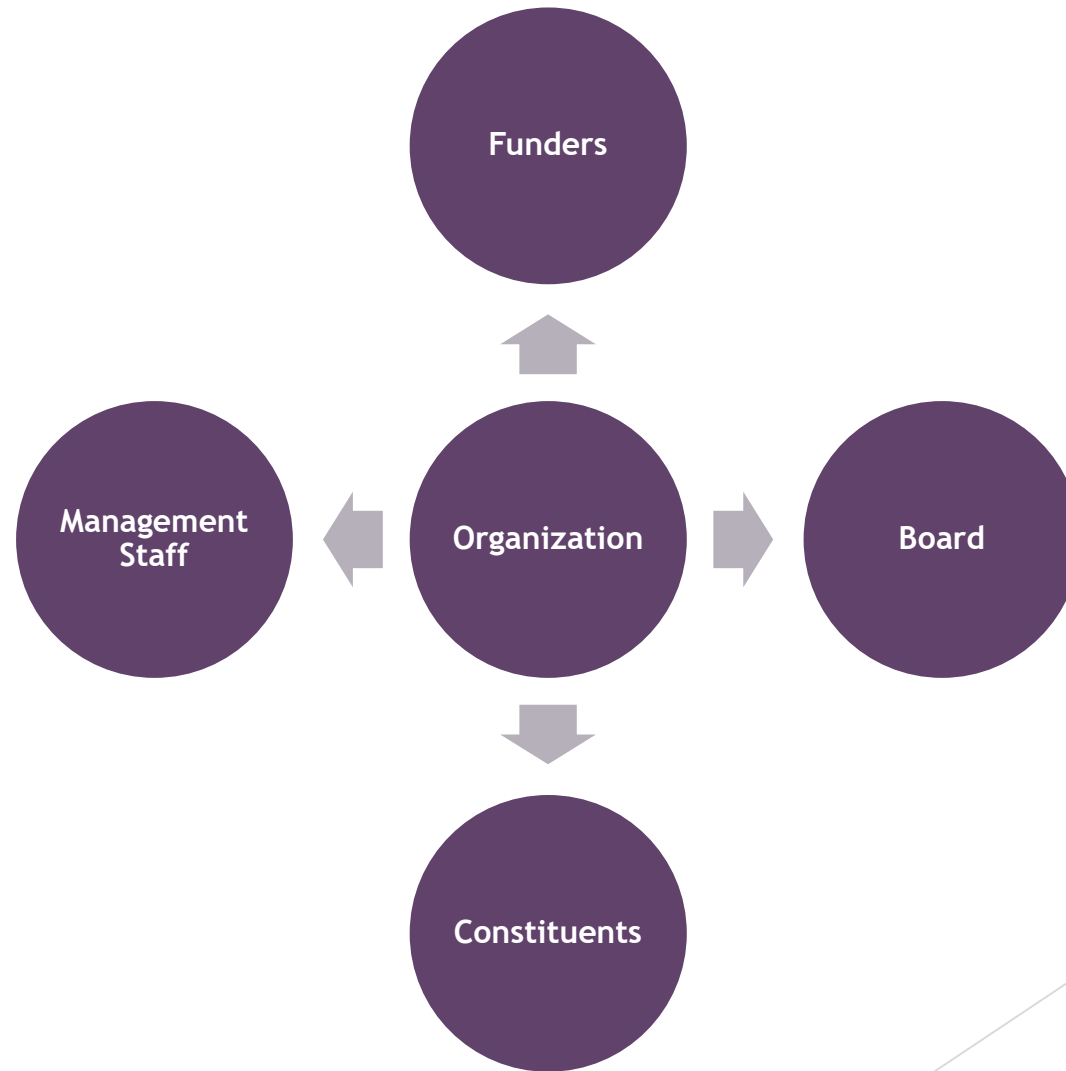


# Reporting

Donor Perfect

# Stakeholder Requirements



# Agenda

- ▶ Welcome and Introductions
- ▶ Expectations
- ▶ Reporting challenges
- ▶ Key metrics
- ▶ Standard reports and methods
- ▶ Questions



# Fundraising Reporting Challenges

## Multiple Data Sources

- ▶ Primary donor management
- ▶ Accounting system
- ▶ Separate event management
- ▶ Volunteer system
- ▶ Online giving
- ▶ Client tracking system



# Addressing the Challenge: Multiple Data Sources

- ▶ Put as many fundraising sources of data into your primary system
  - ▶ Eliminate unnecessary 3<sup>rd</sup> party systems if possible
    - ▶ Use an online giving tool that integrates directly with your donor management system
    - ▶ Use the built-in event registration tools
  - ▶ Create import processes where 3<sup>rd</sup> party system must be used.



# Fundraising Reporting Challenges

## Gift Coding

- ▶ Campaign/fund/appeal/GL codes do not always align with organization's budget or is out of sync with financial system
- ▶ Gift coding may be incomplete
- ▶ Relevant information for grouping gifts is on the CONSTITUENT record rather than the GIFT record.
  - ▶ Example: Board members may leave, but gift coding is forever!



# Addressing the Challenge: Gift Coding

- ▶ Review Campaign/Fund/Appeal codes – align with budget
- ▶ Use complete gift coding on all gifts
  - ▶ Make fields required
  - ▶ Set up audit queries to check for missing data
  - ▶ Provide user manuals/procedures guides
  - ▶ Train your users



# Fundraising Reporting Challenges Meeting Expectations

- ▶ Person requesting the report does not provide clear criteria definition or output format requirements.
  - ▶ Example: Show me a list of Top 50 donors and their total giving from last year
- ▶ Identify your best technical support option.
  - ▶ Invest in your own capacity
  - ▶ Outsource





# Addressing the Challenge: When is Good Good Enough?

- ▶ Become familiar with the canned reports – you're not being lazy, you're being efficient. Your organization will appreciate it!
- ▶ BEFORE you put in a lot of custom work that can't easily be repeated the next time, be sure to show the person requesting the report what you can accomplish with a standard report.
- ▶ Don't be afraid to ask for help. The support desk is often an under-utilized resource.



# Addressing the Challenges: When is Good *Not* Good Enough?

- ▶ The standard reports don't address stakeholder expectations.
  - ▶ Go back to your stakeholder to adjust expectations.
- ▶ We don't have anyone to train.
  - ▶ Be creative
- ▶ We can't afford to outsource report development or go to training.
  - ▶ Your time is not free.
  - ▶ Determine whether other organizations who share the same stakeholder can pool resources.



# Reporting Mechanics

What's the best tool for the job?

- ▶ Query
- ▶ Export
- ▶ Dashboards
- ▶ Standard Reports



# Reporting Mechanics

What can your system do for you?

- ▶ Set report criteria
- ▶ Determine output
- ▶ Save report for future use
- ▶ Schedule Reports

## All Reports

Financial Reports

Listings

Easy Reports

Other Reports

+ Add New Easy Report

Show 25



	Report Name	ID	Last Run	Report Actions
★	gift list	120007	07/15/2016	<i>hover for actions</i>
★	gift list - SAVE AS Copy	120008	07/15/2016	<i>hover for actions</i>
★	abc	120003		<i>hover for actions</i>
★	abc - SAVE AS Copy	120004		<i>hover for actions</i>
★	Donor Giving Report	110002		
★	michele contact report	110003		<i>hover for actions</i>



# Reporting Mechanics

## Report Security

- ▶ Who can see the results?
- ▶ Who can edit the report setup?
- ▶ Share with others?



# Key Donor Metrics

Report Purpose	DPO Report
Donor Retention	Comprehensive Donor Analysis Report
Lapsed Donors	<b>Last Year But Not This Year (LYBNTY)</b> <b>Some Year But Not this Year (SYBNTY)</b>
Recaptured Donors New Donors	AFP-FEP Report
Organization Analysis	Multi-Year Trend Analysis Periodic Gift Comparison (monthly by GL) Statistical Analysis Statistical Tabulation
Donor Recognition	Donor Recognition report Top Donor Listing
Donor Analysis	Top Donor Listing History Listing



# Key Donor Metrics

- ▶ Donor Retention
- ▶ New Donors (# and \$ Amount)
- ▶ Lapsed Donors
- ▶ Recaptured Donors
- ▶ Donor Recognition Report
- ▶ Donor Analysis



# Other Analysis

- ▶ Campaign/Appeal Analysis
- ▶ Event Analysis
- ▶ Actual vs. Target/Goal for Fundraising
- ▶ Board Give/Get





# Reporting Mechanics

What can your system do for you?

- ▶ Automation
- ▶ Make use of canned reports if you do not have a tech savvy person in your organization
- ▶ It is highly recommended to learn to use FILTERS
- ▶ Exporting
- ▶ It is not recommended to do importing/global updates unless you are technically savvy



# Standard Vs Custom Reports

- ▶ Use standard reports “As is”
- ▶ Build Custom reports- easier than it sounds
- ▶ Edit → “Save AS” to allow the standard reports to better meet your organization’s needs

## REPORTS

USER-DEFINED REPORTS
DONOR/GIFT LISTINGS

Add/Delete Reports

Edit
Comprehensive Donor Revenue Analysis

Edit
Donor Recognition Report

Edit
Last Year But Not this Year

Edit
Some Year But Not This Year

Edit
Top Donor Listing

Edit
Last 3 years of Giving

Last 3 years of Giving						
Gift Total	Last Name	First Name	3 Years Ago YTD	2 Years Ago YTD	Last Year YTD \$	Year-to-date \$
379,100	Home Depot		0	0	0	0
270,665	Humphrey	Jon	25,000	25,000	19,650	500
220,050	Honest Politics Foundation	The	50,000	50,000	0	0
101,240	Kashub	Jonathan	0	0	0	0
96,115	Kinko's		0	0	0	0
77,155	Zztest	Roger	17,500	500	2,000	9,300
61,565	Woodley	Craig	25,000	0	0	0
40,450	International Software		6,000	0	0	0
35,000	SofterWare, Inc.	Roger	10,000	0	0	0
28,490	Relles	Alvin	100	0	0	0
28,000	Zztest	Denny	0	500	18,100	9,400
27,275	Marlowe	Mary	500	0	0	0
26,315	Specter	Arlen	0	0	0	0
25,525	Zztest	Jeremy	20,000	0	25	5,500
25,515	Ford Foundation		0	0	0	0
25,000	Sheehan	Lauren	25,000	0	0	0
21,000	Zztest	Allen	0	0	16,000	5,000
21,000	Zztest	Carrie	0	10,000	6,000	5,000

## TOP LIFETIME DONORS

4:55 PM

### Total History

Donor Name	Gift Total	Last Gift	Amount
<a href="#">Home Depot</a>	379,100	01/01/2012	5,000
<a href="#">Humphrey, Jon</a>	270,665	01/31/2017	500
<a href="#">Honest Politics Foundatio</a>	220,050	01/03/2015	50,000
<a href="#">Kashub, Jonathan</a>	101,240	12/21/2013	50
<a href="#">Kinko's</a>	96,115	01/01/2012	5,000
<a href="#">Zztest, Roger</a>	77,155	01/30/2017	2,300
<a href="#">Woodley, Craig</a>	61,565	05/01/2014	25,000
<a href="#">International Software</a>	40,450	09/01/2014	2,000
<a href="#">SofterWare, Inc., Roger</a>	35,000	12/29/2014	10,000
<a href="#">Relles, Alvin</a>	28,490	12/24/2014	100
<a href="#">Zztest, Denny</a>	28,000	01/31/2017	4,400
<a href="#">Marlowe, Mary</a>	27,275	02/03/2014	500
<a href="#">Specter, Arlen</a>	26,315	01/01/2012	350
<a href="#">Zztest, Jeremy</a>	25,525	01/31/2017	5,500
<a href="#">Ford Foundation</a>	25,515	10/08/2009	500
<a href="#">Sheehan, Lauren</a>	25,000	12/26/2014	25,000
<a href="#">Zztest, Allen</a>	21,000	01/31/2017	5,000
<a href="#">Zztest, Carrie</a>	21,000	01/31/2017	5,000



# Using Filters

- ▶ Easy to use!! Don't be intimidated
- ▶ Can be saved per person or organization
- ▶ Create folders by department (Development, Finance, Board, etc.)
- ▶ Exports vs. Reports



# Resources

- ▶ <https://softerware.force.com/dpcommunity/s/article/ka731000000Gr7AAAS/Report-Types>
- ▶ <https://softerware.force.com/dpcommunity/s/article/ka731000000Gr5YAAS/Scheduling-an-Easy-Report>
- ▶ Statistical Tabulation-  
<https://softerware.force.com/dpcommunity/s/article/ka731000000GozEAAS/Statistical-Tabulation-Report>
- ▶ Gift Listing- <https://softerware.force.com/dpcommunity/s/article/ka731000000GovvAAC/What-s-My-Average-Donation-Size>
- ▶ Periodic Gift Comparison-  
<https://softerware.force.com/dpcommunity/s/article/ka731000000Goz4AAC/Periodic-Gift-Comparison-Report>
- ▶ Comprehensive Donor Revenue-  
<https://softerware.force.com/dpcommunity/s/article/ka731000000GoqbAAC/Comprehensive-Donor-Analysis-Report-Explanation>
- ▶ AFP-FEP- <https://softerware.force.com/dpcommunity/s/article/ka731000000GoqRAAS/AFP-Fundraising-Effectiveness-Project-Report-Definitions>
- ▶ Solicitation Analysis-  
<https://softerware.force.com/dpcommunity/s/article/ka731000000Gp5MAAS/Solicitation-Analysis-Report>
- ▶ <https://softerware.force.com/dpcommunity/s/article/ka731000000Gqb4AAC/Linking-a-Contact-Record-to-a-Gift-Pledge>

