual Vs. Target Report
Reference Manual Sample

Page 1

Constituent Name	Target Amount	Amount Given
Jonathon P. Ashley 1208 Creighton Court Baltimore , MD 21098	\$1,000 - \$4,999	75.00
Computer Products, Inc. 3215 Landmark Drive Charleston, SC 29420	Unknown	150.00
Mary M. Reynolds 348 Governor Lane Charleston, SC 29403	Unknown	100,000.00
3 Constituents Listed		<u>100,225.00</u>

Solicitor Performance Analysis

The **Solicitor Performance Analysis** tracks the progress of solicitors toward meeting their assigned goals. List detailed report by solicitor. The report includes the constituents to whom they are assigned, amount each constituent gave, percentage of those who gave, total amount generated per solicitor, solicitor's goal, amount by which each solicitor is over or under their goal, number of constituents assigned, how many of those constituents gave, and the percentage of those who gave. Three columns are available for defining Gift types.

This report provides solicitor performance information for all constituents or for a selected query. A start date, end date, or date range can be selected. You can break down this report by fund or campaign. The Solicitors tab selects the solicitors, solicitor funds, or solicitor campaigns in the report. Specifying information **on the Solicitors tab** filters constituents based on the information located on the Solicitor tab in *Constituent Management*. The Campaign, Fund, and Appeals tabs filter based only on information in the constituent's giving record. It is very important to understand the difference before you run this report. The **detailed** report includes solicitor name, constituent name, and three columns of gift types (e.g., cash, pledged, and stocks). The individual gifts or a summary of gift totals only can be included in the detailed report. The **summary** report includes solicitor name, goal, over/(under), number of donors, donors out of number solicited, and percent donating. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: A gift record must have the solicitor credited to show on the report.

If a donor has a solicitor assigned to a campaign or fund used as a filter **on the Solicitors tab**, any gift to any fund from that donor credited to the solicitor is shown on the report. Once the solicitor is credited, the fund or campaign receiving the gift does not matter.

For example, Blagg is a constituent in your database and Lloyd is listed as her assigned solicitor for the Annual Giving Fund. Blagg gives \$1000.00 to the Library Fund and credits the solicitation to Lloyd. If you run the report filtered only by Solicitor Fund specifying the Annual Fund, Blagg's gift appears. This is because Lloyd is listed as Blagg's assigned solicitor for the Annual Fund although the gift was given to the Library Fund. For this reason, it is important to use the Campaigns, Funds, and Appeals tabs to filter gifts from outside of your area of interest.

Filters:

Solicitors
Solicitor campaigns
Solicitor funds
Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Solicitor name

Options:

Detail or summary
Include non-givers
Include solicitors with no activity
Print each solicitor on a new page
Performance breakdown (by campaign or fund)
Print address
Print telephone number
Print maiden name
Print organizational contact name

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Blackbaud Demo ***Solicitor Performance Analysis*** **Reference Manual Sample**

Page 1

Solicitor Constituent	Col 1	Col 2	Col 3
Myron Banks			
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	No Gifts to List		
Brown, Patterson and Smith, Attorneys at Law 306 King Street Suite 405 Charleston, SC 29401	No Gifts to List		
Charleston Memorial Hospital (Jonathon P. Ashley) 4201 Calhoun Drive Charleston, SC 29401	No Gifts to List		
	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
<i>0.00% (0 out of 3) gave/pledged</i>			
<i>Goal: 0.00</i>			
<i>Total Raised: 0.00</i>			
<i>Over/(Under)</i>			
Totals For All Solicitors			
	<u><u>0.00</u></u>	<u><u>0.00</u></u>	<u><u>0.00</u></u>
<i>0.00% (0 out of 3) gave/pledged</i>			
<i>Goal: \$0.00</i>			
<i>Total Raised: \$0.00</i>			
<i>Over/(Under)</i>			

Appeals Analysis

The **Appeals Analysis** provides information to help analyze the success of appeals.

This report provides appeal performance information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report is listed by appeal name. The report can be in detail or summary format. The **detailed** report includes constituent name, gift date, fund name, amount given, reference, percentage who are giving, amount over/(under) the goal, and goal for each appeal. Either individual gifts or gift totals can be included in the detailed report. The **summary** report includes appeal name, amount given, goal, amount over/(under), number of donors, donors out of number solicited, and percentage donating. Both formats provide totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Constituent name

Options:

Detail or summary
Include non-givers
Include appeals with no activity
Print each appeal on a new page
Gift reporting (by individual gift or totals only)
Print address
Print telephone number
Print maiden name
Print organizational contact

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Blackbaud Demo
Appeals Analysis
Reference Manual Sample

Page 1

Constituent	Amount
ACMail	
Michael J. Murphy 52 Buckingham Avenue Greenville, SC 29609	1,500.00
	<hr/> 1,500.00
<i>100.00% (1 out of 1) gave/pledged</i>	
<i>Goal: 0.00</i>	
<i>Over/(Under) 1,500.00</i>	
Unsolicited	
Myron Banks 3201 South Bend Avenue North Charleston, SC 29420	150.00
	<hr/> 150.00
<i>100.00% (1 out of 1) gave/pledged</i>	
<i>Goal: 0.00</i>	
<i>Over/(Under) 150.00</i>	
<u>Totals For All Appeals</u>	
	<hr/> <hr/> 1,650.00
<i>100.00% (2 out of 2) gave/pledged</i>	
<i>Goal: \$0.00</i>	
<i>Over/(Under) \$1,650.00</i>	

Alumni Class Analysis Report

The **Alumni Class Analysis** tracks donations made by alumni. The detailed report lists each constituent's name by class year with the individual amounts given or total amounts given during a specified date range. A summary report in which each class year appears with the total donations, number of gifts, and percent of participation is also available.

Note: To appear on the Alumni Class Report, the constituent's education record must be marked "Primary Alumni Information" and a constituent code of AL (alumni) must be entered on the Bio 2 tab.

This report provides alumni giving information for all constituents or for a selected query. A start date, end date, or date range can be selected. You must select one or more alumni codes. The report is listed by class year. The detailed report for individual gifts includes constituent name and address, gift date, fund description, amounts given, and reference. The **detailed** report for totals includes constituent name and address, amounts given in three categories (e.g., cash, stocks, gift-in-kind), and total amount given. The **summary** report includes class year, amount, number of gifts, and participation (number of donors, out of number solicited, and percent). Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: The preferences set for **Anonymous** gifts affect 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 the preference is set to "Use Anonymous."

Filters:

- Alumni codes
- Class years
- Gift types
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Class year

Options:

- Detail or summary
- Include non-givers
- Include classes with no activity
- Print each class on a new page
- Gift reporting (by individual gift or totals only)
- Print address
- Print telephone number
- Print maiden name

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Blackbaud Demo
Alumni Class Analysis Report
Reference Manual Sample

Page 1

Constituent Name	Amount
<u>CLASS OF 1950</u>	
Thomas G. Simpson 389 Oak Branch Road Charleston, SC 29401	\$125.00
James B. Steel 3462 Palm Boulevard Mt. Pleasant, SC 29464	No Gifts To List
50.00% (1 out of 2) gave/pledged	<u>\$125.00</u>
<u>CLASS OF 1974</u>	
Thomas A. Cooper 2501 Canyon Road Aspen, CO 30398	\$1,250.00
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	\$8,275.00
100.00% (2 out of 2) gave/pledged	<u>\$9,525.00</u>
Totals For All Classes	
75.00% (3 out of 4) gave/pledged	<u><u>\$9,650.00</u></u>

Parent Class Analysis

The **Parent Class Analysis** tracks donations made by parents of alumni. The detailed report lists each parent name by class year with the individual amounts given or the total given during a specified date range. The summary report is list by class year.

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 on the Bio 2 tab of their record. Establish Relationships in *Constituent Management*. In addition, the child's education record must be marked "Primary Alumni Information."

This report provides parental giving information for all constituents or for a selected query. A start date, end date, or date range can be selected. You must select one or more parent codes and children codes. The report can be in detail or summary format. Both formats break down by class year.

The **detailed** report includes constituent name, gift date, fund description, amount given, reference. Individual gifts or gift totals can be included in the detailed report. The **summary** report includes class year, amount given, number of gifts, number of donors, donors out of number solicited, and percentage of participation. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: The preferences set for **Anonymous** gifts affect 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 the preference is set to "Use Anonymous."

Filters:

- Class years
- Parent codes
- Children codes
- Gift types
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Class year

Options:

- Attribute to oldest, youngest, or split evenly
- Detail or summary
- Include non-givers
- Include classes with no activity
- Print each class on a new page
- Gift reporting (by individual gift or totals only)
- Print address
- Print telephone number

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Blackbaud Demo
Parent Class Analysis Report
Reference Manual Sample

Page 1

<u>Constituent Name</u>	<u>Amount</u>
<u>CLASS OF 1950</u>	
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	\$17,925.00
100.00% (1 out of 1) gave/pledged	<u>\$17,925.00</u>
<u>CLASS OF 1999</u>	
Jonathon P. Smith 1503 Sand Dollar Drive Hilton Head, SC 29489	\$10,400.00
Samantha A. Young 121 Rutledge Avenue Charleston, SC 29401	No Gifts To List
50.00% (1 out of 2) gave/pledged	<u>\$10,400.00</u>
Totals For All Classes	
66.67% (2 out of 3) gave/pledged	<u><u>\$28,325.00</u></u>

CFAE Report

This report provides the information necessary to complete the *Survey of Voluntary Support of Education* as required by the Council For Aid to Education. The report, generated by *The Raiser's Edge*, cannot replace of the actual CFAE Report, but it can gather the required information. You must specify start and end dates. The report can be run for independent schools or colleges. You must select campaigns, funds, or fund categories as the basis for the report.

Required:

Report start date
Report end date

Filters:

Campaigns
Funds
Appeals

Options:


Independent school or college

Blackbaud Demo
Survey Of Volunteer Support Of Education
Reference Manual Sample

PART II - CAPITAL CAMPAIGNS

	Last Completed Campaign	Currently Active Campaign
1. Start Date		
2. End Date		
3. Dollar Goal	\$0.00	\$0.00
4. Amount of Goal Reached	\$0.00	\$0.00

PART III - SUMMARY OF ALL GIFT INCOME (cash, securities, property, in-kind items)

A: GIFTS FOR CURRENT OPERATIONS	INDIVIDUALS				ORGANIZATIONS				TOTAL
SOURCES	A	B	C	D	E	F	G	H	
DONOR PURPOSES	ALUMNI	PARENTS	OTHER INDIVIDUALS	FOUNDATIONS	CORPS, BUSINESSES	RELIGIOUS ORGS	FUND-RAISING CONSORTIA	OTHER ORGS	
1. Unrestricted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2. Restricted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
									
8. TOTAL - Capital Purposes (Lines 4 Thru 7)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9. GRAND TOTAL - (lines 3 + 8)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

PART IV - SELECTED DETAILS ABOUT GIFTS REPORTED IN PART III (All dollar amounts must be included in the spreadsheet above - PART III)

A: BEQUESTS (Actually received during fiscal year)			C: CORPORATE CONTRIBUTIONS		Number	Value
(Include in Cols. A, B, or C of PART III, not Col. H)			1. Cash and Securities, exclusive of matching gifts		0	\$0.00
			4. Matching Gifts			
1. For current operations			a. Number of gifts from individuals that were		0	

Top Donors Report

The **Top Donors Report** lists the top donors within a specified date range. Define the number or percentage of donors to be included in the report on the Format tab. For example, the report can be limited to the top twenty donors or the top ten percent of donors. The report ranks each donor showing the total number of gifts and total amount given.

This report provides giving level information for all constituents or for a selected query. A start date, end date, or date range can be selected. The report can include top donors by count or percentage (e.g., top five donors or top ten percent of donors) with the report title changing automatically to reflect this choice. List the report by donor names alphabetically or by gift size. The report includes rank, constituent name, number of gifts, and total amount given. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: You can graph the Top Donors Report. For more information, refer to the section on graphing a report’s output in the Reports Overview chapter of *The Raiser’s Edge for Windows User’s Guide*.

Required:

Count or percentage to be displayed

Filters:

- Gift types
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

Gift size or constituent name

Options:

- Percentage or count
- Print address
- Print telephone number
- Print maiden name
- Print organizational contact

9/14/98

Blackbaud Demo
Top 5 Donors Report
Reference Manual Sample

Page 1

Rank	Constituent Name	# Gifts	Total Amount
2	Jonathon A. Harrison 8790 Devon Boulevard Charleston, SC 29401	2	200,500.00
3	Mark S. Jones 2600 West Bend Avenue Charleston, WV 69401	2	75,250.00
4	Michael J. Murphy 52 Buckingham Avenue Greenville, SC 29609	8	53,350.00
1	Mary M. Reynolds 348 Governor Lane Charleston, SC 29403	8	775,250.00
5	The Smith Foundation 4401 South Bend Avenue Suite 405 Charleston, SC 29401	3	35,500.00
		<hr/> <hr/> 23	<hr/> <hr/> 1,139,850.00

New Donors Report

The **New Donors Report** lists all first-time donors within the specified date range. The constituent's name, gift amount, gift type, gift date, and description of the fund and the appeal are included on the report.

This report provides first-time donor information for all constituents or for a selected query. You must select a date range. The report includes constituent name, gift type, date of first gift, first gift amount, fund name, and appeal name. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Required:

Report start date

Report end date

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Constituent name

Options:

Print address

Print telephone number

Print maiden name

Print organizational contact

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Blackbaud Demo
New Donors Report
Reference Manual Sample

Page 1

Constituent Name	Type	Date	Amount	Fund	Appeal
John Malcolm 1215 South Palm Avenue #12 Palm Springs, FL	Pledge	6/28/98	500.00	Smith Library Fund	
Omni Records 1009 White Horse Road Greenville, SC 29409	Gift In Kind	12/1/98	500.00	Capital Campaign Pla	Celebrity Auction
Maryann Peterson 217 Oak Lane San Rafael, CA 92925	Stock (Sold)	11/24/98	500.00	Annual Fund 1998	
James Simpkins 200 Broad Street Charleston, SC 29401	Pledge	9/14/98	75.00	James E. Howard Sch	
Susan A. Snow 5352 Oak Tree Lane Apt. 200A Spartanburg, SC 29316	Cash	6/28/98	150.00	Membership Fund 19	
Henry W. Thompson 56 Oakdale Avenue Charlotte, NC 29601	Cash	9/12/98	50.00	Kellogg Endowment 1994 Fall	Appeal

6 Constituent(s) Listed

Consecutive Years Given Report

The **Consecutive Years Report** analyzes the number of years in a row constituents have given.

This report provides giving information for all constituents or for a selected query. You must select a date range. The report includes constituent name, consecutive years of giving, total amount given, and average amount given per year. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: The date range should be for the year from which you want to look back, not the entire number of years you want considered. The number of consecutive years a constituent must have given to qualify is designated on the Format tab. For example, if you want donors who have given for the past five consecutive years, enter the current year, not all five years for start and end dates.

The preferences set for **Anonymous** gifts affect 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 the preference is set to "Use Anonymous."

Required:

Report start date

Report end date

Number of consecutive years

Filters:

Gift types

Constituency

Campaigns

Funds

Appeals

Sort Order:

Consecutive years or constituent name

Options:

Print address

Print telephone number

Print maiden name

Print organizational contact

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Blackbaud Demo
Consecutive Years Given Report
Reference Manual Sample

Page 1

<u>Constituent Name</u>	<u>Consecutive Years</u>	<u>Total Given</u>	<u>Average Given per Year</u>
Anonymous	3	\$9,050.00	\$3,016.67
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	10	\$18,125.00	\$1,812.50
Jonathon P. Smith 1503 Sand Dollar Drive Hilton Head, SC 29489	3	\$1,000.00	\$333.33

3 Constituents Listed

Chapter 6 — Demographic and Statistical Reports

Demographic and Statistical Reports provide summary totals, percentages, and averages of gifts or donors based on your selection from a list of available fields. These reports summarize information to determine how, when, and where gifts were raised (constituent names are not included these reports). For example, find out what day in the month produced the most income, which ZIP code has the highest average giving per constituent, what the geographic breakdown of constituents is, etc. In addition, you can analyze the progress of a campaign by new income generated. For information on procedures such as processing, printing, and exporting reports, see the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Note: You can graph the Demographic and Statistical Reports. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Section Preview

Demographic and Statistical Reports gather information for analyzing constituent demographics, giving patterns, and membership trends. Both reports use report fields and the associated field values to produce statistics, summaries, comparisons, and tallies.

- **Statistical Reports** show a breakdown by selected field and field values of the number of constituents, number of gifts, total given, average given per constituent, and information about participation rates for a specified period.
- **Comparison Reports** compare date ranges for selected field and field values.
- **Summary Reports** summarize information from up to five date ranges based on selected field and field values.

Note: The Statistical Report, Comparative Report, and Summary Report are very similar, except for the number of years they display. List all three reports by the number of donors, total given, and average given for the selected field value. List Statistical Reports by the number of gifts given and each field value percent of the total given. List Comparison Report by a variance between two years based on dollar amounts or percentage.

- **Tallies** total the number of constituents with a specific value in a field. The field and field value are selected by the user.

Note: Constituent names do not appear on the Demographic or Statistical Reports.

Statistical Reports

A **Statistical Report** breaks down the number of constituents, number of gifts, total given, average given per gift, and information about participation by selected field and field values. This is a summary report.

This report provides demographic information for a selected field and associated field values. A start date, end date, or date range can be selected. You must select a field to use (e.g., age group, profession, or region) from the drop-down menu. You can select one or more field values associated with the field to use. This report includes field values, total given, average given, and percent of total donations.* Additional information varies by the field to use selected. Totals for all columns are included as well. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

*Percent of total donations means if five people gave \$100 out of the \$1000 goal, then only 10% gave.

Note: Constituents, who do not have an entry in the selected field, are grouped under “unknown.”

Required:

Varies by the field selected

Filters:

Gift types
Constituency
Campaigns
Funds
Appeals

Sort Order:

Field

Options:

Field
Field values
The available options vary by the field selected

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Blackbaud Demo
Statistical Report by Age Group
Reference Manual Sample

Page 1

Age Group	Total	Donors	# Gifts	Total Given	Avg Given Per Donor	Partic	% Of Total
age 18 - 24	3	1	7	53,350.00	53,350.00	33.33%	4.04%
age 25 - 29	9	3	3	4,075.00	1,358.33	33.33%	0.31%
age 30 - 34	5	3	7	2,300.00	766.67	60.00%	0.17%
age 35 - 39	11	8	15	11,325.00	1,415.63	72.73%	0.86%
age 40 - 44	9	7	30	791,550.00	113,078.57	77.78%	59.92%
age 45 - 49	9	6	38	256,175.00	42,695.83	66.67%	19.39%
age 50 - 54	6	6	25	29,000.00	4,833.33	100.00%	2.20%
age 55 - 59	3	0	0	0.00	0.00	0.00%	0%
age 60 - 64	7	5	9	20,100.00	4,020.00	71.43%	1.52%
age 65 - 69	4	3	4	78,300.00	26,100.00	75.00%	5.93%
age 70 - 74	3	2	3	225.00	112.50	66.67%	0.02%
age 75 - 79	2	1	1	200.00	200.00	50.00%	0.02%
Unknown	27	10	30	74,365.00	7,436.50	37.04%	5.63%
	<u>98</u>	<u>55</u>	<u>172</u>	<u>1,320,965.00</u>	<u>24,017.55</u>	<u>56.12%</u>	

Comparisons and Summaries Reports

The **Comparison and Summary Reports** provide comparisons of date ranges for selected field and field values. You must define two date ranges for the Comparison Report. Up to five date ranges can be defined for the Summary Report. Both reports show the number of constituents and gifts, total amount given, and average gift amount.

These reports provide comparison or summary demographic information for selected field and field values. You must select a field to use (e.g., age group, zip code, or gift size) from the drop-down menu. You can select one or more field values associated with the field to use. Two date ranges must be selected for Comparison Report, and up to five date ranges can be selected for Summary Report.

The **Comparative Report** includes number of donors, total amount given, and average amount given for the two date ranges selected.

The **Summary Report** includes number of gifts, total amount given, and average amount given for each date range.

Both reports include grand totals. Select specific criteria to narrow the report (e.g., gift types, funds, and campaigns).

Note: Constituents who do not have an entry in the selected field are grouped under “Unknown.”

Required:

Varies by the field selected

Filters:

Constituency

Campaigns

Funds

Appeals

Sort Order:

Field selected

Options:

Total on gifts or constituent

Field

Field values

Variance by dollars or percentage (Comparison Report only)

The available options vary by the field selected

Blackbaud Demo
Summary Report by Age Group
Reference Manual Sample

First Period			Second Period			Third Period		
1/1/94 to 12/31/94			1/1/95 to 12/31/95			1/1/96 to 12/31/96		
Donors	Total Given	Avg Given	Donors	Total Given	Avg Given	Donors	Total Given	Avg Given
age 18 - 24								
1	500.00	500.00	1	1,250.00	1,250.00	1	\$1,500.00	\$1,500.00
age 25 - 29								
1	75.00	75.00	0	0.00	0.00	0	\$0.00	\$0.00
age 30 - 34								
3	2,050.00	683.33	0	0.00	0.00	0	\$0.00	\$0.00
age 35 - 39								
5	2,975.00	595.00	1	5,000.00	5,000.00	0	\$0.00	\$0.00
age 40 - 44								
4	503,750.00	125,937.50	0	0.00	0.00	1	\$300.00	\$300.00
age 45 - 49								
6	33,250.00	5,541.67	2	201,500.00	100,750.00	1	\$500.00	\$500.00
age 50 - 54								
4	3,350.00	837.50	0	0.00	0.00	1	\$200.00	\$200.00
age 60 - 64								
4	7,800.00	1,950.00	0	0.00	0.00	1	\$100.00	\$100.00
age 65 - 69								
1	75,250.00	75,250.00	0	0.00	0.00	0	\$0.00	\$0.00
age 70 - 74								
1	125.00	125.00	0	0.00	0.00	0	\$0.00	\$0.00
Unknown								
6	68,650.00	11,441.67	1	1,000.00	1,000.00	0	\$0.00	\$0.00
36	697,775.00	\$19,382.64	5	208,750.00	\$41,750.00	5	\$2,600.00	\$520.00

Tallies

Tallies provide a count of constituents associated with selected field and field values. The report also gives the percentage of constituents associated with the selected values.

This report also provides a tally of demographic information for a selected field. You must select a field to use (e.g., age group, state, or country) from the drop-down menu. You can select one or more field values associated with the field to use. The report includes total number in field, percent of total, and grand total.

Note: Constituents without an entry in the selected field are grouped under “Unknown.”

Required:

Varies by the field selected

Filters:

Constituency

Sort Order:

Field selected

Options:

- Field
- Field values
- Exclude selected attributes
- The available options vary by the field selected

Note: Running this report based on constituency tallies the primary constituency (primary constituency is the first entry listed under constituency code on the Bio 2 tab). This is the only report in *The Raiser’s Edge* containing this information.

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Tally by Constituency
Reference Manual Sample

Page 1

Constituency	Primary	Total	% Of Total
Alumnus	12	16	14.55%
Current Parent	2	5	4.55%
Duplicate Parent	1	2	1.82%
Grandparent	1	1	0.91%
Former Parent	1	1	0.91%
Friend	21	21	19.09%
Corp./Business	12	13	11.82%
Matching Gift Co.	2	3	2.73%
Foundation	1	1	0.91%
Trustee	15	16	14.55%
Student	2	2	1.82%
Member	3	3	2.73%
Prospect	9	9	8.18%
Volunteer	5	6	5.45%
Employee	3	3	2.73%
Board Member	4	4	3.64%
nonprofit	3	3	2.73%
Unknown	1	1	0.91%

Chapter 7 — Action Reports

Action Reports track action assignments. List the actions assigned as a task for each user, produce summaries of the number of constituents assigned an action type, or print a detailed report of a constituent's action history. For information on procedures to print and export reports, see the Reports Overview chapter in *The Raiser's Edge for Windows User's Guide*.

Section Preview

- The **Action Detail Report** lists all actions within the selected date range and can include action attributes.
 - The **Action Summary Report** provides the number of constituents with each action type. The report is a summary, so constituent names do not appear.
 - The **Tickler Report** lists solicitors and corresponding actions.
- The **Constituent Action History** provides a detailed history of all actions for a constituent.
 - The **Action Reminder Report** acts as a “to do” list for Raiser's Edge users. Action reminders for the selected date range appear in the order of their assigned priority.

Action Detail Report

The **Action Detail Report** lists all of the actions in the selected date range. Actions are listed in date order with solicitor and constituent names and detailed information about the action.

This report provides detail information for actions associated with selected constituents. All, selected, or a single record can be included in the report. A start date, end date, or date range can be specified. The report includes action date, constituent name, action type, solicitor name, time, letter type, action notes, and action attributes. Select specific criteria to narrow the report (e.g., action type, action status, and constituency).

Filters:

Action type
Action status
Constituency

Sort Order:

Date

Options:

Include action notes
Include action attributes
Select priority (all, high, medium, or low)
Select all or one solicitor

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Blackbaud Demo
Action Detail Report
Reference Manual Sample

Page 1

Date	Action Type	Solicitor	Time	Letter
Constituent				
3/9/98	Birthday Michael T. Baymann	Unknown	4:00 PM	Birthday Card
Notes: Send Birthday Card.				
4/20/98	Dinner meeting Victor H. Hanson	Myron Banks	6:00 PM	
7/15/98	Follow-Up Call James T. Pierce	Franklin A. Baymann	3:00 PM	Handwritten Thanks
Notes: James agreed to send someone over from Pierce and Associates for free legal consultation - Gift In Kind				

3 Action(s) Listed

Action Summary Report

The **Action Summary Report** provides a count of assigned actions either by solicitor or action type. Constituent names do not appear on the report. This report provides a tally of action types associated with selected constituents. A start date, end date, or date range can be specified. All, selected, or a single record can be included in the report. You can break down this report by solicitor name or action type. The **Solicitor** report provides a count of assigned actions. The **Action Type** report provides a count of actions. Select specific criteria to narrow the report (e.g., action type, action status, and constituency).

Note: You can graph the Action Summary Report. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

- Action types
- Action status
- Constituency

Sort Order:

- Action type or solicitor name

Options:

- Select priority (all, high, medium, low)
- All solicitors or one solicitor

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Blackbaud Demo
Action Summary Report
Reference manual Sample

Page 1

Action Type	Count
Birthday	16
Dinner meeting	1
Follow-Up Call	13
Lunch Meeting	7
Phone Call	1
Proposal	12
Unknown	1

7 Action Type(s) Listed

Tickler Report

The **Tickler Report** lists solicitors and actions the solicitors have been assigned. Constituent information and action type are included. Notes or comments may also be included. This report is often used as an individual's "To Do List." The Action Reminder Report provides a similar list for system users responsible for assigning actions.

This report provides a list of actions associated with selected constituents. A start date, end date, or date range can be specified. All, selected, or a single record can be included in the report. You can break down this report by solicitor name or action date. The report includes solicitor name, action date, time, action type/constituent name, and telephone number(s). Action notes can be included in the report. Select specific criteria to narrow the report (e.g., action type, action status, action priority, and constituency).

Filters:

Action types
Action status
Constituency

Sort Order:

Solicitor name or date

Options:

Include all solicitors or one solicitor
Select action priority (all, high, medium, or low)
Print telephone number (none, one, or two)
Print Action notes
Print one solicitor per page

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Blackbaud Demo
Tickler Report
Reference Manual Sample

Page 1

Solicitor	Phone Types			
	Date	Time	Action Type/Constituent	Criteria Based
Myron Banks				
	5/7/94	2:30 PM	Follow-Up Call Jean P. Marshall	(808) 969-3434
Notes: Call Jean to see if she has had a chance to review the proposal from Jim White, Fundraising Consultant.				
	2/15/95	12:00 PM	Lunch Meeting John Malcolm	504-555-4532
Notes: At West Side Cafe to discuss donation for Spring Auction.				
John is President of Alhambra Metals and Fabrication. He has an extensive wine collection. Plan to ask him to consider making a donation for our auction. He donated two magnums of 1982 Simi Merlot last year which sold for a total of \$1,200.				
	4/20/98	6:00 PM	Dinner meeting Victor H. Hanson	(310) 569-0912

Constituent Action History

The **Constituent Action History** provides a detailed action history for each constituent in the selected date range. This report is useful for bringing solicitors and board members up to date on actions taken in the past.

This report provides detailed action history information for selected constituents. A start date, end date, or date range can be specified. All, selected, or a single record can be included in the report. The report includes constituent name, action date, action type, solicitor/contact name, and action status. Action notes can be included in the report. Select specific criteria to narrow the report (e.g., action type, action status, and constituency).

Filters:

- Action types
- Action status
- Constituency

Sort Order:

- Constituent name

Options:

- Select priority (all, high, medium, low)
- All or one solicitor

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Constituent Action History
Reference Manual Sample

Page 1

Constituent	Date	Action Type Solicitor / Contact	Status
Rebecca B. Aaron	5/6/94	Lunch Meeting Franklin A. Baymann	Open

Notes: Lunch meeting to discuss possible gift annuity of \$20,000. Scheduled for the West Side Cafe. Reservation under Franklin Baymann.

Mary E. Simpson	5/6/94	Birthday Franklin A. Baymann	Open
-----------------	--------	---------------------------------	------

Notes: Send Birthday Card, her birthday is May 28th.

2 Action(s) Listed

Action Reminder Report

The **Action Reminder Report** provides a list of entered action reminders. This report makes an excellent “Assignment Checklist” for system users responsible for assigning actions.

This report provides a list of action reminders associated with selected constituents. A start date, end date, or date range can be specified. All, selected, or a single record can be included in the report. The report is listed by the name of the person to be reminded. This is the name in the auto-remind frame when the action is entered in *Constituent Management*. The report includes action date, time, constituent name, and action type. Select specific criteria to narrow the report (e.g., action type, action status, and constituency).

Filters:

Action types
Action status
Constituency

Sort Order:

User name

Options:

Select priority (all, high, medium, low)
All or one user
Print one user per page

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Action Reminder Report

Reference Manual Sample

Page 1

Date	Time	Constituent	Action Type
Robert			
5/7/94	12:00 PM	Michael J. Simpson	Lunch Meeting
6/15/94	3:00 PM	Michael J. Simpson	Proposal
6/15/94	4:15 PM	Michael J. Simpson	Phone Call
8/1/94	2:30 PM	Dorothy A. Thomas	Lunch Meeting
11/15/94	2:15 PM	Victor H. Hanson	Proposal
11/15/94	2:15 PM	Margaret E. Reynolds	Proposal
11/15/94	2:15 PM	Janice E. Robertson	Proposal
11/15/94	2:15 PM	Mary E. Simpson	Proposal
11/15/94	2:15 PM	Thomas A. Cooper	Proposal
11/15/94	2:15 PM	Elizabeth A. Cooper	Proposal
11/15/94	2:15 PM	James B. Steel	Proposal
11/15/94	2:15 PM	Michael J. Simpson	Proposal
11/15/94	2:15 PM	Thomas G. Simpson	Proposal
11/15/94	2:15 PM	Rebecca B. Aaron	Proposal
11/15/94	2:15 PM	James M. Richards	Proposal
12/8/94	11:00 AM	Victor H. Hanson	Follow-Up Call
12/8/94	11:00 AM	Margaret E. Reynolds	Follow-Up Call
12/8/94	11:00 AM	Janice E. Robertson	Follow-Up Call
12/8/94	11:00 AM	Mary E. Simpson	Follow-Up Call
12/8/94	11:00 AM	Thomas A. Cooper	Follow-Up Call
12/8/94	11:00 AM	Elizabeth A. Cooper	Follow-Up Call
12/8/94	11:00 AM	James B. Steel	Follow-Up Call
12/8/94	11:00 AM	Michael J. Simpson	Follow-Up Call
12/8/94	11:00 AM	Thomas G. Simpson	Follow-Up Call
12/8/94	11:00 AM	Rebecca B. Aaron	Follow-Up Call
12/8/94	11:00 AM	James M. Richards	Follow-Up Call

Chapter 8 — Tribute Reports

RE:Tribute enhances *The Raiser's Edge* by giving you the tools to track donations made in honor or memory of an individual. You can enter the honored constituent or family members as an acknowledgee and then notify them of donations attributed to the honor/memorial. Specialized reports help you track who is being honored or memorialized, what has been given, who the donors are, and who the acknowledgees are.

Section Preview

- The **Honor/Memorial Directory** lists each tribute record with the name of the person being honored or memorialized and the name(s) of the person(s) (acknowledgees) who should be notified when a donation is made to the honor or memorial.
- The **Honor/Memorial Summary List** provides an overview of information in the honor/memorial records.
- The **Honor/Memorial Gift Report** provides detailed information about honor/memorial gifts.
- The **List of Honor/Memorial Contributors** lists constituents who gave a donation in honor or memory of another constituent.

Honor/Memorial Directory

The **Honor/Memorial Directory** lists each tribute record with the name of the person being honored or memorialized and the name of the persons (acknowledgees) who should be notified when a donation is made to the honor or memory of the constituent.

This report provides a directory of honor and memorial records. A start date, end date, or date range can be specified. All, selected, or a single record can be included in the report. The report is listed by the name of the person being honored or memorialized, and includes the honor/memorial date, and a list of acknowledgees. The acknowledgee list includes constituent name and address, constituent ID, and relationship to the person being honored or memorialized. The report can include active and/or inactive honor/memorial records. Select honor/memorial type and constituency to narrow the report.

Filters:

Honor/memorial type

Constituency

Sort Order:

Name of person being honored or memorialized

Options:

Select records (active and/or inactive)

Include records with no activity

Print one honor/memorial per page

Print acknowledgee address

Print acknowledgee telephone number

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Blackbaud Demo
Honor/Memorial Directory
Reference Manual Sample

Page 1

Tribute for Simpson, Michael J.

Hon/Mem Date: 12/15/93

Acknowledge:

Michael J. Simpson
443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443
(803) 740-2691

Constituent Id: 4509-MS

Mary E. Simpson
1200 Colorado
Santa Monica, CA 90411

Constituent Id: 8123-MS
spouse

Honor/Memorial Summary List

The **Honor/Memorial Summary List** provides an overview of information in the honor/memorial records. The name of the person being honored or memorialized, honor/memorial type, date the tribute was established, whether the honor/memorial is active, and the honor/memorial constituent ID are included on the report.

This report provides summary honor and memorial information for selected records. All, selected, or a single record can be included in the report. The report is listed by the name of the person being honored or memorialized; and includes the honor/memorial name, type, and date; constituent ID; and whether the honor/memorial record is active or inactive. The report can include active and/or inactive honor/memorial records. Select honor/memorial type and constituency to narrow the report.

Filters:

Honor/Memorial type

Constituency

Sort Order:

Name of person being honored or memorialized

Options:

Select records (active and/or inactive)

Include records with no activity

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Blackbaud Demo
Honor/Memorial Summary List
Reference Manual Sample

Page 1

Honor/Memorial Name	Honor/Memorial Code	Hon/Mem Date	Active?	Constituent Id
Lance A. Smith	in memory of	12/12/93	Yes	7812-LS
Michael J. Simpson	in honor of	12/15/93	Yes	4509-MS
Samuel M. Jones	in memory of	12/15/94	Yes	9130-SJ
3 Hon/Mem Record(s) Listed				

Honor/Memorial Gift Report

The **Honor/Memorial Gift Report** provides detailed information about honor/memorial gifts. Each gift is listed on the report with the gift type, amount, and fund description. A total of donations for each honor/memorial record and a grand total are provided.

This report provides detailed honor and memorial information for selected records. A start date, end date, or date range can be specified. All records, selected records, or a single record can be included in the report. This report is listed by the name of the person being honored or memorialized, and includes the gift date, constituent name, fund description, gift type, amount given, reference, number of gifts, subtotal amount given, and grand total amount given. The report can include active and/or inactive honor/memorial records. Select specific criteria to narrow the report (e.g., constituency, gift type, and appeals).

Filters:

Honor/Memorial types

Constituency

Gift types

Campaigns

Funds

Appeals

Sort Order:

Name of person being honored or memorialized

Options:

Select records (active and/or inactive)

Print one honor/memorial per page

Breakdown by honor/memorial type

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Honor/Memorial Gift Report
Reference Manual Sample

Page 1

Tribute for Lance A. Smith

Date	Constituent Name	Fund Description	Gift	Amount	Reference
12/31/93	Michael J. Simpson	Smith Library Fund	Cash	2,500.00	
1/10/94	Anthony E. Bakker	Herbert Hoover Memorial Fun	Cash	250.00	
1/15/94	Harold H. Hicks	Smith Library Fund	Cash	75.00	
1/16/94	Jason A. Peters	Smith Library Fund	Cash	75.00	
1/18/94	Janice E. Robertson	Annual Fund 1994	Cash	25.00	
1/20/94	Mark S. Jones	Smith Library Fund	Cash	250.00	
1/24/94	Benjamin C. Grant	Smith Library Fund	Cash	150.00	
1/25/94	Kelly Davis	Smith Library Fund	Cash	150.00	
1/28/94	The Pinckney Group	Smith Library Fund	Cash	250.00	
1/12/98	Jonathon P. Ashley	Smith Library Fund	Cash	75.00	

Total Gifts = 10

Total Cash:

3,800.00

Grand Total Cash \$3,800.00

1 Hon/Mem Record(s) Listed

10 Gift(s) Listed

List of Honor/Memorial Contributors

The **List of Honor/Memorial Contributors** lists constituents who gave a donation in honor or memory of another constituent. Each contributor is listed with his or her address. A telephone number and acknowledgement information can be included.

This report provides a list of honor and memorial contributors associated with selected records. A start date, end date, or date range can be specified. All records, selected records, or a single record can be included in the report. The report is listed by the name of the person being honored or memorialized, and the contributor name and address. You can include the contributor telephone number or address, and acknowledgee information. This report can include active and/or inactive honor/memorial records. Select specific criteria to narrow the report (e.g., constituency, gift type, and campaigns).

Note: This report does not list gift amounts. For this reason, it is a good source for newsletter articles about donors and honor/memorial gift giving.

Filters:

Honor/memorial type
Constituency
Campaign
Fund
Appeal

Sort Order:

Name of person being honored or memorialized

Options:

Select records (active and/or inactive)
Print one honor/memorial per page
Include acknowledge information
Print address
Print telephone
Print one acknowledge recipient per page

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List Honor/Memorial Contributors
Reference Manual Sample

Page 1

Tribute for Lance A. Smith

Gifts received in memory of

Contributors

Anthony E. Bakker
1233 Palm Boulevard
Sullivan's Island, SC 29401

Mark S. Jones
2600 West Bend Avenue
Charleston, WV 69401

Janice E. Robertson
437 Serenity Lane
Mt. Pleasant, SC 29484

Michael J. Simpson
443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443

The Pinckney Group
2504 East Bay Street
Suite 400
Charleston, SC 29401-0012

Chapter 9 — Campaigns, Funds, and Appeals Reports

These specially designed reports help you track the progress of campaigns, funds, and appeals, and analyze the success of your efforts. These reports compare costs versus income, actual income to a goal, or produce a profile or list of campaigns, funds, and appeals. For information on procedures such as processing, printing, and exporting reports, please see the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Section Preview

- The **Campaign Performance Analysis** compares the number of donors and the number of gifts given within a specified date range with a campaign's goal.
 - The **Campaign Progress Report** tracks the progress of a campaign toward its goal.
 - The **Campaign Profile** provides a basic campaign description based on information when the campaign was entered in *Campaigns, Funds, and Appeals*.
 - The **Campaign Summary List** provides an overall view of a campaign and the default fund associated with the campaign.
 - The **Fund Performance Analysis** provides an analysis of the number of donors and their gift giving within a specified date range compared with the fund's goal.
 - The **Fund Profile** provides a basic fund description and a list of the associated general ledger accounts based on information when the fund was entered in *Campaigns, Funds, and Appeals*.
- The **Fund Summary List** provides an overall view of the fund and the campaign associated with the fund.
 - The **Appeal Performance Analysis** tracks the performance of an appeal.
 - The **Appeal Cost Breakdown** reports in detail the expenditures related to an appeal. This is particularly useful in tracking total costs of an appeal to determine if it was a success.
 - The **Appeal Profile** provides a brief appeal description based on information when the appeal was entered in *Campaigns, Funds, and Appeals*.
 - The **Appeal Summary List** provides an overview of the appeal and the campaigns associated with the appeal.

Campaign Performance Analysis

The **Campaign Performance Analysis** analyzes the number of donors and the number of gifts given to a campaign during a specified date range compared with the campaign's goal. The report includes the average given per donor, average size of gift, total given to the campaign, amount over or under the goal, and percent of goal. The report does not include constituent names.

This report provides an analysis of campaign performance for all constituents or for a selected query. A start date, end date, or date range can be specified. The report includes campaign ID, campaign description, number of donors, average per donor, number of gifts, average per gift, total given, goal, amount over/(under), and percent of goal. Select specific criteria to narrow the report (e.g., constituency, gift type, and appeals).

Note: You can graph the Campaign Performance Analysis. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

- Gift type
- Constituency
- Attributes
- Campaigns
- Funds
- Appeals

Sort Order:

- Campaign ID

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Campaign Performance Analysis
Reference Manual Sample Report

Page 1

Camp	Description	# of Donors	Avg/Donor	#Gifts	Avg/Gift	Total Given	Goal	Over(Under)	% Goal
ANNUAL	Annual Campaign	31	8,220.32	68	3,747.50	254,830.00	350,000.00	(95,170.00)	72.81
CAPITAL	The Campaign for Excellence	38	28,893.49	81	13,554.97	1,097,952.50	3,000,000.00	(1,902,047.50)	36.60
ENDOWRE	Endowment - Restricted	9	2,516.67	21	1,078.57	22,650.00	15,000.00	7,650.00	151.00
MEMBER	Membership Campaign	2	750.00	2	750.00	1,500.00	150,000.00	(148,500.00)	1.00

4 Campaign(s) Listed

Campaign Progress Report

The **Campaign Progress Report** tracks the progress of a campaign toward its goal. Only “new dollars” given within the specified date range are reported in the Income column of the report. “New dollars” includes any cash or payment toward a new pledge falling within the date range of the report. A payment to a pledge made outside of the date range of the report is not considered new dollars. The number of donors, outstanding pledges, number of donors who pledged, and an overall total, which includes the income column and the outstanding pledges, are also shown on the report. Additional information regarding participation, percent to goal, and total number of donors appears as well.

This report provides campaign progress information for all constituents or for a selected query. A start date, end date, or date range can be specified. The report includes constituent code, income, number of donors who gave, outstanding pledges, number of donors who pledged, and total income+pledges, total number of donors, number of constituents solicited, and percent participation. Target amounts, over/(under) target, and percent of targeted amount are given for both the campaign and associated fund. Select specific criteria to narrow the report (e.g., constituency, gift type, and appeals).

Note: This reports on the progress of different constituency codes within specified campaigns. Most commonly, the report is run for a single campaign at a time with the campaign name entered as the subheading.

Filters:

- Attributes
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Constituency Code

Blackbaud Demo
Campaign Progress Report
Reference Manual Sample Report

Constituency	Income	#Donors Who Gave	Outstanding Pledges	#Donors Pledged	Total Inc + Plg	#Donors Total	#Constits Solicited	% Partic.
Alumnus	18,000.00	7	700.00	2	18,700.00	8	12	66.67
Board Member	216,375.00	3	560,000.00	2	776,375.00	3	4	75.00
Corp./Business	57,800.00	6	9,225.00	2	67,025.00	6	12	50.00
Current Parent	5,400.00	1	5,000.00	1	10,400.00	1	2	50.00
Duplicate Parent	0.00	0	0.00	0	0.00	0	1	0.00
Employee	9,150.00	2	0.00	1	9,150.00	2	3	66.67
Former Parent	0.00	0	0.00	0	0.00	0	1	0.00
Foundation	0.00	0	0.00	0	0.00	0	1	0.00
Friend	8,242.50	11	8,197.50	7	16,440.00	12	21	57.14
Grandparent	0.00	0	0.00	0	0.00	0	1	0.00
Matching Gift Co.	7,050.00	2	0.00	1	7,050.00	2	2	100.00
Member	650.00	2	0.00	0	650.00	2	2	100.00
nonprofit	0.00	0	0.00	0	0.00	0	3	0.00
Prospect	1,750.00	1	0.00	0	1,750.00	1	9	11.11
Student	0.00	0	0.00	0	0.00	0	2	0.00
Trustee	310,125.00	12	25,350.00	1	335,475.00	12	15	80.00
Volunteer	18,900.00	5	550.00	1	19,450.00	5	6	83.33
Unknown	8,375.00	3	50,075.00	2	58,450.00	3	3	100.00
	<u>661,817.50</u>	<u>55</u>	<u>659,097.50</u>	<u>20</u>	<u>1,320,915.00</u>	<u>57</u>	<u>100</u>	

Campaign Totals		Fund Totals	
Target Amount	3,530,000.00	Target Amount	7,810,000.00
Over (Under) Target	(2,209,085.00)	Over (Under) Target	(6,489,085.00)
Percent of Targeted Amount	-62.58	Percent of Targeted Amount	-83.09

Campaign Profile

The **Campaign Profile** provides a basic description of the campaign based on information when the campaign was entered in *Campaigns, Funds, and Appeals*.

This report provides a profile of selected campaigns. A start date, end date, or date range can be specified. The report includes campaign ID, campaign description, goal, and default fund. Each campaign can be displayed on a separate page.

Filters:

Campaigns

Sort Order:

Campaign ID

Options:

Print each campaign on a separate page

9/14/98

Blackbaud Demo
Campaign Profile
Reference Manual Sample Report

Page 1

Campaign ID: CAPITAL

Description: The Campaign for Excellence

Goal: 3,000,000.00

Start Date: 01/01/1993

End Date: 12/31/1998

Default Fund: Capital Campaign Plant Fund

Campaign ID: ANNUAL

Description: Annual Campaign

Goal: 350,000.00

Start Date:

End Date:

Default Fund: Annual Fund 1998

Campaign ID: ENDOWREST

Description: Endowment - Restricted

Goal: 15,000.00

Start Date:

End Date:

Default Fund: Smith Library Fund

Campaign ID: ENDOWUNREST

Description: Endowment - Unrestricted

Goal: 15,000.00

Start Date:

End Date:

Default Fund:

Campaign ID: MEMBER

Description: Membership Campaign

Goal: 150,000.00

Start Date:

End Date:

Default Fund: Membership Fund 1994

Campaign Summary List

The **Campaign Summary List** provides an overall summary of information associated with a campaign. A start date, end date, or date range can be specified. The report includes campaign ID, campaign description, campaign goal, default fund, and the total number of campaigns listed.

Note: You can graph the Campaign Summary List. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

Campaigns

Sort Order:

Campaign ID

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Blackbaud Demo
Campaign Summary List
Reference Manual Sample Report

Page 1

Campaign	Description	Start Date	End Date	Goal	Default Fund
CAPITAL	The Campaign for Excellence	1/1/93	12/31/98	3,000,000.00	Capital Campaign P
ANNUAL	Annual Campaign			350,000.00	Annual Fund 1998
ENDOWREST	Endowment - Restricted			15,000.00	Smith Library Fund
ENDOWUNREST	Endowment - Unrestricted			15,000.00	
MEMBER	Membership Campaign			150,000.00	Membership Fund 1

5 Campaign(s) Listed

Fund Performance Analysis

The **Fund Performance Analysis** provides information for analyzing the performance or success of a fund. The report includes the number of donors, average given per donor, number of gifts given, average size of gifts given, total amount given, amount over or under the goal, and percent of goal.

Fund performance analysis information can be listed for all constituents or for a selected query. A start date, end date, or date range can be specified. The report includes fund ID, fund description, number of donors, average gift per donor, number of gifts, average amount per gift, total amount given, fund goal, over/(under), and percent of goal. Select specific criteria to narrow the report (e.g., constituency, gift type, date range, and appeals).

Note: You can graph the Fund Performance Analysis. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

- Attributes
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Fund ID

Blackbaud Demo
Fund Performance Analysis
Reference Manual Sample Report

Fund	Description	# of Donors	Avg/Donor	#Gifts	Avg/Gift	Total Given	Goal	Over(Under)	% Goal
AN89	Annual Fund 1989	1	50.00	1	50.00	50.00	150,000.00	(149,950.00)	.03
AN90	Annual Fund 1990	2	150.00	2	150.00	300.00	200,000.00	(199,700.00)	.15
AN91	Annual Fund 1991	2	187.50	2	187.50	375.00	200,000.00	(199,625.00)	.19
AN92	Annual Fund 1992	2	600.00	2	600.00	1,200.00	250,000.00	(248,800.00)	.48
AN93	Annual Fund 1993	4	450.00	5	360.00	1,800.00	300,000.00	(298,200.00)	.60
AN94	Annual Fund 1994	18	486.11	22	397.73	8,750.00	350,000.00	(341,250.00)	2.50
AN95	Annual Fund 1995	2	100,600.00	2	100,600.00	201,200.00	0.00	201,200.00	.00
AN96	Annual Fund 1996	2	900.00	4	450.00	1,800.00	150,000.00	(148,200.00)	1.20
AN97	Annual Fund 1997	6	441.67	8	331.25	2,650.00	0.00	2,650.00	.00
AN98	Annual Fund 1998	12	15,452.50	14	13,245.00	185,430.00	0.00	185,430.00	.00
CCB	Capital Campaign Buildin	10	91,160.00	18	50,644.44	911,600.00	3,000,000.00	(2,088,400.00)	30.39
CCP	Capital Campaign Plant F	21	7,063.21	39	3,803.27	148,327.50	1,500,000.00	(1,351,672.50)	9.89
HHMF	Herbert Hoover Memoria	1	1,000.00	1	1,000.00	1,000.00	15,000.00	(14,000.00)	6.67
JSC	James E. Howard Scholar	4	918.75	5	735.00	3,675.00	500,000.00	(496,325.00)	.74
KEL	Kellogg Endowment Fund	4	129,887.50	11	47,231.82	519,550.00	30,000.00	489,550.00	1731.83
LIB	Smith Library Fund	21	490.48	27	381.48	10,300.00	1,000,000.00	(989,700.00)	1.03
MB93	Membership Fund 1993	1	150.00	3	50.00	150.00	75,000.00	(74,850.00)	.20
MB94	Membership Fund 1994	1	8,000.00	3	2,666.67	8,000.00	90,000.00	(82,000.00)	8.89
MB98	Membership Fund 1998	2	1,250.00	2	1,250.00	2,500.00	0.00	2,500.00	.00

19 Fund(s) Listed

Fund Profile

The **Fund Profile** provides a basic profile for all or selected funds based on information when the fund was entered in *Campaigns, Funds, and Appeals*.

A start date, end date, or date range can be specified. The report includes fund ID, fund description, fund goal, fund category, associated campaign name, restricted, notes, and a summary of general ledger accounts activity associated with the selected funds. You can display each fund on a separate page.

Filters:

Funds

Sort Order:

Fund ID

Options:

Print each fund on a separate page

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Blackbaud Demo
Fund Profile
Reference Manual Sample Report

Page 1

Fund ID: CCBUILDING
Description: Capital Campaign Building Fund
Goal: \$ 3,000,000.00
Fund Category: Capital
Campaign: The Campaign for Excellence
Start Date: 1/1/1993
End Date: 12/31/1998
Restricted: Yes
Notes:

General Ledger Accounts		
Gift Type	Debit Account	Credit Account
Cash	100100	420100
Pledge Current	120100	420100
Pledge Future	120100	420100
Gift In Kind	160000	420200
Other Gift	170000	420200
Plg Pay Cash	100100	120101
Plg Pay Stock	150000	120101
Plg Pay Kind	155000	120101
Plg Pay Other	581000	120101
Pledge Write Off	120100	425001
MG Pledge Current	120100	425001
MG Pledge Future	100100	120101
MG Pay Cash	150000	120101
MG Pay Stock	155000	120101

Fund Summary List

The **Fund Summary List** provides you with general information about the fund. This includes the fund goal, the campaign to which the fund was assigned, the start and end dates, and the fund category.

Note: You can graph the Fund Summary List. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

Funds

Sort Order:

Fund ID

Blackbaud Demo
Fund Summary List
Reference Manual Sample Report

Fund	Description	Start Date	End Date	Goal	Rest	Campaign	Category
ANNUAL98	Annual Fund 1998	1/1/98	12/31/98	0.00	No	Annual Campaign	Annual
Member98	Membership Fund 1998			0.00	No		
CCPLANT	Capital Campaign Plant Fund	1/1/93	12/31/98	1,500,000.00	Yes	The Campaign for Excellence	Capital
LIBRARY	Smith Library Fund	1/1/93	12/31/94	1,000,000.00	Yes	The Campaign for Excellence	Restricted
KELLOGG	Kellogg Endowment Fund	6/1/90	7/1/93	30,000.00	No	Endowment - Restricted	Restricted
HHMF	Herbert Hoover Memorial Fund			15,000.00	No	Endowment - Restricted	Restricted
CCBUILDING	Capital Campaign Building Fund	1/1/93	12/31/98	3,000,000.00	Yes	The Campaign for Excellence	Capital
JHSCHOLAR	James E. Howard Scholarship Fund			500,000.00	No	Annual Campaign	Scholarship
Member99	Membership Fund 1999	1/1/99	12/31/99	0.00	No		
ANNUAL99	Annual Fund 1999	1/1/99	12/31/99	0.00	No	Annual Campaign	
ANNUAL97	Annual Fund 1997			0.00	No		
ANNUAL96	Annual Fund 1996	1/1/96	12/31/96	150,000.00	No	Annual Campaign	Annual
ANNUAL95	Annual Fund 1995			0.00	No		
ANNUAL94	Annual Fund 1994	1/1/94	12/31/94	350,000.00	Yes	Annual Campaign	Annual
ANNUAL93	Annual Fund 1993	1/1/93	12/31/93	300,000.00	No	Annual Campaign	Annual
ANNUAL92	Annual Fund 1992	1/1/92	12/31/92	250,000.00	No	Annual Campaign	Annual
ANNUAL91	Annual Fund 1991	1/1/91	12/31/91	200,000.00	No	Annual Campaign	Annual
ANNUAL90	Annual Fund 1990	1/1/90	12/31/90	200,000.00	No	Annual Campaign	Annual
ANNUAL89	Annual Fund 1989	1/1/89	12/31/89	150,000.00	No	Annual Campaign	Annual
MEMBER93	Membership Fund 1993	1/1/93	12/31/93	75,000.00	Yes	Membership Campaign	Annual
MEMBER94	Membership Fund 1994	1/1/94	12/31/94	90,000.00	Yes	Membership Campaign	Annual

21 Fund(s) Listed

Appeal Performance Analysis

The **Appeal Performance Analysis** tracks the success or performance of an appeal. The report includes calculations of the response percentage, total cost of the appeal, cost per gift, and cost per donor. This report is extremely useful for comparing the results obtained from different types of appeals.

You can include appeal performance analysis information for all constituents or for a selected query. A start date, end date, or date range can be specified. The report includes appeal ID, appeal description, number of solicitations, number of gifts, number of donors, percent response, total given, average per gift, average per donor, goal, over/(under), total cost, cost per gift, and cost per donor calculations. Select specific criteria to narrow the report (e.g., constituency, gift type, and appeals).

Note: You can graph the Appeal Performance Analysis. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

- Attributes
- Constituency
- Campaigns
- Funds
- Appeals

Sort Order:

- Appeal ID

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Blackbaud Demo
Appeal Performance Analysis
Reference Manual Sample Report

Page 1

Appeal	Description	# Sol	Gifts Donors	%Resp	Total Given	Avg/Gift Avg/Donor	Goal Over (Under)	Total Cost	Cost/Gift Cost/Donor
AC98	Celebrity Auction		1		500.00	500.00		357.97	357.97
			1			500.00			357.97
CCK	Capital Campaign Kickoff	2,500	2	0.04	120,000.00	60,000.00	1,000,000.00	236.07	118.04
			1			120,000.00	(880,000.00)		236.07
PH98	1998 Phonathon	500,000	1	0.00	200.00	200.00	1,500,000.00	125.90	125.90
			1			200.00	(1,499,800.00)		125.90
UNSOL	Unsolicited	0	1		500,000.00	500,000.00	0.00	0.00	0.00
			1			500,000.00	500,000.00		0.00

Appeal Cost Breakdown

The **Appeal Cost Breakdown** reports in detail the expenditures related to an appeal. This is particularly useful for tracking the total costs of an appeal to determine if it was a success.

You can include cost information for all or selected appeals. A start date, end date, or date range can be specified. The report includes appeal ID, appeal description, expense description, comment, date, expense amount and subtotals, and grand total.

Filters:

Appeals

Sort Order:

Appeal ID

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Blackbaud Demo
Appeal Cost Breakdown
Reference Manual Sample Report

Page 1

Appeal	Description	Expense Description	Comment	Date	Amount
ANNUALFA 1993 Fall Appeal		Design Cost	Bay Street Design	7/15/93	1,200.00
		Printer	Palmetto Printer	9/12/93	790.00
		Mailing Cost	Low Country Mailing	9/15/93	380.00
			Total		2,370.00
CCKICK	Capital Campaign Kickoff	Design Cost		10/23/92	2,000.00
		Mailing Cost			0.00
			Total		2,000.00
PLANNED	Planned Giving Appeal	Design Cost	Low Country Design	10/1/97	1,200.00
		Mailing Cost	Palmetto Mailers	11/5/97	350.00
			Total		1,550.00
				Grand Total	5,920.00
3 Appeal(s) Listed					

Appeal Profile

The **Appeal Profile** provides a brief description of the appeal based on information when the appeal was entered in *Campaigns, Funds, and Appeals*. You can include profile information for all or selected appeals. A start date, end date, or date range can be specified. The report includes appeal ID, appeal description, goal, campaign name, number solicited, and notes. Where applicable, expense, comment, expense date, and expense amount are included. Enter appeal expense information in *Campaigns, Funds, and Appeals*. You can display each appeal on a separate page.

Filters:

Appeals

Sort Order:

Appeal ID

Options:

Print each appeal on a separate page

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Blackbaud Demo
Appeal Profile
Reference Manual Sample Report

Page 1

Appeal ID: ANNUALFALL93
Description: 1993 Fall Appeal
Goal: 180,000.00
Campaign: Annual Campaign
Start Date: 9/1/1993
End Date: 12/31/1993
Solicited: 1,154
Notes:

Expense	Comment	Date	Amount
Design Cost	Bay Street Design	7/15/93	\$1,200.00
Printer	Palmetto Printer	9/12/93	\$790.00
Mailing Cost	Low Country Mailing	9/15/93	\$380.00

Appeal ID: CCKICK
Description: Capital Campaign Kickoff
Goal: 1,000,000.00
Campaign: The Campaign for Excellence
Start Date: 1/1/1993
End Date: 1/31/1993
Solicited: 2,500
Notes:

Expense	Comment	Date	Amount
Design Cost		10/23/92	\$2,000.00
Mailing Cost			

Appeal Summary List

The **Appeal Summary List** provides general overview of an appeal, including the description, start and end dates, goal, and associated campaign name. The summary list does not show expenses or gifts.

You can include summary information for all or selected appeals. A start date, end date, or date range can be specified. The report includes appeal ID and description, goal amount, and campaign name.

Note: You can graph the Appeal Summary List. For more information, refer to the section on graphing a report's output in the Reports Overview chapter of *The Raiser's Edge for Windows User's Guide*.

Filters:

Appeals

Sort Order:

Appeal ID

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Blackbaud Demo
Appeal Summary List
Reference Manual Sample Report

Page 1

Appeal	Description	Start Date	End Date	Goal	Campaign
ANNUALFALL98	1998 Fall Appeal	9/1/98	11/1/98	125,000.00	The Campaign for Ex
ANNUALSM98	1998 Summer Appeal	6/1/98	8/31/98	500,000.00	Membership Campaig
ANNUALSP98	1998 Spring Appeal	3/1/98	5/31/98	450,000.00	Endowment - Unrestri
98PHONE	1998 Phonathon	1/1/98	12/31/98	1,500,000.00	Annual Campaign
ANNUALWIN98	1998 Winter Appeal	9/1/98	12/31/98	350,000.00	Endowment - Restrict
ACMail	ACMail	1/1/98	12/31/98	5,000,000.00	Endowment - Unrestri
UNSOL	Unsolicited	1/1/98	12/31/98	0.00	Annual Campaign

7 Appeal(s) Listed

Chapter 10 — Alumni Reports

RE:Alum is designed specifically for schools, colleges, and universities. *RE:Alum* includes additional information and reporting capabilities to help you reach, solicit, and better manage your alumni constituency. Also, you can access and list alumni by maiden name, if needed.

The **Educate** button, on the Bio 1 tab of a constituent record, accesses current and past education information. On each education record, you can store detailed information including the degree earned, GPA, and year of graduation, and define Attributes about the constituent's education. Define the education attributes in *Configuration*.

Section Preview

- The **Alumni Class List** lists alumni with class years, addresses, and telephone numbers. This list helps plan appeals directed at alumni or plan class reunions.

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

- The **Parent Directory** lists parents of alumni with the alumni's address and telephone number. The directory helps plan appeals directed toward alumni and their parents.

Note: To appear on the Parent Directory, there must be a relationship established in the constituent records. Relationships are established in *Constituent Management*.

- The **Grandparent Directory** lists grandparents of alumni with their addresses and telephone numbers. The directory helps plan appeals directed toward alumni and their grandparents.

Note: To appear on the Grandparent Directory, there must be a relationship established in the constituent records. Relationships are established in *Constituent Management*.

- The **Professional Directory** lists constituents by their profession. This report helps design appeals for particular professions.

Alumni Class List

The **Alumni Class List** lists alumni with their class year. Two columns are available for displaying address and telephone information. One, several, or all classes can be selected. This report is very useful in generating reunion lists.

This report lists alumni for all or selected class years. List the report by alumni names alphabetically or by class year. Two addresses and telephone numbers can be included in the report. For example, the primary address and home telephone number, and the business address and mobile telephone number can be included. The report includes class year, alumni name, address(es), and telephone number(s). You can display each class year on a separate page.

Note: To appear on the Alumni Class Report the constituent's education record must be marked "Primary Alumni Information."

Required:

Alumni code

Filters:

Alumni codes

Class Years

Attributes

Sort Order:

Alphabetically or class year

Options:

Base on last name or maiden name

Create output query

List deceased attribute for deceased alumni

Print address

Print telephone number

Print each class year on a separate page

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Blackbaud Demo
Alumni Class List
Reference Manual Sample Report

Page 1

Class Of 1977

Elizabeth A. Cooper

139 Barrington Court
Summerville, SC 29461
(803) 871-9146

2501 Canyon Road
Aspen, CO 30398

Mary E. Simpson

443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443
(803) 555-3409

1200 Colorado
Santa Monica, CA 90411

Class Of 1981

Rebecca B. Aaron

2344 Ruby Road
Charleston , SC 29401
(803) 724-5600

2344 Ruby Road
Charleston , SC 29401

Class Of 1997

Michael J. Murphy

52 Buckingham Avenue
Greenville, SC 29609
(803) 523-4541

52 Buckingham Avenue
Greenville, SC 29609

Christopher S. Vassar

#28 Oakdale Avenue
New Port News, VA 30981
(808) 489-1289

#28 Oakdale Avenue
New Port News, VA 30981

Parent Directory

The **Parent Directory** lists the parents of alumni and is great to use as a directory. Two columns are available for displaying address and telephone information. One, several, or all classes can be selected. There must be a parent-child relationship established in the constituent records for the parent to appear in the directory. Relationships are established in *Constituent Management*.

List the report by parent names alphabetically or by class year. Two addresses and telephone numbers can be included in the report. For example, the primary address and home telephone number, and the business address and mobile telephone number can be included. The report includes class year, parent name(s), parent address(es) and telephone number(s), and the alumni's name.

Note: To appear on the Parent Directory, there must be a relationship established in the constituent records. Relationships are established in *Constituent Management*.

Required:

Parent code
Children code

Filters:

Attributes
Parent codes
Children codes
Class years

Sort Order:

Alphabetically or class year

Options:

Create output query
Print address
Print telephone number
Print each class on a separate page

10/1/98

Blackbaud Demo
Parent Directory
Reference Manual Sample Report

Page 1

Graduating Class Of 1999

Jonathon P. Smith
Amanda L. Smith
Jonathon P. Smith

1503 Sand Dollar Drive
Hilton Head, SC 29489

1503 Sand Dollar Drive
Hilton Head, SC 29489

Samantha A. Young
Deborah Young

121 Rutledge Avenue
Charleston, SC 29401

121 Rutledge Avenue
Charleston, SC 29401

Graduating Class Of 2000

John Lanning
Christy Lanning

2600 St. Michael's Boulevard
Boston, MA 2110

2600 St. Michael's Boulevard
Boston, MA 2110

Dorothy A. Thomas
Scott Thomas

3601 West View Parkway
Apartment 52A
Denver, CO 30389

3601 West View Parkway
Apartment 52A
Denver, CO 30389

Graduating Class Of 2001

Jonathon P. Smith
Amanda L. Smith
Laura E. Smith

1503 Sand Dollar Drive
Hilton Head, SC 29489

1503 Sand Dollar Drive
Hilton Head, SC 29489

Grandparent Directory

The **Grandparent Directory** lists grandparents of alumni and can be used as a directory. Two columns are available for displaying address and telephone information. One, several, or all classes can be selected. There must be a grandparent-child relationship established in the constituent records for the grandparent to appear in the directory. Relationships are established in *Constituent Management*.

List the report by grandparent names alphabetically or by class year. Two addresses and telephone numbers can be included in the report. For example, the primary address and home telephone number, and the vacation address and vacation telephone number can be included. The report includes class year, grandparent name(s), address(es), and telephone number(s), and the alumni's name.

Note: To appear on the Grandparent Directory, there must be a relationship established in the constituent records. Relationships are established in *Constituent Management*.

Required:

Grandparent code
Grandchildren code

Filters:

Attributes
Grandparent codes
Grandchildren codes
Class years

Sort Order:

Alphabetically or class year

Options:

Create output query
Print address
Print telephone number
Print each class on a separate page

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Blackbaud Demo
Grandparent Directory
Reference Manual Sample Report

Page 1

Graduating Class Of 2002

Thomas G. Pruitt
Annette C. Pruitt
Cindy Pruitt

138 Princeton Avenue
Hilton Estates
Cambridge, MA 02110

138 Princeton Avenue
Hilton Estates
Cambridge, MA 02110

Professional Directory

The **Professional Directory** lists constituents by their profession. Two columns are available for displaying address and telephone information. One, several, or all professions can be included. This report helps design appeals for particular professions.

Two addresses and telephone numbers can be included in the report. For example, the business address and mobile telephone number, and the primary address and home telephone number can be included. List the report by constituent names alphabetically or by profession. The report includes constituent name, profession, spouse name, address(es), and telephone number(s). The constituent's position appears if the **Print** position checkbox is marked on their constituent record. The spouse's professional category can be included in the report. Select profession code and constituency to narrow the report.

Note: This report is not limited to alumni or relations of alumni. Professional information is pulled from the constituent's business record.

Filters:

Attributes
Professional codes
Constituency

Sort Order:

Alphabetically or profession

Options:

Print spouse information
Print address
Print telephone number
Print each profession on a separate page

9/14/98

Blackbaud Demo
Professional Directory
Reference Manual Sample Report

Page 1

Accounting

Margaret A. Baymann
(Franklin A. Baymann)

239 Lake Shore Drive
Summerville, SC 29383

239 Lake Shore Drive
Summerville, SC 29383

Michael T. Baymann
Lobbyist
(Joyce Baymann)

2873 Connecticut Avenue, NE
Washington, DC 23202

2873 Connecticut Avenue, NE
Washington, DC 23202

Michael J. Simpson
Chief Financial Officer
(Mary E. Simpson)

443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443

443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443

Computers

Franklin A. Baymann
(Margaret A. Baymann)

239 Lake Shore Drive
Summerville, SC 29383

239 Lake Shore Drive
Summerville, SC 29383

Victor H. Hanson
(Anne M. Hanson)

951 Dillard Avenue
Wheaton, CA 96094

951 Dillard Avenue
Wheaton, CA 96094

Sales

Mary E. Simpson
District Sales Manager
(Michael J. Simpson)

Charleston Finance Foundation
1200 Colorado
Santa Monica, CA 90411

Charleston Finance Foundation
1200 Colorado
Santa Monica, CA 90411

Chapter 11 — Membership Reports

Section Preview

- The **Membership List by Category** lists constituents grouped by their membership category.

Note: If a constituent is a member of more than one category, the constituent's name appears in all appropriate groupings.

- The **Membership List by Type** lists constituents grouped by their Membership Type (e.g., renew-upgrade, renew-downgrade, or new member).
- The **Membership Directory** lists constituents alphabetically who have a current membership on the selected date.
- The **New Member Report** lists constituents with new memberships starting within the specified date range.
- The **Renewal Report** lists constituents whose memberships have been renewed within the specified date range.
- The **Rejoin Report** lists constituents who were dropped from active membership, but have rejoined within a specified date range.

Note: A rejoin transaction is required to move a member from a dropped status to an active status.

- The **Lapsed Member Report** lists constituents whose memberships lapsed before the selected date.

Note: Lapsed members are members who do not have a current membership, but have not yet been dropped. A drop transaction is required to remove lapsed members from active status.

- The **Membership Given By Report** lists constituents who received their memberships as gifts.
- The **Dropped Membership Report** lists constituents who have been dropped from active membership.

Note: A drop transaction is required to delete members from active status. Lapsed members are members who do not have a current membership, but have not yet been dropped.

- The **Membership Dues Report** provides information about the income generated from memberships within the specified date range.
- The **Membership Statistics by Category** provides a count of members in each membership category within the specified date range.
- The **Comparative Membership Statistics** provides a comparison of membership categories for specified date ranges.
- The **Monthly Statistical Analysis** summarizes membership activity by month.
- The **Renewal Projection Report** projects income from various levels (percentages) of membership renewals.

Membership List by Category

The **Membership List by Category** lists constituents grouped by their Membership Category. A constituent's address and telephone number may be included. Select the members as of date to narrow the report.

Note: If a constituent is a member of more than one category, the constituent's name appears in all appropriate groupings.

You can include a list of constituents by membership category for all constituents or a selected query. You must select a members as of date and one or more membership types (e.g., new, renew, and rejoin). This report is listed by membership category (e.g., benefactor, lifetime, or student), and includes member name and address. A telephone number can be included. Select constituency, category, and contacts to narrow the report.

Required:

Member as of date

Membership type

Filters:

Constituency

Membership categories

Membership types

Sort Order:

Membership category by constituent key name within the categories

Options:

Organizational contact name

Print maiden name

Print address

Print telephone number

Print each category on a separate page

9/14/98

Blackbaud Demo
Membership List by Category as of 1/1/96
Reference Manual Sample Report

Page 1

Benefactor

Jean P. Marshall
39 Banyan Drive
Hilo, HI 96720

Michael J. Simpson
443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443

2 Benefactor(s) Listed

Individual

Rebecca B. Aaron
2344 Ruby Road
Charleston , SC 29401

1 Individual(s) Listed

Membership List by Type

The **Membership List by Type** lists constituents grouped by their membership type (e.g., renew-upgrade, renew-downgrade, or new member). A constituent's address and telephone number can be included in the report. Select the members as of date to narrow the report.

You can include a list of membership types for all constituents or for a selected query. You must select a members as of date and one or more membership types (e.g., new, renew, and rejoin). The report is listed by membership type, and includes member name, address, and membership category. A telephone number can be included. Select constituency, category, and contacts to narrow the report.

Required:

Member as of date

Membership type

Filters:

Constituency

Membership categories

Membership types

Sort Order:

Membership type by constituent key name within the type

Options:

Print organizational contact name

Print maiden name

Print address

Print telephone number

Print each type on a separate page

10/13/98

Page 1

Blackbaud Demo
Membership List by Type as of 10/13/98
Reference Manual Sample Report

Downgrade	Category
Jonathon P. Ashley 1208 Creighton Court Baltimore , MD 21098	Individual

1 Downgrade Listed

New	Category
Abernathy and Sons (Carolyn Murphy) Highway 201 North Suite 385 Charleston, SC 29401	Corporate Benefactor
Sarah Condon 76 Deerfield Avenue Anderson, SC 29621	Bronze Leaf Society

2 New Listed

Renewal Upgrade	Category
Jean P. Marshall 39 Banyan Drive Hilo, HI 96720	Bronze Leaf Society

1 Renewal Upgrade Listed

Membership Directory

The **Membership Directory** lists constituents alphabetically who have a current membership on the selected date. Membership category and spouse's name are also listed. A constituent's address and telephone number can be included in the report. The report can be limited to specific membership categories and types.

You can create a membership directory for all constituents or for a selected query. You must select a members as of date and one or more membership types (e.g., new, renew, and rejoin). List the report by member names alphabetically. The report includes member name and address, membership category, membership expiration date, and spouse name. A telephone number can be included in the report. Select constituency, category, and contacts to narrow the report.

Required:

Member as of date

Membership type

Filters:

Constituency

Membership categories

Membership types

Sort Order:

Alphabetically by constituent name, key name, and addressee/salutation

Options:

Organizational contact name

Print maiden name

Print address

Print telephone number

10/14/1998

Blackbaud Demo
Membership Directory as of 10/13/1998
Reference Manual Sample Report

Page 1

Rebecca B. Aaron
2344 Ruby Road
Charleston , SC 29401

Lifetime Gold Leaf Society

Until 10/13/1999

Abernathy and Sons
(Carolyn Murphy)
Highway 201 North
Suite 385
Charleston, SC 29401

Corporate Benefactor

Until 03/18/2000

Jonathon P. Ashley
1208 Creighton Court
Baltimore , MD 21098

Individual

Until 10/13/1999

Michael T. Baymann
2873 Connecticut Avenue, NE
Washington, DC 23202

Individual
Joyce

Until 10/13/1999

Victor H. Hanson
951 Dillard Avenue
Wheaton, CA 96094

Student
Anne

Until 09/14/1998

Michael J. Murphy
52 Buckingham Avenue
Greenville, SC 29609

Patron Leaf Society
Elizabeth

Until 10/13/2008

Michael J. Simpson
443 Lake Forest Drive
Country Club Estates
Kiawah Island, SC 29455-0443

Benefactor
Mary

Until 10/13/2008

New Member Report

The **New Member Report** lists constituents with new memberships starting within the selected date range. Select membership categories to narrow the report. You must specify start and end dates. The report includes member name, membership category, joined on date, and renewal due date. A telephone number can be included. Select constituency, category, and contacts to narrow the report.

Note: This report shows only that a new membership transaction took place within the date range. It does not indicate current membership status.

Required:

Report start date

Report end date

Filters:

Constituency

Membership categories

Sort Order:

Alphabetically by constituent name

Options:

Organizational contact name

Print maiden name

Print address

Print telephone number

9/14/98

Blackbaud Demo
New Member Report
Reference Manual Sample Report

Page 1

Member Name	Category	Joined On	Renew
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	Bronze Leaf Society	2/27/97	2/27/98
Abernathy and Sons (Carolyn Murphy) Highway 201 North Suite 385 Charleston, SC 29401	Corporate Benefactor	3/18/98	3/18/00
Jonathon P. Ashley 1208 Creighton Court Baltimore , MD 21098	Family	5/30/98	5/30/99
Sarah Condon 76 Deerfield Avenue Anderson, SC 29621	Bronze Leaf Society	4/19/98	4/19/99
Dynamic Engineering, Inc. 4576 Industrial Road Charleston, SC 29405-2458	Corporate Benefactor	9/12/97	9/12/99
Susan A. Snow 5352 Oak Tree Lane Apt. 200A Spartanburg, SC 29316	Benefactor	8/19/98	8/19/99

6 Member(s) Listed

Renewal Report

The **Renewal Report** lists constituents whose memberships have been renewed within the date range specified. This report helps track change in membership types (e.g., upgrade or downgrade).

You can include membership renewal information for all constituents or for a selected query. You must specify start and end dates. The report includes member name, membership category, renewed on date, and renewal type (e.g., upgrade, downgrade, or same). Address and/or telephone number can be included in the report. Select constituency, category, and contacts to narrow the report.

Note: The report shows only that a renewal transaction took place within the date range. It does not indicate current membership status.

Required:

- Report start date
- Report end date

Filters:

- Constituency
- Membership categories

Sort Order:

- Alphabetically by member name

Options:

- Organizational contact name
- Print maiden name
- Print address
- Print telephone number

9/14/98

Blackbaud Demo
Renewal Report
Reference Manual Sample Report

Page 1

Member Name	Category	Renewed On	Renewal Type
Jean P. Marshall 39 Banyan Drive Hilo, HI 96720	Bronze Leaf Society	3/11/98	Upgrade
1 Upgrade(s) 0 Downgrade(s) 0 Stayed the Same			
1 Member(s) Listed			

Rejoin Report

The **Rejoin Report** lists constituents who were dropped from active membership, but have rejoined within a specified date range. You can include membership rejoin information for all constituents or for a selected query. You must specify start and end dates. The report includes member name, category, rejoined on date, and renew on date. Address and/or telephone number can be included in the report. Select constituency, category, and contacts to narrow the report.

Note: The report shows only that a rejoin transaction took place within the date range. It does not indicate current membership status.

A rejoin transaction is required to move a member from a dropped status to an active status.

Required:

Report start date
Report end date

Filters:

Constituency
Membership categories

Sort Order:

Alphabetically by member name

Options:

Organizational contact name
Print maiden name
Print address
Print telephone number

9/14/98

Blackbaud Demo
Rejoin Report
Reference Manual Sample Report

Page 1

Member Name	Category	Rejoined On	Renew On
Jean P. Marshall 39 Banyan Drive Hilo, HI 96720	Individual	3/4/92	3/4/93
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Individual	3/14/92	3/14/93

2 Member(s) Listed

Lapsed Member Report

The **Lapsed Member Report** lists constituents whose memberships lapsed before the date in the **Lapsed On or Before** field. This report helps target lapsed members for renewal reminders.

You can include lapsed membership information for all constituents or for a selected query. You must specify a lapsed on or before date. The report includes member name, membership category, and scheduled renewal date. Address and/or telephone number can be included in the report. Select constituency, category, and contacts to narrow the report.

Note: A drop transaction is required to remove lapsed members from active status. Lapsed members do not have an existing membership, but they have not yet been dropped.

Required:

Lapsed on or before date (as of this date, who is lapsed)

Filters:

Constituency

Membership categories

Sort Order:

Alphabetically by member name

Options:

Organizational contact name

Create output query

Print maiden name

Print address

Print telephone number

9/14/98

Blackbaud Demo
Lapsed Member Report
Reference Manual Sample Report

Page 1

Member Name	Category	Renewal
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	Individual	6/16/95
	Individual	12/31/95
Michael T. Baymann 2873 Connecticut Avenue, NE Washington, DC 23202	Individual	9/14/97
Michael J. Murphy 52 Buckingham Avenue Greenville, SC 29609	Student	12/31/96
Jonathon P. Smith 1503 Sand Dollar Drive Hilton Head, SC 29489	Individual	12/31/97

4 Member(s) Listed

Membership Given by Report

The **Membership Given By Report** lists constituents who received their memberships as gifts. Select a date range to narrow the report.

You can generate a list of gift memberships from a selected query or from all constituent records. You must specify start and end dates. You must select a members as of date and one or more membership types (e.g., new, renew, and rejoin). The report includes member name, gift membership category, date given, given by name, and notice sent to. Address and/or telephone number can be included in the report. Select constituency, category, and contacts to narrow the report.

Required:

Report start date
Report end date
Membership type

Filters:

Constituency
Membership categories

Sort Order:

Alphabetically by member name

Options:

Organizational contact name
Print maiden name
Print address
Print telephone number

9/14/98

Blackbaud Demo
Membership Given by Report
Reference Manual Sample Report

Page 1

Member Name	Category	Date Given	Given By	Notice To
Jonathon P. Ashley 1208 Creighton Court Baltimore , MD 21098	Family	5/30/98	Dorothy A. Thomas	Member

1 Member(s) Listed

Dropped Membership Report

The **Dropped Membership Report** lists constituents who have been dropped from active membership. The constituents are included if their dropped on date falls within the date range specified in the report parameters.

You can create a list of dropped members for all constituents or for a selected query. A start date, end date, or date range may be entered. The report includes member name, membership category, dropped on date, and reason dropped. Address and/or telephone number can be included in the report. Select constituency, category, and contacts to narrow the report.

Note: The report shows only that a drop transaction took place within the date range. It does not indicate current membership status.

A drop transaction is required to delete members from active status. Lapsed members do not have an existing membership, but they have not yet been dropped.

Filters:

Constituency

Membership categories

Sort Order:

Alphabetically by member name

Options:

Organizational contact name

Print maiden name

Print address

Print telephone number

9/14/98

Blackbaud Demo
Dropped Member Report
Reference Manual Sample Report

Page 1

Member Name	Category	Dropped On	Reason Dropped
Rebecca B. Aaron	Individual	9/14/98	Expired grace pd.
2344 Ruby Road	Individual	9/14/98	Expired grace pd.
Charleston , SC 29401			
Michael T. Baymann	Individual	9/14/98	Expired grace pd.
2873 Connecticut Avenue, NE			
Washington, DC 23202			
Michael J. Murphy	Student	9/14/98	Left Area
52 Buckingham Avenue			
Greenville, SC 29609			
Jonathon P. Smith	Individual	9/14/98	Expired grace pd.
1503 Sand Dollar Drive			
Hilton Head, SC 29489			

4 Member(s) Listed

Membership Dues Report

The **Membership Dues Report** provides information about the income generated from memberships within the specified date range. The report is available in a detailed format with constituents' names and membership categories or in a summary format listing each membership category and the income generated within the date range.

You can include membership dues information for all constituents or for a selected query. You must specify start and end dates. This report can be in summary and/or detailed format. In the **detailed** format, the report includes member name, date paid, membership category, renewal date, and amount of dues paid. Address and/or telephone number can be included in the detailed report. In the **summary** format, the report includes membership category, number of members in the category, amount of dues paid, and grand totals. Select constituency and categories to narrow the report.

When adding a membership, your membership dues and gift amount can be different. The income amount is using the membership amount, not the gift amount. For example, if a donor gives \$100 for a \$75 membership, the membership dues are recorded as \$75 and the gift amount is recorded as \$100. When comparing reports, the Membership Dues Report shows the \$75, but any other report (e.g., gift detail) shows \$100. Consequently, this report is not good to compare to other reports.

Required:

Report start date
Report end date
Membership type

Filters:

Constituency
Membership categories
Gift types
Campaigns
Funds
Appeals

Sort Order:

Alphabetically or date

Options:

Detail and/or summary
Include only memberships with an associated gift
Organizational contact name
Print maiden name
Print address
Print telephone number

10/14/1998

Blackbaud Demo
Membership Dues Report
Reference Manual Sample Report

Page 1

Member Name	Date Paid	Category	Renew	Amount Paid
Dynamic Engineering, Inc. 4576 Industrial Road Charleston, SC 29405-2458	09/12/1997	Corporate Benefactor	09/12/1999	2,000.00
Abernathy and Sons (Carolyn Murphy) Highway 201 North Suite 385 Charleston, SC 29401	03/18/1998	Corporate Benefactor	03/18/2000	500.00
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	10/13/1998	Lifetime Gold Leaf Society	10/13/1999	5,000.00
				7,500.00

10/14/1998

Blackbaud Demo
Membership Dues Summary
Reference Manual Sample Report

Page 1

Category	Members	Amount Paid
Corporate Benefactor	2	2,500.00
Lifetime Gold Leaf Society	1	5,000.00
		3 7,500.00

Membership Statistics by Category

The **Membership Statistics by Category** provides a count of members in each membership category within the date range specified. Within each membership category, the report is listed by membership type (e.g., new, renewed, or rejoined). The income and number of members on the start and end dates are also included.

You can include membership statistics for all constituents or for a selected query. You must specify start and end dates. List the report by membership categories (e.g., benefactor, patron, or lifetime). This report includes number of new members, number of rejoining members, number of dropped members, number of members at end date, renewal, category upgrade, and category downgrade information. You can include the number of members at start date, number of lapsed members, and income amounts. Select constituency and categories to narrow the report.

Note: Start members (the total number of members at the start date) and end members (the total number of members at the end date) are counts of all members, including lapsed members.

Required:

Report start date
Report end date
Membership type

Filters:

Constituency
Membership categories
Gift types
Campaigns
Funds
Appeals

Sort Order:

Membership category

Options:

Include only memberships with an associated gift
Include income amounts (Membership dues amount)
Includes start and lapsed members
Create output query

Blackbaud Demo

Membership Statistics by Category

Reference Manual Sample Report

Members		Renewals														Members	
prior to 1/1/95	New	Upgrade In	Upgrade Out	Downgr. In	Downgr. Out	Same	Upgrade In	Upgrade Out	Downgr. In	Downgr. Out	Rejoin	Lapsed	Dropped	as of 12/31/98	Income		
Bronze Leaf Society																	
0	2	1	0	0	0	0	0	0	0	0	0	0	0	1	2	9,500.00	
Corporate Benefactor																	
0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2,500.00	
Benefactor																	
2	1	0	1	0	0	0	0	0	0	0	0	0	1	0	2	150.00	
Family																	
0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	200.00	
Individual																	
1	2	0	0	0	0	0	0	0	0	0	0	0	0	3	0	0.00	
Student																	
0	2	0	0	0	0	0	0	0	0	0	0	0	1	1	1	0.00	
3	10	1	1	0	0	0	0	0	0	0	0	2	5	8		12,350.00	

Comparative Membership Statistics

The **Comparative Membership Statistics** provides a comparison of membership categories for selected date ranges. The report calculates the number of members on the start and end dates, retention rate, and income generated from the memberships. List membership categories by membership type (e.g., new, renew, or lapsed). This report helps analyze the period with the most membership activity and income.

The retention rate is calculated using the following formula:

$$\frac{\text{Start Members} - \text{Dropped Members}}{\text{Start Members}}$$

You can include comparative membership statistics for all constituents or for a selected query. Specify up to five date ranges for comparison with at least one range entered. This report includes membership category, membership type, number of members in each type, income from each membership type, totals, number of dropped members, number of lapsed members, and retention rate. You can include the number of members on start date and/or end date in the report. Select constituency and categories to narrow the report.

Required:

Report start date

Report end date

Filters:

Constituency

Membership categories

Gift types

Campaigns

Funds

Appeals

Sort Order:

Membership category and type

Options:

Include only memberships with an associated gift

Include start members and/or end members

Blackbaud Demo

Comparative Membership Statistics

Reference Manual Sample Report

01/01/1998 to 12/31/1998			01/01/1997 to 12/31/1997			01/01/1996 to 12/31/1996			01/01/1995 to 12/31/1995		
Start	End	Income	Start	End	Income	Start	End	Income	Start	End	Income
<i>Bronze Leaf Society</i>											
0	2	8,000.00	0	0	0.00	0	0	0.00	0	0	0.00
<i>Corporate Benefactor</i>											
1	1	500.00	0	1	2,000.00	0	0	0.00	0	0	0.00
<i>Benefactor</i>											
2	1	2,000.00	2	2	0.00	2	2	0.00	2	2	0.00
3	4	10,500.00	2	3	2,000.00	2	2	0.00	2	2	0.00

Type	01/01/1998 to 12/31/1998		01/01/1997 to 12/31/1997		01/01/1996 to 12/31/1996		01/01/1995 to 12/31/1995	
	#	Income	#	Income	#	Income	#	Income
New Members	2	1,500.00	1	2,000.00	0	0.00	0	0.00
Renew - Upgrade	1	3,500.00	0	0.00	0	0.00	0	0.00
Renew - Downgrade	0	0.00	0	0.00	0	0.00	0	0.00
Renew - Same	3	5,500.00	0	0.00	0	0.00	0	0.00
Upgrade	0	0.00	0	0.00	0	0.00	0	0.00
Downgrade	0	0.00	0	0.00	0	0.00	0	0.00
Rejoins	0	0.00	0	0.00	0	0.00	0	0.00
Totals	6	10,500.00	1	2,000.00	0	0.00	0	0.00
Dropped	1	2,000.00	0	0.00	0	0.00	0	0.00
Lapsed	0	0.00	0	0.00	0	0.00	2	2,000.00
Retention Rate	66.67		100.00		100.00		100.00	

Monthly Statistical Analysis

The **Monthly Statistical Analysis** summarizes membership activity by month. The report can include the number of members on the start date, number of lapsed members, and income generated by memberships. Memberships with no associated gifts can be included in the report. The report helps analyze membership trends.

You can generate a summary of membership activity for all constituents or for a selected query. You must specify a start month/year and an end month/year. The report includes a count of new, renew, rejoin, upgrade, and downgrade transactions, number lapsed, number dropped, and income. Number of start members and/or end members can be included. Totals can be provided for each month in the report and a grand total for the date range selected. Select constituency and categories to narrow the report.

Note: The report shows only membership transactions within a month. A single constituent could have several membership transactions within one month. Start members (the total number of members at the start date) and end members (the total number of members at the end date) are counts of all members, including lapsed members.

Required:

Report start date

Report end date

Filters:

Constituency

Membership categories

Gift types

Campaigns

Funds

Appeals

Sort Order:

Month and year

Options:

Include only memberships with an associated gift

Include start members and lapsed members

9/15/98

Blackbaud Demo
Monthly Statistical Analysis
Reference Manual Sample Report

Page 1

Month	New	Renew	Rejoin	Upgrd	Dwngrd	Drop	End
January, 98	0	0	0	0	0	0	10
February, 98	0	0	0	0	0	0	10
March, 98	1	1	0	0	0	1	10
April, 98	1	0	0	0	0	0	11
May, 98	1	0	0	0	1	0	12
June, 98	0	0	0	0	0	0	12
July, 98	0	0	0	0	0	0	12
August, 98	1	0	0	0	0	0	13
September, 98	0	0	0	0	0	5	8
October, 98	0	0	0	0	0	0	8
November, 98	0	0	0	0	0	0	8
December, 98	0	0	0	0	0	0	8
<hr/> <hr/>							
	4	1	0	0	1		6

Renewal Projection Report

The **Renewal Projection Report** projects income from various levels (percentages) of membership renewals. This report helps analyze how various levels of membership renewals affect income, because it lists the number of potential renewals grouped by the month they expire. Three adjustable renewal levels (percentages) are used for the calculations. The projections assume the membership category and type remain the same.

You can project membership income information for all constituents or for a selected query. You must specify start and end dates, and high-level, mid-level, and low-level renewal percentages. The report includes period, membership category, number to renew, three income projection levels, and grand totals. Select constituency and categories to narrow the report.

Required:

Report start date

Report end date

Hi end threshold percentage

Mid level threshold percentage

Low end threshold percentage

Filters:

Constituency

Membership categories

Sort Order:

Month and year

9/15/98

Blackbaud Demo
Renewal Projection Report
Reference Manual Sample Report

Page 1

From 1/90 to 12/98

Period	Category	# to Renew	90% Renewed	60% Renewed	10% Renewed
March, 1995	Benefactor	2	1,800.00	1,200.00	200.00
June, 1995	Individual	1	36.00	24.00	4.00
December, 1995	Individual	1	0.00	0.00	0.00
December, 1996	Student	1	0.00	0.00	0.00
September, 1997	Individual	1	0.00	0.00	0.00
December, 1997	Individual	1	0.00	0.00	0.00
February, 1998	Bronze Leaf Society	1	4,500.00	3,000.00	500.00
September, 1998	Student	1	0.00	0.00	0.00
GRAND TOTALS		9	6,336.00	4,224.00	704.00

Chapter 12 — Special Events Reports

RE:Event works with *The Raiser's Edge* to help you manage all aspects of your special events. Whether you are organizing an auction, golf tournament, banquet, or homecoming activities, *RE:Event* helps you plan, organize, and implement all stages of your event. All of the information you need – from registrants lists and expenses to income generated — is kept in one package to give you full access to the data you need.

In addition, you can easily monitor the success of each event by producing special events reports and a summary. The summary includes essential information such as the number of registrants and attendees, total expenses, total income, net profit, and much more. An online Events Calendar gives you a monthly view of the events your organization is planning.

Section Preview

- The **Seating Arrangements Report** lists seat assignments for row seating.
 - The **Table Arrangements Report** lists seat assignments for table seating.
 - The **Tournament Rosters** list participants in team events.
 - The **Accommodations Report** tracks accommodation assignments for participants in special events.
 - The **Host and Sponsor List** tracks event sponsors and the participants they are supporting.
- The **Registration List** tracks actual event registration and attendance.
 - The **Event Income Report** helps analyze the income generated by a special event.
 - The **Event Expense Report** compares event expenses with budgeted amounts.
 - The **Event Summary Report** provides an overview of special event finances, and helps analyze the success of an event.
 - The **Registration Fees Due Report** lists registrants who have not paid an event fee.

Seating Arrangements Report

The **Seating Arrangements Report** lists registrant names alphabetically or by section and seat assignment. The report lists registrants with their sections, rows, seats, and sponsor names.

Note: Use this report for only row seating. Please refer to the Table Arrangements Report for table seating.

You must select an event to generate this report. List the report by participant names alphabetically or by section, row, and seat. Individual name, section, row, seat, and sponsor name are included in the report. Participants who have not yet registered can be included. Select sponsor name, participant name, payment status, and participation type to narrow the report.

Required:

Event name

Filters:

Participation

Status

Sort Order:

Alphabetically or section/row/seat sequence

Options:

Include participants who have not registered

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Blackbaud Demo
Event Seating Arrangements
Reference Manual Sample Report

Page 1

Section	Row	Seat	Individual	Sponsor
1	1	1	Kathy Vanatta	Document Xpress
	2		Cile A. Terrie	Maddie's Pools
	3		James Christian	Blackbaud
1	1	2	Lee Vannatta	Document Xpress
	2		Geoff Lloyd	Wizard Words
	3		Sally Cooke Christian	Blackbaud
1	1	3	Yoder Christian	Document Xpress
	2		Lillian Lloyd	Wizard Words
	3		Nick Indiana	Blackbaud
1	1	4	Jeff Smith	Document Xpress
	2		Susan L. Ginger	Maddie's Pools
	3		Pat Payne	Blackbaud

Section 1 Total: 12

Total Registrants : 12

Table Arrangements Report

The **Table Arrangements Report** lists registrants alphabetically or by table assignment. The report lists registrants with their table number, seat number, and sponsor name.

Note: Use this report for only table seating. Please refer to the Seating Arrangements Report for row seating.

You must select an event to generate this report. List the report participant names alphabetically or by table number. Individual name, table number, seat number, and sponsor name are included in the report. Participants who have not yet registered can be included. Select sponsor name, participant name, payment status, and participation type to narrow the report.

Required:

Event name

Filters:

Status

Participation

Table

Sort Order:

Alphabetically or table/seat sequence

Options:

Include participants who have not registered

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Event Table Arrangements
Reference Manual Sample Report

Page 1

Table	Seat	Individual	Sponsor
1	1	Kathy Vanatta	Document Xpress
1	2	Lee Vannatta	Document Xpress
1	3	Yoder Christian	Document Xpress
1	4	Jeff Smith	Document Xpress
<i>Table 1 Total: 4</i>			
2	1	Cile A. Terrie	Maddie's Pools
2	2	Geoff Lloyd	Wizard Words
2	3	Lillian Lloyd	Wizard Words
2	4	Susan L. Ginger	Maddie's Pools
<i>Table 2 Total: 4</i>			
3	1	James Christian	Blackbaud
3	2	Sally Cooke Christian	Blackbaud
3	3	Nick Indiana	Blackbaud
3	4	Pat Payne	Blackbaud
<i>Table 3 Total: 4</i>			

Total Registrants : 12

Tournament Rosters

The **Tournament Rosters** list participants for team events. List registrants alphabetically or by division with division assignment, team assignment, and sponsor name. This report is extremely helpful in organizing sporting and other team events.

You must select an event to run this report. List the report participant names alphabetically or by division and team. Individual name, division assignment, team assignment, and sponsor name are included in the report. Participants who have not yet registered can be included. Select sponsor name, participant name, payment status, and participation type to narrow the report.

Required:

Event name

Filters:

Status

Participation

Sort Order:

Alphabetically or division/team sequence

Options:

Include participants who have not registered

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Blackbaud Demo
Tournament Rosters
Reference Manual Sample Report

Page 1

Division	Team	Individual	Sponsor
1	1	Kathy Vanatta Lee Vannatta Yoder Christian Jeff Smith	Document Xpress Document Xpress Document Xpress Document Xpress
<i>Division 1 Total: 4</i>			
2	2	Cile A. Terrie Geoff Lloyd Lillian Lloyd Susan L. Ginger	Maddie's Pools Wizard Words Wizard Words Maddie's Pools
<i>Division 2 Total: 4</i>			
3	3	James Christian Sally Cooke Christian Nick Indiana Pat Payne	Blackbaud Blackbaud Blackbaud Blackbaud
<i>Division 3 Total: 4</i>			

Total Registrants : 12

Accommodations Report

The **Accommodations Report** organizes and tracks accommodation assignments for participants in a special event. The report includes the lodging assignment, room number, and sponsor name. This report is particularly useful in organizing seminars, homecoming activities, and trips.

You must select an event to generate this report. List the report registrant names alphabetically or by lodging name and room number. Individual name, lodging name, room number, and sponsor name are included in the report. The report can include Participants who have not yet registered. Select sponsor name, participant name, payment status, and participation type to narrow the report.

Required:

Event name

Filters:

Status

Participation

Lodging

Sort Order:

Alphabetically or lodging/room sequence

Options:

Include participants who have not registered

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Blackbaud Demo
Accommodations Report
Reference Manual Sample Report

Page 1

Lodging	Room	Individual	Sponsor
Charleston Place	327	Kathy Vanatta	Document Xpress
	327	Lee Vannatta	Document Xpress
Charleston Place	451	Yoder Christian	Document Xpress
Charleston Place	619	Jeff Smith	Document Xpress
<i>Lodging Charleston Place Total: 4</i>			
Hilton	259	Geoff Lloyd	Wizard Words
	259	Lillian Lloyd	Wizard Words
Hilton	641	Cile A. Terrie	Maddie's Pools
	641	Susan L. Ginger	Maddie's Pools
<i>Lodging Hilton Total: 4</i>			
Lodge Alley Inn	123	James Christian	Blackbaud
	123	Sally Cooke Christian	Blackbaud
Lodge Alley Inn	234	Nick Indiana	Blackbaud
Lodge Alley Inn	32	Pat Payne	Blackbaud

Lodging Lodge Alley Inn Total: 4

Total Registrants : 12

Hosts and Sponsor List

The **Host and Sponsor List** tracks event sponsors and registrants they are supporting. List sponsors with their level of participation, number of units purchased, type of unit, payment status, and prize awarded. You can list registrant names with their sponsor.

You must select an event to generate this report. This report includes sponsor name, participation type (e.g., team captain), number of units purchased, unit (e.g., golf foursome or banquet table), payment status, prize received, registered, and attended. Participants who have not yet registered can be included. Select sponsor name, participant name, payment status, and participation type to narrow the report.

Required:

Event name

Filters:

Status

Participation

Lodging

Sort Order:

Alphabetically by sponsor name

Options:

Include registrants

Include participants who have not registered

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Blackbaud Demo
Event Hosts and Sponsors List
Reference Manual Sample Report

Registrant	Participation	# Units	Unit	Status	Prize	Reg	Att
Sponsor: Document Xpress							
Kathy Vanatta	Captain	1 Individual		Paid	Engraved Cup	Yes	Yes
Total Registrants: 1							
Sponsor: Maddie's Pools							
Cile A. Terrie	Captain	1 Individual		Paid	Engraved Cup	Yes	Yes
Total Registrants: 1							
Sponsor: Blackbaud							
Sally Cooke Christian	Captain	1 Individual		Paid	Engraved cup	Yes	Yes
Total Registrants: 1							
Total Registered/Attended:						3	3

Registration List

The **Registration List** lists event registrants. The report lists registrants with their participation type, number and type of units purchased, status, any prizes awarded, and sponsor name. The report is very useful for tracking registration and attendance.

You must select an event to generate this report. This report includes registrant name, participation type (e.g., team captain), number of units, units (e.g., golf foursome or banquet table), payment status, prize awarded, sponsor name, number registered, number attended, and grand totals. The report can include registered and/or attended only categories. Select sponsor, participant, status, and participation to narrow this report.

Required:

Event name

Filters:

Status

Participation

Sort Order:

Alphabetically

Options:

Include registered only

Include attendees only

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Blackbaud Demo
Registration List
Reference Manual Sample Report

Registrant	Participation	# Units	Unit	Status	Prize	Sponsor	Reg	Att
Kathy Vanatta	Captain	1	Individual	Paid	Engraved Cup	Document Xpress	Yes	Yes
Lee Vanatta	Player	1	Individual	Paid	Engraved Cup	Document Xpress	Yes	Yes
Yoder Christian	Player	1	Individual	Paid	Engraved Cup	Document Xpress	Yes	Yes
Jeff Smith	Player	1	Individual	Paid	Engraved Cup	Document Xpress	Yes	Yes
Cile A. Terrie	Captain	1	Individual	Paid	Engraved Cup	Maddie's Pools	Yes	Yes
Geoff Lloyd	Player	1	Individual	Paid	Engraved Cup	Wizard Words	Yes	Yes
Lillian Lloyd	Player	1	Individual	Paid	Engraved Cup	Wizard Words	Yes	Yes
Susan L. Ginger	Player	1	Individual	Paid	Engraved Cup	Maddie's Pools	Yes	Yes
James Christian	Player	1	Individual	Paid	Engraved Cup	Blackbaud	Yes	Yes
Sally Cooke Christian	Captain	1	Individual	Paid	Engraved cup	Blackbaud	Yes	Yes
Nick Indiana	Player	1	Individual	Paid	Engraved Cup	Blackbaud	Yes	Yes
Pat Payne	Player	1	Individual	Paid	Engraved Cup	Blackbaud	Yes	Yes
Total Registrants: 12							Total Registered/Attended: 12 12	

Event Income Report

The **Event Income Report** helps analyze the income generated by a special event. The report also shows date and amount paid, sponsor name, participation type, number of units purchased, and unit type. An income summary by sponsor can be generated. Total event income is also calculated.

You must select an event to generate this report. List the report by registrant names alphabetically or by date paid sequence. The report includes individual name, date paid, participation (e.g., team captain), sponsor name, number of units purchased, units (e.g., banquet table or golf foursome), amount paid, total paid, and total registrants. You can generate a **summary** of income by sponsor name. Select sponsor name, participant name, payment status, and participation type to narrow the report.

Required:

Event name

Filters:

Status

Participation

Sort Order:

Alphabetically or date paid sequence

Options:

Include summary by sponsor

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Blackbaud Demo
Event Income Report
Reference Manual Sample Manual

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Individual	Date Paid	Participation	Sponsor	# Units	Unit	Amount Paid
Kathy Vanatta	10/06/1998	Captain	Document Xpress	1	Individual	25,000.00
Lee Vanatta	10/06/1998	Player	Document Xpress	1	Individual	25,000.00
Yoder Christian	10/06/1998	Player	Document Xpress	1	Individual	25,000.00
Jeff Smith	10/06/1998	Player	Document Xpress	1	Individual	25,000.00
Cile A. Terrie	10/06/1998	Captain	Maddie's Pools	1	Individual	25,000.00
Geoff Lloyd	10/06/1998	Player	Wizard Words	1	Individual	25,000.00
Lillian Lloyd	10/06/1998	Player	Wizard Words	1	Individual	25,000.00
Susan L. Ginger	10/06/1998	Player	Maddie's Pools	1	Individual	25,000.00
James Christian	10/06/1998	Player	Blackbaud	1	Individual	25,000.00
Sally Cooke Christian	10/06/1998	Captain	Blackbaud	1	Individual	25,000.00
Nick Indiana	10/06/1998	Player	Blackbaud	1	Individual	25,000.00
Pat Payne	10/06/1998	Player	Blackbaud	1	Individual	25,000.00

Total Registrants : 12

Total Paid 300,000.00

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Blackbaud Demo
Event Income Report - Summary by Sponsor
Reference Manual Sample Manual

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Sponsor	Total Paid
Blackbaud	100,000.00
Document Xpress	100,000.00
Maddie's Pools	50,000.00
Wizard Words	50,000.00
Total Paid	<u>300,000.00</u>

Event Expense Report

The **Event Expense Report** helps analyze the actual cost of organizing an event compared with the amount budgeted. The report lists expenses in the order they were incurred. The total budgeted and the total expenses are calculated.

You must select an event to generate this report. A start date, end date, or date range can be selected. The report includes date of expense, expense description, budgeted amount, actual amount, comments, total budgeted, and total expense.

Required:

Event name

Sort Order:

Expense date

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Blackbaud Demo
Event Expense Report
Reference Manual Sample Report

Page 1

Date	Expense	Budget	Amount	Comment
01/01/1999	Greens Fees	2,500.00	2,500.00	50% discount as donation
01/01/1999	Catering	2,000.00	1,800.00	Payment has been pledged
01/01/1999	Rental	1,000.00	1,000.00	
		<u>5,500.00</u>	<u>5,300.00</u>	

Event Summary Report

The **Event Summary Report** provides an overview of special event finances. The report shows the income generated, expenses incurred, and the net profit or loss. Losses are shown in parenthesis. Additional information such as event capacity, number invited, number accepted, and actually attending helps analyze the success of an event.

You can include summary information for all or selected events. A start date, end date, or date range can be selected. List the report by event names alphabetically or by date sequence. The report includes event name, capacity, number invited, number registered, number attended, income, expenses, net profit/(loss), total number of events, total income, total expenses, and total net profit/(loss). The event ID can be included. Select event types and event groups to narrow the report.

Filters:

Event Types
Event Groups

Sort Order:

Alphabetically or event date sequence

Options:

Include event ID

Blackbaud Demo
Event Summary Report
Reference Manual Sample Report

Event Name	Event Id	Start Date	Capacity	Invited	Registered	Attended	Income	Expenses	Net
Golf99	13	1/1/1999	12	16	12	12	300,000.00	5,300.00	294,700.00
Golf99 Awards Dinner	14	1/2/1999	48	48	48	47	27,500.00	2,400.00	25,100.00
Total Events: 2							327,500.00	7,700.00	319,800.00

Registration Fees Due Report

The **Registration Fees Due Report** lists of registrants who have not paid an event fee. An optional summary report shows fees due from event sponsors. You must select an event from the drop-down menu. All sponsors or one sponsor, all registrants or one registrant may be included in the report. The report includes registrant name, sponsor, participation, registered, attended, fee amount, donation, amount paid, amount due, and total. The optional Summary by Sponsor includes sponsor name, total amount, total donation, total paid, total due, and totals for all columns.

Required:

Event name

Filters:

Status

Participation

Sort Order:

Alphabetically by registrant name

Options:

Include summary by sponsor

Registered only

Attendees only

Blackbaud Demo

Registration Fees Due Report

Registrant	Sponsor	Participation	Reg	Att	Amount	Donation	Amount Paid	Amount Due
Bob Payne	Stockman's Association	Guest	Yes	Yes	500.00	1,000.00	0.00	500.00
Frankie Payne	Craft Guild		Yes	Yes	500.00	1,000.00	0.00	500.00
Lee Sclanders	Sportsman's Club		Yes	Yes	500.00	1,000.00	0.00	500.00
Helen Fernandez	Public Works Commision		Yes	Yes	500.00	1,000.00	0.00	500.00
Marie Fitzwilliam	English Department		Yes	Yes	500.00	1,000.00	0.00	500.00
Total Registrants: 5			Total		2,500.00	5,000.00	0.00	2,500.00

Blackbaud Demo

Registration Fees Due Report - Summary by Sponsor

Sponsor	Total Amount	Total Donation	Total Paid	Total Due
Craft Guild	500.00	1,000.00	0.00	500.00
English Department	500.00	1,000.00	0.00	500.00
Public Works Commision	500.00	1,000.00	0.00	500.00
Sportsman's Club	500.00	1,000.00	0.00	500.00
Stockman's Association	500.00	1,000.00	0.00	500.00
Total	2,500.00	5,000.00	0.00	2,500.00

Chapter 13 — Volunteer Reports

RE:Volunteer tracks all aspects of your volunteers' activities. You can define hours a volunteer is available to work, establish assignments, identify awards, keep online time sheets, and log a volunteer's qualifications. Using *RE:Volunteer*, you can maximize the efficiency of your volunteer program by matching your assignment needs with the volunteers who have the right skills, availability, and experience.

Reports help you track past and current volunteer hours. You can set award levels for each volunteer and run a report to find the volunteers who have met the requirements. Volunteer scheduling reports help you match needs with volunteer availability.

Section Preview

- The **Skills and Qualifications Report** lists volunteers and their skills and qualifications.
 - The **Courses and Training Report** lists volunteers and information about the training they have received.
 - The **Volunteer Assignment Schedule** lists volunteers and details about their assignments.
 - The **Volunteer Schedules** list volunteers and their assignments.
 - The **Time Sheet Report** lists volunteers, number of hours worked, and estimated value of their work.
 - The **Volunteer Summary Report** provides a work history for volunteers.
- The **Assignment Summary Statistics** provide a summary of hours worked by assignment for up to twelve date ranges.
 - The **Volunteer Awards Report** tracks service awards presented to volunteers.
 - The **Awards Due Report** lists volunteers due to receive service awards.
 - The **Volunteer Match List** matches volunteer qualifications to project requirements.

Skills and Qualifications Report

The **Skills and Qualifications Report** lists constituents alphabetically or by skills and qualifications with a description of the skill, skill level, information about licenses, and comments. This report matches volunteers with project needs.

You can include skill and qualification information for all constituents or a selected query. List the report by volunteer names alphabetically or by skill (e.g., first aid, CPR, or commercial driver's license). This report includes volunteer name, skill, skill level, driver's license type, number, and expiration date. Address and/or telephone number can be included in the report. Select skill, skill level, and constituency to narrow the report.

Filters:

- Constituency
- Skills
- Skill levels

Sort Order:

- Alphabetically or skill

Options:

- Include address
- Include telephone number

Blackbaud Demo
Skills and Qualifications Report
Reference Manual Sample Report

Skill/Volunteer	Level	License		
		Type	Number	Expires
CPR				
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	Expert	Red Cross Certified		6/15/99
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Expert	Red Cross Certified		1/26/99
Driver's License				
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	Commercial	Class 1 A	SC-3178933	5/7/02
First Aid				
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	Expert	Red Cross Certified		12/31/99
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	Expert	Red Cross Certified		12/31/99

Courses and Training Report

The **Courses and Training Report** lists constituents alphabetically or by courses and training with dates the volunteer was enrolled, instructor, certificate information, and any comments. This report tracks volunteer training and certification.

The report provides course and training information for all constituents or a selected query. List the report by volunteer names alphabetically or by course. A start date and end date can be specified. The report includes volunteer name, course name, instructor name, certification type, and certification expiration date. Address and/or telephone number can be included in the report. Select constituency and course to narrow the report.

Filters:

Constituency

Courses

Sort Order:

Alphabetically or course

Options:

Include address

Include telephone number

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Blackbaud Demo
Volunteer Courses and Training Report
Reference Manual Sample Report

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Course/Volunteer	Start	End	Instructor	Certification	Expires
CPR					
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	6/15/98	6/15/99	Nicki	Red Cross	6/15/99
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	6/15/98	6/16/98	Nicki	Red Cross	6/15/99
EMT					
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	8/21/98	11/15/98	Roger Row	Roper Hospital	11/15/99
First Aid					
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401	7/9/98	7/10/98	Becky	Red Cross	7/9/01

Volunteer Assignment Schedule

The **Volunteer Assignment Schedule** lists volunteers by assignment with detailed information including the day of the assignment, dates the assignment is valid, and the volunteer's name and telephone number. The report crosschecks to ensure all assignments are filled.

You can include scheduling information for all or selected volunteers. A start date, end date, or date range can be selected. The report includes assignment name, day, assignment date, from time, to time, and volunteer name. Address and/or telephone number can be included in the report. Select constituency and assignment to narrow the report.

Filters:

- Constituency
- Assignments

Sort Order:

- Alphabetically

Options:

- Include address
- Include telephone number

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Blackbaud Demo
Volunteer Assignment Schedule
Reference Manual Sample Report

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Assignment	Day	Date	From	To	Volunteer	Telephone
Gift Shop	Monday	05/04/1998	1:00pm	5:00pm	Michael J. Simpson	(843) 740-2691
	Monday	05/11/1998	1:00pm	5:00pm	Michael J. Simpson	(843) 740-2691
	Monday	05/18/1998	1:00pm	5:00pm	Michael J. Simpson	(843) 740-2691
	Monday	05/25/1998	1:00pm	5:00pm	Michael J. Simpson	(843) 740-2691
Information Desk	Thursday	05/07/1998	6:00pm	9:00pm	Michael J. Simpson	(843) 740-2691
	Thursday	05/14/1998	6:00pm	9:00pm	Michael J. Simpson	(843) 740-2691
	Thursday	05/21/1998	6:00pm	9:00pm	Michael J. Simpson	(843) 740-2691
	Thursday	05/28/1998	6:00pm	9:00pm	Michael J. Simpson	(843) 740-2691

Volunteer Schedules

The **Volunteer Schedules** list each volunteer with their assignments, department to which the volunteer is assigned, location of the assignment, position filled, and dates the assignment is valid. You can print each volunteer's schedule on a separate page and to mail to the volunteer as a reminder.

You can include detailed scheduling information for all or selected volunteers. A start date, end date, or date range can be selected. The report includes volunteer name, assignment, day, assignment date, from time, and to time. Assigned department, assignment location, and position name can be included in the report. Address and/or telephone number can be included in the report. Select constituency and assignment to narrow the report.

Filters:

Constituency

Assignments

Sort Order:

Alphabetically

Options:

Include address

Include telephone number

Include department

Include position

Include location

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Blackbaud Demo
Volunteer Schedule
Reference Manual Sample Report

Page 1

Volunteer/Assignment	Day	Date	From	To	Department	Location	Position
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443 (843) 740-2691							
Gift Shop	Monday	05/04/1998	1:00pm	5:00pm	Marketing	East Wing	Clerk
	Monday	05/11/1998	1:00pm	5:00pm	Marketing	East Wing	Clerk
	Monday	05/18/1998	1:00pm	5:00pm	Marketing	East Wing	Clerk
	Monday	05/25/1998	1:00pm	5:00pm	Marketing	East Wing	Clerk
Information Desk	Thursday	05/07/1998	6:00pm	9:00pm	Administration	East Wing	Volunteer in Charg
	Thursday	05/14/1998	6:00pm	9:00pm	Administration	East Wing	Volunteer in Charg
	Thursday	05/21/1998	6:00pm	9:00pm	Administration	East Wing	Volunteer in Charg
	Thursday	05/28/1998	6:00pm	9:00pm	Administration	East Wing	Volunteer in Charg

Time Sheet Report

The **Time Sheet Report** lists volunteers by assignment with detailed information about the hours worked at each assignment and the value of the volunteer's time. The report includes each volunteer's hours worked for the period, and the year-to-date and cumulative total. This report estimates the dollar value of a volunteer's time.

You can include hour and value information for all or selected volunteers. A start date, end date, or date range can be selected. This report includes volunteer name, assignment name, assignment date, assumed wage, hours worked, value (assumed wage multiplied by hours worked), period total, and year to date total for each volunteer, period grand total, and year to date grand total. Department, assignment location, and position title can be included in the report. Address and/or telephone number can be included in the report. Select constituency and assignment to narrow the report.

Filters:

Constituency
Assignments

Sort Order:

Alphabetically

Options:

Include address
Include telephone number
Include department
Include position
Include location

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Blackbaud Demo
Time Sheet Report
Reference Manual Sample Report

Page 1

Volunteer/Assignment	Date	Wage	Hours	Value
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443				
Gift Shop	05/04/1998	\$4.50	4.00	\$18.00
Information Desk	05/07/1998	\$3.25	4.00	\$13.00
Gift Shop	05/11/1998	\$4.50	4.00	\$18.00
Information Desk	05/14/1998	\$3.25	4.00	\$13.00
Gift Shop	05/18/1998	\$4.50	4.00	\$18.00
Information Desk	05/21/1998	\$3.25	4.00	\$13.00
Gift Shop	05/25/1998	\$4.50	4.00	\$18.00
Information Desk	05/28/1998	\$3.25	4.00	\$13.00
Total for Date Range			32.00	\$124.00
Total for Volunteer Year as of Start Date			0.00	\$0.00
Total			32.00	\$124.00

	Hours	Value
Grand Total for Date Range	32.00	\$124.00
Grand Total for Volunteer Year as of Start Date	0.00	0.00
Grand Total	32.00	\$124.00

Volunteer Summary Report

The **Volunteer Summary Report** lists volunteers alphabetically or by hours worked with the date the volunteer began their service, information about the last assignment worked, hours worked in the previous years, a year-to-date total, and cumulative total.

The report provides summary work history for all or selected volunteers. List the report by volunteer names alphabetically or by hours worked. You can select the hours worked range (e.g., 500 – 1000). The report includes volunteer name, start date, last worked date, last assignment, hours worked, hours worked prior years, hours worked this year, and total hours worked. Address and/or telephone number can be included in the report. Select constituency to narrow the report.

Filters:

Constituency
Total hours

Sort Order:

Alphabetically or hours

Options:

Include address
Include telephone number

9/15/98

Blackbaud Demo
Volunteer Summary
Reference Manual Sample Report

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Volunteer	Started	Last Worked			Hours		
		Date	Assignment	Hours	Prior Years	This Year	Total
Sarah Condon 76 Deerfield Avenue Anderson, SC 29621		4/18/98	Development Office	5.00	0.00	5.00	5.00
Micheal B. Harold 1234 Sea Breeze Lane Charleston, SC 29464	8/25/98	8/25/98	Phonathon	6.00	0.00	6.00	6.00
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	9/1/93	7/1/94	Gift Shop	8.00	228.00	0.00	228.00
Marie Woods 1011 North Bridge Boulevard Goose Creek, SC 29445	1/1/90	4/25/90	Phonathon	8.00	8.00	0.00	8.00

Assignment Summary Statistics

The **Assignment Summary Statistics** summarizes the hours worked by assignment for up to twelve date ranges. This report summarizes volunteer activity monthly.

You can include summary of hours-worked information for all or selected volunteers. The report is listed by assignments (e.g., gift shop and information desk). Specify up to twelve date ranges with at least one range entered. The report includes assignment, hours worked in each date range, and total hours. Total hours worked in each assignment can be included. Select assignments and constituency to narrow the report.

Filters:

- Constituency
- Assignments
- Report periods

Sort Order:

- Alphabetically by assignment

Options:

- Include period totals

10/14/1998

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Volunteer Assignment Summary Statistics
Reference Manual Sample Report

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Assignment	1996	1997	1998	Total
Development Office	0.00	532.00	0.00	532.00
Gift Shop	0.00	0.00	16.00	16.00
Information Desk	0.00	0.00	16.00	16.00
Phonathon	0.00	0.00	347.00	347.00
Volunteer Training	457.00	0.00	0.00	457.00
	<u>457.00</u>	<u>532.00</u>	<u>379.00</u>	<u>1,368.00</u>

Volunteer Awards Report

The **Volunteer Awards Report** lists volunteers alphabetically or by award. Each volunteer is listed with the award given, presenter of the award, hours of service worked, and the next award due. This report tracks awards given to volunteers and as a source of newsletter information.

This report provides award information for all or selected constituents. List the report by volunteer names alphabetically or by award level. A start date, end date, or date range can be selected. The report includes volunteer name, award name, award hours, award date, award presented with, and presented by. Address and/or telephone number can be included in the report. Select constituency and awards to narrow the report.

Filters:

Constituency

Award

Sort Order:

Alphabetically or award

Options:

Include address

Include telephone number

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Volunteer Awards Report
Reference Manual Sample Report

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Volunteer/Award	Award Hours	Award Date	Presented With	Presented By
Jean P. Marshall 39 Banyan Drive Hilo, HI 96720 (808) 969-3434 500 Hours - Gold Pin	500.0	10/14/1998	Gold Pin	J. V. Cooke
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443 (843) 740-2691 1000 Hours - Gold Cup	1,000.0	10/14/1998	Gold Cup	Yoder Christian
Susan A. Snow 5352 Oak Tree Lane Apt. 200A Spartanburg, SC 29316 (803) 244-1032 200 Hours	200.0	10/14/1998	Silver Pin	Louise Christian

Awards Due Report

The **Awards Due Report** lists of which award level a volunteer can earn next. The report is listed by the award due, and includes the hours worked, last date worked, and cumulative hours worked. The award calculation is based on the next award date in the volunteer's award record.

The report provides awards due information for all or selected volunteers. The report includes award due, volunteer name, award hours, last date worked, last award received, and cumulative hours worked. Address and/or telephone number can be included in the report. Select constituency and awards to narrow the report.

Filters:

Constituency

Awards

Sort Order:

Award due

Options:

Include address

Include telephone number

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Awards Due Report
Reference Manual Sample Report

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Award Due/Volunteer	Award Hours	Last Date Worked	Last Award	Cumulative Hours
2500 Hours Engraved Clock Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443	2,500.0	10/14/1998	1000 Hours - Gold Cup	2,432.00
500 Hours - Gold Pin Marie Woods 1011 North Bridge Boulevard Goose Creek, SC 29445	500.0	03/02/1998	200 Hours - Silver Pin	343.00

Volunteer Match List

The **Volunteer Match List** matches volunteers with projects. The report lists only volunteers having the needed training, qualifications, and availability by using the project requirements as filters.

The report provides qualification and availability information for all or selected constituents. List the report by volunteer names alphabetically. This report includes availability day, from date, to date, start time, and end time. Address and/or telephone number can be included in the report. Select specific criteria to narrow the report (e.g., interests, certifications, skills, and courses).

Filters:

Constituency
Interests
Availability
Certification
Courses
Skills

Sort Order:

Alphabetically

Options:

Include address
Include telephone number
Include availability

10/14/1998

Blackbaud Demo
Volunteer Match List
Reference Manual Sample Report

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Volunteer	Availability				
	Day	From Date	To Date	Start Time	End Time
Rebecca B. Aaron 2344 Ruby Road Charleston , SC 29401 (843) 724-5600	Wednesday	01/01	12/31	3:00 PM	9:00 PM
Sarah Condon 76 Deerfield Avenue Anderson, SC 29621 (843) 555-1212	Saturday	01/01	05/01	9:00 AM	2:00 PM
	Saturday	09/01	12/31	9:00 AM	2:00 PM
Michael J. Simpson 443 Lake Forest Drive Country Club Estates Kiawah Island, SC 29455-0443 (843) 740-2691	Monday	01/01	05/15	1:00 PM	8:00 PM
	Thursday	01/01	12/31	1:00 PM	8:00 PM
Marie Woods 1011 North Bridge Boulevard Goose Creek, SC 29445 (843) 555-1212	Tuesday	10/10	12/31	8:00 AM	8:00 PM

Chapter 14 — Prospect Reports

Prospect Reports helps you track proposal to potential donors. These are especially helpful for those large donations that may require special needs get met before the donor will give your organization money. For example, a donor may require applicants be interviewed, write an essay, and attend a training session before a scholarship will be given to student to attend a specific school.

Section Preview

- The **Outstanding Proposal Report** tracks proposals presented to potential donors. Summary information about the proposal, date an answer is expected, and expected donation are included in the report.
- The **Proposal Analysis Report** compares proposal results with the expected outcome. The number of days the proposal was open is also tracked.
- The **Proposal Follow Up Report** tracks actions taken after a proposal has been presented. The status and priority of the proposal are included in the report.

Outstanding Proposal Report

The **Outstanding Proposal Report** tracks proposals after they have been presented to potential donors. Summary information about the proposal, date a response is expected, and expected amount are included.

The report includes summary proposal information for all constituents, a selected query, or a single constituent. Proposals by all or a single solicitor can be included. You can base the report on the date asked or the date expected. The report includes constituent name, gift type, rating, asked date, amount asked, date expected, amount expected, total asked, total expected, difference, and grand totals.

Filters:

- Proposal campaign
- Constituency
- Proposal purpose
- Proposal status
- Proposal funds

Sort Order:

- Purpose
- Solicitor
- Campaign
- Fund

Options:

- Start date
- End date
- Include proposals with no date asked

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Blackbaud Demo
Outstanding Proposal Report
Reference Manual Sample

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Constituent	Gift Type	Rating	Asked Date	Amount Asked	Date Expected	Amount Expected
West Wing Cancer Center						
Mr. and Mrs. Michael J. Simpson, MD	Annuity	Good Prospect	10/14/1998	\$100,000.00	01/01/1999	\$80,000.00
Ms. Marie Woods	Cash	Excellent Prospect	10/14/1998	\$250,000.00	12/01/1998	\$250,000.00
				Total Asked:		\$350,000.00
				Total Expected:		\$330,000.00
				Difference:		\$20,000.00
Capital Campaign						
Mr. and Mrs. Michael J. Simpson, MD	Pledge	Excellent Prospect	10/14/1998	\$500,000.00	02/01/1999	\$500,000.00
				Total Asked:		\$500,000.00
				Total Expected:		\$500,000.00
				Difference:		\$0.00
				Grand Total Asked:		\$850,000.00
				Grand Total Expected:		\$830,000.00
				Grand Total Difference:		\$20,000.00

Proposal Analysis Report

The **Proposal Analysis Report** compares proposal results with the expected outcome. In addition, it helps develop prospect ratings. The number of days the proposal was open is also tracked.

The report includes summary proposal information for all constituents, a selected query, or a single constituent. Proposals by all solicitors or a single solicitor can be included. You can base the report on the amount/date asked or the amount/date expected. Funding can be based on the proposal or a gift summary. If gift summary is selected, it can be from the first gift date or the last gift date. This report includes constituent name, gift type, rating, amount asked, amount funded, difference, date asked, date funded, and days open.

Filters:

- Proposal campaign
- Constituency
- Gift types
- Proposal purpose
- Proposal status
- Proposal funds

Sort Order:

- Purpose
- Solicitor
- Campaign
- Fund

Options:

- Start date
- End date
- Include proposals with no date asked

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Blackbaud Demo
Proposal Analysis Report
Reference Manual Sample

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Constituent	Gift Type	Rating	Amount Asked	Amount Funded	Difference	Date Asked	Date Funded	Days Open
West Wing Cancer Center								
James T. Pierce	Annuity	Good Prospect	\$100,000.00	\$90,000.00	\$10,000.00	07/15/1993	05/01/1994	290.00
Michael J. Simpson	Annuity	Good Prospect	\$100,000.00	\$100,000.00	\$0.00	10/14/1998	12/25/1998	72.00
Marie Woods	Cash	Excellent Prosp	\$250,000.00	\$25,000.00	\$225,000.00	10/14/1998	12/01/1998	48.00
		Average Amount Asked:		\$150,000.00				
		Average Amount Funded:		\$71,666.67				
		Average Days Open:		137.00				
Capital Campaign								
Michael J. Simpson	Pledge	Excellent Prosp	\$500,000.00	\$750,000.00	(\$250,000.00)	10/14/1998	12/25/1998	72.00
Victor H. Hanson	Cash	Excellent Prosp	\$150,000.00	\$125,000.00	\$25,000.00	06/14/1998	10/14/1998	122.00
		Average Amount Asked:		\$325,000.00				
		Average Amount Funded:		\$437,500.00				
		Average Days Open:		97.00				

Proposal Follow up Report

The **Proposal Follow Up Report** tracks actions taken after a proposal has been presented. For example, a dinner meeting to answer a prospective donor's questions would be listed on this report. The status and priority of the proposal are included in the report.

The report includes summary proposal information for all constituents, a selected query, or a single constituent. Proposals by all solicitors or a single solicitor can be included. This report includes constituent name, proposal, action date, action type, solicitor, status, and priority.

Filters:

- Proposal status
- Constituency
- Proposal purpose
- Action status
- Action type

Sort Order:

- Constituent name

Options:

- Start date
- End date
- Action priority (all, high, medium)

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Proposal Follow Up Report

Reference Manual Sample

Constituent	Proposal	Action Date	Action Type	Solicitor	Status	Priority
Victor H. Hanson	Capital Campaign	04/20/1998	Dinner meeting	Myron Banks	Closed	High
		10/14/1998	Dinner meeting	Lance A. Smith	Closed	High
Michael J. Simpson	Capital Campaign	12/01/1998	Follow-Up Call	Myron Banks	Closed	High
		11/01/1998	Dinner meeting	Katherine E. Sinclair	Closed	High
Marie Woods	West Wing Cancer Center	12/01/1998	Lunch Meeting	Franklin A. Baymann	Closed	High

5 Action(s) Listed