

# The**Raiser's**Edge®

Sample Reports Guide

## 032808

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# Sample Reports Guide

<b>ACTION REPORTS</b> .....	1
<b>Action Detail Report</b> .....	2
<b>Action Summary Report</b> .....	4
<b>Advocacy Detail Report</b> .....	6
<b>Tickler Report</b> .....	8
 <b>ANALYTICAL REPORTS</b> .....	11
<b>Actual vs. Target Report</b> .....	12
<b>Alumni Class Analysis (Detail)</b> .....	14
<b>Alumni Class Analysis (Summary)</b> .....	16
<b>Appeals Analysis (Detail)</b> .....	18
<b>Appeals Analysis (Summary)</b> .....	20
<b>Comparative Report</b> .....	22
<b>Consecutive Years Report</b> .....	24
<b>Donor Category Report (Detail)</b> .....	26
<b>Donor Category Report (Summary)</b> .....	28
<b>First/Greatest/Latest Gift Report</b> .....	30
<b>LYBUNT Report</b> .....	32
<b>New Donors Report</b> .....	34
<b>Non-Contributors Report</b> .....	36
<b>Parent Class Analysis (Detail)</b> .....	38
<b>Parent Class Analysis (Summary)</b> .....	40
<b>Solicitor Comparison Report</b> .....	42
<b>Solicitor Goal Summary</b> .....	44
<b>Solicitor Performance Analysis (Detail)</b> .....	46
<b>Solicitor Performance Analysis (Summary)</b> .....	48
<b>SYBUNT Report</b> .....	50
<b>Top Donors Report</b> .....	52
<b>VSE Survey Report</b> .....	54
 <b>CAMPAIGNS, FUNDS, AND APPEALS REPORTS</b> .....	57
<b>Appeal Comparison Summary</b> .....	58
<b>Appeal Cost Breakdown</b> .....	60
<b>Appeal Detail Report</b> .....	62
<b>Appeal Goal Summary</b> .....	64
<b>Appeal Performance Analysis</b> .....	66
<b>Appeal Summary List</b> .....	68
<b>Campaign Comparison Summary</b> .....	70
<b>Campaign Detail Report</b> .....	72

contents

Campaign Fund Analysis .....	74
Campaign Gift Analysis .....	76
Campaign Goal Summary .....	78
Campaign Performance Analysis .....	80
Campaign Progress Report .....	82
Campaign Summary List .....	84
Fund Comparison Summary .....	86
Fund Detail Report .....	88
Fund Goal Summary .....	90
Fund Performance Analysis .....	92
Fund Summary List .....	94

## DEMOGRAPHIC & STATISTICAL REPORTS ..... 97

Advocacy Tallies .....	98
Comparisons and Summaries (Summary) .....	100
Comparisons and Summaries (Comparison) .....	102
Recurring Gift Statistical Report .....	104
Statistical Report .....	106
Tallies .....	108

## EVENT MANAGEMENT REPORTS ..... 111

Dinner Preferences .....	112
Event Expense Report .....	114
Event Income Report (Detail) .....	116
Event Income Report (Summary) .....	118
Event Lists .....	120
Event Summary Report .....	122
Lodging Information .....	124
Registration Fees Due Report (Detail) .....	126
Registration Fees Due Report (Summary) .....	128
Seating Arrangements .....	130
Seating Validation Report .....	132
Sporting Event Roster .....	134

## FINANCIAL REPORTS ..... 137

Account Distribution .....	138
Adjusted Gift Report .....	140
Annual Statement Report .....	142
Cash Receipts Journal (Detail) .....	144
Cash Receipts Journal (Summary) .....	146
Constituent Giving History .....	148
EFT Participation Report .....	150
Expected Maturity Year Report - Detail .....	152
Expected Maturity Year Report (Summary) .....	154
General Ledger Audit Report .....	156
Gift Detail and Summary Report (Detail) .....	158
Gift Detail and Summary Report (Summary) .....	160
Gift Entry Validation .....	162
Gifts-in-Kind Report .....	164
Matching Gift Report (Detail) .....	166

Matching Gift Report (Summary) .....	168
Online Vs. Offline Giving Report - Detail .....	170
Online Vs. Offline Giving Report - Summary .....	172
Other Gifts Report .....	174
Planned Gifts (Detail) .....	176
Planned Gifts Report (Summary) .....	178
Stock Gain/Loss Report .....	180

## MEMBERSHIP REPORTS.....183

Comparative Membership Statistics .....	184
Dropped Member Report .....	186
Expired Membership Report .....	188
Joint Member/Card List Report .....	190
Lapsed Member Report .....	192
Membership Dues Report (Detail) .....	194
Membership Dues Report (Summary) .....	196
Membership Given By Report .....	198
Membership List/Directory .....	200
Membership Statistics by Category .....	202
Month/Year Statistical Analysis .....	204
New Member Report .....	206
Rejoin Report .....	208
Renewal Projection Report .....	210
Renewal Report .....	212

## PLEDGE AND RECURRING GIFT REPORTS.....215

Activity Report .....	216
Campaign Report (Detail) .....	218
Campaign Report (Summary) .....	220
Cash Flow Report (Detail) .....	222
Cash Flow Report (Summary) .....	224
Journal (Detail) .....	226
Journal (Summary) .....	228
Not Paid Report .....	230
Past Due Report (Detail) .....	232
Past Due Report (Summary) .....	234
Pledge Status Report .....	236
Recurring Gift Amendment Report (Detail) .....	254
Recurring Gift Amendment Report (Summary) .....	256
Recurring Gift Missed Payment (Detail) .....	258
Recurring Gift Missed Payment (Summary) .....	260
Written-Off Report (Detail) .....	262
Written-Off Report (Summary) .....	264

## PROFILES, LISTS, AND DIRECTORIES .....267

Alumni Class List .....	268
Appeal Profile .....	270
Blackbaud Analytics Scores List .....	272
Campaign Profile .....	274
Constituent Directory .....	276

<b>Constituent Profile</b>	278
<b>Event Profile</b>	280
<b>Fund Profile</b>	282
<b>Grandparent Directory</b>	284
<b>Honor/Memorial Profile</b>	286
<b>Individual Profile</b>	288
<b>MatchFinder Organization Summary</b>	290
<b>Membership Category Profile</b>	292
<b>Organization Profile</b>	294
<b>Parent Directory</b>	296
<b>Professional Directory</b>	298

## **PROSPECT RESEARCH REPORTS . . . . .301**

<b>Outstanding Proposal Report</b>	302
<b>Proposal Analysis Report</b>	304
<b>Proposal Follow-Up Report</b>	306
<b>Proposal Pipeline Summary</b>	308

## **TRIBUTE REPORTS . . . . .311**

<b>Honor/Memorial Contributors List</b>	312
<b>Honor/Memorial Directory</b>	314
<b>Honor/Memorial Gift Report</b>	316
<b>Honor/Memorial Summary List</b>	318

## **VOLUNTEER REPORTS . . . . .321**

<b>Courses and Training Report</b>	322
<b>Future Awards Report</b>	324
<b>Job Assignment Summary</b>	326
<b>Time Sheet Report</b>	328
<b>Volunteer Awards Report</b>	330
<b>Volunteer Job Assignment Schedule</b>	332
<b>Volunteer Match List</b>	334
<b>Volunteer Skills and Experience</b>	336
<b>Volunteer Summary</b>	338

# Action Reports

## Contents

Action Detail Report.....	2
Action Summary Report .....	4
Advocacy Detail Report .....	6
Tickler Report.....	8

# Chapter 1



# Action Detail Report

The **Action Detail Report** generates detailed information about selected or all actions in your database. Based on your parameter tab settings, an **Action Detail Report** can include constituents and solicitors involved in actions, dates of the actions, action categories, action types, the status of each action type, action priorities, action progress, campaign and fund information, and user contact information. You can also determine how the information is arranged on your report. This report is a great tool for tracking the effectiveness of your actions.

## Report Parameters

Records to include: All

Dates: This quarter (first 2006)

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Include these priorities: High priority = Yes; Normal priority = Yes; Low priority = Yes

Include these progresses: Not Completed = Yes; Completed = Yes

Include actions from: Constituent = Yes; Appeals = Yes; Events = Yes

Campaigns to include: All

Funds to include: All

Constituent Codes to include: All

Gift Solicitors to include: All

Action Statuses to include: All

Action Types to include: All

Action Categories to include: Phone Call, Meeting

Action Tracks to include: All

Users to include: All

Title: Action Detail Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Sort Order: Action Category Asc, Action Date Desc



## Action Detail Report

Date Category	Start Time End Time	Name/ID Solicitor	Action Type Action Status	Action Priority	Action Progress	Campaign Fund	Contact Notified User	Detail Proposal
06/16/2006 Meeting	6:30PM	Sean A. Davenport	Meeting Continuous	High	Not Completed		Supervisor Dana	Conference Room B
06/01/2006 Meeting	6:30PM 9:30PM	Robert C. Hernandez	Board Meeting Continuous	Normal	Not Completed		Supervisor	Board Room
04/16/2006 Meeting		Phillip B. Keller	Board Meeting Continuous	Normal	Not Completed		David	Board Room
06/20/2006 Phone Call		Lajuan Wilson	Thank You Continuous	Normal	Not Completed	Disaster Relief Camp International Relief F	Supervisor Rob	912-925-6645
06/14/2006 Phone Call		Benjiman E. Connor	Thank You Continuous	Normal	Not Completed		Supervisor	804-741-5241
06/07/2006 Phone Call		Francis E. Baker	Thank You Continuous	Normal	Not Completed		Supervisor	915-562-2331
06/01/2006 Phone Call		Jason D. Campbell	Thank You Continuous	Normal	Not Completed		Supervisor Jenny	706-435-8511
06/01/2006 Phone Call		Susan E. McDonald	Thank You Continuous	Normal	Not Completed		Jennifer Supervisor	407-841-6679
06/01/2006 Phone Call		Carl Rhodes	Thank You Continuous	Normal	Not Completed		Supervisor	618-222-9796
05/01/2006 Phone Call		John T. Smith	Thank You Continuous	Normal	Not Completed			502-451-8236
10 action(s) listed								



# Action Summary Report

The **Action Summary Report** generates a list of action categories entered in your database along with a count of constituents associated with each action category. Because this report is a summary, constituent names do not appear. The report simply lists all your action categories with the total number of constituents associated with each. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Include these priorities: High priority = Yes; Normal priority = Yes; Low priority = Yes

Include these progresses: Not Completed = Yes; Completed = Yes

Primary summary for report: Action Category

Campaigns to include: All

Funds to include: All

Constituent Codes to include: All

Gift Solicitors to include: All

Action Statuses to include: All

Action Types to include: All

Action Categories to include: All

Action Tracks to include: All

Users to include: All

Title: Action Summary Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Action Summary Report**

Action Category	Total
Phone Call	11
Meeting	8
Mailing	59
Email	4
Task/Other	100
5 action category(s) listed	

# Advocacy Detail Report

The **Advocacy Detail Report** generates a detailed list of selected advocacy actions. You can break the report down based on either constituents or issues.

## Report Parameters

Records to include: All

Dates: Include all Dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Alert Titles: All

Issues: All

Recipients: All

Campaigns: All

Funds: All

Appeals: All

Solicitors: All

Attributes: None

Columns: Default

Title: Advocacy Detail Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Fields: Constituent and Date

**Advocacy Detail Report**

Constituent	Date	Issue	Recipient	Delivery Method	Alert Title
Mark D. Adamson	06/18/2005	More Healthcare Funding Needed	Senator Margaret Browne	Email	Don't let the state cut healthcare funding
Clara M. Daniels	07/09/2005	Save Public Radio and Television	Governor Matthew Anderson	Action Letter	Tell Congress to increase our budget
Bebe D. Kemp	06/16/2005	Save the Whales	Senator Raiford Smythe	Fax	Vote 'yes' on this important issue
Mary Beth Richardson	12/19/2005	Help Eliminate Hunger	President Matthew Morgan	Email	Vote 'yes' on this important issue
Harris F. Sadler	11/05/2005	Save the Bay	Representative Lawrence Strickland	Email	Vote 'yes' on this important issue

5 advocacy action(s) listed

5 constituent(s) listed

# Tickler Report

The goal of the **Tickler Report** is to help you keep track of the individuals responsible for the actions in your database. This report can be arranged based on solicitors or other users notified about an action. In addition to the solicitor or notified user name, this report can include constituent or contact names, action start and end times, action types, the status of each action type, action priorities, action progress, and proposal information. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include actions with these dates: This month (May 2006)

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Include these priorities: High priority = Yes; Normal priority = Yes; Low priority = Yes

Include these progresses: Not Completed = Yes; Completed = Yes

Base report on: Solicitor

Phone types to include: All

Campaigns to include: All

Funds to include: All

Constituent Codes to include: All

Gift Solicitors to include: All

Action Statuses to include: All

Action Types to include: All

Action Categories to include: All

Action Tracks to include: All

Users to include: All

Title: Tickler Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Date Asc

## Tickler Report

Solicitor Date Category	Start Time End Time	Name/ID Contact	Action Type Action Status	Action Priority Action Progress	Detail Proposal
<b>Allison E. Andrews</b>					
05/26/2006 Mailing		Alan C. Hayes	Letter Open	Normal Not Completed	Mission Statement
<b>Unassigned Actions</b>					
05/01/2006 Phone Call		John T. Smith	Thank You Continuous	Normal Not Completed	502-451-8236
05/17/2006 Mailing		Sidney L. Prescott	Letter Completed	High Completed	
1 Solicitor(s) listed					





# Analytical Reports

## Contents

Actual vs. Target Report .....	12
Alumni Class Analysis (Detail) .....	14
Alumni Class Analysis (Summary) .....	16
Appeals Analysis (Detail) .....	18
Appeals Analysis (Summary) .....	20
Comparative Report .....	22
Consecutive Years Report .....	24
Donor Category Report (Detail) .....	26
Donor Category Report (Summary) .....	28
First/Greatest/Latest Gift Report .....	30
LYBUNT Report .....	32
New Donors Report .....	34
Non-Contributors Report .....	36
Parent Class Analysis (Detail) .....	38
Parent Class Analysis (Summary) .....	40
Solicitor Comparison Report .....	42
Solicitor Goal Summary .....	44
Solicitor Performance Analysis (Detail) .....	46
Solicitor Performance Analysis (Summary) .....	48
SYBUNT Report .....	50
Top Donors Report .....	52
VSE Survey Report .....	54

# Chapter 2

# Actual vs. Target Report

The **Actual vs. Target Report** compares the target amount and the total amount donors actually gave during the time period you define. The report compares the actual donations a constituent gave with the target amounts entered on the constituent record. If you enter no target amount, the word “Unknown” appears in the **Target** column. This report provides target and actual giving information for all constituents, selected constituents, or just one constituent. The report displays the constituent name and address, target amount, and actual amount donated. You can also include telephone numbers. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Constituents with Defined Target Amounts

Date to Use: Gift Date

Date: This quarter (first 2006)

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Actual vs. Target Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Target Asc

**Actual vs. Target Report**

<b>Constituent Name</b>	<b>Target</b>	<b>Amount Given</b>
Angela Diresta	\$0 - \$499	\$100.00
Francis E. Baker	\$500 - \$999	\$200.00
Keith D. Radcliffe	\$1,000 - \$4,999	\$10,000.00
Anonymous	\$5,000 - \$9,999	\$150.00
Timothy D. Billings	\$5,000 - \$9,999	\$3,500.00
Jason D. Campbell	\$5,000 - \$9,999	\$2,000.00
Alexander M. Horne	\$5,000 - \$9,999	\$2,500.00
Autumn Industries, Inc.	\$10,000 - \$19,999	\$350.00
Anthony S. Ellis	\$10,000 - \$19,999	\$30.00
<b>GRAND TOTALS:</b>		<b>\$18,830.00</b>
<b>A Total of 9 Constituent(s) Listed</b>		

# Alumni Class Analysis (Detail)

The **Alumni Class Analysis** provides alumni class giving information either by constituents within a class or by the class itself. The report provides alumni giving information for all constituents, selected constituents, or just one constituent. The detail report lists the constituent name by class year with the individual amounts donated or total amounts donated during the time period you select. To appear on the **Alumni Class Analysis, Primary alumni information** on the education record must be checked. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to Use: Gift Date

Date: This week

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Detail

Alumni Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Class Years to include: All

Degrees to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Alumni Class Analysis - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

# Alumni Class Analysis - Detail

Class	Constituent Name	Amount	Pledge	Pledge Balance
Class Of 1999	Joseph P. Diresta 248 Twin Lane Building #3299 Birmingham, AL 35220	No Gifts To List	No Gifts To List	No Gifts To List
	William A. Quinn 5874 Atlantic Avenue Hartford, CT 06102	No Gifts To List	No Gifts To List	No Gifts To List
	Luke J. Thames 418 Willow Way Vancouver, BC V6C 3L6	No Gifts To List	No Gifts To List	No Gifts To List
<i>0.00% (0 out of 3) gave/pledged</i>				
<b>Totals for All Classes</b>				
<i>0.00% (0 out of 3) gave/pledged</i>				

# Alumni Class Analysis (Summary)

The summary report shows each class year with the total donations, number of gifts, and percentage of participation. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to Use: Gift Date

Date: This calendar yr. (2006)

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Summary

Alumni Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Class Years to include: All

Degrees to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Alumni Class Analysis - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Alumni Class Analysis - Summary**

<b>Class</b>	<b>Amount</b>	<b>No. of Gifts</b>	<b>Pledge</b>	<b>No. of Gifts</b>	<b>Pledge Balance</b>	<b>No. of Gifts</b>	<b>Donors</b>	<b>Out Of</b>	<b>Percent</b>
1978	\$20,000.00	1	\$0.00	0	\$0.00	0	1	1	100.00%
1980	\$150.00	1	\$0.00	0	\$0.00	0	1	1	100.00%
1981	\$100.00	1	\$0.00	0	\$0.00	0	1	2	50.00%
1982	\$355.00	3	\$0.00	0	\$0.00	0	1	1	100.00%
1985	\$20.00	1	\$0.00	0	\$0.00	0	1	1	100.00%
	<b>\$20,625.00</b>	<b>7</b>	<b>\$0.00</b>	<b>0</b>	<b>\$0.00</b>	<b>0</b>	<b>5</b>	<b>6</b>	<b>83.33%</b>

# Appeals Analysis (Detail)

The **Appeals Analysis** provides names of donors and the amount donated so you can analyze the financial success of your appeals. This report includes appeal performance information for all constituents, selected constituents, or just one constituent. It lists the information by appeal name. By viewing the appeals constituents have responded to, you can ascertain the success of your appeals. The detail report includes constituent name, gift date, fund name, amount donated, reference, percentage of those giving, amount over/under the goal, and the goal for each appeal. Both formats provide totals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Trustees

Date to use: Gift date

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Detail

Constituent Codes to include: Board Members

Funds to include: All

Appeals to include: Walk-a-thon

Campaigns to include: All

Gift types to include: All

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Appeals Analysis - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Gift Reporting = Totals Only; Include column totals = Yes



# Appeals Analysis-Detail

Appeal	Constituent Name	Amount	Pledge Balance
Walk-A-Thon	Elizabeth A. Ashton	\$50.00	\$0.00
	Richard J. Jefferson	\$5,050.00	\$0.00
		<hr/>	<hr/>
		\$5,100.00	\$0.00
	100.00% (2 out of 2) gave/pledged		
	Goal	\$250,000.00	
	Over(Under)	(\$244,900.00)	
Totals for All Appeals			
100.00% (2 out of 2) gave/pledged		\$5,100.00	\$0.00
Goal	\$250,000.00		
Over(Under)	(\$244,900.00)		

# Appeals Analysis (Summary)

The summary report includes appeal name, amount donated, goal, amount over/under goal, number of donors, donors out of number solicited, and percentage donating. Both formats provide totals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Summary

Campaigns to include: All

Funds to include: All

Appeals to include: All

Constituent Codes to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Appeals Analysis - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

# Appeals Analysis-Summary

Appeal	Amount	Pledge Balance	Goal	Over(Under)	Donors	Out Of	Percent
1998 Annual Mailing	\$0.00	\$0.00	\$250,000.00	(\$250,000.00)	0	0	0.00%
1998 Annual Phonathon	\$0.00	\$0.00	\$10,000.00	(\$10,000.00)	0	0	0.00%
1999 Annual Mailing	\$0.00	\$0.00	\$60,000.00	(\$60,000.00)	0	0	0.00%
1999 Annual Phonathon	\$0.00	\$0.00	\$60,000.00	(\$60,000.00)	0	0	0.00%
1999 President's Breakfast	\$0.00	\$0.00	\$10,000.00	(\$10,000.00)	0	0	0.00%
2000 Annual Phonathon	\$0.00	\$0.00	\$500,000.00	(\$500,000.00)	0	5	0.00%
2000 President's Breakfast	\$2,550.00	\$0.00	\$10,000.00	(\$7,450.00)	2	4	50.00%
2001 Annual Phonathon	\$50,790.00	\$0.00	\$0.00	\$50,790.00	5	6	83.33%
2002 Direct Mailing	\$0.00	\$0.00	\$50,000.00	(\$50,000.00)	0	0	0.00%
2002 Phonathon	\$375.00	\$0.00	\$0.00	\$375.00	2	5	40.00%
2003 Direct Mailing	\$500.00	\$0.00	\$0.00	\$500.00	1	1	100.00%
Annual Exhibit	\$14,605.00	\$0.00	\$50,000.00	(\$35,395.00)	17	17	100.00%
Annual Mailing	\$22,650.00	\$10,750.00	\$1,000,000.00	(\$966,600.00)	19	23	82.61%
Annual Newsletter	\$330,185.00	\$850.00	\$250,000.00	\$81,035.00	60	71	84.51%
Camp Kids Newsletter	\$3,530.00	\$0.00	\$0.00	\$3,530.00	3	3	100.00%
Celebrity Auction	\$33,200.00	\$0.00	\$100,000.00	(\$66,800.00)	22	26	84.62%
Direct Mailing	\$117,545.00	\$0.00	\$0.00	\$117,545.00	26	27	96.30%
Holiday Cocktail Hour and Dinner Part	\$0.00	\$0.00	\$15,000.00	(\$15,000.00)	0	0	0.00%
Internet/Web Site solicitations	\$213,640.00	\$1,000.00	\$0.00	\$214,640.00	38	43	88.37%
Membership Mailing	\$142,535.00	\$750.00	\$0.00	\$143,285.00	38	38	100.00%
Millennium Direct Mailing	\$1,350.00	\$0.00	\$0.00	\$1,350.00	4	10	40.00%
Open House Letter	\$37,295.00	\$0.00	\$0.00	\$37,295.00	14	14	100.00%
Planned Giving Letter	\$142,525.00	\$0.00	\$200,000.00	(\$57,475.00)	18	24	75.00%
Proposal Appeal	\$826,837.00	\$0.00	\$10,000,000.00	(\$9,173,163.00)	16	16	100.00%
Unsolicited	\$558,620.00	\$800.00	\$0.00	\$559,420.00	75	75	100.00%
Walk-A-Thon	\$21,354.00	\$0.00	\$250,000.00	(\$228,646.00)	13	17	76.47%
Year End Appeal	\$31,985.00	\$0.00	\$500,000.00	(\$468,015.00)	18	19	94.74%
	<b>\$2,552,071.00</b>	<b>\$14,150.00</b>	<b>\$13,315,000.00</b>	<b>(\$10,748,779.00)</b>	<b>155</b>	<b>162</b>	<b>95.68%</b>

# Comparative Report

The **Comparative Report** provides a comparison of information contained in two date ranges, helping you determine whether constituent giving increased, decreased, or remained the same. This may prove useful in identifying your better donors. Or you can choose to show only decreased giving and identify donors for solicitation. You can also run the report to show both increases and decreases. The report can include the constituent name, total donated for each time period, and the variance in either dollar or percentage format. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include records with these Gift dates: Last calendar yr for Period 1.

Include records with these Gift dates: This calendar yr for Period 2.

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Comparative Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Comparative Report

Constituent Name	01/01/2005 12/31/2005 Total Given	01/01/2006 12/31/2006 Total Given	Currency Variance	% Variance
Anonymous	\$200.00	\$0.00	(\$200.00)	(100.00%)
Anonymous	\$830.00	\$1,010.00	\$180.00	21.69%
Derrick J. Baker	\$0.00	\$500.00	\$500.00	
Benjiman E. Connor	\$2,535.00	\$1,325.00	(\$1,210.00)	(47.73%)
Collin Dubose	\$750.00	\$2,500.00	\$1,750.00	233.33%
Robert C. Hernandez	\$57,450.00	\$2,550.00	(\$54,900.00)	(95.56%)
Travis D. Inman	\$200,000.00	\$50.00	(\$199,950.00)	(99.98%)
Jennifer A. Kennick	\$3,000.00	\$50.00	(\$2,950.00)	(98.33%)
David M. Korbin	\$4,000.00	\$250.00	(\$3,750.00)	(93.75%)
Jennifer A. Kovalak	\$5,000.00	\$0.00	(\$5,000.00)	(100.00%)
Spencer Kovalak	\$250.00	\$500.00	\$250.00	100.00%
Roger B. Langley	\$5,000.00	\$1,085.00	(\$3,915.00)	(78.30%)
Orla A. McGrann	\$150.00	\$75.00	(\$75.00)	(50.00%)
Otto G. Montgomery	\$0.00	\$50.00	\$50.00	
Nancy R. Peters	\$15,250.00	\$1,000.00	(\$14,250.00)	(93.44%)
Kyle M. Rhodes	\$50.00	\$0.00	(\$50.00)	(100.00%)
Ira M. Rosenberg	\$1,800.00	\$200.00	(\$1,600.00)	(88.89%)
Monica L. Sharp	\$500.00	\$50.00	(\$450.00)	(90.00%)
Harold P. Smalls	\$0.00	\$1,000.00	\$1,000.00	
John T. Smith	\$75.00	\$0.00	(\$75.00)	(100.00%)
Emma V. Terrell	\$500.00	\$135.00	(\$365.00)	(73.00%)
Stella S. White	\$2,000.00	\$2,500.00	\$500.00	25.00%
<b>GRAND TOTALS:</b>	<b>\$299,340.00</b>	<b>\$14,830.00</b>	<b>(\$284,510.00)</b>	<b>(95.05%)</b>
A total of 22 constituent(s) listed				
A total of 7 constituent(s) increased				
A total of 15 constituent(s) decreased				

# Consecutive Years Report

The **Consecutive Years Report** provides an analysis of the number of years in a row constituents donated. For example, to create a report of donors who gave for the past five years, use the current date and select the five consecutive previous years. This report can provide giving information for all constituents, constituents in a selected query, or one constituent. The report includes constituent name, consecutive years of giving, total donated, and average amount donated per year. The date range defines the starting point from which you want to look back, not the number of years to consider. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Count Consecutive Years up to this Period: This calendar yr

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Consecutive Years Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Minimum number of consecutive years: 2

Sort Order: Consecutive Years Desc

**Consecutive Years Report**

<u>Constituent Name</u>	<u>Consecutive Years</u>	<u>Total Given</u>	<u>Average Given per Year</u>
Robert C. Hernandez	7	\$215,000.00	\$30,714.29
Monica L. Sharp	6	\$1,500.00	\$250.00
Emma V. Terrell	6	\$1,105.00	\$184.17
David M. Korbin	5	\$6,600.00	\$1,320.00
Barrett J. O'Malley	5	\$4,160.00	\$832.00
Stella S. White	5	\$7,500.00	\$1,500.00
Ira M. Rosenberg	4	\$52,300.00	\$13,075.00
Travis D. Inman	3	\$253,550.00	\$84,516.67
Jennifer A. Kennick	3	\$3,250.00	\$1,083.33
Roger B. Langley	3	\$6,235.00	\$2,078.33
Benjiman E. Connor	2	\$3,860.00	\$1,930.00
Collin Dubose	2	\$3,250.00	\$1,625.00
Spencer Kovalak	2	\$750.00	\$375.00
Orla A. McGrann	2	\$225.00	\$112.50
Nancy R. Peters	2	\$16,250.00	\$8,125.00
Derrick J. Baker	1	\$500.00	\$500.00
Otto G. Montgomery	1	\$50.00	\$50.00
Harold P. Smalls	1	\$1,000.00	\$1,000.00
<b>GRAND TOTALS</b>		<b>\$577,085.00</b>	<b>\$149,271.29</b>
A Total of 18 Constituent(s) Listed			

## Donor Category Report (Detail)

The **Donor Category Report** provides a list of giving clubs (for example, benefactor, patron, friend) based on the total donated during a time period you select. You define donor categories in *Configuration*. The detail report lists constituent names with the amount donated per constituent. Both report types provide the total amount donated. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: Query

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Detail

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Donor Category Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail order: Amount Given

Use donor category table: Donor Categories - Table 1

Include these Optional Columns: Constituent Code, Total given

Use Selected Categories only: Founder



## Donor Category Report - Detail

Constituent Name	Constituent Code	Amount Given
<b>Founder - (\$2,500.00 + )</b>		
Travis D. Inman	Volunteer	\$253,550.00
Robert C. Hernandez	Board Member	\$225,700.00
John T. Smith	Volunteer	\$150,325.00
Ira M. Rosenberg	Volunteer	\$52,300.00
Nancy R. Peters	Volunteer	\$26,250.00
Otto G. Montgomery	Volunteer	\$25,100.00
Jennifer A. Kovalak	Volunteer	\$20,350.00
Stella S. White	Volunteer	\$7,500.00
David M. Korbin	Volunteer	\$6,625.00
Roger B. Langley	Volunteer	\$6,450.00
Anonymous	Volunteer	\$5,160.00
Benjiman E. Connor	Volunteer	\$4,140.00
Collin Dubose	Volunteer	\$3,820.00
Jennifer A. Kennick	Volunteer	\$3,375.00
Orla A. McGrann	Volunteer	\$2,900.00
1 Board Member gave a total of:		\$225,700.00
14 Volunteer gave a total of:		\$567,845.00
15 Founder gave a total of:		\$793,545.00
<b>A Total of 15 Constituent(s) Listed</b>		<b>\$793,545.00</b>

# Donor Category Report (Summary)

The summary report lists the number of constituents in each category and the total donated. Both report types provide the total amount donated. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Summary

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Title: Donor Category Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Use donor category table: Donor Categories - Table 1

Include these Optional Columns: Total given

**Donor Category Report - Summary**

<b>Donor Category</b>	<b>Level</b>	<b>No. Constituents</b>	<b>Amount Given</b>
Founder	\$2,500.00	15	\$793,545.00
Chairman	\$1,000.00	4	\$4,755.00
Curator	\$250.00	6	\$3,304.00
Friend	\$10.00	1	\$175.00
<b>A Total of 4 Donor Categories Listed</b>		<b>26</b>	<b>\$801,779.00</b>

# First/Greatest/Latest Gift Report

The **First/Greatest/Latest Gift Report** provides information about the first donation a constituent made, their largest donation, and their most recent donation during a selected period of time. You can include any or all three pieces of information.

The report can include the first gift amount and date, the largest gift amount and date, the latest gift amount and date, or all three. It can also include the constituent name and address and the date and amount of gifts you select. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Title: First/Greatest/Latest Gift Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## First/Greatest/Latest Gift Report

Constituent Name	First	Date	Greatest	Date	Latest	Date
Benjiman E. Connor	\$15.00	08/15/2003	\$2,000.00	03/24/2005	\$100.00	07/16/2007
Orla A. McGrann	\$150.00	05/12/2005	\$2,000.00	11/12/2007	\$500.00	07/11/2008
David M. Korbin	\$800.00	07/30/2002	\$3,500.00	09/11/2005	\$25.00	08/17/2007
Jennifer A. Kennick	\$200.00	09/02/2004	\$3,000.00	05/19/2005	\$125.00	03/24/2007
Roger B. Langley	\$150.00	03/03/2004	\$5,000.00	10/15/2005	\$175.00	05/01/2007
Lucy G. Avdeenko	\$25.00	08/17/2007	\$1,000.00	08/17/2007	\$75.00	05/11/2008
Anonymous	\$200.00	11/13/2003	\$200.00	07/08/2005	\$200.00	07/08/2005
Barrett J. O'Malley	\$250.00	07/30/2002	\$2,000.00	03/23/2003	\$1,000.00	03/06/2007
Sidney L. Prescott	\$275.00	07/30/2004	\$275.00	07/30/2004	\$275.00	07/30/2004
Ira M. Rosenberg	\$300.00	03/03/2003	\$50,000.00	01/29/2004	\$200.00	06/01/2006
Emma V. Terrell	\$35.00	11/13/2001	\$500.00	11/14/2005	\$50.00	11/30/2007
Spencer Kovalak	\$250.00	01/10/2005	\$500.00	11/14/2006	\$75.00	02/08/2007
Robert C. Hernandez	\$100.00	03/03/2000	\$50,000.00	12/11/2001	\$200.00	04/08/2008
Tenli Smyth	\$500.00	01/22/2003	\$500.00	01/22/2003	\$500.00	01/22/2003
Nancy R. Peters	\$250.00	04/21/2005	\$15,000.00	05/19/2005	\$5,000.00	11/19/2008
Daniel R. Snyder	\$175.00	02/13/2004	\$175.00	02/13/2004	\$175.00	02/13/2004
Stella S. White	\$1,000.00	08/02/2002	\$1,500.00	11/14/2006	\$1,500.00	11/14/2006
Jennifer A. Kovalak	\$50.00	12/18/2001	\$10,000.00	11/04/2004	\$125.00	10/24/2008
Derrick J. Baker	\$54.00	11/14/2001	\$500.00	01/14/2006	\$500.00	01/14/2006
Collin Dubose	\$750.00	06/02/2005	\$2,000.00	01/12/2006	\$30.00	07/13/2007
Travis D. Inman	\$50,000.00	01/08/2004	\$200,000.00	06/01/2005	\$50.00	01/08/2006
Otto G. Montgomery	\$50.00	12/18/2001	\$25,000.00	11/15/2004	\$50.00	03/09/2006
Kyle M. Rhodes	\$75.00	11/13/2004	\$100.00	04/02/2007	\$75.00	05/17/2008
Monica L. Sharp	\$50.00	06/14/2001	\$550.00	04/22/2004	\$50.00	03/10/2006
Harold P. Smalls	\$1,000.00	12/01/2006	\$1,000.00	12/01/2006	\$1,000.00	12/01/2006
John T. Smith	\$150,000.00	01/22/2003	\$150,000.00	01/22/2003	\$250.00	08/29/2007
<b>GRAND TOTALS:</b>	<b>\$206,704.00</b>		<b>\$526,300.00</b>		<b>\$12,305.00</b>	
<b>A Total of 26 Constituent(s) Listed</b>						

# LYBUNT Report

The **LYBUNT Report** (last year but unfortunately not this) provides a list of constituents who donated last year but did not donate during the time period you specify as the current year. This report can include the constituent name with the last gift donated and the gift date.

For example, if you use 01/01/2004 - 12/31/2004 for the date range, the report includes donors who gave between 01/01/2003 and 12/31/2003 but have not donated between 01/01/2004 and 12/31/2004. If you use 06/01/2005 - 12/31/2005, the report includes the period 06/01/2004 - 12/31/2004. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include Constituents Who Gave a Gift Previously but Not Within this Date Range: Calendar YTD

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Title: LYBUNT Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail order: Constituent last name

Include these Optional Columns: Gift funds, Total given last year

## LYBUNT Report

Constituent Name	Fund(s)	Last Gift	Date	Total Given Last Yr
Jennifer A. Kennick 4850 Scenic Court Baltimore, MD 21224	Acquisition Fund	\$3,000.00	05/19/2005	\$3,000.00
Spencer Kovalak 844 Ft. Johnson Lane Columbus, GA 31995	Richard Mosley Memorial Fund	\$250.00	01/10/2005	\$250.00
Orla A. McGrann 3150 Brentmore Court Atlanta, GA 30062	2005 Annual Fund	\$150.00	05/12/2005	\$150.00
Nancy R. Peters 158 Columbus Drive Cincinnati, OH 45201	President's Development Fund	\$15,000.00	05/19/2005	\$15,250.00
Kyle M. Rhodes 12 Jane Way Edinburg, IL 62531	2005 Annual Fund	\$50.00	04/08/2005	\$50.00
John T. Smith 621 Winder Road Louisville, KY 40213	Richard Mosley Memorial Fund	\$75.00	05/01/2005	\$75.00
<b>GRAND TOTALS:</b>		<b>\$18,525.00</b>		<b>\$18,775.00</b>

**A Total of 6 Constituent(s) Listed**

# New Donors Report

The **New Donors Report** provides a list of first-time donors (donors who have not given before but did donate during a time period you select). The report includes the constituent name, information about the gift, and the related fund and appeal. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include Constituents Who Gave for the First Time Within this Date Range:  
Calendar YTD

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents  
with no valid addresses = No

Credit matching gifts to: Donor

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge,  
Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG  
Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property  
(Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Detail order: Gift date

Title: New Donors Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



05/24/2006

## New Donors Report

Page 1

Constituent Name	Type	Date	Amount	Fund(s)	Appeal(s)
Neil A. Osborne	Cash	05/05/2006	\$20,000.00	Acquisition Fund	Unsolicited
Davis & Johnson Pharmaceutica	Cash	03/29/2006	\$5,000.00	Building Fund	Proposal Appeal
Baldwin Entertainment Corporat	Cash	03/08/2006	\$5,000.00	Camp Kids Scholarship	
Rodney A. Barlow	Recurring Gift	02/13/2006	\$5.00	Computer Equipment	
Agnes M. Cone	Cash	02/04/2006	\$25,000.00	Building Fund	Unsolicited
The Reading Corner	Stock/Property	01/21/2006	\$1,500.00	Acquisition Fund	Celebrity Auction
Jeffrey B. Goodson	Cash	01/13/2006	\$100.00	2006 Membership Fund	Membership Mailing
<b>GRAND TOTALS:</b>			<b>\$56,605.00</b>		
<b>A Total of 7 Constituent(s) Listed</b>					

# Non-Contributors Report

The **Non-Contributors Report** provides a list of constituents who did not donate during a time period you select. The report can include the constituent name, address, and telephone number. The total number of constituents on the list appears at the bottom of the report. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Date: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Title: Non-Contributors Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Constituent Name**

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Carpet Factory Outlet

Consulting Group, Ltd.

The Flower Patch

Norbert G. Wilkens

**A Total of 4 Constituent(s) Listed**

## Parent Class Analysis (Detail)

The **Parent Class Analysis** tracks donations made by the parents of alumni. The detail report lists each parent name by class year with the individual amounts donated or the total donated during a time period you select. If you choose to create an output query, you can use it later to generate mailing lists. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: Query

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Detail

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Appeals to include: All

Campaigns to include: All

Funds to include: All

Parent Codes to include: All

Children Codes to include: All

Class Years to include: 1994, 2000

Degrees to include: All

Title: Parent Class Analysis - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Gift Reporting: Totals Only

Children Meeting Criteria: Attribute to child graduating first

Include Non-givers; Include column totals

## Parent Class Analysis - Detail

Class	Constituent Name	Amount	Pledge	Pledge Balance
CLASS OF 1994	Christopher T. Young 84 Spine Street Washington, DC 20010	\$19,725.00	\$0.00	\$0.00
		\$19,725.00	\$0.00	\$0.00
	<i>100.00%(1 out of 1) gave/pledged</i>			
CLASS OF 2000	Jason D. Campbell 911 Sycamore Drive Athens, GA 30606	\$17,650.00	\$5,000.00	\$0.00
		\$17,650.00	\$5,000.00	\$0.00
	<i>100.00%(1 out of 1) gave/pledged</i>			
	<b>Totals for All Classes</b>			
	<i>100.00% (2 out of 2) gave/pledged</i>	<b>\$37,375.00</b>	<b>\$5,000.00</b>	<b>\$0.00</b>

# Parent Class Analysis (Summary)

The summary report lists parent donors by class year. If you choose to create an output query, you can use it later to generate mailing lists. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Summary

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Appeals to include: All

Campaigns to include: All

Funds to include: All

Parent Codes to include: All

Children Codes to include: All

Class Years to include: All

Degrees to include: All

Title: Parent Class Analysis - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Gift Reporting: Totals Only

Children Meeting Criteria: Attribute to child graduating first

Include Non-givers; Include column totals

# Parent Class Analysis - Summary

Class	Amount	No. of Gifts	Pledge	No. of Gifts	Pledge Balance	No. of Gifts	Donors	Out Of	Percent
1961	\$126,625.00	12	\$0.00	0	\$0.00	0	3	3	100.00 %
1965	\$9,885.00	8	\$0.00	0	\$0.00	0	1	1	100.00 %
1978	\$800.00	2	\$15,000.00	1	\$14,250.00	1	1	1	100.00 %
1984	\$5,000.00	1	\$0.00	0	\$0.00	0	1	1	100.00 %
1985	\$425.00	3	\$0.00	0	\$0.00	0	1	1	100.00 %
1987	\$6,500.00	9	\$0.00	0	\$0.00	0	1	1	100.00 %
1989	\$11,155.00	12	\$0.00	0	\$0.00	0	1	1	100.00 %
1995	\$175,400.00	38	\$500.00	1	\$0.00	0	1	1	100.00 %
1999	\$1,130.00	3	\$0.00	0	\$0.00	0	1	1	100.00 %
2000	\$18,100.00	8	\$7,000.00	2	\$0.00	0	1	1	100.00 %
2004	\$15.00	1	\$0.00	0	\$0.00	0	1	1	100.00 %
2009	\$160,750.00	6	\$750.00	1	\$0.00	0	1	1	100.00 %
2010	\$37,075.00	6	\$0.00	0	\$0.00	0	1	1	100.00 %
2011	\$26,975.00	9	\$0.00	0	\$0.00	0	1	1	100.00 %
	<b>\$579,835.00</b>	<b>118</b>	<b>\$23,250.00</b>	<b>5</b>	<b>\$14,250.00</b>	<b>1</b>	<b>16</b>	<b>16</b>	<b>100.00 %</b>

# Solicitor Comparison Report

The **Solicitor Comparison Report** lists gift information for all or selected solicitors in your database. You can compare the total gift amount, the number of gifts, the number of donors, and the average gift amount credited to each solicitor for a specific date range. You can also view gift details for each column. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Constituent Codes to include: All

Funds to include: All

Appeals to include: All

Campaigns to include: All

Solicitors tab: Query

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Information: Total Gift Amount

Period 1: From 01/01/2005 to 03/31/2005 Total amount given, First Quarter

Period 2: From 04/01/2004 to 06/30/2005 Total amount given, Second Quarter.

Title: Solicitor Comparison Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



**Solicitor Comparison Report**

<b>Solicitor</b>	<b>First Quarter</b>	<b>Second Quarter</b>
Allison E. Andrews	\$75.00	\$100,000.00
Robert C. Hernandez	\$50.00	\$250.00
Mary Beth Richardson	\$0.00	\$0.00
Andrea L. Tidwell	\$2,000.00	\$0.00
Tyler & Hanson Associates	\$0.00	\$0.00
Nicholas Vincent	\$0.00	\$0.00

# Solicitor Goal Summary

The **Solicitor Goal Summary** provides an overview of your solicitors' fund-raising efforts. The report can include the type of goal, goals versus actual gifts received, and percentages of goals and responses. You can also include information for a campaign, fund, unspecified goal, or combination of these goals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Constituent Codes to include: All

Funds to include: All

Appeals to include: All

Campaigns to include: All

Solicitor: Pick Solicitors from List

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Solicitor Goal Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Solicitor Goal Summary

## Solicitor

Campaign Goals						
Campaign/Fund/Category	Goal	Actual	Over(Under)	Percent	Donors	Out Of
<b>Allison E. Andrews</b>						
Campaign Goals						
Playground Campaign	\$5,000.00	\$500.00	(\$4,500.00)	10.00%	1	11
Fund Goals						
Acquisition Fund	\$2,000.00	\$0.00	(\$2,000.00)	0.00%	0	2
2001 Annual Fund	\$5,000.00	\$0.00	(\$5,000.00)	0.00%	0	0
<b>Kathleen R. Bently</b>						
Campaign Goals						
Annual Campaign	\$10,000.00	\$0.00	(\$10,000.00)	0.00%	0	1
Membership Campaign	\$15,000.00	\$0.00	(\$15,000.00)	0.00%	0	4
Fund Goals						
Richard Mosley Memorial Fund	\$10,000.00	\$0.00	(\$10,000.00)	0.00%	0	0
<b>Zachery J. Clover</b>						
Campaign Goals						
Playground Campaign	\$15,000.00	\$0.00	(\$15,000.00)	0.00%	0	0
Fund Goals						
2001 Annual Fund	\$5,000.00	\$0.00	(\$5,000.00)	0.00%	0	0
Annabelle Johnson Endowment	\$5,000.00	\$0.00	(\$5,000.00)	0.00%	0	0

# Solicitor Performance Analysis (Detail)

The **Solicitor Performance Analysis** tracks the progress of your solicitors toward meeting their assigned goals. The detail report can include solicitors assigned constituents, the constituent names, the amount donated by each constituent, the total amount generated per solicitor, and the solicitor progress toward goal. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Credit matching gifts to: Donor

Report Type: Detail

Constituent Codes to include: All

Funds to include: All

Appeals to include: All

Campaigns to include: All

Solicitors tab: Pick Solicitors from List

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Solicitor Performance Analysis - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Gift Reporting: Totals Only

Include non-givers: Yes

Include Column Totals: Yes

**Solicitor Performance Analysis - Detail**

<b>Constituent</b>		<b>Amount</b>	<b>Pledge Balance</b>
Allison E. Andrews			
Elizabeth A. Ashton	No Gifts to List	\$0.00	\$0.00
Francis E. Baker		\$1,487.00	\$0.00
Timothy D. Billings	No Gifts to List	\$0.00	\$0.00
Carter Pharmaceuticals, Inc.	No Gifts to List	\$0.00	\$0.00
Davis & Johnson Pharmaceuticals		\$5,000.00	\$0.00
Ryan K. Dorrior		\$500.00	\$0.00
Paul R. Frantz		\$10,000.00	\$0.00
Jill M. Garrett		\$5,000.00	\$0.00
Betsy P. Graack	No Gifts to List	\$0.00	\$0.00
Samantha K. Hart		\$2,650.00	\$0.00
Travis D. Inman		\$50,000.00	\$0.00
Lorrel M. Justin		\$18,500.00	\$0.00
Marilyn A. Kessler	No Gifts to List	\$0.00	\$0.00
Susan E. McDonald		\$25.00	\$0.00
Pennsylvania Glass & Paint Corporation	No Gifts to List	\$0.00	\$0.00
Nancy R. Peters		\$10,000.00	\$0.00
Tenli Smyth		\$500.00	\$0.00
Winston R. Tate		\$300.00	\$0.00
Max G. Taylor		\$300.00	\$0.00
Georgia E. Thomas	No Gifts to List	\$0.00	\$0.00
Andrea L. Tidwell		\$100,050.00	\$0.00
Dianne A. Ziegler		\$5,000.00	\$0.00
		<b>\$209,312.00</b>	<b>\$0.00</b>
68.18% (15 out of 22) gave/pledged			
2001 Annual Fund Goal:	\$5,000.00		
Acquisition Fund Goal:	\$2,000.00		
Total Raised:	\$10,500.00		
Over(Under):	\$8,500.00		
Playground Campaign Goal:	\$5,000.00		
Total Raised:	\$124,325.00		
Over(Under):	\$119,325.00		
		<b>\$209,312.00</b>	<b>\$0.00</b>

# Solicitor Performance Analysis (Summary)

The summary report provides similar information but with no constituent names. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Credit matching gifts to: Donor

Report Type: Detail

Constituent Codes to include: All

Funds to include: All

Appeals to include: All

Campaigns to include: All

Solicitors tab: Pick Solicitors from List

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Solicitor Performance Analysis - Summary

Include non-givers: Yes

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Gift Reporting: Totals Only

Include Column Totals: Yes

**Solicitor Performance Analysis - Summary**

<b>Solicitor</b>	<b>Amount</b>	<b>Pledge Balance</b>	<b>Goal</b>	<b>Over(Under)</b>	<b>Donors</b>	<b>Out Of</b>	<b>Percent</b>
Allison E. Andrews	\$209,312.00	\$0.00	\$12,000.00	\$122,825.00	15	22	68.18%
Kathleen R. Bently	\$2,050.00	\$0.00	\$35,000.00	(\$32,950.00)	2	6	33.33%
Zachery J. Clover	\$26,950.00	\$0.00	\$25,000.00	\$1,950.00	1	1	100.00%
Ellen H. Crenshaw	\$21,640.00	\$0.00	\$20,000.00	(\$6,400.00)	10	14	71.43%
Angela Diresta	\$1,000.00	\$0.00	\$5,000.00	(\$4,000.00)	1	1	100.00%
Joseph P. Diresta	\$2,500.00	\$0.00	\$5,000.00	(\$5,000.00)	2	3	66.67%
	<b>\$263,452.00</b>	<b>\$0.00</b>	<b>\$322,000.00</b>	<b>(\$143,575.00)</b>	<b>30</b>	<b>44</b>	<b>68.18%</b>

# SYBUNT Report

The **SYBUNT Report** (some years but unfortunately not this) provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify. The last gift donated and the date of the gift appear with the constituent name. Because last year is also “some year,” donors appearing on the **LYBUNT Report** can also appear on the **SYBUNT Report**. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include Constituents Who Gave a Gift but Not Within this Date Range:  
Date to use: Gift date; Date: This calendar yr

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: SYBUNT Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail order: Constituent last name

Optional Columns: Gift funds, Total amount given



## SYBUNT Report

Constituent Name	Fund(s)	Last Gift Date	Total Given
Anonymous	Smith-Brown Scholarship Fund	\$200.00 07/08/2005	\$400.00
Lucy G. Avdeenko 52 Pebble Lane Kennebunkport, ME 04046	Playground Site	\$75.00 05/11/2008	\$1,100.00
Jennifer A. Kovalak 844 Ft. Johnson Lane Columbus, GA 31995	Botanical Garden Fund	\$125.00 10/24/2008	\$20,350.00
Lavern E. Nivens 8328 Chalmers Street Richmond, VA 23233	Smith-Brown Scholarship Fund	\$50.00 02/08/2004	\$50.00
Sidney L. Prescott 1425 White Point Road Building 250 Boston, MA 02116	Acquisition Fund	\$275.00 07/30/2004	\$275.00
Kyle M. Rhodes 12 Jane Way Edinburg, IL 62531	Playground Site	\$75.00 05/17/2008	\$300.00
John T. Smith 621 Winder Road Louisville, KY 40213	Acquisition Fund	\$250.00 08/29/2007	\$150,325.00
Tenli Smyth 2510 College Avenue Apartment #12 Oakland, CA 94618	Building Fund	\$500.00 01/22/2003	\$500.00
Daniel R. Snyder 74 Carter Avenue Portland, ME 04108	Acquisition Fund	\$175.00 02/13/2004	\$175.00
<b>GRAND TOTALS:</b>		<b>\$1,725.00</b>	<b>\$173,475.00</b>
<b>A Total of 8 Constituent(s) Listed</b>			

# Top Donors Report

The **Top Donors Report** provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 10% of your donors, top five donors, top 99 donors). The report ranks and displays the total number of gifts, the total amount donated, and provides giving level information alphabetically or by gift size. The report title changes automatically to reflect whether you are reporting by count or percentage. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Solicitors to include: All

Selected gift types: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Top Donors Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail order: Amount given

Top Donor Criteria: Top 10 Count

## Top Donors Report

Rank	Constituent Name	No. Gifts	Amount Given
1	Travis D. Inman 2223 Sweetwater Lane Cincinnati, OH 45223	4	\$253,550.00
2	Robert C. Hernandez 410 17th St Denver, CO 80202-4402	48	\$225,700.00
3	John T. Smith 621 Winder Road Louisville, KY 40213	3	\$150,325.00
4	Ira M. Rosenberg 251 Fifth Avenue New York, NY 10128	4	\$52,300.00
5	Nancy R. Peters 158 Columbus Drive Cincinnati, OH 45201	5	\$26,250.00
6	Otto G. Montgomery 11 Shell Street Oklahoma City, OK 73114	3	\$25,100.00
7	Jennifer A. Kovalak 844 Ft. Johnson Lane Columbus, GA 31995	7	\$20,350.00
8	Stella S. White 22-B Cooper Way Coffman Cove, AK 99918	7	\$7,500.00
9	David M. Korbin 1230 Pelican Point Dover, DE 19707	9	\$6,625.00
10	Roger B. Langley 18 Hassell Street San Antonio, TX 78218	6	\$6,450.00
<b>GRAND TOTALS:</b>		<b>96</b>	<b>\$774,150.00</b>
<b>A Total of 10 Constituent(s) Listed</b>			

# VSE Survey Report

The **VSE Survey Report** is used to calculate certain sections of the Voluntary Support of Education Survey. Please note that not all sections of the survey are calculated in *The Raiser's Edge*. Also, not all gift types are calculated. For example, *The Raiser's Edge* does not include calculation for deferred gifts such as planned giving. For official sample reports and supplemental information, see the VSE Web site at [www.cae.org](http://www.cae.org).

The **VSE Survey Report** collects detailed information from colleges, universities, and private elementary and secondary schools on private gifts and grants received from alumni, parents, other individuals, foundations, corporations, and other organizations. In addition to gift income, the survey gathers data on enrollment, endowment market value, and educational and general expenditures from each institution. Independent schools are asked to provide a total advancement program expenditure figure as well.

Participation in the survey is voluntary. Reporting is consistent with the guidelines set forth in *CASE Management Reporting Standards: Standards for Annual Giving and Campaigns in Educational Fund Raising, 1996*, available from CASE (Council for Advancement and Support of Education, 202-328-5900, [www.case.org](http://www.case.org)).

The **VSE Survey Report** category that donors and their gifts fall under is determined by the constituent codes on the Bio 2 tab of the constituent's record. Constituent codes attached to the gift record do not determine the category. The constituent code Alumnus takes precedence over any other code. If Alumnus is not listed first in a record's list of constituent codes, but is present on the list, the donor is still counted as an Alumnus in the report. Section IV of the report can track multiple alumni codes. If a constituent has multiple codes, for example Alumni-Graduate and Alumni-Undergraduate, the first alumni code in the list determines the code associated with the constituent. The exact data included depends on your parameter tab settings.

## Report Parameters

This sample report was generated based on the VSE Report program default settings.

**VSE Survey Report**

Start Date: 01/01/2004 End Date 12/31/2004

**Section I A. Outstanding Pledges**

1. For current operations
2. For capital purposes
3. Total

No. of Pledges	Amount
0	\$0.00
0	\$0.00
0	\$0.00

**Section III Current Outright Gifts at Face Value****A. Current Operations**

1. Unrestricted
2. Academic Restricted
3. Total Current Operations (add 1-2)

Alumni A	Parents B.1.	Grandparents B.2.	Other C
\$0.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00

**B. Capital Purposes**

4. Property, Building, Equipment
5. Endowment-Unrestricted
6. Endowment-Restricted
7. Loan Funds
8. Total Capital Purposes (add 4-7)

\$0.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00

**TOTAL OUTRIGHT GIFTS**

9. Curr. Ops&Cap. Purp.(add3+8)

\$0.00	\$0.00	\$0.00	\$0.00
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# Campaigns, Funds, and Appeals Reports

## Contents

---

Appeal Comparison Summary .....	58
Appeal Cost Breakdown.....	60
Appeal Detail Report .....	62
Appeal Goal Summary.....	64
Appeal Performance Analysis .....	66
Appeal Summary List.....	68
Campaign Comparison Summary.....	70
Campaign Detail Report .....	72
Campaign Fund Analysis.....	74
Campaign Gift Analysis.....	76
Campaign Goal Summary .....	78
Campaign Performance Analysis .....	80
Campaign Progress Report .....	82
Campaign Summary List.....	84
Fund Comparison Summary.....	86
Fund Detail Report.....	88
Fund Goal Summary .....	90
Fund Performance Analysis.....	92
Fund Summary List .....	94

# chapter 3

# Appeal Comparison Summary

The **Appeal Comparison Summary** compares different appeals. You can use the report to review the effectiveness of appeals. You can also produce a graph of the report results. The report lists appeals with the amount generated for each report period you define. Totals also appear for each report period, so you can compare appeals or report periods. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift date

Dates: Include all dates

Soft credit option: Donor

Credit Matching Gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Appeals: All

Constituent Codes to include: All

Gift Solicitors to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind

Exclude zero amounts: Yes

Use gift balance instead of gift amount: Yes

Calculate gift balance based on date range, campaign, fund, and appeal: yes

Report Periods: 01/01/2004 to 12/31/2004; 01/01/2005 to 12/31/2005.

Headings: 2004, 2005.

Title: Appeal Comparison Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include package information: Yes



**Appeal Comparison Summary**

<b>Appeal Package</b>	<b>2004</b>	<b>2005</b>
1998 Annual Mailing	\$0.00	\$0.00
1998 Annual Phonathon	\$0.00	\$0.00
1999 Annual Mailing	\$0.00	\$0.00
1999 Annual Phonathon	\$0.00	\$0.00
1999 President's Breakfast	\$0.00	\$0.00
2000 Annual Phonathon	\$0.00	\$0.00
2000 President's Breakfast	\$0.00	\$0.00
2001 Annual Phonathon	\$0.00	\$0.00
2002 Direct Mailing	\$0.00	\$0.00
2002 Phonathon	\$0.00	\$0.00
2003 Direct Mailing	\$0.00	\$0.00
Annual Exhibit	\$425.00	\$3,000.00
Annual Mailing	\$0.00	\$150.00
Annual mailing with color brochur	<i>\$0.00</i>	<i>\$0.00</i>
Packages Totals:	<i>\$0.00</i>	<i>\$0.00</i>
Annual Newsletter	\$3,775.00	\$775.00
Camp Kids Newsletter	\$0.00	\$0.00
Newsletter-Color	<i>\$0.00</i>	<i>\$0.00</i>
Newsletter-Black/White	<i>\$0.00</i>	<i>\$0.00</i>
Newsletter with hand-written letter	<i>\$0.00</i>	<i>\$0.00</i>
Packages Totals:	<i>\$0.00</i>	<i>\$0.00</i>
Celebrity Auction	\$350.00	\$8,300.00
Celebrity Auction page on the Web	<i>\$0.00</i>	<i>\$0.00</i>
Weekly drive time spot on WGIV	<i>\$0.00</i>	<i>\$2,000.00</i>
Packages Totals:	<i>\$0.00</i>	<i>\$2,000.00</i>
Direct Mailing	\$50,000.00	\$0.00
Holiday Cocktail Hour and Dinner P	\$0.00	\$0.00
Holiday Event Volunteer Opportun	<i>\$0.00</i>	<i>\$0.00</i>
Holiday Cocktail Hour and Dinner	<i>\$0.00</i>	<i>\$0.00</i>
Holiday Dinner	<i>\$0.00</i>	<i>\$0.00</i>
Packages Totals:	<i>\$0.00</i>	<i>\$0.00</i>

# Appeal Cost Breakdown

The **Appeal Cost Breakdown** provides details about expenditures related to an appeal. This is particularly useful in tracking total costs of an appeal and determining the appeal's success. You can produce a graph of the report results. This report includes the appeal ID and description, expense description, comments, date, subtotals, and grand totals of costs. You can choose to report on cost information for all appeals or selected appeals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Appeals: Internet, Open House Letter, Planned Giving Letter

Title: New Appeal Cost Breakdown

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Include package information = Yes; Include budget amounts = Yes

# Appeal Cost Breakdown

Appeal ID	Description	Package	Comment	Date	Amount
INTERNET	Internet/Web Site solicitations				
	Design work				\$1,500.00
	Web site maintenance		Annual Contract		\$5,000.00
				INTERNET Total:	\$6,500.00
NEWSLETTER	Annual Newsletter				
	Printing				\$500.00
	Design work		J & J Graphics		\$125.00
	Postage		USS		\$200.00
				NEWSLETTER Total:	\$825.00
PG LETTER	Planned Giving Letter				
	Postage		USPS		\$188.00
				PG LETTER Total:	\$188.00
				<b>GRAND TOTALS:</b>	<b>\$7,513.00</b>
				<b>A Total of 3 Appeal(s) Listed</b>	

# Appeal Detail Report

The **Appeal Detail Report** provides a basic description of information entered in the appeal record. You can include a list of your appeals with appeal ID, goal, start and end dates, default campaign and fund, number solicited during the appeal, and notes about the appeal. You can also choose to display each appeal on a separate page. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Appeals to include: Internet

Title: Appeal Detail Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Campaigns to include: All

Funds to include: All

Include appeal notes: Yes

Sort Order: Appeal Description Asc

**Appeal Detail Report**

**Appeal ID:** INTERNET  
**Description:** Internet/Web Site solicitations  
**Goal:** \$0.00  
**Start date:**  
**End date:**  
**No. Solicited:** 1,108  
**Campaigns:** ANNUAL (Annual Campaign)  
CAPITAL (Capital Campaign)  
RELIEF (Disaster Relief Campaign)  
ENDOW (Endowment Campaign)  
MEMBER (Membership Campaign)  
SCHOLAR (Scholarship Campaign)  
PLAYGROUND (Playground Campaign)  
PLANNED (Planned Giving Campaign)  
**Funds:** DISASTER (Natural Disaster Relief Fund)  
DEVELOPMENT (President's Development Fund)  
SBSF (Smith-Brown Scholarship Fund)  
RMMF (Richard Mosley Memorial Fund)  
INTERNATIONAL (International Relief Fund)  
CAMP (Camp Kids Scholarship)  
JOHNSON (Annabelle Johnson Endowment)  
2004ANNUAL (2004 Annual Fund)  
2005ANNUAL (2005 Annual Fund)  
2004MEMBER (2004 Membership Fund)  
2005MEMBER (2005 Membership Fund)  
2006ANNUAL (2006 Annual Fund)  
**Notes:** This appeal is used for donations that originate from the Donation page of our Web site.  
Constituents can send in a pledge or donation directly from the Web site.

# Appeal Goal Summary

The **Appeal Goal Summary** compares your goals to the actual gifts received. It also includes responses to appeals and other statistical information about relationships among your campaigns, funds, and appeals. You can produce a graph of the report results. You can also view the number of constituents solicited by an appeal and the number who actually contributed. The cost of the appeal divided by the amount raised indicates the overall effectiveness of your appeal. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: Include all dates

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: All

Funds: All

Appeals: Membership Mailing

Constituent Codes: All

Gift Solicitors: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MGPAY-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind

Exclude zero gift amounts: Yes

User gift balance instead of gift amount: Yes

Title: Appeal Goal Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Appeal Goal Summary

Appeal	Overall Goal	Actual	Over (Under)	% of Goal	No. Solicited	No. Donors	% Resp.	Cost/\$Raised
<b>Membership Mailing</b>	\$0.00	\$6,405.00	\$6,405.00	0.00%	711	7	0.98%	\$0.00
<i>Campaigns</i>								
<Unknown>	\$0.00	\$1,035.00	\$1,035.00	0.00%		2		
Disaster Relief Campaig	\$10,000,000.00	\$1,000.00	(\$9,999,000.00)	0.01%		1		
Membership Campaign	\$1,000,000.00	\$4,370.00	(\$995,630.00)	0.44%		7		
<i>Funds</i>								
2002 Membership Fund	\$50,000.00	\$2,650.00	(\$47,350.00)	5.30%		4		
2004 Membership Fund	\$100,000.00	\$1,050.00	(\$98,950.00)	1.05%		2		
2005 Membership Fund	\$125,000.00	\$35.00	(\$124,965.00)	0.03%		1		
2006 Membership Fund	\$130,000.00	\$1,670.00	(\$128,330.00)	1.28%		6		
Natural Disaster Relief F	\$2,000,000.00	\$1,000.00	(\$1,999,000.00)	0.05%		1		

# Appeal Performance Analysis

The **Appeal Performance Analysis** tracks the success of an appeal. You can run the report for more than one appeal and compare grand totals and donors. This report is especially helpful for comparing results obtained from different types of appeals. The report includes the number of constituents solicited, number of gifts and donors, percentage responding, total donated, average size of gift, average gift per donor, amount over/under goal, total cost of the appeal, and cost of the appeal per dollar donated and per donor. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: This month (May 2006)

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Appeals: All

Funds: All

Campaigns: All

Constituent Codes: All

Gift Solicitors: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind

Exclude zero amount gifts

Use gift balance instead of gift amount

Title: Appeal Performance Analysis

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include package information: Yes

Sort on: Appeal Description Asc



### Appeal Performance Analysis

Appeal Package	No. Sols % Resp	Gifts Donors	Total Given Total Cost	Avg/Gift Avg/Donor	Goal Over(Under)	Cost/Gift Cost/Donor
Annual Exhibit	660 0.15%	1 1	\$2,000.00 \$0.00	\$2,000.00 \$2,000.00	\$50,000.00 (\$48,000.00)	\$0.00 \$0.00
Proposal Appeal	14 7.14%	1 1	\$10,000.00 \$0.00	\$10,000.00 \$10,000.00	\$10,000,000.00 (\$9,990,000.00)	\$0.00 \$0.00
Unsolicited	69 2.90%	2 2	\$23,500.00 \$0.00	\$11,750.00 \$11,750.00	\$0.00 \$23,500.00	\$0.00 \$0.00
<b>GRAND TOTALS:</b>	<b>743 0.54%</b>	<b>4 4</b>	<b>\$35,500.00 \$0.00</b>	<b>\$8,875.00 \$8,875.00</b>	<b>\$10,050,000.00 (\$10,014,500.00)</b>	<b>\$0.00 \$0.00</b>
<b>Actual Counts:</b>		<b>4 4</b>		<b>\$8,875.00 \$8,875.00</b>		<b>\$0.00 \$0.00</b>
<b>A Total of 3 Appeal(s) Listed</b>						

# Appeal Summary List

The **Appeal Summary List** provides an overview of an appeal and the campaigns to which it is associated. The report does not show any gift amounts or expenses. You can include summary information about all of your appeals, selected appeals, or just one appeal. The report includes the appeal ID and description, starting and ending dates, the goal, and names of the associated campaign and funds. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Appeals: All

Title: Appeal Summary List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include package information: Yes

Sort on: Appeal Description Asc

## Appeal Summary List

Appeal ID	Description	Start date	End date	Goal	Default Campaign ID
2001 Phone	2001 Annual Phonathon	01/01/2001	12/31/2001	\$0.00	
NEWSLETTER	Annual Newsletter			\$250,000.00	RELIEF
DIRECT MAIL	Direct Mailing			\$0.00	
INTERNET	Internet/Web Site solicitations			\$0.00	
MEMBERMAIL	Membership Mailing	01/01/2000		\$0.00	MEMBER
Newsletter	Newsletter Envelope			\$0.00	
Newsletter-Calen	Newsletter with Calendar of Even			\$0.00	
	<i>Packages Total:</i>			<u>\$0.00</u>	
PG LETTER	Planned Giving Letter			\$200,000.00	ENDOW
PROPOSAL	Proposal Appeal	01/01/2000		\$10,000,000.00	
UNSOL	Unsolicited			\$0.00	
<b>GRAND TOTALS:</b>				<b>\$10,450,000.00</b>	
<b>A Total of 8 Appeal(s) Listed</b>					

# Campaign Comparison Summary

The **Campaign Comparison Summary** compares campaign performances. The summary lists selected campaigns and provides the total amount of gifts donated to each. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift date

Dates: Include all dates

Soft credit option: Donor

Credit Matching Gifts to: MG Company

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: All

Constituent Codes to include: All

Gift Solicitors to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Report Periods: 01/01/2004 to 12/31/2004; 01/01/2005 to 12/31/2005.  
Headings: 2004, 2005.

Title: Campaign Comparison Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Campaign Comparison Summary**

<b>Campaign</b>	<b>2004</b>	<b>2005</b>
Annual Campaign	\$400.00	\$212,500.00
Capital Campaign	\$29,395.00	\$17,280.00
Disaster Relief Campaign	\$51,275.00	\$62,685.00
Endowment Campaign	\$325.00	\$1,175.00
Membership Campaign	\$1,050.00	\$5,500.00
Planned Giving Campaign	\$10,000.00	\$0.00
Playground Campaign	\$0.00	\$0.00
Scholarship Campaign	\$55,400.00	\$200.00
<b>GRAND TOTALS:</b>	<b>\$147,845.00</b>	<b>\$299,340.00</b>
<b>A Total of 8 Campaign(s) Listed</b>		

# Campaign Detail Report

The **Campaign Detail Report** provides a basic description of information entered in the campaign record. It produces a list of your campaigns with ID, goal, and start and end dates. You can also display each campaign on a separate page. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Campaigns: Capital

Title: Campaign Detail Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Appeals to include: All

Funds to include: All

Include campaign notes: Yes

Sort Order: Campaign Description Asc

**Campaign Detail Report**

**Campaign ID:** CAPITAL  
**Description:** Capital Campaign  
**Goal:** \$10,000,000.00  
**Start date:** 01/01/1997  
**End date:** 12/31/2017  
**Funds:** GARDEN (Botanical Garden Fund)  
BUILDING (Building Fund)  
DEVELOPMENT (President's Development Fund)  
ACQUISITION (Acquisition Fund)  
**Appeals:** NEWSLETTER (Annual Newsletter)  
YEAREND (Year End Appeal)  
OPENHOUSE (Open House Letter)  
UNSOL (Unsolicited)  
2000BREAKFAST (2000 President's Breakfast)  
INTERNET (Internet/Web Site solicitations)  
PROPOSAL (Proposal Appeal)  
**Events:**  
**Notes:** The Capital Campaign was launched on January 1, 1997 with a day of fundraising forums and gala festivities. The campaign will raise \$10 million over the next twenty years. John Smith is our dedicated Campaign Manager.

# Campaign Fund Analysis

Available in the *The Raiser's Edge Enterprise*, the **Campaign Fund Analysis Report** displays selected gift and goal data along with statistics for selected funds. You can base the report on campaign or reporting hierarchy information. The report includes gift totals, goals, progress versus goals, and gift statistics for each fund included in the campaign giving hierarchy or reporting hierarchy.

## Report Parameters

Records to include: Query

Report on: Campaign; Capital

Include gifts with these dates: Date to use = Gift Date; Dates: Include all dates

Soft Credit Gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts To: MG Company

Campaigns: All

Funds: All

Constituent Codes to include: All

Gift Solicitors: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Columns: % of Goal; Goal; Pledges, Outstanding Pledges

Title: Campaign Fund Analysis

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Fund Display Format: Description

Show Hierarchy: Entire Hierarchy

Gift Distribution: Balance against Goals



### Campaign Fund Analysis

<b>Fund Hierarchy</b>	<b>Total Gifts</b>	<b>Over (Under)</b>	<b>% of Goal</b>	<b>Goal</b>	<b>Pledges</b>	<b>tstanding Pledges</b>
Capital Campaign	\$231,740.00	(\$9,768,260.00)	2.32%	\$10,000,000.00	\$1,000.00	\$800.00
Botanical Garden Fund	\$15,515.00	(\$484,485.00)	3.10%	\$500,000.00	\$1,000.00	\$800.00
Building Fund	\$179,425.00	(\$9,820,575.00)	1.79%	\$10,000,000.00	\$0.00	\$0.00
President's Development Fund	\$28,800.00	(\$471,200.00)	5.76%	\$500,000.00	\$0.00	\$0.00
Acquisition Fund	\$8,000.00	(\$492,000.00)	1.60%	\$500,000.00	\$0.00	\$0.00
<b>Campaign Totals</b>	<b>\$231,740.00</b>	<b>(\$9,768,260.00)</b>	<b>2.32%</b>	<b>\$10,000,000.00</b>	<b>\$1,000.00</b>	<b>\$800.00</b>

A total of 4 Fund(s) Listed

# Campaign Gift Analysis

Available in the *The Raiser's Edge Enterprise*, the **Campaign Gift Analysis Report** displays detailed information about individual gifts, as well as aggregate gift data for selected funds. You can base the report on campaign or reporting hierarchy information. The report includes, gift details, gift totals, goals, progress verses goals, and gift statistics for each fund included in the campaign giving hierarchy or reporting hierarchy.

## Report Parameters

Records to include: Query

Report on: Campaign; Capital

Include gifts with these dates: Date to use = Gift Date; Dates: Include all dates

Soft Credit Gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Pledge Type: Master

Credit Matching Gifts To: MG Company

Campaigns: All

Funds: Building

Constituent Codes to include: All

Gift Solicitors: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Columns: Default

Title: Campaign Gift Analysis

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Campaign Gift Analysis

Hierarchy/Fund/Constituent	Gift Date	Gift Amount	Gift Type
Capital Campaign		\$179,425.00	
Botanical Garden Fund		\$0.00	
Building Fund		\$179,425.00	
Jennifer A. Kennick	11/13/2006	\$50.00	Cash
David M. Korbin	02/18/2006	\$250.00	Cash
Roger B. Langley	01/27/2006	\$1,000.00	Cash
Orla A. McGrann	07/07/2008	\$175.00	Cash
Otto G. Montgomery	11/15/2004	\$25,000.00	Stock/Property
Kyle M. Rhodes	04/02/2007	\$100.00	Cash
Monica L. Sharp	09/18/2001	\$50.00	Cash
Monica L. Sharp	07/30/2002	\$200.00	Cash
Monica L. Sharp	06/30/2003	\$50.00	Cash
Monica L. Sharp	04/22/2004	\$550.00	Cash
Monica L. Sharp	02/08/2005	\$500.00	Cash
John T. Smith	01/22/2003	\$150,000.00	Cash
Tenli Smyth	01/22/2003	\$500.00	Cash
Stella S. White	07/01/2005	\$1,000.00	Recurring Gift Pay-Cash
President's Development Fund		\$0.00	
Acquisition Fund		\$0.00	
<b>Campaign Totals</b>		<b>\$179,425.00</b>	
<b>A Total of 4 Fund(s) Listed</b>			
<b>A Total of 14 Gift(s) Listed</b>			
<b>A Total of 10 Constituent(s) Listed</b>			

# Campaign Goal Summary

The **Campaign Goal Summary** compares campaign goals to actual gifts received. The difference between the goal and the amount received is presented as a dollar amount and as a percentage. You can also view the number of constituents solicited for a campaign and the number who actually contributed. The cost of the campaign divided by the amount raised indicates the overall effectiveness of your campaign. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift date

Dates: Include all dates

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: Annual

Funds: All

Appeals: All

Constituent Codes: All

Gift Solicitors: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MGPAY-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind

Exclude zero gift amounts: Yes

User gift balance instead of gift amount: Yes

Calculate gift balance based on date range, campaign, fund and appeal: Yes

Title: Campaign Goal Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

# Campaign Goal Summary

Campaign	Overall Goal	Actual	Over (Under)	% of Goal	No. Solicited	No. Donors	% Resp.	Cost/ \$Raised
<b>Annual Campaign</b>	\$2,000,000.00	\$239,125.00	(\$1,760,875.00)	11.96%		18		
<i>Funds</i>								
2000 Annual Fund	\$100,000.00	\$500.00	(\$99,500.00)	0.50%		1		
2001 Annual Fund	\$200,000.00	\$550.00	(\$199,450.00)	0.28%		2		
2002 Annual Fund	\$200,000.00	\$250.00	(\$199,750.00)	0.13%		1		
2003 Annual Fund	\$200,000.00	\$100.00	(\$199,900.00)	0.05%		1		
2004 Annual Fund	\$500,000.00	\$400.00	(\$499,600.00)	0.08%		3		
2005 Annual Fund	\$600,000.00	\$206,200.00	(\$393,800.00)	34.37%		6		
2006 Annual Fund	\$650,000.00	\$2,450.00	(\$647,550.00)	0.38%		7		
2007 Annual Fund	\$700,000.00	\$5,375.00	(\$694,625.00)	0.77%		4		
Acquisition Fund	\$500,000.00	\$4,500.00	(\$495,500.00)	0.90%		2		
Botanical Garden Fund	\$500,000.00	\$5,000.00	(\$495,000.00)	1.00%		1		
President's Development F	\$500,000.00	\$13,800.00	(\$486,200.00)	2.76%		3		
<i>Appeals</i>								
<Unknown>	\$0.00	\$3,675.00	\$3,675.00	0.00%	0	8	0.00%	\$0.00
2001 Annual Phonathon	\$0.00	\$500.00	\$500.00	0.00%	12	1	8.33%	\$0.00
2002 Phonathon	\$0.00	\$250.00	\$250.00	0.00%	9	1	11.11%	\$0.00
Annual Exhibit	\$50,000.00	\$3,150.00	(\$46,850.00)	6.30%	660	2	0.30%	\$0.00
Annual Mailing	\$1,000,000.00	\$650.00	(\$999,350.00)	0.07%	20	2	10.00%	\$0.00
Annual Newsletter	\$250,000.00	\$175.00	(\$249,825.00)	0.07%	6,564	2	0.03%	\$4.71
Celebrity Auction	\$100,000.00	\$500.00	(\$99,500.00)	0.50%	2,509	1	0.04%	\$0.00
Direct Mailing	\$0.00	\$5,275.00	\$5,275.00	0.00%	30	3	10.00%	\$0.00
Internet/Web Site solicit	\$0.00	\$5,000.00	\$5,000.00	0.00%	1,108	1	0.09%	\$1.30
Millennium Direct Maili	\$0.00	\$550.00	\$550.00	0.00%	7,503	2	0.03%	\$4.23
Proposal Appeal	\$10,000,000.00	\$200,000.00	(\$9,800,000.00)	2.00%	14	1	7.14%	\$0.00
Unsolicited	\$0.00	\$15,600.00	\$15,600.00	0.00%	69	4	5.80%	\$0.00
Year End Appeal	\$500,000.00	\$3,800.00	(\$496,200.00)	0.76%	1,211	2	0.17%	\$0.02

# Campaign Performance Analysis

The **Campaign Performance Analysis** compares the campaign goal, the number of donors, and gifts donated to the campaign. This report does not include constituent names. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: Include all dates

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: Capital, Annual, Endowment, and Membership

Funds: All

Appeals: All

Constituent Codes: All

Gift Solicitors: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MGPAY-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind

Exclude zero gift amounts: Yes

User gift balance instead of gift amount: Yes

Title: Campaign Performance Analysis

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort on: Campaign Description Asc

### Campaign Performance Analysis

Campaign	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
Annual Campaign	18	\$13,284.72	32	\$7,472.66	\$239,125.00	\$2,000,000.00	(\$1,760,875.00)	11.96%
Capital Campaign	10	\$5,301.50	29	\$1,828.10	\$53,015.00	\$10,000,000.00	(\$9,946,985.00)	0.53%
Endowment Campa	8	\$490.63	19	\$206.58	\$3,925.00	\$50,000,000.00	(\$49,996,075.00)	0.01%
Membership Campa	9	\$1,100.56	16	\$619.06	\$9,905.00	\$1,000,000.00	(\$990,095.00)	0.99%
<b>GRAND TOTALS:</b>	<b>45</b>	<b>\$6,799.33</b>	<b>96</b>	<b>\$3,187.19</b>	<b>\$305,970.00</b>	<b>\$63,000,000.00</b>	<b>(\$62,694,030.00)</b>	<b>0.49%</b>
Actual Counts:	23	\$13,303.04	96	\$3,187.19				
A Total of 4 Campaign(s) Listed								

# Campaign Progress Report

The **Campaign Progress Report** tracks a campaign's progress toward its goal. Only "new dollars" donated during the time period you select are reported as income. Pledge payments made outside the date range of the report are not considered new dollars. The program summarizes information based on constituent codes. The report shows you the number of donors, outstanding pledges, number of donors pledging, and an overall total with income and outstanding pledges. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: Include all dates

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: All

Funds: All

Appeals: All

Constituent Codes: All

Gift Solicitors: All

Gift types: All

Exclude zero gift amounts: Yes

Title: Campaign Progress Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



# Campaign Progress Report

Constituent Code	Income	No. of Donors	Outstanding Pledges	Donors Pledged	Total Inc+Plg	Donors Total	Const. Sol.	% Partic.
<Unknown>	\$1,189.00	4	\$800.00	1	\$1,989.00	4	4	100.00%
Board Member	\$78,125.00	1	\$50.00	1	\$78,175.00	1	1	100.00%
Friend	\$2,175.00	2	\$0.00	0	\$2,175.00	2	2	100.00%
Staff Doctor	\$500.00	1	\$0.00	0	\$500.00	1	1	100.00%
Volunteer	\$716,915.00	24	\$0.00	0	\$716,915.00	24	24	100.00%
	\$798,904.00	32	\$850.00	2	\$799,754.00	32	32	

## Campaign Totals

Target Amount	\$80,000,000.00
Over(Under) Target	(\$79,200,246.00)
Percent of Targeted Amount	1.00%

## Fund Totals

Target Amount	\$40,625,000.00
Over(Under) Target	(\$39,825,246.00)
Percent of Targeted Amount	1.97%

# Campaign Summary List

The **Campaign Summary List** provides an overview of a campaign, including a description of the campaign, its start and end dates, goal, and funds associated with the campaign. You can include summary information about all of your campaigns, selected campaigns, or just one campaign. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Dates: Include all dates

Campaigns: All

Title: Campaign Summary List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Campaign Description Asc

### Campaign Summary List

Campaign ID	Description	Start Date	End Date	Goal	Default Fund
ANNUAL	Annual Campaign	01/01/1990	12/31/2010	\$2,000,000.00	
CAPITAL	Capital Campaign	01/01/1997	12/31/2017	\$10,000,000.00	
RELIEF	Disaster Relief Campaign	01/01/2000		\$10,000,000.00	
ENDOW	Endowment Campaign	01/01/2000	12/31/2010	\$50,000,000.00	
MEMBER	Membership Campaign	01/01/1997	12/31/2010	\$1,000,000.00	
PLANNED	Planned Giving Campaign	01/01/2000		\$0.00	
PLAYGROUND	Playground Campaign	01/01/2000	12/31/2010	\$2,000,000.00	
SCHOLAR	Scholarship Campaign	01/01/2000	06/30/2015	\$5,000,000.00	
<b>GRAND TOTALS:</b>				<b>\$80,000,000.00</b>	
<b>A Total of 8 Campaign(s) Listed</b>					

# Fund Comparison Summary

The **Fund Comparison Summary** compares different funds. The summary lists selected funds and provides the total amount of gifts donated to each. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift date

Dates: Include all dates

Soft credit option: Donor

Credit Matching Gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Funds: Acquisition Fund; Building Fund; International Relief Fund; Membership Fund

Constituent Codes to include: All

Gift Solicitors to include: All

Gift types to include: All

Exclude zero amounts: Yes

Use gift balance instead of gift amount: Yes

Report Periods: 01/01/2004 to 12/31/2004; 01/01/2005 to 12/31/2005.  
Headings: 2004, 2005.

Title: Fund Comparison Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Fund Comparison Summary**

<b>Fund</b>	<b>2004</b>	<b>2005</b>
2008 Membership Fund	\$0.00	\$0.00
Acquisition Fund	\$450.00	\$5,300.00
Building Fund	\$25,550.00	\$1,500.00
International Relief Fund	\$50,000.00	\$160.00
<b>GRAND TOTALS:</b>	<b>\$76,000.00</b>	<b>\$6,960.00</b>
<b>A Total of 4 Fund(s) Listed</b>		

LastRec

# Fund Detail Report

The **Fund Detail Report** displays basic information entered on the fund record. It prints a list of your funds with the ID, goal, start and end dates, and notes. It also gives you information about any restrictions on the fund and a summary of the *General Ledger* account distribution associated with the selected funds. You can display each fund on a separate page. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: Include all dates

Funds: Building Fund; Natural Disaster Relief Fund

Title: Fund Detail Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Campaigns to include: All

Appeals to include: All

Include fund notes: Yes

Sort Order: Fund Description Asc

**Fund Detail Report**

**Fund ID:** BUILDING  
**Description:** Building Fund  
**Goal:** \$10,000,000.00  
**Category:** Capital  
**Start date:** 01/01/2000  
**End date:**  
**Restricted:** No  
**Campaigns:** PLAYGROUND (Playground Campaign)  
 CAPITAL (Capital Campaign)  
 PLANNED (Planned Giving Campaign)  
 PROPOSAL (Proposal Appeal)  
 DIRECT MAIL (Direct Mailing)  
**Appeals:**  
**Notes:**

**Fund ID:** DISASTER  
**Description:** Natural Disaster Relief Fund  
**Goal:** \$2,000,000.00  
**Category:** Capital  
**Start date:**  
**End date:**  
**Restricted:** Yes  
**Campaigns:** RELIEF (Disaster Relief Campaign)  
 INTERNET (Internet/Web Site solicitations)  
 WALK-A-THON (Walk-A-Thon)  
 DIRECT MAIL (Direct Mailing)  
**Appeals:**  
**Notes:**

General Ledger Accounts		
Gift Type	Debit Account	Credit Account
Cash	01-111100-00-00	01-413050-00-02
Pledge Pay - Cash	01-111100-00-00	01-413050-00-02
Matching Gift Pledge Pay - Cash	01-111100-00-00	01-413050-00-02
Gift-in-Kind	01-151000-00-00	01-413400-00-02
Pledge Pay - Gift-in-Kind	01-151000-00-00	01-112300-00-00
Matching Gift Pledge Pay - Gift-in-Kind	01-151000-00-00	01-112300-00-00
Other Gift	01-151000-00-00	01-413400-00-02
Pledge Pay - Other	01-151000-00-00	01-112300-00-00
Matching Gift Pledge Pay - Other	01-151000-00-00	01-112300-00-00
Unsold Stock/Property	01-132000-00-00	01-413050-00-00
Pledge Pay - Stock/Property	01-132000-00-00	01-112300-00-00

# Fund Goal Summary

The **Fund Goal Summary** compares fund goals to the actual gifts received. The difference between the goal and the amount received is presented as a dollar amount and as a percentage. You can include the total amount raised for each goal, the number of constituents solicited for a fund, and how many actually contributed. The cost of the fund divided by the amount raised indicates the overall effectiveness of your fund. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: Include all dates

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: All

Funds: Acquisition Fund; Botanical Garden Fund

Appeals: All

Constituent Codes: All

Gift Solicitors: All

Gift types to include: All

Exclude zero gift amounts: Yes

User gift balance instead of gift amount: Yes

Title: Fund Goal Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



**Fund Goal Summary**

<b>Fund</b>	<b>Overall Goal</b>	<b>Actual</b>	<b>Over (Under)</b>	<b>% of Goal</b>	<b>No. Solicited</b>	<b>No. Donors</b>	<b>% Resp.</b>	<b>Cost/ \$Raised</b>
<b>Acquisition Fund</b>	\$500,000.00	\$8,000.00	(\$492,000.00)	1.60%		8		
<i>Appeals</i>								
<Unknown>	\$0.00	\$1,500.00	\$1,500.00	0.00%	0	1	0.00%	\$0.00
Annual Exhibit	\$50,000.00	\$3,275.00	(\$46,725.00)	6.55%	660	2	0.30%	\$0.00
Celebrity Auction	\$100,000.00	\$800.00	(\$99,200.00)	0.80%	2,509	1	0.04%	\$0.00
Open House Letter	\$0.00	\$300.00	\$300.00	0.00%	9	1	11.11%	\$0.43
Planned Giving Letter	\$200,000.00	\$1,925.00	(\$198,075.00)	0.96%	28	3	10.71%	\$0.10
Unsolicited	\$0.00	\$200.00	\$200.00	0.00%	69	1	1.45%	\$0.00
<i>Campaigns</i>								
Annual Campaign	\$2,000,000.00	\$4,500.00	(\$1,995,500.00)	0.23%		2		
Capital Campaign	\$10,000,000.00	\$275.00	(\$9,999,725.00)	0.00%		1		
Endowment Campaign	\$50,000,000.00	\$3,225.00	(\$49,996,775.00)	0.01%		6		
<b>Botanical Garden Fund</b>	\$500,000.00	\$15,515.00	(\$484,485.00)	3.10%		7		
<i>Appeals</i>								
<Unknown>	\$0.00	\$1,155.00	\$1,155.00	0.00%	0	3	0.00%	\$0.00
Annual Exhibit	\$50,000.00	\$1,000.00	(\$49,000.00)	2.00%	660	1	0.15%	\$0.00
Annual Newsletter	\$250,000.00	\$3,500.00	(\$246,500.00)	1.40%	6,564	1	0.02%	\$0.24
Internet/Web Site	\$0.00	\$6,000.00	\$6,000.00	0.00%	1,108	2	0.18%	\$1.08
Open House Letter	\$0.00	\$2,770.00	\$2,770.00	0.00%	9	2	22.22%	\$0.05
Unsolicited	\$0.00	\$1,090.00	\$1,090.00	0.00%	69	1	1.45%	\$0.00
<i>Campaigns</i>								
Annual Campaign	\$2,000,000.00	\$5,000.00	(\$1,995,000.00)	0.25%		1		
Capital Campaign	\$10,000,000.00	\$10,390.00	(\$9,989,610.00)	0.10%		5		
Playground Campaign	\$2,000,000.00	\$125.00	(\$1,999,875.00)	0.01%		1		

# Fund Performance Analysis

The **Fund Performance Analysis** helps you analyze the success or performance of a fund over a given time period. The report includes the number of donors, average given per donor, number and average size of gifts donated, total donated, and percentage of the goal met. The analysis can include information for all or selected constituents. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Dates: Include all dates

Soft credit gifts to: Donor

Credit Matching gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Campaigns: All

Funds: President's Development Fund; Smith-Brown Scholarship Fund; Playground Site; Natural Disaster Relief Fund

Appeals: All

Constituent Codes: All

Gift Solicitors: All

Gift types to include: All

Exclude zero gift amounts: Yes

Use gift balance instead of gift amount: Yes

Title: Fund Performance Analysis

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort on: Fund Description Asc

**Fund Performance Analysis**

<b>Fund</b>	<b>No. Donors</b>	<b>Avg/Donor</b>	<b>No. Gifts</b>	<b>Avg/Gifts</b>	<b>Total Given</b>	<b>Goal</b>	<b>Over(Under)</b>	<b>%Goal</b>
President's Developmer	4	\$7,200.00	4	\$7,200.00	\$28,800.00	\$500,000.00	(\$471,200.00)	5.76%
Natural Disaster Rel	12	\$18,279.17	42	\$5,222.62	\$219,350.00	\$2,000,000.00	(\$1,780,650.00)	10.97%
Playground Site	3	\$400.00	5	\$240.00	\$1,200.00	\$500,000.00	(\$498,800.00)	0.24%
Smith-Brown Schola	4	\$14,531.25	17	\$3,419.12	\$58,125.00	\$1,000,000.00	(\$941,875.00)	5.81%
<b>GRAND TOTALS:</b>	<b>23</b>	<b>\$13,368.48</b>	<b>68</b>	<b>\$4,521.69</b>	<b>\$307,475.00</b>	<b>\$4,000,000.00</b>	<b>(\$3,692,525.00)</b>	<b>7.69%</b>
<b>Actual Counts:</b>	<b>15</b>	<b>\$20,498.33</b>	<b>68</b>	<b>\$4,521.69</b>				
<b>A Total of 4 Fund(s) Listed</b>								

# Fund Summary List

The **Fund Summary List** generates an overview of a fund, the campaign to which it is assigned, start and end dates, and the fund category. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: Include all dates

Funds: Building, Garden, Library

Title: Fund Summary List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort on: Fund Description Asc

**Fund Summary List**

<b>Fund ID</b>	<b>Description</b>	<b>Start Date</b>	<b>End Date</b>	<b>Goal</b>	<b>Rest.</b>	<b>Default Campaign</b>	<b>Fund Category</b>
GARDEN	Botanical Garden Fund			\$500,000.00	Yes	Capital Campaig	Capital
BUILDING	Building Fund	01/01/2000		\$10,000,000.00	No	Playground Camp	Capital
LIBRARY	Library Fund	01/01/2000		\$3,000,000.00	No		Capital
<b>GRAND TOTALS:</b>				<b>\$13,500,000.00</b>			
<b>A Total of 3 Fund(s) Listed.</b>							



# Demographic & Statistical Reports

## Contents

Advocacy Tallies .....	98
Comparisons and Summaries (Summary) .....	100
Comparisons and Summaries (Comparison) .....	102
Recurring Gift Statistical Report .....	104
Statistical Report .....	106
Tallies .....	108

# Chapter 4

# Advocacy Tallies

The **Advocacy Tallies Report** counts the number of advocates, communications sent, and actions taken based on records with specific field values. Use this report to help analyze your advocates. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Field to use: Volunteer type (included all)

Columns: Default

Constituent Codes: All

Recipients: All

Alert Titles: All

Issues: All

Delivery Method: All

Attributes: none

Graph: no

Title: Advocacy Tallies

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Limit report results: Not marked

For Constituents with multiple field values: Include constituents for the most recent field value



## Advocacy Tallies

Volunteer type	Number of constituents	Number of advocates	Percent of advocacy participation	Number of communications sent	Number of times action taken
Corporate	1	0	0.00%	0	0
General	20	1	5.00%	1	1
Gift Shop Staff	3	0	0.00%	0	0
Kitchen Staff	3	0	0.00%	0	0
Medical Staff	5	0	0.00%	0	0
Office Staff	5	0	0.00%	0	0
Professional	2	0	0.00%	0	0
Teacher	1	0	0.00%	0	0
<Unknown>	198	4	2.02%	4	4
	238	5		5	5

# Comparisons and Summaries (Summary)

In summary version of the **Comparisons and Summaries**, you can view a summary of up to five time periods. Both report types include the variance, or difference, between the time periods as either a percentage or a dollar amount. You can select one or two fields, such as age group or gift size, to compare or summarize. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Summary

Field to Use: Target

Include These Field Values: \$0 - \$499, \$500 - \$999, \$1000 - \$4,999

Columns: Defaults

Funds to include: All

Appeals to include: All

Constituent Codes to include: All

Campaigns to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Report Periods: 01/01/2004 to 12/31/2004; 01/01/2005 to 12/31/2005.  
Headings: 2004, 2005.

Title: Comparisons and Summaries

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

# Comparisons and Summaries

Target	2004			2005		
	01/01/2004 to 12/31/2004			01/01/2005 to 12/31/2005		
	Number of Donors	Total given	Avg given per donor	Number of Donors	Total given	Avg given per donor
\$0 - \$499	6	\$41,050.00	\$6,841.67	5	\$27,075.00	\$5,415.00
\$1,000 - \$4,999	9	\$9,990.00	\$1,110.00	14	\$94,025.00	\$6,716.07
\$500 - \$999	4	\$16,250.00	\$4,062.50	4	\$11,787.00	\$2,946.75
	19	\$67,290.00	\$3,541.58	23	\$132,887.00	\$5,777.70

# Comparisons and Summaries (Comparison)

In comparison version of the **Comparisons and Summaries**, you can compare two time periods. Both report types include the variance, or difference, between the time periods as either a percentage or a dollar amount. You can select one or two fields, such as age group or gift size, to compare or summarize. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Report Type: Comparison

Field to Use: Target

Columns: Default

Include These Field Values: \$0 - \$499, \$500 - \$999, \$1000 - \$4,999

Funds to include: All

Appeals to include: All

Constituent Codes to include: All

Campaigns to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Report Periods: 01/01/2004 to 12/31/2004; 01/01/2005 to 12/31/2005.  
Headings: 2004, 2005.

Title: Comparisons and Summaries (Comparison) Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include Variance: Percent

## Comparisons and Summaries (Comparison)

Target	2004			2005				
	01/01/2004 to 12/31/2004			01/01/2005 to 12/31/2005				
	Number of Donors	Total given	Avg given per donor	Number of Donors	Total given	Avg given per donor	Percent Variance Donor	Amount
\$0 - \$499	6	\$41,050.00	\$6,841.67	5	\$27,075.00	\$5,415.00	(16.67)%	(34.04)%
\$1,000 - \$4,999	9	\$9,990.00	\$1,110.00	14	\$94,025.00	\$6,716.07	55.56%	\$41.19%
\$500 - \$999	4	\$16,250.00	\$4,062.50	4	\$11,787.00	\$2,946.75	0.00%	(27.46)%
	19	\$67,290.00	\$3,541.58	23	\$132,887.00	\$5,777.70	21.05%	97.48%

# Recurring Gift Statistical Report

The **Recurring Gift Statistical Report** can help you find the regular supporters you have lost and help you better target future donors. You can determine statistics such as how many donors were lost per month; which gender or age group is giving the most money; which gender or age group is less likely to continue giving; or from which region you are receiving the highest donations.

## Report Parameters

Records to include: Query

Date to use: Gift Date

Include all dates

Soft credit option: Donor

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Field to use: Profession

Include These Field Values: All

Columns: Default

Funds to include: All

Appeals to include: All

Constituent Codes to include: All

Campaigns to include: All

Payment Types to include: All

Title: Recurring Gift Statistical Report

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Limit Results: not marked

## Recurring Gift Statistical Report

Profession	No. of constituents	Constituents with an active rec. gift	Percent of participation	New rec. gifts	Payments for new rec. gifts	Avg. payments for new rec. gifts
Accountant	1	0	0.00%	0	\$0.00	\$0.00
Advertising	1	0	0.00%	0	\$0.00	\$0.00
Design	1	0	0.00%	0	\$0.00	\$0.00
Fireman	1	0	0.00%	0	\$0.00	\$0.00
Insurance	1	0	0.00%	0	\$0.00	\$0.00
Landscaping	1	0	0.00%	0	\$0.00	\$0.00
Law	1	1	100.00%	1	\$590.00	\$53.64
Management	1	0	0.00%	0	\$0.00	\$0.00
Medicine	4	2	50.00%	2	\$1,325.00	\$120.45
Military	1	0	0.00%	0	\$0.00	\$0.00
Retail	1	0	0.00%	0	\$0.00	\$0.00
Sales	3	1	33.33%	1	\$110.00	\$11.00
Travel	1	0	0.00%	0	\$0.00	\$0.00
<Unknown>	1	0	0.00%	0	\$0.00	\$0.00
	19	4	21.05%	4	\$2,025.00	\$63.28

# Statistical Report

**Statistical Reports** provide you with a breakdown of how many constituents have a specific field value, how many gifts they gave, and how much money they donated. For example, run a **Statistical Report** by state to find out how many constituents live in each state, how many of them made a gift, and the total amount they gave. You can also select the column information to appear on the report. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Gift Date

Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Field to use: State

Include These Field Values: Florida, Georgia, South Carolina, North Carolina, Virginia

Columns: Default

Funds to include: All

Appeals to include: All

Constituent Codes to include: All

Campaigns to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Statistical Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Limit results: not marked

For Constituents with multiple field values: Include constituents for the most recent field value



## Statistical Reports

State	Number of constituents	Number of donors	Number of gifts	Total given	Average given per donor	Percent of participation	Percent of total given
Florida	5	5	38	\$69,875.00	\$13,975.00	100.00%	15.52%
Georgia	15	11	54	\$141,300.00	\$12,845.45	73.33%	31.37%
North Carolina	7	5	32	\$39,955.00	\$7,991.00	71.43%	8.87%
South Carolina	41	21	117	\$167,825.00	\$7,991.67	51.22%	37.26%
Virginia	6	6	29	\$31,415.00	\$5,235.83	100.00%	6.98%
Total:	74	74	270	\$450,370.00	\$6,086.08	100.00%	

# Tallies

**Tallies** count the number of gifts or constituents whose records contain specific field values. Use **Tallies** to calculate statistics, such as how many constituents with a particular constituent code are in a particular age group. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit matching gifts to: Donor

Field to use: Religion

Include These Field Values: All

Columns: Default

Funds to include: All

Appeals to include: All

Constituent Codes to include: All

Campaigns to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gift in Kind, Other

Exclude zero amount gifts: Yes

Use gift balance instead of gift amount: Yes

Title: Tallies

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Limit Report Results: not marked

**Tallies**

<b>Religion</b>	<b>Number of constituents</b>	<b>Percent of total constituents</b>
African Methodist Episcopal	3	1.26%
Baptist	7	2.94%
Buddhism	1	0.42%
Episcopalian	5	2.10%
Islam	2	0.84%
Judaism	6	2.52%
Lutheran	2	0.84%
Methodist	9	3.78%
Presbyterian	6	2.52%
Roman Catholic	15	6.30%
Seventh-Day Adventist	1	0.42%
Organizations	65	27.31%
<Unknown>	116	48.74%
	238	



# Event Management Reports

## Contents

Dinner Preferences .....	112
Event Expense Report .....	114
Event Income Report (Detail) .....	116
Event Income Report (Summary) .....	118
Event Lists .....	120
Event Summary Report .....	122
Lodging Information .....	124
Registration Fees Due Report (Detail) .....	126
Registration Fees Due Report (Summary) .....	128
Seating Arrangements .....	130
Seating Validation .....	132
Sporting Event Roster .....	134

# Chapter 5

# Dinner Preferences

The **Dinner Preferences** provide information about participant choices for a selected dinner event. This report includes information for dinner events only. If you select a group of events, none of which is a dinner event, nothing appears on the report. In the report, you can include the dinner name, dinner preferences, constituent name and address information, the total number of requests for each meal preference, the number of dinner preferences requested for each constituent, and any comments. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on: Event

Volunteer Dinner

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Statuses to include: All

Participation Codes to include: All

Participation Types to include: All

Title: Dinner Preferences

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Would you like to print: Phone (Home)

Sort Order: Dinner Preference Asc

**Dinner Preferences**

<b>Participant Name</b>	<b>Preference</b>	<b>Quantity</b>	<b>Comments</b>
<b>Volunteer Dinner</b>			
Lavern E. Nivens Home: 843-889-7478	Beef Wellington	1	Rare
Joseph P. Diresta Home: 205-566-1254	Beef Wellington	1	Well done
Susan E. McDonald Home: 407-841-6679	Beef Wellington	1	Medium rare
Agnes M. Cone Home: 843-555-7623	Beef Wellington	1	Medium rare
Bebe D. Kemp Home: 843-555-0912	Beef Wellington	1	Rare
Genevieve G. Smith Home: 843-555-0111	Beef Wellington	1	Rare
Scarlett K. Ray Home: 316-849-5147	Chicken Kiev	1	
Clara M. Daniels Home: 203-778-2523	Chicken Kiev	1	
Mark D. Adamson Home: 843-798-6698	Pasta Primavera	1	Vegetarian
Tenli Smyth Home: 510-601-9852	Pasta Primavera	1	Vegetarian
Sidney L. Prescott Home: 617-426-8598	Pasta Primavera	1	Strict vegan
Angela Diresta Home: 205-566-1254	Trout Almondine	2	Eats no red meat or chicken
Orla A. McGrann Home: 770-509-0487	Trout Almondine	1	
Mohammed Rahman	Trout Almondine	1	
14 participant(s) listed			

# Event Expense Report

The **Event Expense Report** analyzes the actual cost involved in organizing an event compared to budgeted amounts. The report can include expenses by expense type, amount paid, date paid, and vendor information. It calculates the total budgeted and total expenses. The report displays the date and description of the expense, budgeted amount, actual amount, comments, total budgeted, and total of expenses for the event. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include expenses with all dates

Include these Vendors Only: Invited vendors = No; Registered vendors = No; Vendors who have attended = No

Group by: Campaign

Expense Types: Catering

Title: Event Expense Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



## Event Expense Report

Expense Type	Budgeted	Expense	Amount Paid	Date Paid	Under (Over) Budget	Amount Due	Vendor
<No Campaign Associated>							
<b>Playground Grand Opening Party</b>							
Catering	\$7,000.00	\$7,000.00	\$7,000.00	04/15/2007	\$0.00	\$0.00	
<b>Volunteer Dinner</b>							
Catering	\$2,000.00	\$1,680.00	\$1,680.00	12/04/2008	\$320.00	\$0.00	
<b>Campaign Total</b>	<b>\$9,000.00</b>	<b>\$8,680.00</b>	<b>\$8,680.00</b>		<b>\$320.00</b>	<b>\$0.00</b>	
<b>Annual Campaign</b>							
<b>Golf Tournament - 2004</b>							
Catering	\$350.00	\$500.00	\$500.00	07/16/2004	(\$150.00)	\$0.00	
<b>Campaign Total</b>	<b>\$350.00</b>	<b>\$500.00</b>	<b>\$500.00</b>		<b>(\$150.00)</b>	<b>\$0.00</b>	
<b>Disaster Relief Campaign</b>							
<b>Walk-A-Thon</b>							
Catering	\$8,000.00	\$7,500.00	\$7,500.00	06/06/2007	\$500.00	\$0.00	
<b>Walk-A-Thon Pasta Dinner</b>							
Catering	\$8,000.00	\$6,384.00	\$6,384.00	06/28/2007	\$1,616.00	\$0.00	
<b>Campaign Total</b>	<b>\$16,000.00</b>	<b>\$13,884.00</b>	<b>\$13,884.00</b>		<b>\$2,116.00</b>	<b>\$0.00</b>	
<b>Playground Campaign</b>							
<b>Afternoon Tea</b>							
Catering	\$750.00	\$825.00	\$825.00	02/22/2008	(\$75.00)	\$0.00	
<b>Campaign Total</b>	<b>\$750.00</b>	<b>\$825.00</b>	<b>\$825.00</b>		<b>(\$75.00)</b>	<b>\$0.00</b>	
<b>Grand Totals:</b>	<b>\$26,100.00</b>	<b>\$23,889.00</b>	<b>\$23,889.00</b>		<b>\$2,211.00</b>	<b>\$0.00</b>	
6 Event(s) listed							

## Event Income Report (Detail)

The **Event Income Report** helps you analyze the income generated by an event. The report can include the participant name, date and amount paid, sponsor name, participation type, number and type of units purchased, total paid, and total number of registrants. The report lists registrant names alphabetically or by date paid. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Report on: Event, Afternoon Tea

Include these Participants Only: Invited participants = Yes, include all dates; Registered participants = Yes, include all dates; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

For Calculating Income: Include registration fees = Yes; Include other donations = Yes; Include sponsoring pledges = Yes

Report Type: Detail

Participation to include: All

Statuses to include: All

Participant Codes to include: All

Participant Types to include: All

Title: Event Income Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort: Participant Name, Asc

## Event Income Report - Detail

Participant	Type	Date Paid	Amount Paid	Amount Due
<b>Afternoon Tea</b>				
Lucy G. Avdeenko	Registration Fees	05/11/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
The Bean Grinder	Other Donations		\$1,000.00	\$0.00
	Total:		\$1,000.00	\$0.00
Melissa C. Elzy	Registration Fees	06/15/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
George D. Finley	Registration Fees	05/25/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
Claudia L. Ivery	Registration Fees	06/15/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
Hampton L. Judson	Registration Fees	05/25/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
Bebe D. Kemp	Registration Fees	05/11/2008	\$225.00	\$0.00
	Total:		\$225.00	\$0.00
Leslie McNally	Registration Fees	05/25/2008	\$225.00	\$0.00
	Total:		\$225.00	\$0.00
Kenneth Parker	Registration Fees	05/21/2008	\$150.00	\$0.00
	Total:		\$150.00	\$0.00
Madison R. Parker	Registration Fees	05/11/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
Mia Patras	Registration Fees	05/17/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
Carl Rhodes	Registration Fees	05/11/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00
Kyle M. Rhodes	Registration Fees	05/17/2008	\$75.00	\$0.00
	Total:		\$75.00	\$0.00

13 Participant(s) listed

**Grand Total:** **\$2,275.00** **\$0.00**

Amount Due subtotals and grand total do not include overpayment of fees.

# Event Income Report (Summary)

You can summarize the report based on participant, solicitor, or sponsor. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on: Event, Afternoon Tea

Include these Participants Only: Invited participants = Yes, include all dates; Registered participants = Yes, include all dates; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

For Calculating Income: Include registration fees = Yes; Include other donations = Yes; Include sponsoring pledges = Yes

Report Type: Summary

Participation to include: All

Statuses to include: All

Participant Codes to include: All

Participant Types to include: All

Title: Event Income Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Summarize by: Participant

Include breakdown by income type: Yes

Sort: Participant Name, Asc

## Event Income Report - Summary

## Summary by Participant

Participant	Type	Total Amt. Paid	Total Amt. Due
<b>Afternoon Tea</b>			
Lucy G. Avdeenko	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
The Bean Grinder	Other Donations	\$1,000.00	\$0.00
	Total:	\$1,000.00	\$0.00
Melissa C. Elzy	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
George D. Finley	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
Claudia L. Ivery	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
Hampton L. Judson	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
Bebe D. Kemp	Registration Fees	\$225.00	\$0.00
	Total:	\$225.00	\$0.00
Leslie McNally	Registration Fees	\$225.00	\$0.00
	Total:	\$225.00	\$0.00
Kenneth Parker	Registration Fees	\$150.00	\$0.00
	Total:	\$150.00	\$0.00
Madison R. Parker	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
Mia Patras	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
Carl Rhodes	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00
Kyle M. Rhodes	Registration Fees	\$75.00	\$0.00
	Total:	\$75.00	\$0.00

13 Participant(s) listed

**Grand Total:** \$2,275.00**\$0.00**

Amount due column does not reflect overpayment of fees.

# Event Lists

The **Event Lists Report** provides lists of sponsors or registrants for an event. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on event: CPR Training Session

List to create: Participant

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Registration Codes to include: All

Participation Codes to include: All

Participant Types to include: All

Title: Event Lists

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sponsors: All Sponsors

## Event Lists

## Event Name: CPR Training Session

Full Name	Participation	Unit	No. Units	Status	Award	Sponsor	Registration	Attended
Mark D. Adamson	Student	Individual	1	Paid		<Unknown>	Registered	No
Angela Diresta	Student	Individual	1	Paid		Lightning Air Transport	Registered	No
Joseph P. Diresta	Student	Individual	1	Paid		Lightning Air Transport	Registered	No
Melissa C. Elzy	Student	Individual	1	Paid		<Unknown>	Registered	No
Claudia L. Ivery	Student	Individual	1	Paid		<Unknown>	Registered	No
Lightning Air Transport	Corporate Sponsor			Donation only		<Unknown>	Do not register	No
Susan E. McDonald	Coordinator			Complimentary		<Unknown>	Do not register	No
Orla A. McGrann	Instructor			Complimentary		<Unknown>	Do not register	No
Jane L. Vincent	Student	Individual	1	Paid		<Unknown>	Registered	No
Nicholas Vincent	Student	Individual	1	Paid		<Unknown>	Registered	No
10 Participant(s) listed						Total registered and attended:	7	0

# Event Summary Report

The **Event Summary Report** provides an overview of event finances. You can include key information, such as event ID, registration, attendance, income generated, and expenses incurred to help you determine the success of an event. You can also include information based on event names arranged alphabetically or base on event dates. You can graph the results of this report. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on all groups

Include events with all dates

Event Categories to include: All

Campaigns: All

For Calculating Income, Include these Participants Only: Invited participants = Yes, include all dates; Registered participants = Yes, include all dates; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

For Calculating Income: Include registration fees = Yes; Include other donations = Yes; Include sponsoring pledges = Yes

Include expenses with all dates

For Expense Calculation, Include these Vendors Only: Invited Vendors = No; Registered Vendors = No; Vendors who have attended = No

Include these Expense Types: Table Rental, Catering, Music, Green Fees, Cart Rental, Hole Monitor, Certification Cards, Graphic Design, Photography, Valet Parking, Parking, Florist, Room Rental, Postage, Printing, Supplies, Awards

Sort Order: Start Date Asc

Title: Event Summary Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



## Event Summary Report

Event	Campaign	Start Date	Capacity	Invited	egistered	Attended	Total Income	Total Expenses	Net
Golf Tournament - 2004 (GOLF2	Annual Campaign	07/24/2004	120	500	30	32	\$3,500.00	\$5,100.00	(\$1,600.00)
Fire Prevention (FIRE PREVENT		12/02/2006	50	100	23	0	\$1,515.00	\$850.00	\$665.00
Spring Ball (BALL)		04/07/2007	1,000	0	45	0	\$3,510.00	\$0.00	\$3,510.00
Alta Tennis Tournament (TENNI		06/02/2007	50	100	4	0	\$475.00	\$0.00	\$475.00
Walk-A-Thon Pasta Dinner (PA	Disaster Relief Campai	07/27/2007	2,500	4,000	7	1	\$0.00	\$7,884.00	(\$7,884.00)
Walk-A-Thon (WALK)	Disaster Relief Campai	07/28/2007	500	1,000	5	0	\$11,725.00	\$17,086.34	(\$5,361.34)
Starlight Concert (STAR)		08/25/2007	1,500	1,000	27	0	\$690.00	\$0.00	\$690.00
Playground Grand Opening Par		09/30/2007	1,000	500	11	14	\$1,375.00	\$7,000.00	(\$5,625.00)
Afternoon Tea (AFTERNOON T	Playground Campaig	06/21/2008	100	125	14	0	\$1,275.00	\$1,225.00	\$50.00
CPR Training Session (CPRTRAI		07/12/2008	50	100	7	0	\$0.00	\$0.00	\$0.00
Volunteer Dinner (VOLDINNER		12/20/2008	50	50	16	0	\$4,500.00	\$1,898.56	\$2,601.44
11 event(s) listed						Totals:	\$28,565.00	\$41,043.90	(\$12,478.90)

# Lodging Information

The **Lodging Information** report provides information about where participants stayed during an event. The report includes the lodging assignment, room number, and sponsor name. This report is particularly useful when organizing seminars, homecoming activities, and trips. It can list registrant names alphabetically or by lodging name and room number. The report can also include participants not yet registered. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on: Event, Fire Prevention

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Statuses to include: All

Participation Codes to include: All

Participant Types to include: All

Lodging Codes to include: All

Title: Lodging Information

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Lodging Name Asc

## Lodging Information

Participant Name	Lodging Name	Room No.	Phone No.	Confirmation No.	Chk-in Date	Chk-in Time	Chk-out Date	Chk-out Time
<b>Fire Prevention</b>								
Agnes M. Cone	Dorms	14		Cone14	12/01/2006		12/03/2006	
Joseph Bernstein	Dorms	15	843-555-7070	Bernstein15	12/01/2006		12/03/2006	
Chloe V. Ohar	Hilton Hotel	316	800-555-0909	CVO316	12/01/2006	3:00PM	12/03/2006	11:00AM
Meredith A. Tirrito	Hilton Hotel	320	800-555-0909	MAT320	12/01/2006	3:00PM	12/03/2006	12:00PM
Mark D. Adamson	Hilton Hotel	125	800-555-0909	MDA125	12/01/2006	3:00PM	12/03/2006	12:00PM
Kyle N. Bell	Hilton Hotel	214	800-555-0909	KB214	12/01/2006	3:00PM	12/03/2006	12:00PM
Anthony S. Ellis	Hilton Hotel	414	800-555-0909	ASE414	12/01/2006	3:00PM	12/03/2006	12:00PM
Paul R. Frantz	Hilton Hotel	312	800-555-0909	PRF312	12/01/2006	3:00PM	12/03/2006	12:00PM
Lisa Haas	Hilton Hotel	110	800-555-0909	LH110	12/01/2006	3:00PM	12/03/2006	12:00PM
Elizabeth A. Ashton	Hilton Hotel	201	800-555-0909	EAA201	12/01/2006	3:00PM	12/03/2006	12:00PM
Mary Beth Richardson	Hilton Hotel	322	800-555-0909	MBR322	12/01/2006	3:00PM	12/03/2006	12:00PM
Melissa C. Elzy	Hilton Hotel	314	800-555-0909	MCE314	12/01/2006	3:00PM	12/03/2006	12:00PM
Jeffrey P. Ferber	Hilton Hotel	242		JPF242	12/01/2006	3:00PM	12/03/2006	12:00PM

13 participant(s) listed

# Registration Fees Due Report (Detail)

The **Registration Fees Due Report** lists participants who have not paid or have partially paid their fees for an event. The report can include addresses and phone numbers. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on: Event, CPR Training Session

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report Type: Detail

Statuses to include: All

Participation Codes to include: All

Participant Types to include: All

Title: Registration Fees Due Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Registration Fees Due Report - Detail

Participant	Sponsor/Guest of	Participation	Registration	Att.	Gift Amt.	Receipt Amt.	Amount Paid	Amount Due
<b>CPR Training Session</b>								
Mark D. Adamson		Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
Angela Diresta	Lightning Air Transport	Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
Joseph P. Diresta	Lightning Air Transport	Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
Melissa C. Elzy		Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
Claudia L. Ivery	Melissa C. Elzy	Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
Jane L. Vincent		Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
Nicholas Vincent		Student	Registered	No	\$75.00	\$25.00	\$0.00	\$75.00
7 participant(s) listed								
<b>Totals:</b>					<b>\$525.00</b>	<b>\$175.00</b>	<b>\$0.00</b>	<b>\$525.00</b>

# Registration Fees Due Report (Summary)

You can produce a summary of fees due from event sponsors and select to base the report on either an individual event or a group of related events. If you base the report on a group, you can also print one event per page. The exact data included depends on your parameter tab settings

## Report Parameters

Records to include: All

Report on: Event, CPR Training Session

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report Type: Summary by sponsor

Statuses to include: All

Participation Codes to include: All

Participant Types to include: All

Title: Registration Fees Due Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Registration Fees Due Report - Summary**

<b>Sponsor</b>	<b>Total Gift Amount</b>	<b>Total Receipt Amount</b>	<b>Total Paid</b>	<b>Total Due</b>
<b>CPR Training Session</b>				
<Unknown>	\$375.00	\$125.00	\$0.00	\$375.00
Lightning Air Transport	\$150.00	\$50.00	\$0.00	\$150.00
7 participant(s) listed				
<b>Totals:</b>	<b>\$525.00</b>	<b>\$175.00</b>	<b>\$0.00</b>	<b>\$525.00</b>

# Seating Arrangements

The **Seating Arrangements** report lists participants and sponsors alphabetically or by section table, row, and seat assignment. You can base the report on either an individual event or a group of related events. If you base the report on a group, you can print one event per page. This report can show you participants not yet registered. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on: Event, Afternoon Tea

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Statuses to include: All

Participation Codes to include: All

Participant Types to include: All

Title: Seating Arrangements

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Fields: Guest of Asc



**Seating Arrangements****Event: Afternoon Tea**

Setup: 10 tables, 10 seats per table

Participant Name	Table	Seat	Guest of	Sponsor
Melissa C. Elzy	1(Table 1)	2(B)		
Leslie McNally	1(Table 1)	1(A)		
Kenneth Parker	1(Table 1)	4(D)		
Madison R. Parker	1(Table 1)	3(C)		
Carl Rhodes	1(Table 1)	5(E)		
Kyle M. Rhodes	1(Table 1)	6(F)		

6 participant(s) listed

# Seating Validation Report

The **Event Seating Validation Report** warns you about potential seating issues. For example, groups not seated together, guests not seated with registrant host, and sponsored participants not seated together.

The report also includes a layout summary, alerting you to items added or removed since the last time you accessed the Seating Setup wizard; lists all participants who have not yet been seated; and generates a seating summary, displaying total participants in the event, total number of seats needed, number of seats assigned, and number of seats still available.

## Report Parameters

Report on Event: Afternoon Tea

Selected Sections: All Available Sections

Title: Seating Validation Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Afternoon Tea****Unseated Participants**

<u>Participant</u>	<u>Host</u>	<u>Sponsor</u>	<u>Group</u>
Mia Patras			
Lucy G. Avdeenko			Lucy Avdeenko Party
The Bean Grinder			
Claudia L. Ivery			
Hampton L. Judson			
George D. Finley	Lucy G. Avdeenko		
Dianne D. Cone	Lucy G. Avdeenko		Lucy Avdeenko Party
Bebe D. Kemp	Lucy G. Avdeenko		Lucy Avdeenko Party
Clarice E. Riddle	Lucy G. Avdeenko		Lucy Avdeenko Party

**Layout Summary**

<u>Section</u>	<u>Table/Row</u>	<u>No. Of Seats</u>	<u>No. Of Assigned</u>	<u>Number Open</u>
1 (Section 1)	1 (Table 1)	10	6	4
	2 (Table 2)	10	0	10
	3 (Table 3)	10	0	10
	4 (Table 4)	10	0	10
	5 (Table 5)	10	0	10
	6 (Table 6)	10	0	10
	7 (Table 7)	10	0	10
	8 (Table 8)	10	0	10
	9 (Table 9)	10	0	10
	10 (Table 10)	10	0	10

**Seating Summary**

Total number of participants:	15
Number who require seating:	15
Number of seats in venue:	100
Number of seats assigned:	6
Number of open seats remaining:	94
Number of participants left to seat:	9

# Sporting Event Roster

The **Sporting Event Roster** provides a detailed list of participants in a sporting event. This report runs only for sporting events. If you select a group of events, none of which is a sporting event, nothing appears on the report. The report can list participants alphabetically or by division. It includes division assignments, team assignments, and sponsor names. This report can include participants not yet registered. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Report on: Event, Golf Tournament

Include these Participants Only: Invited participants = No; Registered participants = No; Participants who have attended = No

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Statuses to include: All

Participation Codes to include: All

Participant Types to include: All

Title: Sporting Event Roster

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Fields: Participant name, Gender

**Participant Name**

---

**Golf Tournament - 2004**

Mark D. Adamson  
Kyle N. Bell  
Autumn L. Compton  
Joseph P. Diresta  
Ryan K. Dorrior  
Dynamic Engineering  
George D. Finley  
Faith A. George  
Harry E. Goodson  
Betsy P. Graack  
Ralph A. Grable  
Kristy Graham  
Wade C. Grayson  
Lisa Haas  
Robert C. Hernandez  
Laura Holt  
Travis D. Inman  
Dean P. Isley  
Jennifer A. Kovalak  
Kimberly J. Luton  
Isabelle G. Matley  
Kenneth Parker  
Madison R. Parker  
Ginger Rosenberg  
Joseph A. Sinclair  
Stephanie G. Smith  
Michelle Taylor  
Theresa M. Vazquez  
Nicholas Vincent  
Lajuan Wilson  
Miles A. Yang  
Christopher T. Young

32 participant(s) listed



# Financial Reports

## Contents

Account Distribution .....	138
Adjusted Gift Report .....	140
Annual Statement Report .....	142
Cash Receipts Journal (Detail) .....	144
Cash Receipts Journal (Summary) .....	146
Constituent Giving History .....	148
EFT Participation Report .....	150
Expected Maturity Report (Detail).....	152
Expected Maturity Report (Summary) .....	154
General Ledger Audit Report .....	156
Gift Detail Report .....	158
Gift Summary Report .....	160
Gift Entry Validation .....	162
Gifts-in-Kind Report .....	164
Matching Gift Report (Detail) .....	166
Matching Gift Report (Summary) .....	168
Other Gifts Report .....	174
Online Vs. Offline Giving Report (Detail) .....	170
Online Vs. Offline Giving Report (Summary).....	172
Planned Gifts Report (Detail) .....	176
Planned Gifts Report (Summary).....	178
Stock Gain/Loss Report .....	180

# Chapter 6

# Account Distribution

The **Account Distribution Report** provides a breakdown by *General Ledger* accounts of gifts donated during a time period you select. The report includes the posting status of gifts and shows debit and credit amounts. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Date to use: Gift date

Include Gifts with these Dates: This calendar yr

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind, Other

Exclude zero amount gifts: Yes

Address: None

Title: Account Distribution Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include Gifts: Both



## Account Distribution Report

Date	Gift Type	Constituent Name	Fund	DB Amount	CR Amount	GL Account
11/28/2006	CASH	Elizabeth A. Ashton	2006 Annual Fund		\$75.00	<Not specified>
				\$75.00		<Not specified>
07/09/2006	CASH	Sean A. Davenport	Smith-Brown Scholarsh		\$500.00	<Not specified>
				\$500.00		<Not specified>
01/15/2006	CASH	Paul R. Frantz	Building Fund		\$20,000.00	<Not specified>
				\$20,000.00		<Not specified>
11/24/2006	CASH	Paul R. Frantz	2006 Annual Fund		\$75.00	<Not specified>
				\$75.00		<Not specified>
09/16/2006	CASH	Paul R. Frantz	Acquisition Fund		\$10,000.00	<Not specified>
				\$10,000.00		<Not specified>
08/31/2006	CASH	Samantha K. Hart	Natural Disaster Relief F		\$150.00	01-413050-00-02
				\$150.00		01-111100-00-00
05/13/2006	Stock/Property Broker Fee	Robert C. Hernandez	Smith-Brown Scholarsh		\$25.00	<Not specified>
				\$25.00		<Not specified>
05/13/2006	Stock/Property Gain	Robert C. Hernandez	Smith-Brown Scholarsh		\$400.00	<Not specified>
				\$400.00		<Not specified>
05/13/2006	STOCK/PROPERTY (SOLD)	Robert C. Hernandez	Smith-Brown Scholarsh		\$2,000.00	<Not specified>
				\$2,000.00		<Not specified>
02/01/2006	RECURRING GIFT PAY-CASH	Robert C. Hernandez	Smith-Brown Scholarsh		\$100.00	<Not specified>
				\$100.00		<Not specified>
01/13/2006	CASH	Robert C. Hernandez	2006 Membership Fund		\$450.00	<Not specified>
				\$450.00		<Not specified>
11/19/2006	CASH	Andrea L. Tidwell	Building Fund		\$2,000.00	<Not specified>
				\$2,000.00		<Not specified>
01/20/2006	CASH	Andrea L. Tidwell	2006 Membership Fund		\$50.00	<Not specified>
				\$50.00		<Not specified>
12/06/2006	CASH	Christopher T. Young	International Relief Fun		\$1,000.00	01-413050-00-02
				\$1,000.00		01-111100-00-00
Totals:				\$36,825.00	\$36,825.00	

# Adjusted Gift Report

The **Adjusted Gift Report** provides a list of donations changed through the adjustment process. The report can include *General Ledger* accounts information and the reason for the adjustment. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: Last Calendar Yr

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Address: None

Title: Adjusted Gift Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include general ledger account numbers: Yes



# Annual Statement Report

The **Annual Statement Report** provides constituent giving histories for a time period you select. It can include receipt information, including receipts with no receipt amount. This report is useful to send to constituents as an end-of-the-year report so they can review their donations for tax purposes. Each constituent's information appears on a separate page. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: Elizabeth Ashton

Include all dates

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), MG Pay-Stock/Property, Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind, Other.

Exclude zero amount gifts: Yes

Address: Preferred

Title: Annual Statement Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Annual Statement Report**

<b>Constituent Name</b>	<b>Date</b>	<b>Gift Type</b>	<b>Amount</b>	<b>Receipt Number</b>	<b>Receipt Amount</b>
Elizabeth A. Ashton 2457 Morrison Drive Savannah, GA 31406	03/12/2002	Cash	\$75.00		\$75.00
	03/17/2003	Cash	\$5,000.00		\$5,000.00
	10/15/2004	Cash	\$100.00		\$74.00
	11/28/2006	Cash	\$75.00		\$75.00
	01/18/2007	Cash	\$25.00		\$25.00
	06/15/2007	Cash	\$50.00	4242	\$30.00
	06/01/2008	Cash	\$7,500.00		\$7,500.00
					<hr/>
					Total: \$12,779.00
					<hr/>

## Cash Receipts Journal (Detail)

The **Cash Receipts Journal** displays cash and stock/property gifts received during a time period you select. The detail version of the report displays each donation with the constituent name. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: Query

Include records with these Dates: This calendar yr

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Report Type: Detail

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Recurring Gift Pay-Cash

Exclude zero amount gifts: Yes

Address: None

Title: Cash Receipts Journal

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include these Optional Columns: Gift ID

## Cash Receipts Journal

Date	Constituent	Fund	Amount	Payment Type	Check Da	Check No.	Gift ID
01/08/2006	Travis D. Inman	Natural Disaster Relief F	\$50.00	Personal Check	01/08/2006	1000	
01/13/2006	Robert C. Hernandez	2006 Membership Fund	\$450.00	Credit Card			1153
01/13/2006	Roger B. Langley	2006 Membership Fund	\$85.00	Personal Check	01/13/2006	4500	1157
01/14/2006	Derrick J. Baker	2006 Annual Fund	\$500.00	Personal Check	01/11/2006	4509	608
01/16/2006	Benjiman E. Connor	International Relief Fund	\$100.00	Credit Card			1139
01/17/2006	Barrett J. O'Malley	Botanical Garden Fund	\$10.00	Direct Debit			1184
01/27/2006	Roger B. Langley	Building Fund	\$1,000.00	Personal Check	01/27/2006	9797	25
02/01/2006	Robert C. Hernandez	Smith-Brown Scholarsh	\$100.00	Direct Debit			1152
02/18/2006	David M. Korbin	Building Fund	\$250.00	Personal Check			26
02/22/2006	Benjiman E. Connor	Botanical Garden Fund	\$1,000.00	Personal Check	02/22/2006	1278	
03/09/2006	Otto G. Montgomery	2006 Membership Fund	\$50.00	Cash			1177
03/09/2006	Emma V. Terrell	2006 Membership Fund	\$35.00	Cash			1179
03/09/2006	Stella S. White	2006 Membership Fund	\$1,000.00	Credit Card			1182
03/10/2006	Monica L. Sharp	2006 Membership Fund	\$50.00	Cash			1108
06/01/2006	Ira M. Rosenberg	2006 Annual Fund	\$200.00	Cash			489
07/03/2006	Benjiman E. Connor	Natural Disaster Relief F	\$50.00	Cash			485
07/06/2006	Emma V. Terrell	2006 Annual Fund	\$100.00	Cash			323
07/17/2006	Benjiman E. Connor	International Relief Fund	\$100.00	Credit Card			1140
09/06/2006	Nancy R. Peters	Richard Mosley Memoria	\$1,000.00	Cash			720
11/13/2006	Jennifer A. Kennick	Building Fund	\$50.00	Cash			482
11/14/2006	Spencer Kovalak	2001 Annual Fund	\$500.00	Personal Check	11/14/2006	1345	611
11/14/2006	Stella S. White	Acquisition Fund	\$1,500.00	Credit Card			634
11/15/2006	Collin Dubose	2006 Annual Fund	\$500.00	Cash			648
12/01/2006	Benjiman E. Connor	2006 Annual Fund	\$75.00	Cash			259
12/01/2006	Orla A. McGrann	2006 Annual Fund	\$75.00	Cash			248
12/01/2006	Harold P. Smalls	2006 Annual Fund	\$1,000.00	Personal Check	12/01/2006	1200	327
<b>Grand Totals:</b>			<b>\$9,830.00</b>				

26 Gift(s) listed

# Cash Receipts Journal (Summary)

The summary version of the report displays the total amount of gifts received for each campaign, fund, appeal, or constituent code. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include records with these Dates: This calendar yr

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Report Type: Summary

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Recurring Gift Pay-Cash

Exclude zero amount gifts: Yes

Title: Cash Receipts Journal - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Summarize by: Fund



## Cash Receipts Journal - Summary

Fund ID	Description	Gift Type	No. Gifts	Amount	Debit Acct	Credit Acct
2001ANNUAL	2001 Annual Fund	Cash	1	\$500.00		
		Totals:	1	\$500.00		
2006ANNUAL	2006 Annual Fund	Cash	7	\$2,450.00		
		Totals:	7	\$2,450.00		
2006MEMBER	2006 Membership Fund	Cash	6	\$1,670.00		
		Totals:	6	\$1,670.00		
ACQUISITION	Acquisition Fund	Cash	1	\$1,500.00		
		Totals:	1	\$1,500.00		
BUILDING	Building Fund	Cash	3	\$1,300.00		
		Totals:	3	\$1,300.00		
DISASTER	Natural Disaster Relief Fund	Cash	2	\$100.00		
		Totals:	2	\$100.00		
GARDEN	Botanical Garden Fund	Cash	1	\$1,000.00		
		Recurring Gift Pay-Cas	1	\$10.00		
		Totals:	2	\$1,010.00		
INTERNATIONAL	International Relief Fund	Recurring Gift Pay-Cas	2	\$200.00		
		Totals:	2	\$200.00		
RMMF	Richard Mosley Memorial Fund	Cash	1	\$1,000.00		
		Totals:	1	\$1,000.00		
SBSF	Smith-Brown Scholarship Fund	Recurring Gift Pay-Cas	1	\$100.00		
		Totals:	1	\$100.00		
Grand Totals:				\$9,830.00		

26 Gift(s) listed

# Constituent Giving History

The **Constituent Giving History** lists all constituents who gave gifts during the time period you define. The report is a chronology of constituent gifts and can include related fund information and pledge balances due. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include Gifts with these Dates: This calendar yr

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Pledge type: Master

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind, Recurring Gift Pay-Cash, Other

Exclude zero amount gifts: Yes

Title: Constituent Giving History

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include non-givers on report: Yes

## Constituent Giving History

Constituent Name	Date	Gift	Fund Description	Amount	Balance
Elizabeth A. Ashton	11/28/2006	Cash	2006 Annual Fund	\$75.00	\$0.00
		Total Cash:		\$75.00	
Sean A. Davenport	07/09/2006	Cash	Smith-Brown Schola	\$500.00	\$0.00
		Total Cash:		\$500.00	
Paul R. Frantz	01/15/2006	Cash	Building Fund	\$20,000.00	\$0.00
	09/16/2006	Cash	Acquisition Fund	\$10,000.00	\$0.00
	11/24/2006	Cash	2006 Annual Fund	\$75.00	\$0.00
		Total Cash:		\$30,075.00	
Samantha K. Hart	08/31/2006	Cash	Natural Disaster Reli	\$150.00	\$0.00
		Total Cash:		\$150.00	
Richard J. Jefferson					
Andrea L. Tidwell	01/20/2006	Cash	2006 Membership Fu	\$50.00	\$0.00
	11/19/2006	Cash	Building Fund	\$2,000.00	\$0.00
		Total Cash:		\$2,050.00	
Nicholas Vincent					
Christopher T. Young	12/06/2006	Cash	International Relief F	\$1,000.00	\$0.00
		Total Cash:		\$1,000.00	
Robert C. Hernandez	01/13/2006	Cash	2006 Membership Fu	\$450.00	\$0.00
	02/01/2006	Recurring G	Smith-Brown Schola	\$100.00	\$0.00
	05/13/2006	Stock/Prope	Smith-Brown Schola	\$2,000.00	\$0.00
		Total Cash:		\$550.00	
		Total Stock:		\$2,000.00	
		Grand Total Cash:		\$34,400.00	
	Grand Total Stock:		\$2,000.00		

# EFT Participation Report

The **EFT Participation Report** provides a list of constituents whose gifts are being paid via the electronic transfer of funds. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Address: None

Title: EFT Participation Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## EFT Participation Report

Constituent	Created On Gift Type	Payment Type Fund	Amount Frequency	Next Transaction Total to Date	Status
Robert C. Hernandez	07/23/2003	Direct Debit	\$100.00	08/01/2006	Active
	Recurring Gift	Smith-Brown Scholarship Fund	Semi-Annually	\$475.00	
Bebe D. Kemp	09/04/2003	Direct Debit	\$100.00	06/15/2006	Active
	Recurring Gift	Natural Disaster Relief Fund	Annually	\$415.00	
Mary Beth Richardson	07/22/2003	Direct Debit	\$20.00	02/01/2006	Active
	Recurring Gift	Botanical Garden Fund	Monthly	\$560.00	

Direct Debit Total: \$220.00

Credit Card Total: \$0.00

**Grand Total: \$220.00**

Total Transactions: 3

Total Donors: 3

## Expected Maturity Year Report - Detail

The **Expected Maturity Year Report** shows you gifts expected to mature within selected report periods. The columns display information for each year range you select. You can use this report to estimate anticipated cash flow from planned gifts as they reach maturity. Based on the **Expected Maturity Year** entered for each planned gift, the **Remainder Value** of each applicable gift displays in the column for the report period including the selected year.

Records to include: Query

Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Soft credit option: Donor

Credit Matching Gifts to: Donor

Report Type: Detail

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift Vehicle: All

Gift Solicitor: All

Report Periods: 2006-2007, Year 1; 2007-2008, Year 2

Columns: Default

Address: Preferred

Title: Expected Maturity Year Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Expected Maturity Year Report - Detail

Constituent Name		Fund			
Date	Gift Vehicle				
	Gift Amount		Year 1	Year 2	Total
Robert C. Hernandez					
410 17th St					
Denver, CO 80202-4402					
12/01/2006	Gift Annuity	President's Development Fund			
	\$2,500,000.00		\$0.00	\$0.00	\$0.00
John T. Smith					
621 Winder Road					
Louisville, KY 40213					
12/01/2006	Remainder Annuity Trust	Botanical Garden Fund			
	\$750,000.00		\$0.00	\$0.00	\$0.00
Stella S. White					
22-B Cooper Way					
Coffman Cove, AK 99918					
12/01/2006	Pooled Income Fund	International Relief Fund			
	\$500,000.00		\$0.00	\$0.00	\$0.00
	<u>\$3,750,000.00</u>		<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
Gift Count:					
	3		0	0	0

## Expected Maturity Year Report (Summary)

The **Expected Maturity Year Report** shows you gifts expected to mature within selected report periods. The columns display information for each year range you select. You can use this report to estimate anticipated cash flow from planned gifts as they reach maturity. Based on the **Expected Maturity Year** entered for each planned gift, the **Remainder Value** of each applicable gift displays in the column for the report period including the selected year.

The Summary view of the report breaks the gifts down by Fund, displaying the anticipated amounts expected to mature, in total, for each fund, spread out over the user-defined report periods.

Records to include: Query

Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Report Type: Summary

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift Vehicle: All

Gift Solicitor: All

Report Periods: 2006-2007, Year 1; 2007-2008, Year 2

Columns: Default

Title: Expected Maturity Year Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



## Expected Maturity Year Report - Summary

## Fund

	Gift Count	Gift Amount	Year 1	Year 2	Total
Acquisition Fund	1	\$500,000.00	\$0.00	\$0.00	\$0.00
Building Fund	1	\$100,000.00	\$0.00	\$0.00	\$0.00
Camp Kids Scholarship	2	\$700,000.00	\$0.00	\$0.00	\$0.00
President's Development Fund	2	\$3,500,000.00	\$0.00	\$0.00	\$0.00
Botanical Garden Fund	1	\$750,000.00	\$0.00	\$0.00	\$0.00
Gift Annuity Fund	1	\$800,000.00	\$0.00	\$0.00	\$0.00
International Relief Fund	1	\$500,000.00	\$0.00	\$0.00	\$0.00
Annabelle Johnson Endowment	1	\$1,200,000.00	\$0.00	\$0.00	\$0.00
Computer Lab Fund	1	\$333,333.33	\$0.00	\$0.00	\$0.00
Library Fund	1	\$333,333.33	\$0.00	\$0.00	\$0.00
Science Center Fund	2	\$1,833,333.34	\$0.00	\$0.00	\$0.00
	14	\$10,550,000.00	\$0.00	\$0.00	\$0.00
Gift Count:		14	0	0	0

# General Ledger Audit Report

The **General Ledger Audit Report** provides a list of gifts posted to **General Ledger** then deleted. The report includes the name of the constituent, gift type, gift date, and fund name. Audit information also includes current and future pledge amounts and stock gains or losses. The exact data included depends on your parameter tab settings.

## Report Parameters

Date to use: Gift date

Include all dates

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind, Other, Pay-Other, MG Pay-Other, Write Off, MG Write Off, MG Pledge, Recurring Gift, Recurring Gift Pay-Cash

Exclude zero amount gifts: Yes

Title: General Ledger Audit Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail Order: Constituent last name

## General Ledger Audit Report

Post Date	Constituent Name	Gift Date	Fund	Gift Type	Amount	Stock Gain (Loss)	Broker Fee	Pledge Amounts	
								Current	Future
06/28/1998	Ms. Marilyn Andrea Kessl	06/28/2000	2000 Members	Cash	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00
11/29/1998	Monica L. Sharp	11/29/1998	Botanical Gard	Cash	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals:					\$350.00	\$0.00	\$0.00	\$0.00	\$0.00

# Gift Detail and Summary Report (Detail)

The detail version of the **Gift Detail and Summary Report** provides details about constituent giving during a time period you define. The report includes totals of gifts received within the date range for each campaign, fund, appeal, constituent code, constituent name, and address. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include records with these Dates: Last quarter

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Report Type: Detail

Pledge Type: Master

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift Types for Column Cash: Cash, Pay-Cash, MG Pay-Cash, Recurring Gift Pay-Cash

Include these Gift Types for Column Stocks: Stock/Property, Stock/Property (Sold), Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property, MG Pay-Stock/Property (Sold)

Include these Gift Types for Column Pledge Bal: Pledge

Include these Gift Types for Column MG Pledge Bal: MG Pledge

Exclude zero amount gifts: Yes

Columns: Default

Address: Preferred

Title: Gift Detail and Summary Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Fields: Constituent Asc

## Gift Detail and Summary Report - Detail

Constituent Name	Date	Fund Description	Cash	Stocks	Pledge Bal	MG Pledge Bal
Paul R. Frantz 2583 Edgerton Road Cleveland, OH 44104	01/15/2006	Building Fund	\$20,000.00	\$0.00	\$0.00	\$0.00
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	02/01/2006	Smith-Brown Scholars	\$100.00	\$0.00	\$0.00	\$0.00
	01/13/2006	2006 Membership Fun	\$450.00	\$0.00	\$0.00	\$0.00
Andrea L. Tidwell 614 Village Creek Lane Little Rock, AR 72212	01/20/2006	2006 Membership Fun	\$50.00	\$0.00	\$0.00	\$0.00
<b>Grand Totals:</b>			<b>\$20,600.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

4 Gift(s) listed

3 Donor(s) listed

# Gift Detail and Summary Report (Summary)

The summary version of the **Gift Detail and Summary Report** includes totals of gifts received within the date range for each campaign, fund, appeal, or constituent code. You can also graph the results of the summary report. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include records with these Dates: This quarter

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Report Type: Summary

Pledge Type: Master

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Columns: Default

Include these Gift Types for Column Cash: Cash, Pay-Cash, MG Pay-Cash, Recurring Gift Pay-Cash

Include these Gift Types for Column Stocks: Stock/Property, Stock/Property (Sold), Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property, MG Pay-Stock/Property (Sold)

Include these Gift Types for Column Pledge Bal: Pledge

Include these Gift Types for Column MG Pledge Bal: MG Pledge

Exclude zero amount gifts: Yes

Title: Gift Detail and Summary Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Fields: Constituent Asc

## Gift Detail and Summary Report - Detail

Fund ID	Gift Count	Cash	Stocks	Pledge Bal	MG Pledge Bal	Total
2002ANNUAL	2	\$5,300.00	\$0.00	\$0.00	\$0.00	\$5,300.00
2006ANNUAL	15	\$15,815.00	\$0.00	\$0.00	\$0.00	\$15,815.00
2006MEMBER	15	\$8,655.00	\$0.00	\$750.00	\$0.00	\$9,405.00
ACQUISITION	6	\$2,600.00	\$1,500.00	\$0.00	\$0.00	\$4,100.00
BUILDING	9	\$71,330.00	\$0.00	\$0.00	\$0.00	\$71,330.00
CAMP	3	\$9,750.00	\$0.00	\$0.00	\$0.00	\$9,750.00
COMPUTER EQUIP	1	\$5.00	\$0.00	\$0.00	\$0.00	\$5.00
DEVELOPMENT	2	\$400.00	\$0.00	\$0.00	\$0.00	\$400.00
DISASTER	7	\$1,510.00	\$0.00	\$0.00	\$0.00	\$1,510.00
GARDEN	6	\$6,780.00	\$0.00	\$0.00	\$0.00	\$6,780.00
INTERNATIONAL	2	\$125.00	\$0.00	\$0.00	\$0.00	\$125.00
JOHNSON	1	\$250.00	\$0.00	\$0.00	\$0.00	\$250.00
LAB	1	\$15.00	\$0.00	\$0.00	\$0.00	\$15.00
RMMF	1	\$675.00	\$0.00	\$0.00	\$0.00	\$675.00
SBSF	3	\$475.00	\$0.00	\$0.00	\$0.00	\$475.00
<b>Grand Totals:</b>		<b>\$123,685.00</b>	<b>\$1,500.00</b>	<b>\$750.00</b>	<b>\$0.00</b>	<b>\$125,935.00</b>

74 Gift(s) listed

65 Donor(s) listed

# Gift Entry Validation

The **Gift Entry Validation** provides a detailed list of all gifts entered during a time period you define. This report is a useful daily report. Because it provides all information related to each individual gift, it can help you balance accounts at the end of the day. You can also use it to double-check the accuracy of your data entry. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include Gifts with these Dates: This month (May)

Date to use: Gift date

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift-in-Kind, Pay-Gift-in-Kind, MG Pay-Gift-in-Kind, Other

Exclude zero amount gifts: Yes

Title: Gift Entry Validation

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Fields to include: Matching Gifts, Honor/Memorials, Soft Credits, Split Gift Distribution, Gift Attributes, Gift Notepads



## Gift Entry Validation

**Gift:**

<b>Gift Date:</b>	05/13/2006	<b>Gift Type:</b>	Stock/Property (Sold)
<b>Constituent:</b>	Robert C. Hernandez	<b>Gift Subtype:</b>	
<b>Fund:</b>	Smith-Brown Scholarship Fund	<b>Appeal:</b>	Annual Exhibit
<b>Campaign:</b>	Scholarship Campaign	<b>Package:</b>	
<b>Amount:</b>	\$2,000.00	<b>Solicitors:</b>	
<b>Reference:</b>		<b>Receipt:</b>	Not Received
<b>Letter:</b>		<b>Receipt Amount:</b>	\$0.00
<b>Acknowledge:</b>	Acknowledged	<b>Receipt Number:</b>	
<b>Acknowledged Date:</b>		<b>Receipt Date:</b>	
<b>Pay Method:</b>	Other	<b>Reference Number:</b>	
		<b>Reference Date:</b>	
<b>Gift ID:</b>	32	<b>Constituent Code:</b>	Volunteer
<b>Gift Code:</b>		<b>Anonymous:</b>	No
<b>Date Added:</b>	01/27/2000	<b>GL Post Status:</b>	Do Not Post
<b>Added By:</b>	Supervisor	<b>GL Post Date:</b>	05/13/2006

<u>Type</u>	<u>Number of Gifts</u>	<u>Total Gift Amount</u>
Stock (Sold)	1	\$2,000.00

A Total of 1 Gift(s) Listed

# Gifts-in-Kind Report

The **Gifts-in-Kind Report** provides information specific to gift-in-kind donations. A gift-in-kind donation is a gift of goods or services, such as computer equipment or tutoring, for which a monetary value can be assigned. The report includes the value of the gift and a description of the gift-in-kind. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include records with these Dates: This calendar yr (2006)

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Gift-in-Kind, Pay-Gift-in-Kind, MG  
Pay-Gift-in-Kind

Exclude zero amount gifts: Yes

Address: Preferred

Title: Gifts-in-Kind Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Constituent Asc, Gift Date Asc

**Gifts-in-Kind Report**

<b>Constituent</b>	<b>Date</b>	<b>Fund</b>	<b>Gift Value</b>	<b>Reference</b>
Collin Dubose 5541 Old Towne Rd. Albuquerque, NM 87108	01/12/2006	International Relief Fund	\$2,000.00	Medical Supplies for Relief Effort
Barrett J. O'Malley 5428 Hickory Trace Drive Greensboro, NC 27405	11/14/2006	Botanical Garden Fund	\$1,000.00	Plants for the garden
<b>Grand Total:</b>			<b>\$3,000.00</b>	

2 Gift(s) listed

## Matching Gift Report (Detail)

The **Matching Gift Report** provides information about gifts matched by matching gift companies. The detail report lists the matching gift company name with the names of constituents whose gifts were matched. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Include Gifts with these Dates: All

Date to use: Gift date

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Report Type: Detail

Pledge type: Master

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Column 1, MG Pay-Cash; Column 2, MG Stock/Property and MG Stock/Property (sold); Column 3 MG Pledge - Balance

Exclude zero amount gifts: Yes

Address: None

Title: Matching Gift Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Matching Gift Report - Detail

Company Name	Constituent Name	MG Cash	MG Stock	MG Pledge Bal	Total
Davis & Johnson Pharmaceuticals	Robert C. Hernandez			\$50.00	\$50.00
	Totals:	\$0.00	\$0.00	\$50.00	\$50.00
Midland Banking Center	Andrea L. Tidwell			\$100.00	\$100.00
	Totals:	\$0.00	\$0.00	\$100.00	\$100.00
Summerville Land & Lumber	Anne C. Sinclair			\$100.00	\$100.00
	Totals:	\$0.00	\$0.00	\$100.00	\$100.00
Trapman & Associates	Mohammed Rahman			\$400.00	\$400.00
	Totals:	\$0.00	\$0.00	\$400.00	\$400.00
Wesley & Sons	Anne C. Sinclair			\$200.00	\$200.00
	Totals:	\$0.00	\$0.00	\$200.00	\$200.00
	<b>Grand Totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$850.00</b>	<b>\$850.00</b>

5 Gift(s) listed

# Matching Gift Report (Summary)

The summary report includes a breakdown of gifts made by matching gift companies without constituent names. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include Gifts with these Dates: All

Date to use: Gift date

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Report Type: Summary

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Column 1, MG Pay-Cash; Column 2, MG Stock/Property and MG Stock/Property (sold); Column 3 MG Pledge

Exclude zero amount gifts: Yes

Title: Matching Gift Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Matching Gift Report - Summary**

<b>Company Name</b>	<b>MG Cash</b>	<b>MG Stock</b>	<b>MG Pledge Bal</b>	<b>Total</b>
Davis & Johnson Pharmaceuticals	\$0.00	\$0.00	\$50.00	\$50.00
Midland Banking Center	\$0.00	\$0.00	\$100.00	\$100.00
Summerville Land & Lumber	\$0.00	\$0.00	\$100.00	\$100.00
Trapman & Associates	\$0.00	\$0.00	\$400.00	\$400.00
Wesley & Sons	\$0.00	\$0.00	\$200.00	\$200.00
<b>Grand Totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$850.00</b>	<b>\$850.00</b>

5 Gift(s) listed

## Online Vs. Offline Giving Report - Detail

If you have NetCommunity Integration, the **Online vs. Offline Giving Report** is available. Accessed through **Reports** on the Raiser's Edge bar, this financial report enables you to compare gifts received through your Blackbaud NetCommunity Web site with constituent giving through other means during a time period you define. The exact data included depends on your parameter tab settings.

The detail report presents the same information as the summary report and adds constituent information.



4/12/2007

**Online vs. Offline Giving Report**

Page 1

**Start Date: 4/1/2007 End Date: 4/30/2007**

Constituent Name	Date	Fund	Online	Offline	Variance
Anonymous	4/8/2007	Building Fund		500.00	
			Online Giving: \$0.00	Offline Giving: \$500.00	Variance \$: (\$500.00)
			Online Gifts: 0	Offline Gifts: 1	Variance %: 0.00%
Autumn Industries, Inc.	4/1/2007	Library Fund		500.00	
			Online Giving: \$0.00	Offline Giving: \$500.00	Variance \$: (\$500.00)
			Online Gifts: 0	Offline Gifts: 1	Variance %: 0.00%
Matt Daniel	4/11/2007	Building Fund	200.00		
	4/11/2007	Wallace Brown Memorial S	30.00		
	4/12/2007	Computer Equipment	100.00		
			Online Giving: \$330.00	Offline Giving: \$0.00	Variance \$: \$330.00
			Online Gifts: 3	Offline Gifts: 0	Variance %: 1.00%
Davenport Creamery	4/1/2007	Library Books		10,000.00	
			Online Giving: \$0.00	Offline Giving: \$10,000.00	Variance \$: (\$10,000.00)
			Online Gifts: 0	Offline Gifts: 1	Variance %: 0.00%
Mohammed Rahman	4/2/2007	Library Fund		40.00	
			Online Giving: \$0.00	Offline Giving: \$40.00	Variance \$: (\$40.00)
			Online Gifts: 0	Offline Gifts: 1	Variance %: 0.00%
Kyle M. Rhodes	4/2/2007	Building Fund		100.00	
			Online Giving: \$0.00	Offline Giving: \$100.00	Variance \$: (\$100.00)
			Online Gifts: 0	Offline Gifts: 1	Variance %: 0.00%
			Total Online Giving: \$330.00	Total Offline Giving: \$11,140.00	Total Variance \$: (\$10,810.00)
			Total Online Gifts: 3	Total Offline Gifts: 5	Total Variance %: -32.76%

8 Gift(s) Listed

6 Constituent(s) Listed

5 Constituent(s) gave more offline

1 Constituent(s) gave more online

## Online Vs. Offline Giving Report - Summary

If you have NetCommunity Integration, the **Online vs. Offline Giving Report** is available. Accessed through **Reports** on the Raiser's Edge bar, this financial report enables you to compare gifts received through your Blackbaud NetCommunity Web site with constituent giving through other means during a time period you define. The exact data included depends on your parameter tab settings.

The summary report compares totals of gifts received within the date range for each campaign, fund, appeal, or constituent code. You can graph the results of the summary report.

4/12/2007

**Online vs. Offline Giving Report**

Page 1

**Start Date:**4/1/2007    **End Date:** 4/30/2007

Fund ID	Description	No. Gifts	Online	No. Gifts	Offline	Variance	
			Amount		Amount	Amount	%
BUILDING	Building Fund	1	200.00	2	600.00	0.00	0.00
COMPUTER EQUI	Computer Equipment	1	100.00	0	0.00	0.00	0.00
LIBRARY BOOKS	Library Books	0	0.00	1	10,000.00	0.00	0.00
LIBRARY	Library Fund	0	0.00	2	540.00	0.00	0.00
WBROWNMEMFU	Wallace Brown Memo	1	30.00	0	0.00	0.00	0.00
		3.00	\$330.00	5.00	\$11,140.00	(\$10,810.00)	(\$32.76)

# Other Gifts Report

The **Other Gifts Report** provides information about gifts made in the form of miscellaneous donations, which do not easily fit into any other pre-defined category. For example, planned gifts, annuities, and life insurance policies can be classified as other gifts. This report includes the value of the gift and a column with a description of the other gift. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include all dates

Date to use: Gift date

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Other, Pay-Other, MG Pay-Other

Exclude zero amount gifts: Yes

Address: None

Title: Other Gifts Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Constituent Asc, Gift Date Asc

## Other Gifts Report

Constituent	Date	Fund	Gift Value	Reference
AAA Concrete	05/30/2005	SBSF	\$40.00	Other for Remainder
Zachery J. Clover	05/16/2004	DISASTER	\$500.00	
Samantha K. Hart	12/02/2002	ACQUISITION	\$25,000.00	MetLife
Travis D. Inman	06/01/2005	2005ANNUAL	\$200,000.00	Life Insurance Policy
Virginia F. Morrison	12/15/2004	SBSF	\$500.00	Life Insurance Policy
Barrett J. O'Malley	07/30/2002	2002ANNUAL	\$250.00	Bequest
Ira M. Rosenberg	01/29/2004	INTERNATIONAL	\$50,000.00	Bequest
Martin A. Schultz	02/13/2004	BUILDING	\$8,000.00	Computer equipment for the classrooms
Anne C. Sinclair	03/11/2002	GARDEN	\$500.00	Annuity
Christopher T. Young	04/30/2003	ACQUISITION	\$150.00	Annuity
<b>Grand Total:</b>			<b>\$284,940.00</b>	

10 Gift(s) listed

## Planned Gifts (Detail)

The **Planned Gifts Report** provides detailed information about planned gifts made by selected constituents within a selected time period.

### Report Parameters

Records to include: Query

Date to use: Gift Date

Date: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report Type: Detail

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift Vehicle: All

Gift Status: All

Expected Maturity: All

Gift Solicitors: All

Columns: Default

Address: Preferred

Title: Planned Gifts Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include Tribute

Sort Order: Constituent Asc, Date Asc

**Planned Gifts Report - Detail**

<u>Constituent Name</u>	<u>Gift Date</u>	<u>Gift Vehicle</u>	<u>Fund</u>	<u>Amount</u>	<u>Remainder Value</u>
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	12/01/2006	Gift Annuity	President's Development Fund	\$2,500,000.00	\$2,500,000.00
John T. Smith 621 Winder Road Louisville, KY 40213	12/01/2006	Remainder Annuity Trust	Botanical Garden Fund	\$750,000.00	\$1,000,000.00
Stella S. White 22-B Cooper Way Coffman Cove, AK 99918	12/01/2006	Pooled Income Fund	International Relief Fund	\$500,000.00	\$400,000.00
<b>Grand Totals:</b>				<b>\$3,750,000.00</b>	<b>\$3,900,000.00</b>

3 Gift(s) listed  
3 Total Donor(s)

## Planned Gifts Report (Summary)

The **Planned Gifts Report** provides detailed information about planned gifts made by selected constituents within a selected time period. A summary version of the report also provides planned gift totals based on maturity year, fund, appeal, constituent code, solicitor, or gift vehicle.

### Report Parameters

Records to include: All

Date to use: Gift Date

Date: Include all dates

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report Type: Summary

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift Vehicle: All

Gift Status: All

Expected Maturity: All

Gift Solicitors: All

Columns: Default

Title: Planned Gifts Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include Tribute

Sort Order: Constituent Asc, Gift Date Asc



**Planned Gifts Report - Summary**

<u>Fund ID</u>	<u>Fund Description</u>	<u>Gift Count</u>	<u>Amount</u>	<u>Remainder Value</u>
ACQUISITION	Acquisition Fund	1	\$500,000.00	\$300,000.00
BUILDING	Building Fund	1	\$100,000.00	\$100,000.00
CAMP	Camp Kids Scholarship	2	\$700,000.00	\$700,000.00
DEVELOPMENT	President's Development Fund	2	\$3,500,000.00	\$2,500,000.00
GARDEN	Botanical Garden Fund	1	\$750,000.00	\$1,000,000.00
GIFT ANNUITY	Gift Annuity Fund	1	\$800,000.00	\$432,000.00
INTERNATION	International Relief Fund	1	\$500,000.00	\$400,000.00
JOHNSON	Annabelle Johnson Endowment	1	\$1,200,000.00	\$1,650,000.00
LAB	Computer Lab Fund	1	\$333,333.33	\$333,333.33
LIBRARY	Library Fund	1	\$333,333.33	\$333,333.33
SCIENCE	Science Center Fund	2	\$1,833,333.34	\$15,333,333.34
<b>Grand Totals:</b>			<b>\$10,550,000.00</b>	<b>\$23,082,000.00</b>

14 Gift(s) listed  
12 Total Donor(s)

# Stock Gain/Loss Report

The **Stock Gain/Loss Report** provides information about stock gifts. The report includes details about each stock transaction, including the date the stock was donated, the date of the sale, and the name of the donor. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Last Calendar yr (2006)

Soft credit option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Credit Matching Gifts to: Donor

Appeals to include: All

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Gift types to include: Stock/Property, Stock/Property (Sold), Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), MG Pay-Stock/Property

Exclude zero amount gifts: Yes

Address: None

Title: Stock Gain/Loss Report Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Constituent Asc, Gift Date Asc

**Stock Gain/Loss Report**

<u>Constituent</u>	<u>Date</u>	<u>Stock Value</u>	<u>Issuer</u>	<u>Reference</u>	<u>Date Sol</u>	<u>Sold Amount</u>	<u>Broker Fee</u>	<u>Gain(Loss)</u>
Robert C. Hernandez	05/13/2006	\$2,000.00	RVX Businesses		05/13/2006	\$2,400.00	\$25.00	\$400.00
David B. Murphy	11/14/2006	\$3,500.00	KBN Office Equi					
The Reading Corner	01/21/2006	\$1,500.00		5 Acres in Lot D-9				
<b>Grand Total:</b>		<b>\$7,000.00</b>				<b>\$2,400.00</b>	<b>\$25.00</b>	<b>\$400.00</b>
3 Gift(s) listed								



# Membership Reports

## Contents

Comparative Membership Statistics.....	184
Dropped Member Report.....	186
Expired Membership Report.....	188
Joint Member/Card List Report.....	190
Lapsed Member Report.....	192
Membership Dues Report (Detail) .....	194
Membership Dues Report (Summary) .....	196
Membership Given By Report.....	198
Membership List/Directory .....	200
Membership Statistics by Category .....	202
Month/Year Statistical Analysis .....	204
New Member Report .....	206
Rejoin Report .....	208
Renewal Projection Report .....	210
Renewal Report.....	212

# Chapter 7

# Comparative Membership Statistics

The **Comparative Membership Statistics Report** compares the performance of membership categories in selected date ranges. This report includes the number of memberships or members for each membership level and the income generated. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Membership dates

Counts to Include: Start memberships

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: Patron

Programs: Adopt an Animal

Membership Solicitors: All

Subcategories: All

Current Standings: All

Report Periods: 01/01/2004 - 12/31/2004; 01/01/2005 - 12/31/2005; 01/01/2006 - 12/31/2006; 01/01/2007 - 12/31/2007; 01/01/2008 - 12/31/2008.

Headings: 2004, 2005, 2006, 2007, 2008

Title: Comparative Membership Statistics

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Display options for membership types, Programs, Categories, and Subcategories

Sort Order: Program Asc

**Comparative Membership Statistics**

2004	2005	2006	2007	2008
Start	Start	Start	Start	Start
Adopt an Animal.Contributor.Tiger 1	1	1	1	1
Adopt an Animal.Couple.Koala 1	1	1	1	1
Adopt an Animal.Patron.<None> 0	0	1	1	1
Adopt an Animal.Patron.Bear 1	1	1	1	1
Adopt an Animal.Sustainer.Bear 1	1	1	1	1
Adopt an Animal.Sustainer.Flamingo 1	1	1	1	1
Adopt an Animal.Sustainer.Tiger 0	0	0	0	0
5	5	6	6	6

# Dropped Member Report

The **Dropped Member Report** provides a list of constituents dropped from active membership during a time period you define. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: All dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: All

Membership Solicitors: All

Subcategories: All

Current Standings: All

Address: Preferred

Title: Dropped Member Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name, Comments

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional information to display, Comments

Sort Order: Program Asc



**Dropped Member Report**

<b>Member</b>	<b>Membership</b>	<b>Date Dropped</b>
Max G. Taylor 3327 Dawson Street Pittsburgh, PA 15208	Adopt an Animal.Sustainer.Tiger Comments: Changed Memberships and moved to the Young Explorer	05/30/2000
Paul R. Frantz 2583 Edgerton Road Cleveland, OH 44104	Arts Program.Patron.Historic Homes	05/30/2000
Stella S. White 22-B Cooper Way Coffman Cove, AK 99918	Arts Program.Patron.Art Aquisition Club	08/02/2002
South Carolina Blood Bank 11 Defense Street Charleston, SC 29401 Grace J. Overstreet	Business Level.Not-for-profit.<None>	02/10/2004
Dianne A. Ziegler (Dianne A. Cone) 14 Hopkins Avenue, Brookfield, CT , 06804	Individual.Lifetime.<None>	11/11/2002
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239	Young Explorers.Young Maestros.Elementary	04/01/1999
Mary Beth Richardson (Mary Beth Sanders) 307 Pastor Lane Delray Beach, FL 33447	Young Explorers.Young Maestros.<None>	12/30/1998
<b>Total No. Members:</b>		7
<b>Total No. Children:</b>		0
<b>A Total of 7 Membership(s) Listed</b>		

# Expired Membership Report

The **Expired Membership Report** provides a list of memberships expiring during a time period you define. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: All dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Adopt an Animal

Membership Solicitors: All

Subcategories: All

Current Standings: All

Address: Preferred

Title: Expired Membership Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Detail: Display options for membership types, Programs, Categories, and Subcategories

Sort Order: Program Asc

**Expired Membership Report**

<b>Member</b>	<b>Membership Type</b>	<b>Date Expired</b>
Mark D. Adamson 125 Smokerise Way Charleston, SC 29401	Adopt an Animal.Contributor.Tiger	07/20/2000
	Adopt an Animal.Contributor.Tiger	07/20/2003
	Adopt an Animal.Contributor.Tiger	11/30/2004
	Adopt an Animal.Contributor.Tiger	11/30/2005
	Adopt an Animal.Contributor.Tiger	06/28/2006
Julie M. Bach 502 Lang Avenue Pittsburgh, PA 15228	Adopt an Animal.Sustainer.Bear	11/19/2003
	Adopt an Animal.Sustainer.Bear	02/10/2007
	Adopt an Animal.Contributor.Bear	09/07/1999
	Adopt an Animal.Sustainer.<None>	09/07/1999
	Adopt an Animal.Sustainer.Bear	12/14/2000
Jill M. Garrett 45 Worthly Avenue Cheshire, CT 06410	Adopt an Animal.Patron.Bear	09/15/2000
Chad Patterson 845 Heinz Street Atlanta, GA 30303	Adopt an Animal.Couple.Koala	03/22/2002
	Adopt an Animal.Couple.Koala	02/10/2005
Monica L. Sharp (Monica L. Owens) 325 Kentwood Lane Chicago, IL 60612	Adopt an Animal.Sustainer.Flamingo	06/14/2005
	Adopt an Animal.Sustainer.Flamingo	03/10/2007
	Adopt an Animal.Sustainer.Flamingo	06/14/2000
	Adopt an Animal.Sustainer.Flamingo	06/14/2003
Max G. Taylor 3327 Dawson Street Pittsburgh, PA 15208	Adopt an Animal.Sustainer.Tiger	04/20/1998
<b>Total No. Members:</b>		18
<b>Total No. Children:</b>		0
<b>A Total of 18 Membership(s) Listed</b>		

# Joint Member/Card List Report

The **Joint Member/Card List Report** provides lists of joint members and membership card holders. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Dates: All dates

Display information for: Joint members

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Education

Membership Solicitors: All

Subcategories: All

Current Standings: Active

Transaction Types: All

Address: Preferred

Title: Joint Member/Card Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name

Detail: Display options for membership types, Programs, Categories, and Subcategories

Sort Order: Program Asc

**Joint Member/Card List Report****Membership Information****Relationship**

Allison E. Andrews  
(Allison E. Kersher)  
4859 Philpot Lane  
Minneapolis, MN 55403  
Education Program.Sustainer.Rainforest Club

Number of Joint Members Listed: 1

Jason D. Campbell  
911 Sycamore Drive  
Athens, GA 30606  
Education Program.Sustainer.Rainforest Club

Number of Joint Members Listed: 1

Nicholas Vincent  
1425 Jefferson Lane  
Orlando, FL 32803  
Education Program.Family.Rainforest Club

Jane Vincent

Daughter

Number of Joint Members Listed: 2

**Total Joint Members Listed: 4**

**A Total of 3 Membership(s) Listed**

# Lapsed Member Report

The **Lapsed Member Report** provides a list of memberships that lapsed or will lapse before the date you specify. This report differs from the **Expired Membership Report** in that the **Lapsed Member Report** limits processing to current membership transactions only. That is, this report does not include lapsed memberships renewed on or before the report date. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Lapsed on or Before: Today

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Arts Program, Young Explorers

Membership Solicitors: All

Subcategories: All

Current Standings: New, Active

Address: Preferred

Title: Lapsed Member Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional Information, Joint member names

Sort Order: Program Asc

**Lapsed Member Report**

<b>Member</b>	<b>Membership</b>	<b>Date Expired</b>
Dean P. Isley 81 Winston Way South Bend, IN 46617	Arts Program.Benefactor.Historic Homes	2/2/2003
Roger B. Langley 18 Hassell Street San Antonio, TX 78218	Arts Program.Benefactor.Art Aquisition Club	11/13/2002
Andrea L. Tidwell 614 Village Creek Lane Little Rock, AR 72212	Arts Program.Benefactor.Historic Homes	11/19/2002
Tyler & Hanson Associates 110 Main Street Kansas City, MO 64111	Arts Program.Patron.Preservation Society	6/26/2003
Elizabeth A. Ashton (Elizabeth A. Carter) 2457 Morrison Drive Savannah, GA 31406 Jill A. Ashton	Young Explorers.Aqua Kids.Elementary	4/30/2003
Jeffrey B. Goodson 201 Brentwood Avenue Greenville, SC 29608	Young Explorers.Aqua Kids.Elementary	5/16/2003
Bethany M. Taylor 89901 Treybrook Richmond, VA 23230	Young Explorers.Young Maestros.College	4/22/2003
Max G. Taylor 3327 Dawson Street Pittsburgh, PA 15208 Kimberly J. Taylor Bethany M. Taylor Melanie Taylor	Young Explorers.Young Maestros.Elementary	3/17/2002
David A. Underwood 154 Cedar Avenue Summerville, SC 29407	Young Explorers.Aqua Kids.<None>	3/17/2004
<b>Total No. Members:</b>		12
<b>Total No. Children:</b>		4
<b>A Total of 9 Membership(s) Listed</b>		

# Membership Dues Report (Detail)

The **Membership Dues Report** provides information about the income generated from membership dues paid during the time period you define. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Membership dates

Date: Include All

Credit Gifts of Membership to: Donor

Report Type: Detail

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Young Explorers

Membership Solicitors: All

Subcategories: All

Current Standings: Active

Transaction Types: All

Address: Preferred

Title: Membership Dues Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional Information, Joint member names

Sort Order: Program Asc



## Membership Dues Report - Detail

Members	Membership Program.Category.Subcategory	Next Renewal	Membership Dues
*Mark D. Adamson 125 Smokerise Way Charleston, SC 29401	Young Explorers.Aqua Kids.Elementary	05/16/2003	\$100.00
Elizabeth A. Ashton (Elizabeth A. Carter) 2457 Morrison Drive Savannah, GA 31406	Young Explorers.Aqua Kids.Elementary	02/28/2001	\$100.00
	Young Explorers.Aqua Kids.Elementary	04/30/2002	\$100.00
	Young Explorers.Aqua Kids.Elementary	04/30/2003	\$100.00
	Young Explorers.Aqua Kids.Elementary	10/15/2005	\$100.00
	Young Explorers.Aqua Kids.Elementary	10/15/2007	\$100.00
Jill A. Ashton			
Jason D. Campbell 911 Sycamore Drive Athens, GA 30606	Young Explorers.Aqua Kids.High School	12/02/2001	\$450.00
	Young Explorers.Aqua Kids.High School	01/23/2003	\$450.00
Jeffrey B. Goodson 111 Berry Road Greenville, SC 29608	Young Explorers.Aqua Kids.Elementary	01/13/2007	\$100.00
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239	Young Explorers.Young Maestros.Elementary	03/01/1999	\$750.00
	Young Explorers.Young Maestros.Elementary		\$0.00
	Young Explorers.Young Maestros.Elementary	08/02/2003	\$750.00
	Young Explorers.Young Maestros.<None>	05/10/2005	\$750.00
	Young Explorers.Young Maestros.<None>	01/13/2007	\$750.00
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	Young Explorers.Aqua Kids.Elementary	06/25/2001	\$450.00
	Young Explorers.Aqua Kids.Elementary	06/06/2005	\$450.00
	Young Explorers.Aqua Kids.Elementary	01/13/2009	\$450.00
Mary Beth Richardson (Mary Beth Sanders) 307 Pastor Lane Delray Beach, FL 33447	Young Explorers.Young Maestros.<None>	12/30/1998	\$750.00
	Young Explorers.Young Maestros.<None>		\$0.00
<b>Total No. Members:</b>	<b>9 Total No. Children:</b>	<b>Totals:</b>	<b>\$6,700.00</b>

A Total of 6 Membership(s) listed.

\* Before a name denotes the donor of a given membership.

# Membership Dues Report (Summary)

The **Membership Dues Report** provides information about the income generated from membership dues paid during the time period you define. The summary report does not include constituent name and address information. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Membership dates

Date: Include all dates

Credit Gifts of Membership to: Donor

Report Type: Summary

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: All

Membership Solicitors: All

Subcategories: All

Current Standings: Active

Transaction Types: All

Address: Preferred

Title: Membership Dues Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Display options for membership types, Programs, Categories, and Subcategories

Sort Order: Program Asc

# Membership Dues Report - Summary

Program.Category.Subcategory	Memberships	Members	Membership Dues
<None>.Out-of-Area.<None>	1	1	\$140.00
Adopt an Animal.Sustainer.<None>	1	1	\$50.00
Adopt an Animal.Sustainer.Bear	1	1	\$150.00
Adopt an Animal.Sustainer.Flamingo	1	1	\$200.00
Adopt an Animal.Patron.<None>	1	1	\$50.00
Adopt an Animal.Patron.Bear	1	1	\$100.00
Adopt an Animal.Contributor.Bear	1	1	\$50.00
Adopt an Animal.Contributor.Tiger	1	1	\$1,250.00
Arts Program.Benefactor.<None>	1	1	\$3,000.00
Arts Program.Benefactor.Art Aquisition C	2	2	\$5,880.00
Arts Program.Benefactor.Historic Home	3	3	\$75,200.00
Arts Program.Lifetime.<None>	1	1	\$25,000.00
Arts Program.Patron.<None>	1	1	\$6,000.00
Arts Program.Patron.Historic Homes	1	1	\$400.00
Arts Program.Patron.Art Aquisition Club	1	1	\$5,000.00
Arts Program.Patron.Preservation Socie	1	1	\$20,000.00
Arts Program.Senior.<None>	1	1	\$1,000.00
Business Level.Corporate.<None>	3	27	\$5,500.00
Education Program.Family.Rainforest C	1	1	\$50.00
Education Program.Sustainer.Rainforest	2	4	\$11,000.00
Education Program.Individual.<None>	1	1	\$0.00
Friends of the Museum.Individual.<None>	5	5	\$1,650.00
Friends of the Museum.Patron.<None>	3	3	\$9,000.00
Individual.Lifetime.<None>	4	4	\$20,000.00
Young Explorers.Aqua Kids.High School	1	3	\$900.00
Young Explorers.Aqua Kids.Elementary	3	3	\$2,050.00
Young Explorers.Young Maestros.<None>	2	2	\$2,250.00
Young Explorers.Young Maestros.Eleme	1	1	\$1,500.00
<b>Totals:</b>	<b>46</b>	<b>74</b>	<b>\$197,370.00</b>

# Membership Given By Report

The **Membership Given By Report** lists constituents who received their memberships as gifts from another constituent. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: Include all dates

Base Report Processing on: Member

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: All

Membership Solicitors: All

Subcategories: All

Current Standings: Active

Transaction Types: All

Address: Preferred

Title: Membership Given By Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional Information, Joint member names

Sort Order: Program Asc

Optional Columns: Current Standing

**Membership Given By Report**

<b>Member</b>	<b>Membership</b>	<b>Date Given</b>	<b>Given By</b>	<b>Current Standing</b>
Jill M. Garrett 45 Worthy Avenue Cheshire, CT 06410	Adopt an Animal.Patron.Bear		Mary Beth Richardson	Active
Jeffrey B. Goodson 111 Berry Road Greenville, SC 29608	Young Explorers.Aqua Kids.Elementary		Mark D. Adamson	Active
<b>Total No. Members:</b>	2	<b>Total No. Children:</b>	0	
<b>A Total of 2 Membership(s) Listed</b>				

# Membership List/Directory

The **Membership List/Directory** generates a list or directory of members. You can include address and phone information and group the memberships based on membership category or membership type. The report uses current membership information. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Young Explorers

Membership Solicitors: All

Subcategories: All

Current Standings: Active

Transaction Types: All

Address: Preferred

Title: Membership List/Directory

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Sort Order: Program Asc

Optional Columns: Member Since

**Membership List/Directory**

<b>Member</b>	<b>Member Since</b>		
Elizabeth A. Ashton (Elizabeth A. Carter) 2457 Morrison Drive Savannah, GA 31406 Jill A. Ashton	02/28/2000		
Jeffrey B. Goodson 111 Berry Road Greenville, SC 29608	11/16/2001		
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239	12/01/1998		
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	12/25/1999		
<b>Total No. Members:</b>		4	<b>Total No. Children:</b> 1
<b>A Total of 4 Membership(s) Listed</b>			

# Membership Statistics by Category

The **Membership Statistics by Category** report provides a snapshot of activity within each membership category for a time period you define. The report can include information about upgrades, downgrades, total memberships, and income. You can also generate a graph of the report results. The exact data included depends on your parameter tab settings. produced by *The Raiser's Edge* after a report has been generated.

## Report Parameters

Records to include: All

Date to use: Membership

Date: Include all dates

Include these constituents: Inactive = Yes; Deceased = Yes; Constituents with no valid addresses = Yes

Include only active memberships in the 'Memberships as of' count: Yes

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Friends of the Museum

Membership Solicitors: All

Subcategories: All

Title: Membership Statistics by Category

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Display options for membership types, Programs, Categories, and Subcategories

Sort Order: Category Asc



# Membership Statistics by Category

New	Renewals	Rejoins	Upgrade During Cycle	Downgrade During Cycle	Dropped	Memberships as of 05/26/2006
Friends of the Museum.Individual.<None>						
5	Same 9	Same 0	In 0	In 0	0	0
	Up-In 0	Up-In 0	Out 2	Out 0		
	Up-Out 0	Up-Out 0				
	Dwn-In 0	Dwn-In 0				
	Dwn-Out 0	Dwn-Out 0				
Friends of the Museum.Patron.<None>						
0	Same 1	Same 0	In 3	In 0	0	3
	Up-In 0	Up-In 0	Out 0	Out 0		
	Up-Out 0	Up-Out 0				
	Dwn-In 0	Dwn-In 0				
	Dwn-Out 0	Dwn-Out 0				
5	Same 10	Same 0	In 3	In 0	0	3
	Up-In 0	Up-In 0	Out 2	Out 0		
	Up-Out 0	Up-Out 0				
	Dwn-In 0	Dwn-In 0				
	Dwn-Out 0	Dwn-Out 0				

# Month/Year Statistical Analysis

The **Month/Year Statistical Analysis** provides a monthly or yearly breakdown of membership activity. The report can include a count of new, renewed, rejoined, upgraded, downgraded, and dropped memberships. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Membership dates

Breakdown by: Year, Start Year 2005, End Year 2007

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: All

Membership Solicitors: All

Subcategories: All

Current Standings: All

Title: Month/Year Statistical Analysis

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Show upgrade, downgrade, and same breakdown for renewals: Yes, Show upgrade, downgrade, and same breakdown for rejoins: Yes

Optional Columns: Lapsed Memberships

## Month/Year Statistical Analysis

Year	New	Renewals	Rejoins	Upgrade During Cycle	Downgrade During Cycle	Lapsed	Dropped	End Members
2005	2	5	0	0	0	15	0	47
	Same:	5	Same:	0				
	Upgrd:	0	Upgrd:	0				
	Dwngrd:	0	Dwngrd:	0				
2006	0	18	0	1	1	3	0	47
	Same:	18	Same:	0				
	Upgrd:	0	Upgrd:	0				
	Dwngrd:	0	Dwngrd:	0				
2007	0	1	0	0	0	18	0	47
	Same:	1	Same:	0				
	Upgrd:	0	Upgrd:	0				
	Dwngrd:	0	Dwngrd:	0				
<b>Totals:</b>	<b>2</b>	<b>24</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>36</b>	<b>0</b>	
	Same:	<b>24</b>	Same:	<b>0</b>				
	Upgrd:	<b>0</b>	Upgrd:	<b>0</b>				
	Dwngrd:	<b>0</b>	Dwngrd:	<b>0</b>				

# New Member Report

The **New Member Report** provides a list of constituents with new memberships, starting during a time period you define. You can include constituent names, join and renewal dates, and totals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Adopt an Animal

Membership Solicitors: All

Subcategories: All

Current Standings: All

Address: Preferred

Title: New Member Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional Information, Joint member names

Sort Order: Program Asc

Optional Columns: Expires on, No. members

## New Member Report

New Member	Membership	Joined On	Expires On	No. Members
Mark D. Adamson 125 Smokerise Way Charleston, SC 29401	Adopt an Animal.Contributor.Tiger	07/20/1999	07/20/2000	1
Jill M. Garrett 45 Worthly Avenue Cheshire, CT 06410	Adopt an Animal.Patron.Bear	09/15/1999	09/15/2000	1
Chad Patterson 845 Heinz Street Atlanta, GA 30303	Adopt an Animal.Couple.Koala	03/22/2001	03/22/2002	1
Ginger Rosenberg (Ginger Michelson) 251 Fifth Avenue New York, NY 10128	Adopt an Animal.Patron.<None>	10/20/2005		1
Monica L. Sharp (Monica L. Owens) 325 Kentwood Lane Chicago, IL 60612	Adopt an Animal.Sustainer.Flamingo	06/14/1999	06/14/2000	1
Max G. Taylor 3327 Dawson Street Pittsburgh, PA 15208	Adopt an Animal.Sustainer.Tiger	04/20/1997	04/20/1998	1
<b>Total No. New Members:</b>	6	<b>Total No. New Children:</b>	0	
<b>A Total of 6 New Membership(s) Listed</b>				

# Rejoin Report

The **Rejoin Report** provides a list of constituents dropped from active membership, but who rejoined during a time period you define. You can include constituent names, rejoined or renewal dates, and totals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: All dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: All

Membership Solicitors: All

Subcategories: All

Current Standings: All

Rejoin Types: All

Address: Preferred

Title: Rejoin Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional Information, Joint member names

Sort Order: Rejoin type Asc

Optional Columns: Expires on

## Rejoin Report

Member	Membership	Date Rejoined	Expires On
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239	Young Explorers.Young Maestros.Element	08/02/2002	08/02/2003
Stella S. White 22-B Cooper Way Coffman Cove, AK 99918	Arts Program.Patron.Art Aquisition Club	01/13/2003	01/13/2004
Dianne A. Ziegler (Dianne A. Cone) 14 Hopkins Avenue, Brookfield, CT , 06804	Individual.Lifetime.<None>	01/13/2003	
Mary Beth Richardson (Mary Beth Sanders) 307 Pastor Lane Delray Beach, FL 33447	Business Level.Corporate.<None>	03/18/1999	03/18/2000

Total No. Members: 4

Total No. Children: 0

A Total of 4 Membership(s) Listed

# Renewal Projection Report

The **Renewal Projection Report** projects the amount of income expected from various categories of membership renewals for a time period you define. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to Include: All

Start month/year 01/2006, End month/year 12/2006

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = Yes

Projected Renewal Targets: High % 75, Medium % 50, Low % 25

Base Report Processing On: No. of Memberships

Constituent Codes to include: All

Constituent Solicitors: All

Categories to include: All

Programs to include: All

Membership Solicitors to include: All

Subcategories to include: All

Title: Renewal Projection Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Display options for membership types, Programs, Categories, and Subcategories



**Renewal Projection Report**

<b>Period</b>	<b>Program.Category.Subcategory</b>	<b>Membership To Renew</b>	<b>75% Renewed</b>	<b>50% Renewed</b>	<b>25% Renewed</b>
Jun-2006	Adopt an Animal.Contributor.Tiger	1	\$187.50	\$125.00	\$62.50
	Period Totals:	1	\$187.50	\$125.00	\$62.50
Aug-2006	Business Level.Corporate.<None>	1	\$375.00	\$250.00	\$125.00
	Period Totals:	1	\$375.00	\$250.00	\$125.00
Oct-2006	Friends of the Museum.Individual.<None>	1	\$37.50	\$25.00	\$12.50
	Period Totals:	1	\$37.50	\$25.00	\$12.50
	<b>GRAND TOTALS:</b>	<b>3</b>	<b>\$600.00</b>	<b>\$400.00</b>	<b>\$200.00</b>

# Renewal Report

The **Renewal Report** lists constituents who renewed their memberships during a time period you defined. You can include the member names and addresses, program categories and subcategories, and whether the membership is a gift. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date: Calendar YTD (05/13/2004)

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes: All

Constituent Solicitors: All

Categories: All

Programs: Benefactor

Membership Solicitors: All

Subcategories: All

Current Standings: All

Renewal Types: All

Address: Preferred

Title: Renewal Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Additional Information to Display on Report: Maiden Name, Joint Member Name

Detail: Display options for membership types, Programs, Categories, and Subcategories; Additional Information, Joint member names

Sort Order: Renewal type Asc

Optional Columns: Number times renewed

## Renewal Report

Member	Membership	Date Renewed	No. Times Renewed
Dean P. Isley 81 Winston Way South Bend, IN 46617	Arts Program.Benefactor.Historic Homes	02/02/2006	1
Roger B. Langley 18 Hassell Street San Antonio, TX 78218	Arts Program.Benefactor.Art Aquisition Club	01/13/2006	2
Campbell A. Phan 622 Peachtree Rd. Atlanta, GA 30309	Arts Program.Benefactor.<None>	03/09/2006	2
Andrea L. Tidwell 614 Village Creek Lane Little Rock, AR 72212	Arts Program.Benefactor.Historic Homes	01/20/2006	3

Total No. Members:

4

Total No. Children:

0

A Total of 4 Membership(s) Listed



# Pledge and Recurring Gift Reports

## Contents

<b>Activity Report</b> .....	<b>216</b>
<b>Campaign Report (Detail)</b> .....	<b>218</b>
<b>Campaign Report (Summary)</b> .....	<b>220</b>
<b>Cash Flow Report (Detail)</b> .....	<b>222</b>
<b>Cash Flow Report (Summary)</b> .....	<b>224</b>
<b>Journal (Detail)</b> .....	<b>226</b>
<b>Journal (Summary)</b> .....	<b>228</b>
<b>Not Paid Report</b> .....	<b>230</b>
<b>Past Due Report (Detail)</b> .....	<b>232</b>
<b>Past Due Report (Summary)</b> .....	<b>234</b>
<b>Pledge Status Report</b> .....	<b>236</b>
Standard Report Scenario .....	239
Payment to Different Fund than Pledge Scenario .....	242
Split Gift Report Scenarios .....	245
Split Gift Scenario Filtering on Annual Fund .....	249
Split Gift with Write-Off Scenario .....	252
<b>Recurring Gift Amendment Report (Detail)</b> .....	<b>254</b>
<b>Recurring Gift Amendment Report (Summary)</b> .....	<b>256</b>
<b>Recurring Gift Missed Report (Detail)</b> .....	<b>258</b>
<b>Recurring Gift Missed Report (Summary)</b> .....	<b>260</b>
<b>Written-Off Report (Detail)</b> .....	<b>262</b>
<b>Written-Off Report (Summary)</b> .....	<b>264</b>

## Chapter 8

# Activity Report

The **Activity Report** provides a detailed account of all pledge and recurring gift activity, including payments, installments, and balances due, during the time period you define. You can limit the report to specific pledges, such as outstanding pledges and recurring gifts. This report shows only activity that occurs during the selected time period; it does not list pledges with no activity in the time period. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: One Record: Geoffrey Beckner

Date to use: Gift date

Dates: Calendar YTD

Soft credit option: Donor

Credit Matching Gifts to: MG Company

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift type selected: Pledge; MG Pledge

Exclude zero amount gifts: Yes

Calculate gift balance based on select date range, campaign, fund, and appeal: Yes

Columns: Default

Address: Preferred

Title: Activity Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Activity Report

Constituent Name	Date	Type	Gift Amount	Fund	Activity		
					Type	Date	Amount
Geoffrey T. Beckner 112 Seaside Street Beaufort, SC 29906	07/30/2003	PL M5	\$1,500.00	2003 Annual Fund			
					INS	08/05/2003	\$300.00
					PAY	08/06/2003	(\$300.00)
					INS	09/02/2003	\$300.00
					PAY	09/02/2003	(\$300.00)
					INS	10/07/2003	\$300.00
					INS	11/04/2003	\$300.00
					INS	12/02/2003	\$300.00
					PAY	07/01/2005	(\$300.00)
					Write Off	12/31/2005	(\$300.00)
					Write Off	12/31/2005	(\$300.00)
					Balance		\$0.00
					Total Pledge Balance:		\$0.00

# Campaign Report (Detail)

The **Campaign Report** provides a list of gifts donated to campaigns after a specific date. The report includes the date of final payment (whether future or past), payments made to date, and amounts written off. The detail version of the report includes constituent names and address information. This is a good report for listing campaign pledges with outstanding balances. This report is useful if you want to close a campaign but verify the status of all pledges made to the campaign first. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include records with these dates: Include all dates

Soft credit option: Donor

Matching gift option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Detail

Constituent Codes: All

Appeals: All

Campaigns: Annual

Funds to include: All

Gift types: Pledge, MG Pledge

Address: Preferred

Title: Campaign Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



## Campaign Report - Detail

Campaign Constituent Name	Date	Type	Amount	Payments	Skipped/ Written Off	Balance	Date Final
<b>Annual Campaign</b>							
Geoffrey T. Beckner 112 Seaside Street Beaufort, SC 29906	07/30/2003	PL M5	\$1,500.00	\$900.00	\$600.00	\$0.00	12/02/2003
Cole Hensley 2600 Deerwood Trail Charlotte, NC 28225	02/19/2002	PL Q5	\$1,500.00	\$600.00	\$0.00	\$900.00	02/19/2003
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	04/13/2000	PL M5	\$500.00	\$500.00	\$0.00	\$0.00	08/13/2000
Lane A. Pembroke 74 Sunbird Court Phoenix, AZ 85004	04/16/2000	PL S1	\$1,000.00	\$1,000.00	\$0.00	\$0.00	04/16/2000
	07/06/2001	PL M12	\$12,000.00	\$5,000.00	\$0.00	\$7,000.00	06/06/2002
Luke J. Thames 418 Willow Way Vancouver, BC V6C 3L6	03/05/2000	PL Q5	\$250.00	\$250.00	\$0.00	\$0.00	03/05/2001
<b>Totals:</b>			<b>\$16,750.00</b>	<b>\$8,250.00</b>	<b>\$600.00</b>	<b>\$7,900.00</b>	
<b>Grand Totals:</b>			<b>\$16,750.00</b>	<b>\$8,250.00</b>	<b>\$600.00</b>	<b>\$7,900.00</b>	

5 Constituent(s) listed

## Campaign Report (Summary)

The summary version of this report provides totals of pledges by fund but without constituent names or addresses. This is a good report for listing campaign pledges with outstanding balances. This report is useful if you want to close a campaign but verify the status of all pledges made to the campaign first. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Include records with these dates: Include all dates

Soft credit option: Donor

Matching gift option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Summary

Constituent Codes: All

Appeals: All

Campaigns: All

Funds to include: All

Gift types: Pledge, MG Pledge

Title: Campaign Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

# Campaign Report - Summary

Fund ID	Description	Gift Amount	Payments	Skipped/ Written Off	Balance
2000ANNUAL	2000 Annual Fund	\$1,750.00	\$1,750.00	\$0.00	\$0.00
2000MEMBER	2000 Membership Fund	\$750.00	\$750.00	\$0.00	\$0.00
2001ANNUAL	2001 Annual Fund	\$12,000.00	\$5,000.00	\$0.00	\$7,000.00
2002ANNUAL	2002 Annual Fund	\$1,500.00	\$600.00	\$0.00	\$900.00
2003ANNUAL	2003 Annual Fund	\$1,500.00	\$900.00	\$600.00	\$0.00
2004MEMBER	2004 Membership Fund	\$750.00	\$0.00	\$0.00	\$750.00
2006MEMBER	2006 Membership Fund	\$750.00	\$0.00	\$0.00	\$750.00
BUILDING	Building Fund	\$5,000.00	\$1,250.00	\$0.00	\$3,750.00
CAMP	Camp Kids Scholarship	\$11,000.00	\$11,000.00	\$0.00	\$0.00
DEVELOPMENT	President's Development Fund	\$5,000.00	\$1,000.00	\$4,000.00	\$0.00
DISASTER	Natural Disaster Relief Fund	\$5,900.00	\$5,000.00	\$50.00	\$850.00
GARDEN	Botanical Garden Fund	\$2,000.00	\$1,200.00	\$0.00	\$800.00
INTERNATIONAL	International Relief Fund	\$54.00	\$54.00	\$0.00	\$0.00
RMMF	Richard Mosley Memorial Fund	\$800.00	\$0.00	\$0.00	\$800.00
SCIENCE	Science Center Fund	\$400.00	\$200.00	\$0.00	\$200.00
Totals:		\$49,154.00	\$28,704.00	\$4,650.00	\$15,800.00

## Cash Flow Report (Detail)

The **Cash Flow Report** displays anticipated cash flow. The report reviews pledges due within the date range you define and calculates the projected cash flow over one or several periods. The detail version of the report includes constituent names and addresses along with outstanding pledge balances. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Include gifts made after: All

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Soft credit option: Donor

Credit Matching Gifts to: Donor

Report type: Detail

Constituent Codes: All

Appeals: All

Campaigns: Annual

Funds to include: All

Gift types selected: Pledge, MG Pledge

Calculate total due based on select date range, campaign, fund, and appeal: Yes

Report Periods: 08/31/05 to 09/30/05; 10/31/05 to 11/30/05; 12/31/05 to 01/30/06; 12/31/06 to 01/30/07; 1/31/07 to 2/28/07 . Headings: Sept., Oct., Nov., Dec., Jan., Feb.

Columns: Default

Address: Preferred

Title: Cash Flow Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Cash Flow Report - Detail**

Constituent Name Date		Type	Fund						
	ift Amount	Past Due	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Total
Cole Hensley 2600 Deerwood Trail Charlotte, NC 28225 02/19/2002			PL Q5		2002 Annual Fund				
	\$1,500.00	\$900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00
Lane A. Pembroke 74 Sunbird Court Phoenix, AZ 85004 07/06/2001			PL M12		2001 Annual Fund				
	\$12,000.00	\$7,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,000.00
	\$13,500.00	\$7,900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,900.00

# Cash Flow Report (Summary)

The summary version of the report includes totals due in each date range but does not list constituent names or addresses. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include gifts made after: All

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Soft credit option: Donor

Credit Matching Gifts to: Donor

Report type: Summary

Constituent Codes: All

Appeals: All

Campaigns: All

Funds to include: All

Gift types selected: Pledge, MG Pledge

Calculate total due based on select date range, campaign, fund, and appeal: Yes

Report Periods: 08/31/05 to 09/30/05; 10/31/05 to 11/30/05; 12/31/05 to 01/30/06; 12/31/06 to 01/30/07; 1/31/07 to 2/28/07 . Headings: Sept., Oct., Nov., Dec., Jan., Feb.

Columns: Default

Address: Preferred

Title: Cash Flow Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Cash Flow Report - Summary****Fund**

	<b>Past Due</b>	<b>Sept.</b>	<b>Oct.</b>	<b>Nov.</b>	<b>Dec.</b>	<b>Jan.</b>	<b>Feb.</b>	<b>Total</b>
2001 Annual Fund								
\$7,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,000.00
2002 Annual Fund								
\$900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00
2004 Membership Fund								
\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$750.00
2006 Membership Fund								
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$750.00	\$0.00	\$750.00
Botanical Garden Fund								
\$800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$800.00
Building Fund								
\$3,750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,750.00
Natural Disaster Relief Fund								
\$850.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$850.00
Richard Mosley Memorial Fund								
\$800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$800.00
Science Center Fund								
\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00
\$15,050.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$750.00	\$0.00	\$15,800.00

## Journal (Detail)

The **Journal** provides information about pledge and recurring gift activity. It can include payments made and payments still outstanding. The detail version of the report displays constituent name and address information and pledged amounts. The **Journal** is similar to the **Activity Report**, but the **Journal** arranges columns by gift type. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: Lane Pembroke

Date to use: Gift date

Dates: All

Soft credit option: Donor

Matching gift option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Detail

Constituent Codes to include: All

Campaigns to include: Annual

Appeals to include: All

Funds to include: All

Gift types to include: Pledge, MG Pledge

Address and Phone: Preferred

Title: Journal - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



## Journal - Detail

Constituent Name	Date	Fund	Type	Gift Amount	Payments	Skipped/ Written Off	Pledge	
							Date	Amount
Lane A. Pembroke 74 Sunbird Court Phoenix, AZ 85004	04/16/2000	2000ANNUAL	PL S1	\$1,000.00			04/16/2000	\$1,000.00
	07/06/2001	2001ANNUAL	PL M12	\$12,000.00			07/06/2001	\$12,000.00
	04/30/2000	2000ANNUAL	Pay-Cash		\$1,000.00		04/16/2000	\$1,000.00
	11/13/2001	2001ANNUAL	Pay-Cash		\$1,000.00		07/06/2001	\$1,000.00
	11/13/2001	2001ANNUAL	Pay-Cash		\$1,000.00		08/06/2001	\$1,000.00
	11/13/2001	2001ANNUAL	Pay-Cash		\$1,000.00		09/06/2001	\$1,000.00
	11/13/2001	2001ANNUAL	Pay-Cash		\$1,000.00		10/06/2001	\$1,000.00
	11/13/2001	2001ANNUAL	Pay-Cash		\$1,000.00		11/06/2001	\$1,000.00
Totals:				\$13,000.00	\$6,000.00			

## Journal (Summary)

The summary report totals the pledges by fund and displays debit and credit account numbers. This report is similar to the **Activity Report**, but the Journal presents columns by gift type. The Journal provides information about the pledge itself. For example, Erin Kelly makes a \$500 pledge on 02/15/2000 with installments due between 04/15/2000 and 09/15/2000. Her first installment arrives 03/15/2000. You run the report using a date range of 02/01/2004 to 02/28/2004; only the pledge shows. You run it again, this time with 03/01/2004 to 03/31/2004 as the date range and both the pledge and the payment appear, even though the master pledge falls outside the date range.

## Report Parameters

Records to include: Lane Pembroke

Date to use: Gift date

Dates: All

Soft credit option: Donor

Matching gift option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Summary

Constituent Codes to include: All

Campaigns to include: All

Appeals to include: All

Funds to include: All

Gift types to include: Pledge, MG Pledge

Title: Journal - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Journal - Summary**

<b>Fund ID</b>	<b>Description</b>	<b>Gift Type</b>	<b>Count</b>	<b>Amount</b>	<b>Debit Account</b>	<b>Credit Account</b>
2000ANNUAL	2000 Annual Fund	Pay-Cash	1	\$1,000.00		
		Pledge	1	\$1,000.00		
2001ANNUAL	2001 Annual Fund	Pay-Cash	1	\$5,000.00		
		Pledge	1	\$12,000.00		
	Total Pledge:		2	\$13,000.00		
	Total Pledge Payment - Cash:		6	\$6,000.00		

# Not Paid Report

The **Not Paid Report** lists constituents who made a pledge but have not made any payments toward the pledge. You can run this report to include unpaid installments only or pledges with a balance. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Gift date

Dates: All dates

Soft credit option: Donor

Matching gift option: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Pledge Type: Master

Constituent Codes: All

Appeals: All

Campaigns: All

Funds: All

Payment Types: All

Gift types: Pledge, MG Pledge

Exclude Zero Amount: Yes

Columns: Default

Address: Preferred

Title: Not Paid Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Date Desc

## Not Paid Report

Constituent Name	Gift Date	Type	Amount	Fund	Reference	First Pay Due
Winston R. Tate 2312 Three Woods Lane Barrington, RI 02806	05/11/2000	PL S1	\$800.00	RMMF		05/11/2000
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239	02/10/2004	PL S1	\$750.00	2004MEMBER		02/10/2004
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	04/21/2005	MG PL S1	\$50.00	DISASTER	Hernandez, Robert C.	04/21/2005
Mohammed Rahman 12 Broad Street Dayton, OH 45406	04/21/2005	MG PL S1	\$400.00	DISASTER	Rahman, Mohammed	04/21/2005
Anne C. Sinclair 115 Ashley River Road Charleston, SC 29412	04/21/2005	MG PL S1	\$200.00	DISASTER	Sinclair, Anne C.	04/21/2005
	04/21/2005	MG PL S1	\$100.00	DISASTER	Sinclair, Anne C.	04/21/2005
Andrea L. Tidwell 614 Village Creek Lane Little Rock, AR 72212	04/21/2005	MG PL S1	\$100.00	DISASTER	Tidwell, Andrea L.	04/21/2005
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239	01/13/2006	PL S1	\$750.00	2006MEMBER		01/13/2006
6 Constituent(s) listed		Total:	<u>\$3,150.00</u>			

## Past Due Report (Detail)

The **Past Due Report** lists pledge payments past due as of a selected date. Pledges are categorized by the number of days past due. The detail version of the report lists the constituent name and address with the amount past due. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Gifts made after: Last day of last fiscal yr (12/31/05)

Past due as of: Today (05/26/06)

Soft credit option: Donor

Credit Matching Gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Detail

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift types selected: Pledge, MG Pledge

Report Periods: 0-30; 31-60; 61-90; 91-180; Over 180

Columns: Default

Address: Preferred

Title: Past Due Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Past Due Report - Detail

Constituent Name				Days Past Due					Total
Date	Type	Gift Amount	Fund	0-30	31-60	61-90	91-180	Over 181	
Wade C. Grayson 55 Ashford Drive Dallas, TX 75239									
01/13/2006	PL S1	\$750.00	2006MEMBER	\$0.00	\$0.00	\$0.00	\$750.00	\$0.00	\$750.00
Totals:				\$0.00	\$0.00	\$0.00	\$750.00	\$0.00	\$750.00

## Past Due Report (Summary)

The summary version of the report can include a total of the past due amount for each fund. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Gifts made after: Last day of last fiscal yr (12/31/06)

Past due as of: Today (05/26/06)

Soft credit option: Donor

Credit Matching Gifts to: Donor

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Summary

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Columns: Default

Gift types selected: Pledge, MG Pledge

Report Periods: 0-30; 31-60; 61-90; 91-180; Over 180

Title: Past Due Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



**Past Due Report - Summary**

Fund	Fund Description	Days Past Due					Total
		0-30	31-60	61-90	91-180	Over 181	
2006MEMBER	2006 Membership Fund	\$0.00	\$0.00	\$0.00	\$750.00	\$0.00	\$750.00
Totals:		\$0.00	\$0.00	\$0.00	\$750.00	\$0.00	\$750.00

# Pledge Status Report

In the **Pledge Status Report**, a number of factors determine the columns and information included in your report. This section lists the columns available and explains why certain information is or is not included.

- Two date fields included on the General tab of the **Pledge Status Report** affect the pledge amount that displays on your report:
  - **Include pledges made after:** This field filters the pledges included in the report based on the date you select.
  - **Date:** This date range affects how the pledge information displays on your report.
    - If in the **Detail** category on the Format tab you select **Format 1**, the 'Prior to' amounts include any activity from the **Include pledges made after** date up to but not including the beginning of the date range you select in the **Date** field.
    - If in the **Detail** category on the Format tab you select **Format 2**, the 'Previous Balance' is the balance of the fund, including all activity up to but not including the beginning of the date range you select in the **Date** field.
- Amount pledged appears only if in the **Detail** category on the Format tab you select **Format 2**. This is the amount pledged to the selected fund(s). All pledges between the date entered in the **Include pledges made after** field and the end date of the date range specified in the **Date** field are included in this column.
- Pledge appears only if in the **Detail** category on the Format tab you select **Format 1**. This is the amount pledged to the selected fund(s). All pledges between the date entered in the **Include pledges made after** field and the end date of the date range specified in the **Date** field are included in this column.

- Previous balance appears only if in the **Detail** category on the Format tab you select **Format 2**. This is the balance of the selected fund(s) as of the day before the date range specified in the **Date** field. For example, if the date range is 11/01/03 – 11/30/03, then the previous balance is all activity up to and including 10/31/03.
- Pledged appears only if in the **Detail** category on the Format tab you select **Format 2**. This is the amount pledged during the date range specified in the **Date** field. For pledges made in the date range, the Pledged and the Amount Pledged columns are equal. For pledges made outside the date range, the Pledge column is 0.
- Payments appears if in the **Detail** category on the Format tab you select **Format 1** or **Format 2**. This is the amount paid toward pledges in the selected funds. The column includes all payments satisfying the report criteria, including payments to funds other than the funds on the pledge. The payment also must satisfy the date range specified in the **Date** field to be included in the report.
- Written Off appears if in the **Detail** category on the Format tab you select **Format 1** or **Format 2**. Write-offs are not specifically associated with a fund. For pledges split between two funds, the write-offs are distributed between the funds on the pledge based on the percentage of the gift associated with each fund.
- Pledge Balance appears if in the **Detail** category on the Format tab you select **Format 1** or **Format 2**. This is the pledge balance as of the end date of the date range specified in the **Date** field. If on the Gift Types tab you marked **Calculate gift balance based on date range, campaign, fund and appeal**, the balance is calculated only for payments with campaigns, funds, and appeals included in the filter and are within the date range entered in the **Date** field.

For example, if the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox is marked and the date range is 11/01/03-11/30/03, then payments made after 11/30/03 are not included in the balance calculation. Likewise, if the report is filtered only for Fund A, any payments made to another fund are not included in the calculation.

- Include Outstanding Pledges Only appears if in the **Detail** category on the Format tab you select **Format 1** or **Format 2**. If the **Include outstanding pledges only** checkbox on the Gift Types tab is marked, pledges with a zero balance at the end of the date range specified in the **Date** field are not included in the report.

## Standard Report Scenario

Your organization has the following pledge data entered:

**Pledge Date:** 10/01/03

**Pledge Amount:** \$1000

**Pledge Fund:** Annual Fund

**Pledge Activity:**

Date	Fund	Amount
10/01/03	Annual Fund	\$100
11/01/03	Annual Fund	\$100
12/01/03	Annual Fund	\$100

## Report Parameters

**Include pledges made after:** 01/01/03

**Date:** 11/01/03 – 11/30/03

Calculate gift balance based on date range, campaign, fund and appeal:  
Varies based on format type.

**Fund Filters:** Annual Fund only

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$1,000.00	\$100.00	\$0.00		\$100.00	\$0.00		\$700.00

Note the pledge balance includes the December payment because on the Gift Types tab you did not mark the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$1,000.00	Annual Fund	\$900.00	\$0.00	\$100.00	\$0.00	\$700.00

Note the pledge balance includes the December payment because on the Gift Types tab you did not mark the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$1,000.00	\$100.00	\$0.00		\$100.00	\$0.00		\$800.00

Note the pledge balance does not include the December payment because on the Gift Types tab you marked the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox and December is outside the date range.

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$1,000.00	Annual Fund	\$900.00	\$0.00	\$100.00	\$0.00	\$800.00

Note the pledge balance does not include the December payment because on the Gift Types tab you marked the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox and December is outside the date range.

## Payment to Different Fund than Pledge Scenario

Your organization has the following pledge data entered:

**Pledge Date:** 10/01/03

**Pledge Amount:** \$1000

**Pledge Fund:** Annual Fund

**Pledge Activity:**

Date	Fund	Amount
10/01/03	Building Fund	\$100
11/01/03	Building Fund	\$100

## Report Parameters

**Include pledges made after:** 01/01/03

**Date:** 11/01/03 – 11/30/03

Calculate gift balance based on date range, campaign, fund and appeal:  
Varies based on format type.

**Fund Filters:** Annual Fund only



## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$1,000.00	\$0.00	\$0.00		\$0.00	\$0.00		\$800.00

Note the payments to the Building Fund are not included in the payments column; the payments are excluded based on the Annual Fund filter. The pledge balance, however, includes the payments because on the Gift Types tab you did not mark the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$1,000.00	Annual Fund	\$900.00	\$0.00	\$0.00	\$0.00	\$800.00

Note the payments to the Building Fund are not included in the payments column; the payments are excluded based on the Annual Fund filter. The pledge balance, however, includes the payments because on the Gift Types tab you did not mark the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$1,000.00	\$0.00	\$0.00		\$0.00	\$0.00		\$1,000.00

Note the payments to the Building Fund are not included in the payments column; the payments are excluded based on the Annual Fund filter. The pledge balance also does not include the payments because on the Gift Types tab you marked the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$1,000.00	Annual Fund	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00

Note the payments to the Building Fund are not included in the payments column; the payments are excluded based on the Annual Fund filter. The pledge balance also does not include the payments because on the Gift Types tab you marked the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Split Gift Report Scenario

Your organization has the following pledge data entered:

**Pledge Date:** 10/01/03

**Pledge Amount:** \$1000

**Pledge Fund:** Annual Fund (\$750)

Building Fund (\$250)

**Pledge Activity:**

Date	Fund	Amount
10/01/03	Annual Fund	\$250
	Playground Fund	\$250
11/01/03	Annual Fund	\$100
	Playground Fund	\$100

## Report Parameters

**Include pledges made after:** 01/01/03

**Date:** 11/01/03 – 11/30/03

Calculate gift balance based on date range, campaign, fund and appeal:  
Results are the same regardless if marked or unmarked.

**Fund Filters:** All funds

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$750.00	\$437.50	\$0.00		\$175.00	\$0.00		\$137.50
Building Fund	\$250.00	\$62.50	\$0.00		\$25.00	\$0.00		\$162.50

To calculate the pledge balance for these funds, the payments of \$350 to the Annual Fund are subtracted from the \$750 pledge for the Annual Fund. However, the payments of \$350 to the Playground Fund do not have a corresponding fund on the pledge. The \$350 is split 75% toward the Annual Fund and 25% toward the Building Fund (75% of \$350.00 equals \$262.50 and 25% of \$350.00 equals \$87.50).

- To calculate the pledge balance for the Annual Fund:  
 \$750.00 (initial amount of the pledge allocated to the Annual Fund)  
 - 350.00 (payments allocated specifically to the Annual Fund)  
 - 262.50 (payments to the Playground Fund allocated to the Annual Fund)  
**\$137.50**
- To calculate the pledge balance for the Building Fund:  
 \$250.00 (initial amount of the pledge allocated to the Building Fund)  
 - 87.50 (payments to the Playground Fund allocated to the Building Fund)  
**\$162.50**

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$750.00	Annual Fund	\$312.50	\$0.00	\$175.00	\$0.00	\$137.50
\$250.00	Building Fund	\$187.50	\$0.00	\$25.00	\$0.00	\$162.50

To calculate the previous balance for these funds, the payment of \$250.00 to the Annual Fund is subtracted from the \$750 pledge for the Annual Fund. However, the payment of \$250.00 to the Playground Fund does not have a corresponding fund on the pledge. The \$250.00 is split 75% toward the Annual Fund and 25% toward the Building Fund (75% of \$250.00 equals \$187.50 and 25% of \$150.00 equals \$62.50).

- To calculate the previous balance for the Annual Fund:  
 \$750.00 (the initial amount of the pledge allocated to the Annual Fund)  
 - \$250.00 (payment allocated specifically to the Annual Fund)  
 - \$187.50 (payment to the Playground Fund that was allocated to the Annual Fund)  
**\$312.50**
- To calculate the previous balance for the Building Fund:  
 \$250.00 (the initial amount of the pledge allocated to the Building Fund)  
 - \$62.50 (payment to the Playground Fund that was allocated to the Building Fund)  
**\$187.50**

To calculate the pledge balance for these funds, the payments of \$100 to the Annual Fund is subtracted from the \$312.50 previous pledge balance for the Annual Fund. However, the payment of \$100 to the Playground Fund does not have a corresponding fund on the pledge. The \$100 is split 75% toward the Annual Fund and 25% toward the Building Fund (75% of \$100.00 equals \$75.00 and 25% of \$100.00 equals \$25.00).

- To calculate the pledge balance for the Annual Fund:  
\$312.50 (the previous balance for the Annual Fund)  
- \$100.00 (payment allocated specifically to the Annual Fund)  
- \$75.00 (payment to the Playground Fund that was allocated to the Annual Fund)  
**\$137.50**
- To calculate the pledge balance for the Building Fund:  
\$187.50 (the previous balance for the Building Fund)  
- \$25.00 (payment to the Playground Fund that was allocated to the Building Fund)  
**\$162.50**

## Split Gift Scenario Filtering on Annual Fund

The scenario in this section is based on the data included in the “Split Gift Report Scenario” on page 245.

### Report Parameters

Calculate gift balance based on date range, campaign, fund and appeal: varies.

**Fund Filters:** Annual Fund

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$750.00	\$250.00	\$0.00		\$100.00	\$0.00		\$400.00

Note the payments to the Playground Fund are not included in the pledge balance because the fund filters only include Annual Fund and the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox has been marked.

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$750.00	Annual Fund	\$500.00	\$0.00	\$100.00	\$0.00	\$400.00

Note the payments to the Playground Fund are not included in the balance and the previous balance because the fund filters only include Annual Fund, and the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox has been marked.

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$750.00	\$250.00	\$0.00		\$100.00	\$0.00		\$137.50

Note the payments to the Playground Fund are not included in the Payments column; the payments are excluded based on the Annual Fund filter. The pledge balance, however, does include these payment because on the Gift Types tab you did not mark the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.



## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$750.00	Annual Fund	\$312.50	\$0.00	\$100.00	\$0.00	\$137.50

Note the payments to the Playground Fund are not included in the Payments column; the payments are excluded based on the Annual Fund filter. The pledge balance and previous balance, however, do include these payment because on the Gift Types tab you did not mark the **Calculate gift balance based on date range, campaign, fund and appeal** checkbox.

## Split Gift with Write-Off Scenario

Your organization entered the following data:

**Pledge Date:** 10/01/03

**Pledge Amount:** \$1000

**Pledge Fund:** Annual Fund (\$750)

Building Fund (\$250)

**Pledge Activity:**

Date	Fund	Amount
10/01/03	Annual Fund	\$250
	Playground Fund	\$250
11/01/03	Annual Fund	\$100
	Playground Fund	\$100
11/15/03	Write-off	\$100

## Report Parameters

**Include pledges made after:** 01/01/03

**Date:** 11/01/03 – 11/30/03

Calculate gift balance based on date range, campaign, fund and appeal: Not marked

**Fund Filters:** All funds

## Sample Report Format 1

		Prior To 11/01/2003			11/01/03 - 11/30/03			
Fund	Pledge	Payments	Written Off		Payments	Written Off		Plg Balance
Annual Fund	\$750.00	\$437.50			\$175.00	\$75.00		\$62.50
Building Fund	\$250.00	\$62.50			\$25.00	\$25.00		\$137.50

Note the write-off has been distributed to the funds based on the percentage of the gift associated with that fund.

## Sample Report Format 2

Amount		Previous	11/01/03 - 11/30/03			
Pledged	Fund	Balance	Pledged	Payments	Written Off	Plg Balance
\$750.00	Annual Fund	\$312.50	\$0.00	\$175.00	\$75.00	\$62.50
\$250.00	Building Fund	\$187.50	\$0.00	\$25.00	\$25.00	\$137.50

Note the write-off has been distributed to the funds based on the percentage of the gift that is associated with that fund.

# Recurring Gift Amendment Report (Detail)

The **Recurring Gift Amendment Report** can help you determine the success rate of your upgrade appeals or campaigns. It can show you who has upgraded or downgraded, when, and how much your donors were previously giving and how much they are giving now.

In the detail report, you can select to include recurring gifts with amounts that have been upgraded, downgraded, or remained the same; and you can select to process this report as a summary report, detail report, or both. You can filter by constituent code(s), appeal(s), campaign(s), fund(s), and payment type(s).

## Report Parameters

Records to include: All

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Include these Amendments: Upgrade, Downgrade, Same

Report type: Detail

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: Garden

Payment types: All

Address: None

Columns: Default

Title: Recurring Gift Amendment Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Colour Scheme: Yes

Sort: Constituent Name, Asc

## Recurring Gift Amendment Report

Constituent Name	Amendment Date	Amendment Amount	Constituent ID	Fund	Variance Amount	Variance Percentage
Barrett J. O'Malley	01/01/2005	\$10.00	59	Botanical Garden Fund	(\$15.00)	(60.00%)
Barrett J. O'Malley	11/01/2004	\$25.00	59	Botanical Garden Fund	\$3.33	15.36%
Mary Beth Richardson	12/01/2003	\$20.00	66	Botanical Garden Fund	\$10.00	100.00%
<b>Grand Totals:</b>						
Monthly		\$55.00			(\$1.67)	(2.95%)

3 Amendment(s) listed

^ The amendment changed the frequency of the recurring gift schedule. The previous amount was recalculated based on the new frequency.

# Recurring Gift Amendment Report (Summary)

The **Recurring Gift Amendment Report** can help you determine the success rate of your upgrade appeals or campaigns. It can show you who has upgraded or downgraded, when, and how much your donors were previously giving and how much they are giving now.

In the summary report, you can summarize the report by campaign, fund, appeal, package, constituent code, canvasser, and pay method.

## Report Parameters

Records to include: All

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Include these Amendments: Upgrade, Downgrade, Same

Report type: Summary

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Payment types: All

Columns: Default

Title: Recurring Gift Amendment Report Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Summarize by: Appeal

## Recurring Gift Amendment Report - Summary

Appeal ID	Appeal Description	Amendment Amount	Previous Amount	Variance Amount	Variance Percentage
CAMP LETTER	Camp Kids Newsletter				
	Monthly	\$20.00	\$10.00	\$10.00	100.00%
	Semi-Annually	\$500.00	\$120.00	\$380.00	316.67% ^
DIRECT MAIL	Direct Mailing				
	Monthly	\$20.00	\$10.00	\$10.00	100.00%
	Quarterly	\$75.00	\$60.00	\$15.00	25.00% ^
INTERNET	Internet/Web Site solicitations				
	Annually	\$100.00	\$100.00	\$0.00	0.00% ^
	Monthly	\$55.00	\$35.00	\$20.00	57.14%
	Quarterly	\$100.00	\$75.00	\$25.00	33.33% ^
	Semi-Annually	\$400.00	\$410.00	(\$10.00)	(2.44%) ^
NEWSLETTER	Annual Newsletter				
	Monthly	\$25.00	\$20.00	\$5.00	25.00%
OPENHOUSE	Open House Letter				
	Semi-Annually	\$100.00	\$75.00	\$25.00	33.33% ^
<b>Grand Totals</b>					
	Annually	\$100.00	\$100.00	\$0.00	0.00%
	Monthly	\$120.00	\$75.00	\$45.00	60.00%
	Quarterly	\$175.00	\$135.00	\$40.00	29.63%
	Semi-Annually	\$1,000.00	\$605.00	\$395.00	65.29%

^ The amendment changed the frequency of the recurring gift schedule. The previous amount was recalculated based on the new frequency.

## Recurring Gift Missed Payment (Detail)

The **Recurring Gift Missed Payment Report** helps you locate the regular supporters you have lost and helps you determine when you lost them. The report shows the gift amounts to which a donor has committed, but not yet paid. It processes information for recurring gifts with consecutive missed payments - the number of payments that have been skipped or missed since the last payment made.

### Report Parameters

Records to include: All

Consecutive Payments Missed as of: Today

Minimum number of consecutive payments missed: 1

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Soft Credit Gifts to: Donor

Credit Matching Gifts to: Donor

Report type: Detail

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Types: All

Pay Method: All

Frequency: All

Columns: Default

Address: None

Title: Recurring Gift Missed Payment Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Include these recurring gifts: All recurring gifts, regardless of the number of payments.



## Recurring Gift Missed Payment Report - Detail

Constituent Name	Cons. ID	Gift date	Fund	First Payment		Last Payment		Frequency	Total Pmts. Given	Total Amt. Given
				Date	Amount	Date	Amount			
Anthony S. Ellis	17	01/01/2006	Building Fund	01/15/2006	\$25.00	04/01/2006	\$30.00	Monthly	4	\$110.00
Barrett J. O'Malley	59	07/23/2004	Botanical Garde	07/23/2004	\$5.00	01/17/2006	\$10.00	Monthly	10	\$110.00
Clara M. Daniels	194	02/02/2004	International Rel	03/01/2004	\$20.00	01/02/2006	\$25.00	Monthly	16	\$375.00
Keith D. Radcliffe	67	01/01/2006	Natural Disaster R	01/15/2006	\$10.00	01/15/2006	\$10.00	Bimonthly	1	\$10.00
Luke J. Thames	81	01/06/2003	Camp Kids Sch	01/15/2003	\$10.00	09/15/2005	\$500.00	Semi-Annually	15	\$2,130.00
Mary Beth Richardson	66	07/22/2003	Botanical Garde	08/01/2003	\$10.00	01/02/2006	\$20.00	Monthly	14	\$250.00
Max G. Taylor	77	06/23/2003	Playground Site	07/07/2003	\$25.00	07/15/2005	\$250.00	Semi-Annually	8	\$875.00
Rodney A. Barlow	236	02/13/2006	Computer Equi	03/01/2006	\$5.00	04/03/2006	\$5.00	Monthly	2	\$10.00
Winston R. Tate	79	02/17/2006	Computer Lab F	03/06/2006	\$15.00	03/06/2006	\$15.00	Monthly	1	\$15.00
<b>Grand Total</b>									<b>71</b>	<b>\$3,885.00</b>
9 Constituent(s) listed										

## Recurring Gift Missed Payment (Summary)

The **Recurring Gift Missed Payment Report** helps you locate the regular supporters you have lost and helps you determine when you lost them. The report shows the gift amounts to which a donor has committed, but not yet paid. It processes information for recurring gifts with consecutive missed payments - the number of payments that have been skipped or missed since the last payment made.

You can summarize the report by campaign, fund, appeal, package, constituent code, canvasser, and pay method.

### Report Parameters

Records to include: All

Date: Today

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Include these Amendments: Upgrade, Downgrade, Same

Report type: Summary

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift Types: All

Pay Method: All

Frequency: All

Columns: Default

Title: Recurring Gift Missed Payment Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Summarized by: Appeal

Include these recurring gifts: All recurring gifts, regardless of the number of payments.

## Recurring Gift Missed Payment Report - Summary

Appeal ID	Appeal Descr	No. of Constituents	No. of Gifts	Total Pmts. Given	Total Pmts. Amount	Total Amt. Missed	Total Pmts. Missed
	<Unknown>						
Monthly		1	1	2	\$10.00	\$5.00	1
<b>Total for &lt;Unknown&gt;</b>		1	1	2	\$10.00	\$5.00	1
NEWSLETTER	Annual Newsletter						
Bimonthly		1	1	1	\$10.00	\$20.00	2
Monthly		1	1	16	\$375.00	\$100.00	4
<b>Total for Annual Newsletter</b>		2	2	17	\$385.00	\$120.00	6
CAMP LETTER	Camp Kids Newsletter						
Semi-Annually		1	1	15	\$2,130.00	\$500.00	1
<b>Total for Camp Kids Newsletter</b>		1	1	15	\$2,130.00	\$500.00	1
INTERNET	Internet/Web Site solici						
Monthly		2	2	15	\$265.00	\$110.00	6
Semi-Annually		1	1	8	\$875.00	\$250.00	1
<b>Total for Internet/Web Site solicitations</b>		3	3	23	\$1,140.00	\$360.00	7
UNSOL	Unsolicited						
Monthly		1	1	10	\$110.00	\$40.00	4
<b>Total for Unsolicited</b>		1	1	10	\$110.00	\$40.00	4
YEAREND	Year End Appeal						
Monthly		1	1	4	\$110.00	\$30.00	1
<b>Total for Year End Appeal</b>		1	1	4	\$110.00	\$30.00	1
<b>Grand Total</b>		<b>9</b>	<b>9</b>	<b>71</b>	<b>\$3,885.00</b>	<b>\$1,055.00</b>	<b>20</b>

## Written-Off Report (Detail)

The **Written-Off Report** lists of all pledges written off during a time period you select. Writing off a pledge indicates you do not expect the balance of the pledge to be paid. The detail version of the report can include the constituent name and address information along with the pledge write-off. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Date to use: Gift date

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Detail

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift types: Pledge, MG Pledge

Exclude zero amount gifts: Yes

Address: None

Title: Written-Off Report - Detail

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort order: Date Desc

## Written-Off Report - Detail

		Pledge			
Date	Constituent Name	Written Off	Date	Type	Amount Fund
01/14/2005	Catlin R. Daly	\$4,000.00	07/30/2005	PL A5	\$5,000.00 President's Development Fund
07/01/2005	Autumn L. Compton	\$50.00	03/01/2000	PL S1	\$50.00 Natural Disaster Relief Fund
12/31/2005	Geoffrey T. Beckner	\$600.00	07/30/2003	PL M5	\$1,500.00 2003 Annual Fund
Totals:		\$4,650.00			\$6,550.00

3 written-off pledge(s) listed

## Written-Off Report (Summary)

The summary version of the report includes the total amount written off for each fund but cannot include name and address information. The exact data included depends on your parameter tab settings.

### Report Parameters

Records to include: All

Date to use: Gift date

Date: Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Report type: Summary

Constituent Codes to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift types: Pledge, MG Pledge

Exclude zero amount gifts: Yes

Title: Written-Off Report - Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort order: Date Desc

**Written-Off Report - Summary**

<b>Fund ID</b>	<b>Description</b>	<b>Count</b>	<b>Written Off</b>
2003ANNUAL	2003 Annual Fund	1	\$600.00
DEVELOPMENT	President's Development Fund	1	\$4,000.00
DISASTER	Natural Disaster Relief Fund	1	\$50.00
	Totals:	3	\$4,650.00





# Profiles, Lists, and Directories

## Contents

Alumni Class List .....	268
Appeal Profile .....	270
Blackbaud Analytic Scores List .....	272
Campaign Profile .....	274
Constituent Directory .....	276
Constituent Profile .....	278
Event Profile .....	280
Fund Profile .....	282
Grandparent Directory .....	284
Honor/Memorial Profile .....	286
Individual Profile .....	288
MatchFinder Organization Summary .....	290
Membership Category Profile .....	292
Organization Profile .....	294
Parent Directory .....	296
Professional Directory .....	298

# Chapter 9

# Alumni Class List

The **Alumni Class List** provides a list of alumni with their class years. This report can help you plan class reunions or design appeals directed toward alumni. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Alumni information to include: Primary alumni information

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes to include: All

Gift Solicitors to include: All

Academic Status Codes to include: All

Class Years to include: Class of 1997, Class of 1998, Class of 1999, Class of 2000, Class of 2001, Class of 2002, Class of 2003

Degrees to include: All

Majors to include: All

Assigned Solicitors: All

Address: Preferred

Phone: Home

Title: Alumni Class List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Class of Asc.

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

Detail: Include major information: Yes

Autumn L. Compton  
Graduating class of 1997

Andrew Crenshaw  
Graduating class of 2003

*Chemistry*  
Joseph P. Diresta  
Graduating class of 1999

Alexander M. Horne  
Graduating class of 1997

Barrett J. O'Malley  
Graduating class of 2002

William A. Quinn  
Graduating class of 1999

Emilio Suarez  
Graduating class of 1997

Melanie Taylor  
Graduating class of 2001

Emma V. Terrell  
Graduating class of 1997

Luke J. Thames  
Graduating class of 1999

Stella S. White  
Graduating class of 1997

11 Alumni listed

1205 Pinetree Lane  
Nashville, TN 37218

87 Park Avenue  
New York, NY 10081

248 Twin Lane  
Building #3299  
Birmingham, AL 35220

8092 Spring Avenue  
Barnet, VT 05821

5428 Hickory Trace Drive  
Greensboro, NC 27405

5874 Atlantic Avenue  
Hartford, CT 06102

57 Farly Street  
Cabo Rojo, PR 00623

41633 Hanover Lane  
Richmond, VA 23230

845 High Hill Court  
Suite 56  
Toronto, ON M1M 1M1

418 Willow Way  
Vancouver, BC V6C 3L6

22-B Cooper Way  
Coffman Cove, AK 99918

# Appeal Profile

The **Appeal Profile** provides a summary of appeal information. You can include associated campaigns and funds, appeal packages, attributes, benefits, expenses related to the appeal, and gifts donated during the appeal. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Walk-a-thon

Include records with these dates: Include all dates

Profile Contents: Defaults

Title: Appeal Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Appeal Profile

## Walk-A-Thon

## Appeal Information

Appeal ID: WALK-A-THON  
 Appeal Description: Walk-A-Thon  
 Start Date: 01/01/2003  
 End Date:  
 Appeal Category: Event  
 Overall Goal: \$250,000.00  
 Default Gift Amt: \$0.00  
 No. Solicited: 15

Is Inactive? No  
 Date Added: 01/07/2000  
 Added By: Supervisor  
 Last Changed On: 10/13/2004  
 Last Changed By: Supervisor  
 Import ID: 00001-012-0000018

## Notes:

This Appeal is used strictly for the Walk-a-thon event

## Campaigns

Campaign ID	Campaign Description	Start Date	End Date	Overall Goal
RELIEF	Disaster Relief Campaign	01/01/2000		\$10,000,000.00

## Funds

Fund ID	Fund Description	Start Date	End Date	Overall Goal
DISASTER	Natural Disaster Relief Fund			\$2,000,000.00
INTERNATIONAL	International Relief Fund			\$5,000,000.00

## Packages

Package ID	Description	Category	Start Date	End Date	Overall Goal
WalkNewsAd	Walk-a-thon ad in the Daily Times	Newspaper	01/01/2004	07/31/2004	\$50,000.00
WalkCalendar	Walk-a-thon Registration form w/Cale	Mail - Calendar	01/01/2004	07/31/2004	\$75,000.00

Package Benefits	Count	Unit Cost	Total Benefit Value	Sent/Fulfilled	
Calendar	1	\$12.00	\$27.00		
WalkWeb	Walk-a-thon signup page on our Web s	Web site	01/01/2004	07/30/2004	\$40,000.00

## Gift History

Constituent Name	Date	Gift Type	Fund	Amount	Balance
ABC Learning Center	01/14/2007	Cash	International Relief Fund	\$2,500.00	\$0.00
Mark D. Adamson	06/15/2007	Cash	International Relief Fund	\$50.00	\$0.00
Mark D. Adamson	04/25/2007	Cash	International Relief Fund	\$5,000.00	\$0.00
Anonymous	06/15/2007	Cash	Natural Disaster Relief F	\$25.00	\$0.00
Anonymous	07/01/2007	Gift-in-Kind	International Relief Fund	\$1,500.00	\$0.00
Elizabeth A. Ashton	06/15/2007	Cash	Natural Disaster Relief F	\$50.00	\$0.00
Autumn Industries, Inc.	04/04/2007	Cash	Natural Disaster Relief F	\$1,000.00	\$0.00
Derrick J. Baker	11/14/2001	Pay-Cash	International Relief Fund	\$54.00	\$0.00
The Chip 'N Dip	05/17/2007	Cash	International Relief Fund	\$1,000.00	\$0.00
Cotton Clothing, Inc.	07/14/2007	Cash	Natural Disaster Relief F	\$2,500.00	\$0.00
Melissa C. Elzy	06/01/2007	Cash	International Relief Fund	\$100.00	\$0.00
Richard J. Jefferson	06/15/2007	Cash	International Relief Fund	\$50.00	\$0.00
Richard J. Jefferson	04/29/2007	Cash	International Relief Fund	\$5,000.00	\$0.00
Nashville Healthcare	06/15/2007	Cash	International Relief Fund	\$2,500.00	\$0.00

# Blackbaud Analytics Scores List

The **Blackbaud Analytics Scores List** generates a list of constituents and their Blackbaud Analytics ratings. If you have *Prospect Research Management*, the scores available for use in the list are the score categories you imported into the program from Blackbaud Analytics Services. These scores are stored in the **Category** field of the ratings records. Rating records are accessed from the **Ratings** category on the Prospect tab. If you do not have *Prospect Research Management*, all Blackbaud Analytic scores are stored on the Attributes tab of the constituent record. The following scores are available: Annual Gift Likelihood, Major Gift Likelihood, Bequest Likelihood, CRT Likelihood, and BBA Estimated Income.

On the Scores tab, you can select the Blackbaud Analytics scores you want to include in the list. You can also filter scores included based on ranges.

## Report Parameters

Records to include: Query

Include scores with these dates: Include all dates

Filters: Include all

Scores included: CMS Annual Gift Likelihood

Address: Preferred

Phone: Home

Title: Blackbaud Analytics Scores List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Blackbaud Analytics Scores List****Total number of constituents = 5**

<b>Constituent Name</b>	<b>CMS Likelihood</b>	<b>Annual</b>	<b>Gift</b>
Samantha K. Hart 30 Walden Place Providence, RI 02907 401-276-7777			966
Andrea L. Tidwell 614 Village Creek Lane Little Rock, AR 72212 501-227-9144 (Do not contact)			762
Sean A. Davenport 2151 Brant Avenue Miami, FL 33147 305-326-1551			723
Richard J. Jefferson 1825 Long Bird Road Salt Lake City, UT 84106 801-467-8999			289
Nicholas Vincent 1425 Jefferson Lane Orlando, FL 32803 407-896-1210			289

# Campaign Profile

The **Campaign Profile** summarizes campaign information contained in your campaign records. You can include campaign solicitors, associated funds and appeals, campaign attributes, and gifts donated to the campaign. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include records with these dates: Include all dates

Profile Contents: Campaign Information and Solicitors

Title: Campaign Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



**Annual Campaign****Campaign Information**

Campaign ID: ANNUAL  
Campaign Description: Annual Campaign  
Start Date: 01/01/1990  
End Date: 12/31/2010  
Campaign Category: Annual  
Overall Goal: \$2,000,000.00

Is Inactive? No  
Date Added: 06/25/1999  
Added By: Supervisor  
Last Changed On: 04/13/2005  
Last Changed By: Supervisor  
Import ID: 00001-022-0000001

**Notes:**

The Annual Campaign is the program through which alumni and friends of the organization contribute to continued excellence and new opportunities each year. Annual gifts can be unrestricted or designated for a specific department or program to enhance our mission of teaching, research, and public service.

**Solicitors**

	<u>Team Goal</u>	<u>Solicitor Goal</u>
Tyler & Hanson Associates (104)		\$200,000.00
Team A (Nicholas Vincent)	\$70,000.00	
Nicholas Vincent (86)		\$40,000.00
David B. Murphy (51)		\$10,000.00
Ellen H. Crenshaw (10)		\$10,000.00
Kathleen R. Bently (8)		\$10,000.00
Harris F. Sadler (75)		\$5,000.00
Mary Beth Richardson (66)		\$5,000.00
Team B (Andrea L. Tidwell)	\$310,000.00	
Andrea L. Tidwell (82)		\$100,000.00
<b>Totals:</b>	<u>\$380,000.00</u>	<u>\$380,000.00</u>

# Constituent Directory

The **Constituent Directory** generates a list of address and telephone information for constituent records in your database. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Constituent Codes = All

Assigned Solicitors = All

Solicit Codes = All

Address: Preferred

Phone: Home

Title: Constituent Directory

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Include Spouse

## Constituent Directory

Elizabeth A. Ashton  
Dennis Ashton

2457 Morrison Drive  
Savannah, GA 31406

Sean A. Davenport

2151 Brant Avenue  
Miami, FL 33147

Paul R. Frantz

2583 Edgerton Road  
Cleveland, OH 44104

Samantha K. Hart

30 Walden Place  
Providence, RI 02907

Robert C. Hernandez  
Wendy Hernandez

410 17th St  
Denver, CO 80202-4402

Richard J. Jefferson

1825 Long Bird Road  
Salt Lake City, UT 84106

Andrea L. Tidwell

614 Village Creek Lane  
Little Rock, AR 72212

Nicholas Vincent

1425 Jefferson Lane  
Orlando, FL 32803

Christopher T. Young  
Mary Young

84 Spine Street  
Washington, DC 20010

# Constituent Profile

The **Constituent Profile** summarizes information contained in your constituent records. You can run a constituent profile for a constituent, an individual, or an organization. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: AAA Concrete

Profile Contents: Constituent Name, Biographical (Include Credit Card), Addresses, Constituent Codes, Individual Relationships

Title: Constituent Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Constituent Profile

## AAA Concrete

## Constituent Name

## AAA Concrete

AAA Concrete  
48 Island Lakes Shore  
Pahoa, HI 78741

Business:

808-779-1466

## Biographical Information

Is Inactive? No  
Is a Solicitor? No  
Has No Valid Addresses? No  
Gives Gifts Anonymously? No  
Org. Matches Gifts? Yes  
Fiscal Year Starts: 01/01  
Matching Gift Factor: 2.00  
Minimum Match Per Gift: \$50.00  
Maximum Match Per Gift: \$5,000.00  
Annual Per Donor Minimum: \$50.00  
Annual Per Donor Maximum: \$60,000.00  
Constituent ID: 163

Total Per Donor Minimum: \$50.00  
Total Per Donor Maximum: \$100,000.00  
Requests No Email? No  
Target: \$30,000 - \$39,999  
No. Employees: 45  
No. Subsidiaries:  
Income: \$350,000 - \$499,999  
Industry: Building/Construction  
Receipt Type: One receipt per gift  
Parent Corporation: International Concrete, Inc.

## Matching Gift Notes:

AAA Concrete will match only for full-time employees.

## Credit Card Information

Credit Card Type	Credit Card Number	Card Expires On
Discover	xxxx-xxxx-xxxx-7771	05/2010

## Addresses

Address Type	Address
Business	48 Island Lakes Shore Pahoa, HI 78741

## Constituent Codes

Code Abbreviation	Code Description	Date From	Date To
FR	Friend	04/01/2003	
MG	Matching Gift Company	04/01/2003	

## Individual Relationships

Name	Relationship	Class Of	Notes
Martin A. Schultz	Employee	1990	
Kyle N. Bell	Employee		

# Event Profile

The **Event Profile** summarizes event information contained in your event records. You can include event details, a financial summary, and participants. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: Walk-A-Thon

Include records with these dates: Include all dates

Event Categories to Include: Sporting event, dinner, class, other

Profile Contents: Event Details, Financial Summary

Title: Event Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Event Profile

## Walk-A-Thon

## Event Details

Event Name:	Walk-A-Thon	Event Goal:	\$250,000.00
Event ID:	WALK	Itinerary Description:	Nashville Walk-A-Thon
Category:	Sporting Event	Capacity:	500
Location Name:	International Conference Center	No. Invited:	1,000
Start Date:	07/28/2007	Event is Inactive:	No
End Date:	07/28/2007	Display on Calendar:	Yes
Start Time:	7:00AM	No. Participants:	12
End Time:	4:00PM	No. Registered:	5
Type:	Annual Fundraiser	Campaign:	Disaster Relief Campaign
Group:	Walk-A-Thon for Relief		

## Event Description:

This is a 5 kilometer walk that begins and ends at the International Conference Center. There will be a closing ceremony concert performed by The Jazz Sons. Proceeds from this year's walk-a-thon are designated for Disaster Relief.

## Financial Summary

## Financial Summary (Actual)

	<u>Budgeted</u>	<u>Actual</u>	<u>Over (Under)</u>
Income	\$250,000.00	\$26,350.00	(\$223,650.00)
Expense	\$19,700.00	\$18,386.34	(\$1,313.66)
Net	\$230,300.00	\$7,963.66	(\$222,336.34)

## Breakdown Information

<u>Type of Income</u>	<u>Total Amount</u>	<u>Paid</u>	<u>Balance</u>
<All>	\$26,345.00	\$26,350.00	(\$5.00)
Registration Fees	\$7,745.00	\$7,750.00	(\$5.00)
Other Donations	\$18,600.00	\$18,600.00	\$0.00
Sponsoring Pledge	\$0.00	\$0.00	\$0.00

Capacity:	500
No. invited:	12 (2.40% of capacity)
No. registered:	5
No. attended:	0 (0.00% of registered)
No. guests:	0
No. sponsors:	4

# Fund Profile

The **Fund Profile** summarizes fund information contained in your fund records. You can include descriptions of the fund, information about the fund solicitors, associated campaigns and appeals, fund attributes, *General Ledger* distribution, and gifts donated to the fund. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: 2008 Annual Fund

Include records with these dates: Include all dates

Profile Contents: Campaign, Appeal, Gift History

Title: Fund Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



**Fund Profile****2008 Annual Fund****Campaigns**

<b>Campaign ID</b>	<b>Campaign Description</b>	<b>Start Date</b>	<b>End Date</b>	<b>Overall Goal</b>
ANNUAL	Annual Campaign	01/01/1990	12/31/2010	\$2,000,000.00

**Gift History**

<b>Constituent Name</b>	<b>Date</b>	<b>Gift Type</b>	<b>Fund</b>	<b>Amount</b>	<b>Balance</b>
Mark D. Adamson	06/25/2008	Cash	2008 Annual Fund	\$50.00	\$0.00
Anonymous	11/14/2008	Cash	2008 Annual Fund	\$5,000.00	\$0.00
Agnes M. Cone	12/01/2008	Cash	2008 Annual Fund	\$75.00	\$0.00
Madison R. Parker	06/25/2008	Cash	2008 Annual Fund	\$20.00	\$0.00

# Grandparent Directory

The **Grandparent Directory** lists the grandparents of alumni, including their addresses and telephone numbers. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Alumni information to include: Primary alumni information

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Academic Status Codes to include: All

Class Years to include: Class of 2001, Class of 2002, Class of 2003, Class of 2004

Degrees to include: All

Majors to include: All

Grandchildren Codes to include: All

Grandparent Codes to include: All

Address: Preferred

Phone: Home

Title: Grandparent Directory

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Include Major Information= Yes

Barclay Furniture  
Barrett J. O'Malley (2002)  
Business

Ellen H. Crenshaw  
Andrew Crenshaw (2003)  
Biology

Harry E. Goodson  
Allison D. Goodson (2004)  
Business

Jeffrey B. Goodson  
Allison D. Goodson (2004)  
Business

Kristy Graham  
Wade C. Grayson  
Curtis Grayson (2002)

Max G. Taylor  
Michelle Taylor  
Melanie Taylor (2001)  
Business

Michelle Taylor  
Max G. Taylor  
Melanie Taylor (2001)  
Business

*7 Alumni listed*

4620 Grandover Pkwy.  
Greensboro, NC 27407

191 Island Drive  
Newport, RI 02840

201 Brentwood Avenue  
Greenville, SC 29608  
843-823-2526

111 Berry Road  
Greenville, SC 29608  
843-823-2526

55 Ashford Drive  
Dallas, TX 75239  
214-630-8834

3327 Dawson Street  
Pittsburgh, PA 15208  
403-555-4579

3327 Dawson Street  
Pittsburgh, PA 15208  
506-683-4579

# Honor/Memorial Profile

The **Honor/Memorial Profile** summarizes tribute information contained in your tribute records. You can include constituent names, addresses, and biographical information; solicit codes; credit card information; constituent codes; and spouse, business, education, relationship, and bank information. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: Bently, Kathleen

Profile Contents: Constituent Name, Biographical Information (include credit card information), Solicit Codes, Addresses, Constituent Codes

Title: Honor/Memorial Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Kathleen R. Bently****Constituent Name****Kathleen R. Bently**

3212 Baywood Avenue  
Oakview Plantation  
Atlanta, GA 30066

Home:

404-864-2522

**Biographical Information**

Nickname: Kathy  
Maiden Name: Payne  
Gender: Female  
Birthdate: 08/02/1944  
Age: 61  
Deceased?: No  
Deceased Date: N/A  
Marital Status: Married  
Is Inactive?: No  
Social Security Number: xxx-xx-4856  
Constituent ID: 8

Is a Solicitor? Yes  
Has No Valid Address? No  
Gives Gifts Anonymously? No  
Requests No Email? No  
Target: \$1,000 - \$4,999  
Income: \$60,000 - \$69,999  
Ethnicity: Hispanic  
Religion: Methodist  
Receipt Type: One receipt per gift  
Birthplace: Columbus., GA

**Credit Card Information****Credit Card Type**

Discover

**Credit Card Number**

xxxx-xxxx-xxxx-1111

**Card Expires On**

02/2012

**Solicit Codes**

Do not phone on weekends

**Addresses****Address Type**

Home

**Address**

3212 Baywood Avenue  
Oakview Plantation  
Atlanta, GA 30066

Former Address

1174 Warrior Way  
Amherst, NE 68812

Employment History

14 Lowland Road  
Columbus, GA

**Constituent Codes****Code Abbreviation**

AL

**Code Description**

Alumnus

**Date From**

1965

**Date To**

# Individual Profile

The **Individual Profile** summarizes information contained on your individual constituent records. You can include individual constituent name, address, spouse, education, business, and biographical information. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: Campbell, Jason

Profile Contents: Constituent Name, Biographical Information (include credit card information), Solicit Codes, Addresses, Constituent Codes

Title: Individual Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

## Individual Profile

## Jason D. Campbell

## Constituent Name

Jason D. Campbell

911 Sycamore Drive  
Athens, GA 30606

Home:

706-435-8511

## Biographical Information

Nickname:  
Maiden Name:  
Gender: Male  
Birthdate: 05/31/1947  
Age: 58  
Deceased?: No  
Deceased Date: N/A  
Marital Status: Married  
Is Inactive?: No  
Social Security Number: xxx-xx-6532  
Constituent ID: 19

Is a Solicitor? No  
Has No Valid Address? No  
Gives Gifts Anonymously? No  
Requests No Email? No  
Target: \$5,000 - \$9,999  
Income: \$90,000 - \$99,999  
Ethnicity:  
Religion: Roman Catholic  
Receipt Type: One receipt per gift  
Birthplace: Savannah, Georgia

## Credit Card Information

Credit Card Type	Credit Card Number	Card Expires On
Visa	xxxx-xxxx-xxxx-2345	07/2012

## Solicit Codes

Do not phone at work

## Addresses

Address Type	Address
Home	911 Sycamore Drive Athens, GA 30606
Business	2361 Northside Drive Atlanta, GA 30303

## Constituent Codes

Code Abbreviation	Code Description	Date From	Date To
FR	Friend	04/03/1999	
GP	Grandparent	12/13/1982	
MD	Major Donor	10/09/1998	
PA	Patient	12/15/1996	12/18/1996
PP	Past Parent	01/01/1995	01/01/2001

# MatchFinder Organization Summary

When you use the optional module *MatchFinder*, the **MatchFinder Organization Summary** report is available. Accessed through *Reports* on the Raiser's Edge bar, this profile report displays the matching gift factor and limits of companies in the *MatchFinder* database. The exact data included depends on your parameter tab settings. For example, you can select to view information about matching gift companies in a specified location. You can also select to view only companies of a selected industry, educational institution, or other type of nonprofit organization.

## Report Parameters

Sort by: Company name

Sort order: Acending

City: "equals" "Cleveland"

State: "equals" "OH"

Zip: All

Industries: All

Educational Institutions: All

Other nonprofits: All

Title: MatchFinder Organization Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)



**MatchFinder Organization Summary**

<u>Company Name</u>	<u>City</u>	<u>State</u>	<u>Industry</u>	<u>Ratio</u>	<u>Min Gift</u>	<u>Max Gift</u>
Acme-Cleveland Corporation	Cleveland	OH	Manufacturing	1.00		
Austin Company, The	Cleveland	OH	Construction	1.00	\$25.00	\$1,000.00
Brush Engineered Materials, Inc.	Cleveland	OH	Manufacturing	1.00	\$25.00	\$1,000.00
Centerior Energy Corporation	Cleveland	OH	Utility			
Cleveland-Cliffs, Inc.	Cleveland	OH	Metals and Mining	1.00	\$25.00	\$2,500.00
Eaton Corporation	Cleveland	OH	Manufacturing	1.00	\$25.00	\$5,000.00
Ferro Corporation	Cleveland	OH	Manufacturing	1.00	\$100.00	\$2,000.00
KeyCorp	Cleveland	OH	Banking	1.00	\$25.00	\$2,000.00
Lamson & Sessions Co., The	Cleveland	OH	Manufacturing	1.00	\$25.00	\$5,000.00
National City Corporation	Cleveland	OH	Financial Services	1.00	\$25.00	\$1,000.00
Novelis Corporation	Cleveland	OH	Manufacturing	1.00	\$25.00	\$1,000.00
Oglebay Norton Company	Cleveland	OH	Construction	1.00	\$25.00	\$1,000.00
Parker Hannifin Corporation	Cleveland	OH	Manufacturing	1.00	\$20.00	\$5,000.00
Preformed Line Products Company	Cleveland	OH	Manufacturing	1.00	\$25.00	\$2,000.00
Sherwin-Williams Company, The	Cleveland	OH	Manufacturing	1.00	\$25.00	\$5,000.00
SIFCO Industries, Inc.	Cleveland	OH	Manufacturing	1.00		\$1,000.00
White Consolidated Industries, Inc.	Cleveland	OH	Manufacturing			
<b>Total Companies Listed:</b>	17					

# Membership Category Profile

The **Membership Category Profile** summarizes information about your membership categories and programs. You can include current membership statistics and renewal history. The exact data included depends on your parameter tab settings.

## Report Parameters

As of Date: 5/26/2006

Membership Categories: Corporate

Profile Contents: All

Title: Membership Category Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Membership Category Profile****Corporate - Business Level****Membership Information**

Membership Category:	Corporate	Members per Membership:	25
Membership Program:	Business Level	Lifetime Membership?	No
Dues Level:		Date Added:	09/23/1999
Minimum Dues:	\$500.00		
Maximum Dues:	\$500.00		

**Membership Statistics**

No. Current Members:	3	Average Age of Members:	58
No. Primary Members:	3	Average Membership Age:	7
Total Dues:	\$5,000.00	Most Times Renewed:	2
Total Dues Paid:	\$1,500.00		
Number of Females:	1		
Number of Males:	2		

**Renewal Information**

Letters	Comments	Send To	No.	Frequency	Before/After
General Final Notice		Primary Member	2	Month(s)	After Expiration
General First Notice		Primary Member	1	Month(s)	Before Expiration
General Second Notice		Primary Member	1	Week(s)	After Expiration

**Default Benefits**

Benefit	Count	Unit Cost	Total Value	Comments
Parking Pass	1	\$25.00	\$25.00	

**Default Settings**

Default Renewal Card Status to:	Lost	New Memberships Expire After:	1 Year(s)
Default 'Expires' to:	Same month/day as cycle start date	Renewed Memberships Expire After:	1 Year(s)
Default 'Expires' to Date:		Rejoined Memberships Expire After:	

# Organization Profile

The **Organization Profile** summarizes information contained on your organization constituent records. You can include the organization name, address, and biographical information; constituent codes; individual relationships; contacts; employees; a giving history; actions; and attributes. The exact data included depends on your parameter tab settings.

## Report Parameters

Record to include: Carter Pharmaceuticals, Inc.

Profile Contents: Constituent Name, Biographical Information , Solicit Codes, Addresses, Constituent Codes

Title: Organization Profile

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Organization Profile****Carter Pharmaceuticals, Inc.****Constituent Name****Carter Pharmaceuticals, Inc.**

Carter Pharmaceuticals, Inc.  
209 Low Blvd.  
Wilmington, DE 19850

Business:

302-798-6260

**Biographical Information**

Is Inactive? No  
Is a Solicitor? No  
Has No Valid Addresses: No  
Gives Gifts Anonymously? No  
Org. Matches Gifts? Yes  
Fiscal Year Starts: 01/01  
Matching Gift Factor: 1.00  
Minimum Match Per Gift: \$25.00  
Maximum Match Per Gift: \$5,000.00  
Annual Per Donor Minimum: \$25.00  
Annual Per Donor Maximum: \$5,000.00  
Constituent ID: 138  
Matching Gift Notes:  
Must be full time

Total Per Donor Minimum: \$25.00  
Total Per Donor Maximum: \$15,000.00  
Requests No Email? No  
Target:  
No. Employees:  
No. Subsidiaries:  
Income:  
Industry: Pharmaceuticals  
Receipt Type: One receipt per gift  
Parent Corporation:

**Addresses****Address Type**

Business

**Address**

209 Low Blvd.  
Wilmington, DE 19850

**Constituent Codes****Code Abbreviation**

CO  
MG

**Code Description**

Corporation/Business  
Matching Gift Company

**Date From****Date To**

# Parent Directory

The **Parent Directory** lists parents of alumni. You can include their addresses and telephone numbers. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Alumni information to include: Primary alumni information

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Academic Status Codes to include: All

Class Years to include: Class of 2000, Class of 2001, Class of 2002, Class of 2003, Class of 2004

Degrees to include: All

Majors to include: All

Children Codes to include: All

Parent Codes to include: All

Address: Preferred

Phone: Home

Title: Parent Directory

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Class of Asc.

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

Detail: Include major information: Yes

Jason D. Campbell  
Dorothea A. Campbell  
Brooke Campbell (2000)  
Biology

Max G. Taylor  
Michelle Taylor  
Melanie Taylor (2001)  
Business

Michelle Taylor  
Max G. Taylor  
Melanie Taylor (2001)  
Business

Barclay Furniture  
Barrett J. O'Malley (2002)  
Business

Kristy Graham  
Wade C. Grayson  
Curtis Grayson (2002)

Ellen H. Crenshaw  
Andrew Crenshaw (2003)  
Biology

Harry E. Goodson  
Allison D. Goodson (2004)  
Business

Jeffrey B. Goodson  
Allison D. Goodson (2004)  
Business

*8 Alumni listed*

911 Sycamore Drive  
Athens, GA 30606

3327 Dawson Street  
Pittsburgh, PA 15208

3327 Dawson Street  
Pittsburgh, PA 15208

4620 Grandover Pkwy.  
Greensboro, NC 27407

55 Ashford Drive  
Dallas, TX 75239

191 Island Drive  
Newport, RI 02840

201 Brentwood Avenue  
Greenville, SC 29608

111 Berry Road  
Greenville, SC 29608

# Professional Directory

The **Professional Directory** lists alumni professions and businesses. You can include their addresses and telephone numbers. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Profession Codes to include: Accounting, Education

Constituent Codes to include: All

Address: Preferred

Phone: Home

Title: Professional Directory

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

Detail: Include spouse information: Yes; Include spouse employment information: Yes



Mark D. Adamson  
Accountant  
Financial Analyst

125 Smokerise Way  
Charleston, SC 29401

Kathleen R. Bently  
Teacher  
Math Teacher  
Frank Bently

3212 Baywood Avenue  
Oakview Plantation  
Atlanta, GA 30066

George D. Finley  
Accountant  
Senior Accountant

74 St. Ives Road  
Milwaukee, WI 53202

David B. Murphy  
Education  
Assistant Professor  
Margaret L. Murphy

3596 Friendship Way  
Cambridge, MA 02141

Grace J. Overstreet  
Education  
Course Development

548 Harbor Cove Lane  
Mt. Pleasant, SC 29464

Mary Beth Richardson  
Education  
Professor

307 Pastor Lane  
Delray Beach, FL 33447

Anne C. Sinclair  
Accountant  
Senior Accountant  
Joseph A. Sinclair  
Engineer  
Owner

115 Ashley River Road  
Charleston, SC 29412

Winston R. Tate  
Accountant  
CFO

2312 Three Woods Lane  
Barrington, RI 02806

Collin Dubose  
Accountant  
CPA  
Gretta Dubose

5541 Old Towne Rd.  
Albuquerque, NM 87108

Dale Green  
Accountant  
Accountant

783 Winchester Lane  
Russell Springs, KY 42642



# Prospect Research Reports

**Contents**

**Outstanding Proposal Report ..... 302**  
**Proposal Analysis Report..... 304**  
**Proposal Follow-Up Report..... 306**  
**Proposal Pipeline Summary.....308**

# Outstanding Proposal Report

The **Outstanding Proposal Report** lists proposals presented to potential donors. You can include a summary of the proposal, including the amount requested and the amount expected. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Date asked

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Include proposals with no date asked = Yes; Include inactive proposals = No;

Campaigns to include: All

Constituent Codes to include: All

Funds to include: All

Purposes: All

Proposal Statuses: All

Prospect Classification: All

Prospect Status: All

Address: Preferred

Title: Outstanding Proposal Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort: Proposal Status Asc

Optional Column: Prospect Contact

## Outstanding Proposal Report

Constituent	Proposal Contact Gift Type	Rating	Amount Asked	Amount Expected	Date Expected Date Asked
Julie M. Bach 502 Lang Avenue Pittsburgh, PA 15228	Cash	Needs Cultivation	\$2,000.00	\$2,000.00	12/31/2009 02/01/2008
Lightning Air Transport 821 Runway Drive Atlanta, GA 30320	Planned Gift	Excellent Prospect	\$500,000.00	\$500,000.00	09/01/2001 02/15/1999
Marlena Nodason 1542 Parisan Court Toronto, ON M1M 1M1	Property	Needs Cultivation	\$250,000.00	\$200,000.00	07/01/2005 09/27/2001
Lajuan Wilson 184 River Street Savannah, GA 31419	Cash	Needs Cultivation	\$10,000.00	\$0.00	01/03/2005
Jason D. Campbell 911 Sycamore Drive Athens, GA 30606	Planned Gift	Excellent Prospect	\$1,000,000.00	\$0.00	02/02/2005
Gretchen N. Jones 22 Concord Street Allendale, NJ 07401	Planned Gift	Excellent Prospect	\$100,000.00	\$100,000.00	03/06/2004
6 constituent(s) listed			<b>Grand Total:</b> <b>Difference:</b>	<b>\$1,862,000.00</b> <b>\$802,000.00</b> <b>\$1,060,000.00</b>	

# Proposal Analysis Report

The **Proposal Analysis Report** compares proposal results with the expected outcome. You can also track the number of days the proposal has been open. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Date asked

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Base funding on: Proposal

Campaigns to include: Annual

Constituent Codes to include: All

Funds to include: All

Purposes: Annual, Current Restricted

Proposal Statuses: All

Prospect Classification: All

Prospect Status: All

Title: Proposal Analysis Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Purpose Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

Optional Column: Prospect Contact

# Proposal Analysis Report

## Purpose

Constituent	Contact	Amount	Amount		Date Asked	Date Funded	
Proposal	Type of Gift	Asked	Funded	Difference	Date Expected	Days Open	
<b>Annual Fund</b>							
Davis & Johnson					02/25/2006	11/02/2006	
Annual Gift Proposal	Cash	\$10,000.00	\$10,000.00	\$0.00	10/31/2006		250
Cynthia B. Urban					07/01/2002	02/07/2003	
Annual Gift Proposal	Cash	\$4,000.00	\$5,000.00	(\$1,000.00)	07/01/2003		221
	Total:	\$14,000.00	\$15,000.00	(\$1,000.00)			
2 constituent(s) listed for Annual Fund	Average:	\$7,000.00	\$7,500.00		Average Days Open:		\$235.50
<b>Current Restricted</b>							
Davis & Johnson					07/09/2003	03/29/2004	
General Proposal	Cash	\$5,000.00	\$5,000.00	\$0.00	12/31/2003		264
Jason D. Campbell					01/01/2004	04/03/2004	
General Proposal	Cash	\$2,000.00	\$2,000.00	\$0.00	06/30/2004		93
Julie M. Bach					02/01/2008		
General Proposal	Cash	\$2,000.00	\$0.00	\$2,000.00	12/31/2009		0
	Total:	\$9,000.00	\$7,000.00	\$2,000.00			
3 constituent(s) listed for Current Restricted	Average:	\$3,000.00	\$2,333.33		Average Days Open:		\$119.00
5 proposal(s) listed	<b>Grand Total:</b>	\$23,000.00	\$22,000.00	\$1,000.00			

# Proposal Follow-Up Report

The **Proposal Follow-Up Report** tracks actions taken after you present a proposal. The report can include the status and priority of the proposal. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Priorities to include: High priority = Yes; Medium priority = Yes; Low priority = Yes

Action Progress: Complete = Yes; Incomplete = Yes

Include inactive proposals = Yes

Action Statuses to include: All

Action Types to include: All

Constituent Codes to include: All

Purposes: All

Proposal Statuses: All

Prospect Classification: All

Prospect Status: All

Address: Preferred

Title: Proposal Follow-Up Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Constituent Name Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

Optional Column: Proposal Contact



## Proposal Follow-Up Report

Constituent	Proposal	Proposal Contact	Action Date	Type	Solicitor	Status	Priority
<b>Hernandez Robert Carlos - 280</b>							
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	Relief Proposal		02/01/2005	Dinner Meeting	Mohammed Rahman	Pending	Normal
	Relief Proposal		09/19/2001	Correspondence	Mohammed Rahman	Completed	Normal
	Relief Proposal		12/01/2002	Correspondence	Mohammed Rahman	Completed	Normal
	Relief Proposal		01/03/2000	Introduction Call	Mohammed Rahman	Completed	Normal
	Relief Proposal		10/08/2003	Dinner Meeting	Mohammed Rahman	Completed	Normal
	Relief Proposal		05/01/2000	Follow-Up	Mohammed Rahman	Completed	Normal
	Relief Proposal		10/11/2004	Dinner Meeting	Mohammed Rahman	Completed	Normal

*7 Action(s) listed for Hernandez Robert Carlos - 280*

### Tidwell Andrea Lynn - 266

Andrea L. Tidwell 614 Village Creek Lane Little Rock, AR 72212	Disaster Campaign Prop		06/03/2007	Dinner Meeting	Mohammed Rahman	Open	Normal
--	------------------------	--	------------	----------------	-----------------	------	--------

*1 Action(s) listed for Tidwell Andrea Lynn - 266*

8 Action(s) Listed

# Proposal Pipeline Summary

The **Proposal Pipeline Summary** provides information about solicitors associated with proposals and proposal statuses. This is a cross-tab report with the solicitors listed vertically and the corresponding proposal status horizontally. Each column corresponds to one proposal status and each row to one solicitor. The only data included on the report, beyond solicitor names and proposal statuses is the number of proposals for each status and each solicitor. A **Total** column appears, displaying totals for each row, and a **Total** row appears at the end of the report, displaying totals for each column. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Date to use: Date asked

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Include inactive proposals = Yes

Action Statuses to include: All

Action Types to include: All

Constituent Codes to include: All

Purposes: All

Proposal Statuses: All

Prospect Classification: All

Prospect Status: All

Title: Proposal Pipeline Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

# Proposal Pipeline Summary

Solicitor	Closed	Cultivation	Follow-Up	Identification	Proposal	Research	Stewardship
Allison E. Andrews	1	1	0	1	0	0	1
Kathleen R. Bently	1	0	0	0	0	0	0
Zachery J. Clover	0	0	0	0	0	0	0
Ellen H. Crenshaw	0	0	0	0	0	0	0
Earl N. Hunter	1	0	0	1	0	0	0
Spencer Kovalak	0	0	0	0	0	1	0
Audrey I. Lorenz	0	0	0	0	0	0	1
David B. Murphy	0	0	1	0	1	0	0
Mohammed Rahman	0	2	0	0	0	0	1
Mary Beth Richardson	0	0	0	0	0	0	0
Harris F. Sadler	0	0	0	0	0	0	0
Anne C. Sinclair	0	0	0	0	0	0	0
Max G. Taylor	0	0	0	0	0	0	0
Nicholas Vincent	0	0	0	0	0	0	2
<Unknown>	0	2	1	0	0	0	0
<b>Total:</b>	<b>3</b>	<b>5</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>5</b>

15 Solicitor(s) listed



# Tribute Reports

## Contents

Honor/Memorial Contributors List .....	312
Honor/Memorial Directory .....	314
Honor/Memorial Gift Report .....	316
Honor/Memorial Summary List .....	318

# Chapter 11

# Honor/Memorial Contributors List

The **Honor/Memorial Contributors List** lists constituents who donated in honor or memory of another constituent. This report lists each contributor and address. You can include telephone numbers and acknowledgement information. This list is a good source for newsletter articles about donors and honor/memorial donations. Because the **Honor/Memorial Contributors List** provides only contributor information, it does not list gift amounts. The **Honor/Memorial Gift Report** provides gift amounts. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Otto G. Montgomery

Date to use: Gift date

Include all dates

Include these constituents: Inactive = No; Deceased = No; Constituents with no valid addresses = No

Soft credit option: Donor

Matching gift option: Donor

Include these Tributes: Gifts may be given to the tribute = Yes; Gifts may not be given to the tribute = Yes

Constituent Codes to include: All

Tribute Types to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gifts-in-Kind

Address: Preferred

Title: Honor/Memorial Contributors List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Include Acknowledgee Information = Yes

## Honor/Memorial Contributors List

### Tribute(s) for Otto G. Montgomery

#### Gifts received In Honor of Lifetime Volunteer Award

##### Acknowledge:

Jacqueline Montgomery-Byrne (Daughter)  
11 Shell Street  
Oklahoma City, OK 73114

##### Contributors:

Mark D. Adamson  
125 Smokerise Way  
Charleston, SC 29401

Julie M. Bach  
502 Lang Avenue  
Pittsburgh, PA 15228

Autumn L. Compton  
1205 Pinetree Lane  
Nashville, TN 37218

Angela Diresta  
248 Twin Lane  
Building #3299  
Birmingham, AL 35220

Heather L. Faulkner  
1205 Hibben Ferry Road  
South Bend, IN 46637

Kristy Graham  
55 Ashford Drive  
Dallas, TX 75239

Laura Holt  
265 St. John's Place  
Charleston, SC 29420

Spencer Kovalak  
844 Ft. Johnson Lane  
Columbus, GA 31995

Roger B. Langley  
18 Hassell Street  
San Antonio, TX 78218

Madison R. Parker  
557 Dogwood Court  
Omaha, NE 68147

Emma V. Terrell  
845 High Hill Court  
Suite 56  
Toronto, ON M1M 1M1

David A. Underwood  
154 Cedar Avenue  
Summerville, SC 29407

# Honor/Memorial Directory

The **Honor/Memorial Directory** lists each tribute record with the name of the person being honored, memorialized, or celebrated and the names of the acknowledgees to be notified when a donation is made in tribute of someone. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Include these Tributes: Gifts may be given to the tribute = Yes; Gifts may not be given to the tribute = Yes

Constituent Codes to include: All

Tribute Types to include: All

Address: Preferred

Title: Honor/Memorial Directory

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Include Acknowledgee Information = Yes



**Tribute(s) for Francis E. Baker****In Special Recognition of Francis and Derrick's 25th Anniversary**

## Acknowledge:

Francis E. Baker  
3207 Yucca Court  
El Paso, TX 78212

Start Date: 09/01/2006

End Date: 10/01/2007

Constituent ID: 149

**Tribute(s) for Kathleen R. Bently****In Honor of Teacher of the Year**

## Acknowledge:

Kathleen R. Bently  
3212 Baywood Avenue  
Oakview Plantation  
Atlanta, GA 30066

Start Date: 06/03/2007

End Date: 06/03/2008

Constituent ID: 8

**Tribute(s) for Robert C. Hernandez****In Special Recognition of Dr. Robert Hernandez, Pediatrician of the Year**

## Acknowledge:

Robert C. Hernandez  
410 17th St  
Denver, CO 80202-4402

Start Date: 01/01/2006

End Date: 01/01/2007

Constituent ID: 96

**Tribute(s) for Otto G. Montgomery****In Honor of Lifetime Volunteer Award**

## Acknowledge:

Jacqueline Montgomery-Byrne  
11 Shell Street  
Oklahoma City, OK 73114

Start Date: 01/01/2002

End Date:

Relationship: Daughter

# Honor/Memorial Gift Report

The **Honor/Memorial Gift Report** provides details about honor/memorial gifts. This report can include each gift with the gift type, amount, fund description, and totals by gift type. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Robert Hernandez

Date to use: Gift date

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Include these Tributes: Gifts may be given to the tribute = Yes; Gifts may not be given to the tribute = Yes

Soft credit option: Donor

Matching gift option: Donor

Gift types to include: Cash, Pay-Cash, MG Pay-Cash, Covenant Payment, Pledge, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, MG Pay-Stock/Property, Pay-Stock/Property (Sold), MG Pay-Stock/Property (Sold), Gift in Kind, Pay-Gift in Kind, MG Pay-Gifts-in-Kind

Constituent Codes to include: All

Tribute Types to include: All

Appeals to include: All

Campaigns to include: All

Funds to include: All

Address: Preferred

Title: Honor/Memorial Gift Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Honor/Memorial Gift Report****Tribute(s) for Robert C. Hernandez**

Date	Constituent	Fund Description	Gift Type	Amount	Reference
<u>In Special Recognition of</u> Dr. Robert Hernandez, Pediatrician of the Year					
01/27/2006	Roger B. Langley 18 Hassell Street San Antonio, TX 78218	Building Fund	Cash	\$1,000.00	
02/18/2006	David M. Korbin 1230 Pelican Point Dover, DE 19707	Building Fund	Cash	\$250.00	
2 gift(s) listed		Total Cash:		\$1,250.00	
		<b>Grand Total Cash:</b>		\$1,250.00	
1 honor/memorial record(s) listed					
2 gift(s) listed					

# Honor/Memorial Summary List

The **Honor/Memorial Summary List** provides an overview of the honor/memorial records. The report can include the name of the person being honored, memorialized, or celebrated; the honor/memorial type; the date the tribute was established; whether the tribute is active; and the tribute code. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Include these Tributes: Gifts may be given to the tribute = Yes; Gifts may not be given to the tribute = Yes

Constituent Codes to include: All

Tribute Types to include: All

Title: Honor/Memorial Summary List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Honor/Memorial Name Asc; Tribute Start Date Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

**Honor/Memorial Summary List**

<b>Tribute Type</b>	<b>Start Date</b>	<b>End Date</b>	<b>Accepts Gifts</b>	<b>Constituent ID</b>
<b>Francis E. Baker</b>				
In Special Recognition of	09/01/2006	10/01/2007	Yes	149
<i>1 Tribute(s) listed for Francis E. Baker</i>				
<b>Kathleen R. Bently</b>				
In Honor of	06/03/2007	06/03/2008	Yes	8
<i>1 Tribute(s) listed for Kathleen R. Bently</i>				
<b>Robert C. Hernandez</b>				
In Special Recognition of	01/01/2006	01/01/2007	Yes	96
<i>1 Tribute(s) listed for Robert C. Hernandez</i>				
<b>Otto G. Montgomery</b>				
In Honor of	01/01/2002		Yes	49
<i>1 Tribute(s) listed for Otto G. Montgomery</i>				



# Volunteer Reports

## Contents

Courses and Training Report .....	322
Future Awards Report .....	324
Job Assignment Summary .....	326
Time Sheet Report .....	328
Volunteer Awards Report .....	330
Volunteer Job Assignment Schedule .....	332
Volunteer Match List .....	334
Volunteer Skills and Experience .....	336
Volunteer Summary .....	338

# Courses and Training Report

The **Courses and Training Report** lists volunteers with the dates they enrolled in courses, the instructor for the course, and information about volunteer certification. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Certifications to include: All

Courses to include: Job Skills Assessment

Volunteer Statuses to include: All

Volunteer Types to include: All

Address: None

Title: Courses and Training Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Course Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes



**Courses and Training Report**

<b>Constituent Name</b>	<b>Course</b>	<b>Start Date</b>	<b>End Date</b>	<b>Instructor</b>	<b>Certification</b>	<b>Expires</b>
<b>Job Skills Assessment</b>						
Angela Diresta	Job Skills Assessment				College or Technical Sc	
Nicole M. Dustin	Job Skills Assessment					
David M. Korbin	Job Skills Assessment					
Ira M. Rosenberg	Job Skills Assessment				College or Technical Sc	

*4 Course(s) listed for Job Skills Assessment*

4 Course(s) listed

# Future Awards Report

The **Future Awards Report** lists volunteers with the award they are due, the number of hours and the last date they worked, and the cumulative number of hours worked for your organization. The award calculation is based on the next award date recorded on the Volunteer tab of the constituent record. The exact data included depends on your parameter tab setting

## Report Parameters

Records to include: All

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Awards to include: All

Volunteer Types to include: All

Volunteer Statuses to include: All

Preferred Address

Title: Future Awards Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Future Awards Report**

<u>Constituent Name</u>	<u>Future Award</u>	<u>Min. Amount of Service</u>	<u>Amount Worked</u>	<u>Comments</u>
Angela Diresta 248 Twin Lane Building #3299 Birmingham, AL 35220	Newsletter Recognition	15 hours	25.50	Angela created the Job Assessment Program
Susan E. McDonald 321 University Way Orlando, FL 32829	Horizon Volunteer	1 hours	215.00	
Otto G. Montgomery 11 Shell Street Oklahoma City, OK 73114	Gold Leaf Award	600 hours	118.00	Will receive this award as appropriate
Lavern E. Nivens 8328 Chalmers Street Richmond, VA 23233	T-Shirt	40 hours	58.00	
Barrett J. O'Malley 5428 Hickory Trace Drive Greensboro, NC 27405	Two Free Tickets	80 hours	109.00	Needs another 40 hours of service.

# Job Assignment Summary

The **Job Assignment Summary** provides a summary of the hours worked by your volunteers. This report lists the information by assignment, not name, for as many as 12 date ranges. Names and addresses do not appear on this report. You can produce a graph of the report results. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include all dates

Jobs to include: All

Volunteer Types to include: All

Volunteer Statuses to include: All

Categories to include: All

Tasks to include: All

Title: Job Assignment Summary

Report Periods: 01/01/2005-01/31/2005; 02/01/2005 - 02/29/2005; 03/01/2005-03/31/2005; 04/01/2005-04/30/2005. Headings: Jan., Feb., March, April

Title: Job Assignment Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

**Job Assignment Summary**

<b>Job Assignment</b>	<b>Jan</b>	<b>Feb</b>	<b>March</b>	<b>April</b>
Computer	14.00	12.00	4.00	4.00
CPR Class Instructor	0.00	0.00	0.00	0.00
Crowd Control	0.00	0.00	0.00	0.00
Decorations	0.00	0.00	0.00	0.00
Dinner Staff	0.00	0.00	0.00	0.00
Health Awareness	5.00	0.00	0.00	0.00
Job Skills Assessment	0.00	0.00	0.00	0.00
Language Instructors	0.00	0.00	0.00	4.00
Lawn Care	0.00	0.00	0.00	4.00
Newsletter	5.00	0.00	0.00	0.00
Parking Assistance	0.00	0.00	0.00	0.00
Phone Calls	0.00	0.00	0.00	0.00
Photographer	0.00	0.00	0.00	0.00
Post-Event Cleanup	0.00	0.00	0.00	0.00
Promotion Committee	0.00	0.00	0.00	0.00
Refreshments	0.00	0.00	0.00	0.00
Shots for Tots	10.00	8.00	7.00	13.00
Sign-in Table	0.00	0.00	0.00	0.00
Soup Kitchen	4.00	4.00	14.00	8.00
Special Events Coordinator	0.00	0.00	0.00	0.00
Wait Staff for Lunch Break	0.00	0.00	0.00	0.00
Wait Staff	0.00	0.00	0.00	0.00

# Time Sheet Report

The **Time Sheet Report** lists your volunteers and their assignments. You can include the number of hours worked at each assignment, the monetary value of their time, the number of hours worked during the period you select for each volunteer, and the year-to-date and cumulative totals. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Mark Adamson

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Assignments: All

Volunteer Types to include: All

Volunteer Statuses to include: All

Address: Preferred

Title: Time Sheet Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Optional Column: Position

## Time Sheet Report

Constituent Name	Job Assignment	Position	Date	Hours	Hourly Wage	Value
Mark D. Adamson 125 Smokerise Way Charleston, SC 29401	Computer	Data Entry Clerk	01/05/2004	5.00	\$6.00	\$30.00
	Soup Kitchen	Server	08/22/2004	4.00	\$6.00	\$24.00
	Lawn Care	Mowing	07/09/2005	4.00	\$5.00	\$20.00
	Soup Kitchen	Server	08/29/2005	3.00	\$6.00	\$18.00
	Soup Kitchen	Server	11/03/2005	4.00	\$6.00	\$24.00
	Soup Kitchen	Server	11/17/2005	8.00	\$6.00	\$48.00
	Computer	Data Entry Clerk	12/14/2005	8.00	\$6.00	\$48.00
	Computer	Data Entry Clerk	04/06/2006	8.00	\$6.00	\$48.00
	Lawn Care	Mowing	05/27/2006	4.00	\$5.00	\$20.00
	Lawn Care	Mowing	06/03/2006	4.00	\$6.00	\$24.00
	Soup Kitchen	Server	08/05/2006	8.00	\$6.00	\$48.00
	Soup Kitchen	Server	08/12/2006	5.00	\$6.00	\$30.00
	Soup Kitchen	Server	08/19/2006	4.00	\$6.00	\$24.00
	Computer	Data Entry Clerk	10/14/2006	2.00	\$6.00	\$12.00
	Soup Kitchen	Server	01/06/2007	4.00	\$6.00	\$24.00
	Lawn Care	Mowing	07/07/2007	4.00	\$6.00	\$24.00
	Parking Assistance	Valet	08/25/2007	6.50	\$5.00	\$32.50
	Computer	Data Entry Clerk	12/15/2007	8.00	\$6.00	\$48.00
<b>Total for Date Range</b>				93.50		\$546.50
<b>Total for Volunteer Year as of Start Date</b>				0.00		\$0.00
				<b>Hours</b>		<b>Value</b>
<b>Grand Total for Date Range</b>				93.50		\$546.50
<b>Grand Total for Volunteer Year as of Start Date</b>				0.00		\$0.00

# Volunteer Awards Report

The **Volunteer Awards Report** provides a list of volunteers with the award level each has reached. You can also include the minimum amount of service required for the award, the award presented to the volunteer, and the name of the award presenter. This report is useful as a source of newsletter information or press releases so you can publicly recognize your volunteers' service. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Awards to include: 100 hours, 200 hours, 400 hours

Volunteer Types to include: All

Volunteer Statuses to include: All

Address: Preferred

Title: Volunteer Awards Report

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Award Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes



## Volunteer Awards Report

Constituent Name	Award	Min. Amount of Service	Amount Worked	Award Date	Presented With	Presented By
<b>100 Hours</b>						
Susan E. McDonald 321 University Way Orlando, FL 32829	100 Hours	100 hours	215.00	10/11/2000	Tee shirt	John Riddle
<i>1 Award(s) listed for 100 Hours</i>						
<b>200 Hours</b>						
Susan E. McDonald 321 University Way Orlando, FL 32829	200 Hours	200 hours	215.00	11/07/2001	Appreciation plaque	Harry Cone
<i>1 Award(s) listed for 200 Hours</i>						
<b>400 Hours</b>						
Susan E. McDonald 321 University Way Orlando, FL 32829	400 Hours	400 hours	215.00	09/04/2002	Crystal paperweight	Harry Cone
<i>1 Award(s) listed for 400 Hours</i>						
3 Award(s) listed						

# Volunteer Job Assignment Schedule

The **Volunteer Job Assignment Schedule** lists volunteers and their telephone numbers with their job assignments and the days and times of the assignments. You can include the department, location, and position of the assignments to help you with your scheduling. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include job assignments with these dates: Last calendar yr

Include job assignments with a status of: Both

Requested on: Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes: All

Assignments: Computer, Lawn Care

Volunteer Types: All

Volunteer Statuses: All

Address: None

Title: Volunteer Job Assignments

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Job Assignment Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

**Volunteer Job Assignments**

<b>Job Assignment Organization/Event</b>	<b>Constituent Name</b>	<b>Day</b>	<b>Date</b>	<b>Start Time</b>	<b>End Time</b>
<b>Computer</b>	Mark D. Adamson	Saturday	01/02/2003		
	Kathleen R. Bently	Friday	06/30/2003	6:00PM	10:00PM
	David M. Korbin	Monday	01/02/2003		
	Otto G. Montgomery	Saturday	01/02/2003	9:00AM	12:00PM
	Barrett J. O'Malley	Saturday	02/13/2003	8:30AM	3:30PM

*5 Job Assignment(s) listed for Computer*

**Lawn Care**

Mark D. Adamson	Saturday	01/01/2004		
Jason D. Campbell	Saturday	09/13/2001	9:00AM	12:00PM
Otto G. Montgomery	Saturday	01/01/2002		
John T. Smith	Saturday	09/09/2003	8:00AM	12:00PM

*4 Job Assignment(s) listed for Lawn Care*

9 Job Assignment(s) listed

# Volunteer Match List

The **Volunteer Match List** report helps you match your volunteers and your jobs. This report uses the qualifications of your volunteers and their availability, as recorded in the volunteer record, to guide you in making your selections for volunteers for specific jobs. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: Query

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Skill Descriptions to include: All

Courses to include: All

Certifications to include: All

Assignments to include: All

Volunteer Types to include: All

Volunteer Statuses to include: All

Use selected months only: Yes (June)

Use selected days: Yes (Saturday and Sunday)

Use specified time: No

Only volunteers available for entire time: No

Address: Preferred

Title: Volunteer Match List

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Detail: Print Availability

**Volunteer Match List**

Constituent Name	Availability				
	Day	From Date	To Date	Start Time	End Time
Lucy G. Avdeenko 52 Pebble Lane Kennebunkport, ME 04046	Weekends	01/01	12/31		
Otto G. Montgomery 11 Shell Street Oklahoma City, OK 73114	All Week	01/01	12/31	9:00AM	7:00PM
Stella S. White 22-B Cooper Way Coffman Cove, AK 99918	Weekends	02/01	10/22	9:00AM	6:00PM

# Volunteer Skills and Experience

The **Volunteer Skills and Experience** report lists your volunteers with a description of their skills and experience, their skill level, and information about the licenses they hold. Use this report to match volunteers with the needs of your project. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include all dates

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Skill Descriptions to include: Medical Professional

Skill Levels to include: All

Volunteer Types to include: All

Volunteer Statuses to include: All

Address: Preferred

Title: Volunteer Skills and Experience

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Description Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes

## Volunteer Skills and Experience

Constituent Name	Description	Skill Level	License	License Number	Expires
<b>Medical Professional</b>					
Robert C. Hernandez 410 17th St Denver, CO 80202-4402	Medical Professional	Licensed	MD		
Susan E. McDonald 321 University Way Orlando, FL 32829	Medical Professional	Licensed	RN	SC2345	
Orla A. McGrann 3150 Brentmore Court Atlanta, GA 30062	Medical Professional	Licensed	MD		
Tenli Smyth 2510 College Avenue Apartment #12 Oakland, CA 94618	Medical Professional	Licensed	MD	CA95628844	
Stella S. White 22-B Cooper Way Coffman Cove, AK 99918	Medical Professional	Licensed	MD	87H	
5 Skill(s) listed for Medical Professional					
5 Skill(s) listed					

# Volunteer Summary

The **Volunteer Summary** report lists your volunteers with the dates they began their service and information about their most recent assignments. You can include the number of hours each worked in previous years and in the current year with a cumulative total. The exact data included depends on your parameter tab settings.

## Report Parameters

Records to include: All

Include Volunteers with these Total Hours 50-80

Include these constituents: Inactive = Yes; Deceased = No; Constituents with no valid addresses = Yes

Constituent Codes to include: All

Assignments: All

Volunteer Types to include: All

Volunteer Statuses to include: All

Address: Preferred

Title: Volunteer Summary

Align: Center

Print Page Number in Heading = Yes (Align: Right)

Print Date in Heading = Yes (Align: Left)

Sort Order: Total Hours Asc

Break Report by <Sort Field 1> = Yes

Print count of records = Yes



## Volunteer Summary

Constituent Name	Begin Date	Last Worked			Hours		
		Date	Job Assignment	Hours	Prior Years	This Year	Total
<b>50.00</b>							
Lorrel M. Justin 4803 Franklin Lane Green Bay, WI 54306			Parking Assistance	6.50	10.50	39.50	50.00
		Total Awards:	0				
<i>1 Constituents listed for 50.00</i>							
<b>58.00</b>							
Lavern E. Nivens 8328 Chalmers Street Richmond, VA 23233			Soup Kitchen	5.00	16.00	42.00	58.00
		Total Awards:	1				
<i>1 Constituents listed for 58.00</i>							
<b>72.00</b>							
Clara M. Daniels 48 Farmridge Road Danbury, CT 06810			Soup Kitchen	4.00	48.00	24.00	72.00
		Total Awards:	0				
<i>1 Constituents listed for 72.00</i>							
<b>76.00</b>							
Kyle N. Bell 976 Ocean Shore Drive Pahoa, HI 78741			Lawn Care	4.00	56.00	20.00	76.00
		Total Awards:	0				
<i>1 Constituents listed for 76.00</i>							
<b>79.50</b>							
Agnes M. Cone 110 Wichman Street Walterboro, SC 29488			Soup Kitchen	4.00	0.00	79.50	79.50
		Total Awards:	0				
<i>1 Constituents listed for 79.50</i>							

