

Reporting

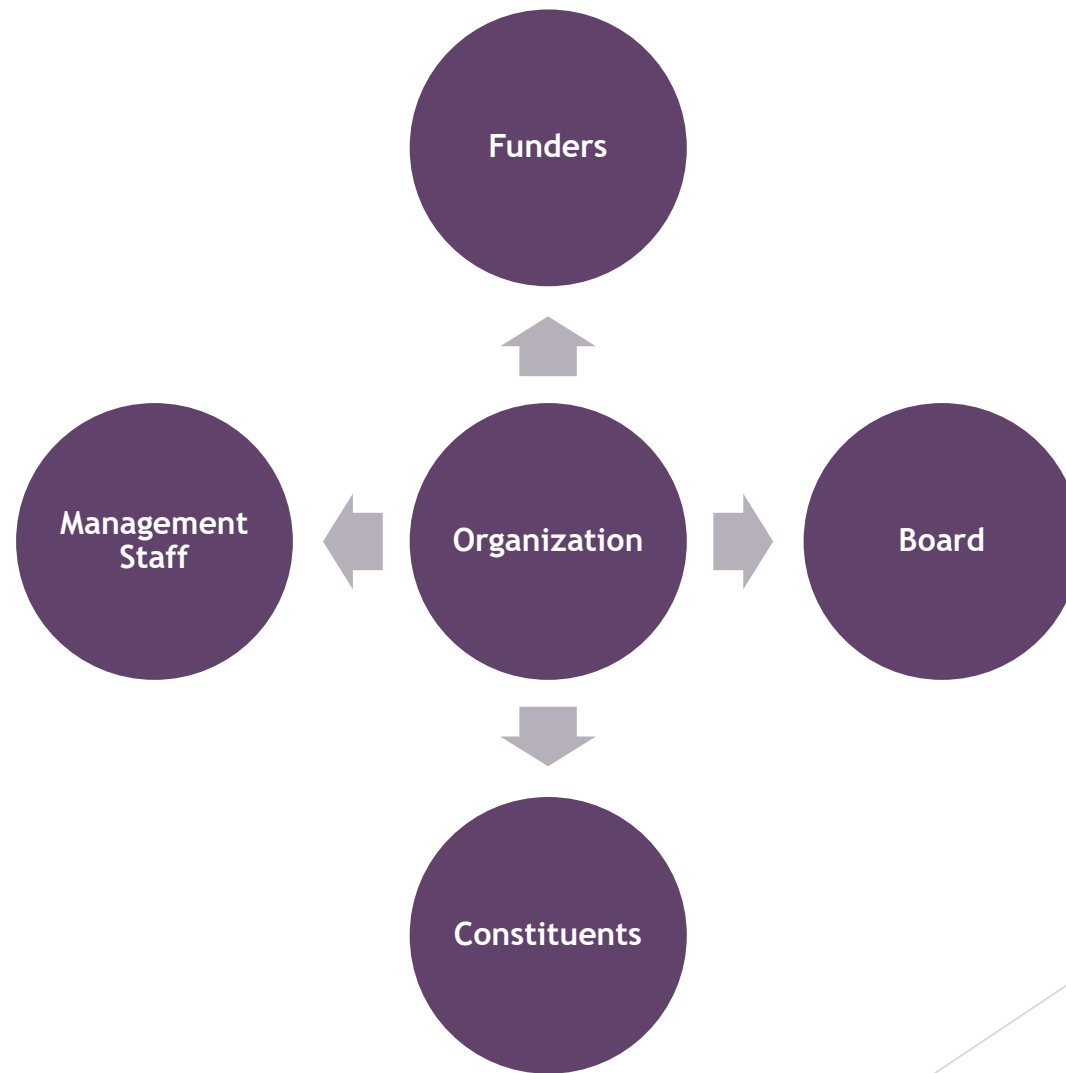
Raiser's Edge

Agenda

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



Stakeholder Requirements



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 3rd 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 3rd party system must be used.



Fundraising Reporting Challenges

Gift Coding

- ▶ Campaign/fund/appeal 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
 - ▶ Campaign – source of contributions (Individuals, Corp, Foundations, Special Events)
 - ▶ Funds – what is the money used for (general operating/unrestricted, Program 1, Program 2)
 - ▶ Appeals/Events – how the money was raised
 - ▶ Package



Addressing the Challenge: Gift Coding

- ▶ Use complete gift coding on all gifts
 - ▶ Make fields required.
 - ▶ Restrict attributes to be 1:1 when appropriate
 - ▶ Set up audit queries to check for missing data
 - ▶ Provide user manuals/procedures guides
 - ▶ Train your users
 - ▶ Use Batch Entry to streamline gift entry data



Addressing the Challenge: Gift Coding Auditing

This search will pull any gift or pledge missing a Campaign



The screenshot shows a software window titled "New Gift Query - The Raiser's Edge". The window has a menu bar with "File", "Edit", "View", "Format", "Records", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with icons for file operations and help. The main interface has tabs for "1:Criteria", "2:Output", "3:Sort", and "4:Results", with "1:Criteria" selected. A red text instruction reads: "The filters entered here will determine the records that are output." Below this are three checked checkboxes: "Include inactive constituents", "Include deceased constituents", and "Include constituents with no valid address". On the left, under "Available Fields", there is a "Show:" dropdown menu currently set to "<All>". On the right, under "Filters", there is a text input field containing "..... Campaign ID blank", which is circled in red.



Fundraising Reporting Challenges Meeting Expectations

- ▶ Person requesting the report does not provide clear criteria definition or output format requirements:
“Show me a list of Top 50 donors and their total giving from last year.”
 - ❖ What types of gifts should be included
 - ❖ Do you want to see individuals and organizations, or just one or the other?
 - ❖ For individuals, should they all be listed separately, or combined into households?



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.



Capture necessary data (in one system)

- ▶ Solicitors on Gifts
- ▶ Campaign, Fund AND Appeal Codes
- ▶ Link gifts to proposal and event records
- ▶ Maintain Proposal (Opportunity in NXT) Statuses
- ▶ Fundraising Goals (donor, solicitor, appeal, etc. records)



Reporting Mechanics

What can your system do for you?

- ▶ Set report criteria
- ▶ Determine output
- ▶ Save report for future use
- ▶ Confirm options for accessing the report later



Reporting Mechanics

What can your system do for you?

- ▶ Make use of canned reports if you do not have a tech savvy person in your organization
- ▶ Report on standard fundraising and financial metrics without technical skills.
- ▶ Get raw data out of the system
- ▶ It is not recommended to do importing/global updates unless you are technically savvy



Reporting Mechanics

What's the best tool for the job?

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



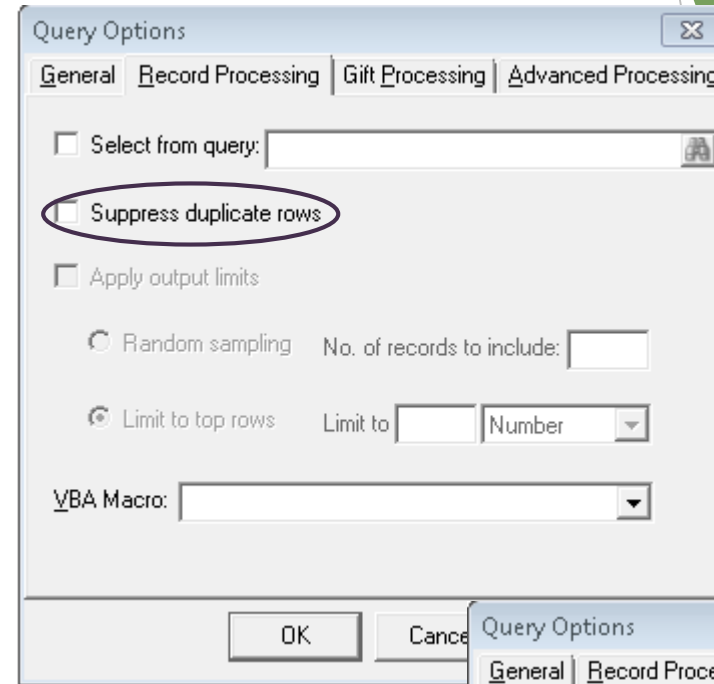
Query vs Export

QUERY	EXPORT
Query groups records based on shared criteria; for example, Constituency Code equals Board Member or Grade Level equals Ninth	Export extracts database fields for all records, selected records (query), or one record
Query is typically the starting point in a multi-step process	Export pulls directly from the records in the database and is not limited to the fields included in the output of the source query (when used)
Because the query output verifies the correct records are selected, it may display duplicates. Therefore, it is not intended to be used as a reporting or exporting module.	Export does not include duplicates. Export is the recommended way to export information from the database.



Query

- ▶ You know how to build a query but did you know...
 - ▶ How to suppress duplicate rows
- ▶ Show gift credit to soft credit instead of donor
- ▶ The difference between static and dynamic queries



Query Options

General Record Processing Gift Processing Advanced Processing

Select from query:

Suppress duplicate rows

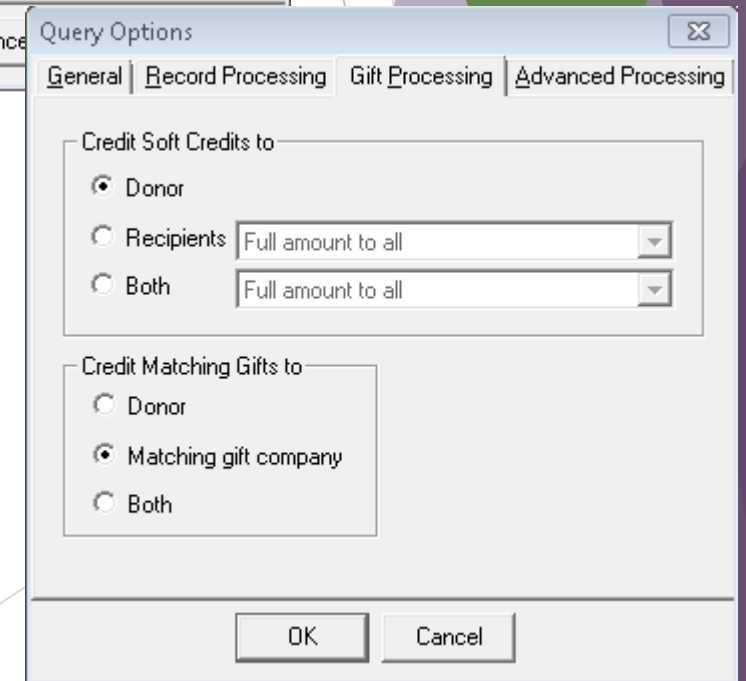
Apply output limits

Random sampling No. of records to include:

Limit to top rows Limit to Number

VBA Macro:

OK Cancel



Query Options

General Record Processing Gift Processing Advanced Processing

Credit Soft Credits to

Donor

Recipients

Both

Credit Matching Gifts to

Donor

Matching gift company

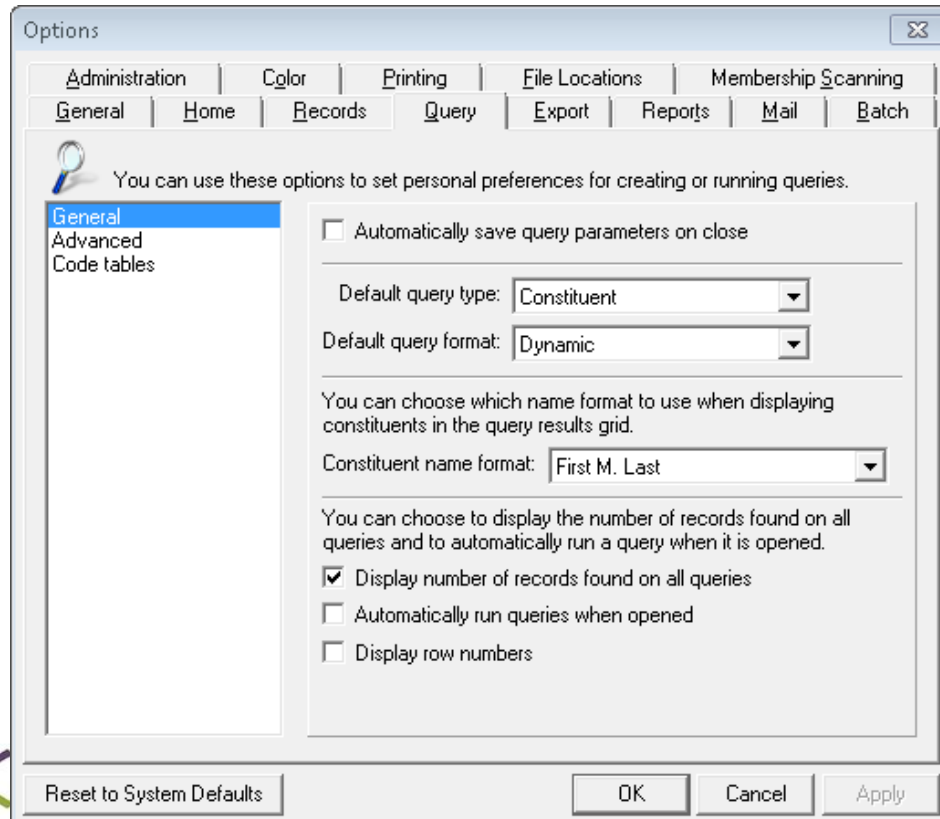
Both

OK Cancel



Query

- ▶ You know how to build a query but did you know...
 - ▶ Automate via Query User Options



Options

Administration | Color | Printing | File Locations | Membership Scanning
General | Home | Records | Query | Export | Reports | Mail | Batch

You can use these options to set personal preferences for creating or running queries.

General
Advanced
Code tables

Automatically save query parameters on close

Default query type:

Default query format:

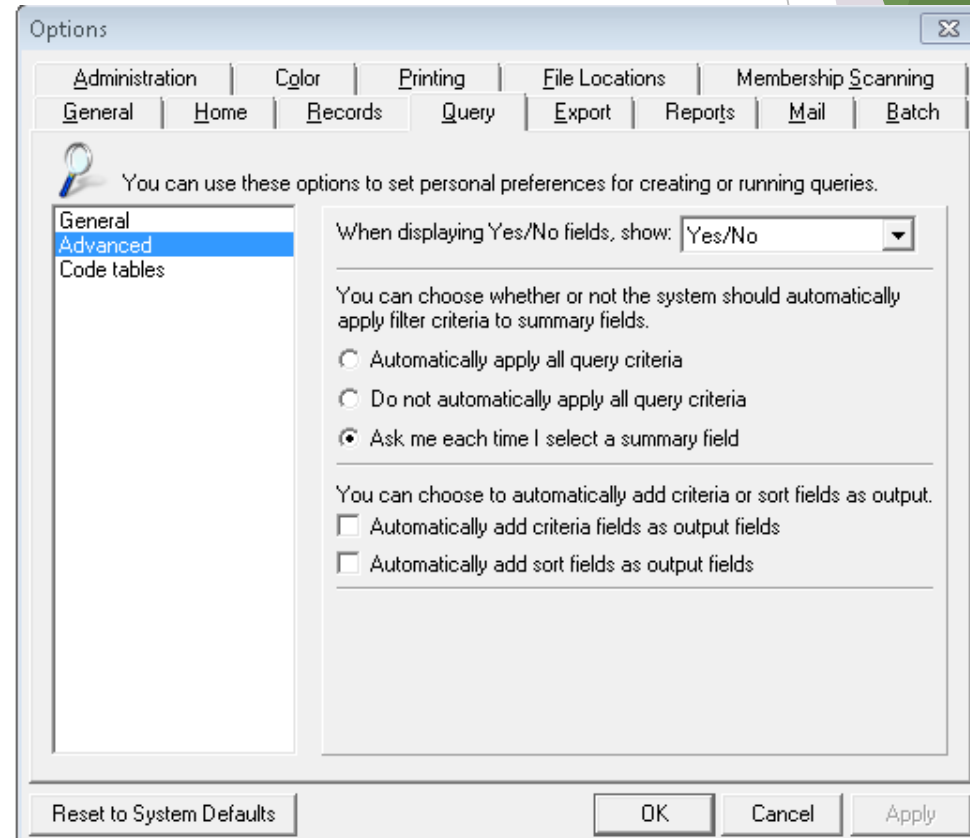
You can choose which name format to use when displaying constituents in the query results grid.

Constituent name format:

You can choose to display the number of records found on all queries and to automatically run a query when it is opened.

Display number of records found on all queries
 Automatically run queries when opened
 Display row numbers

Reset to System Defaults OK Cancel Apply



Options

Administration | Color | Printing | File Locations | Membership Scanning
General | Home | Records | Query | Export | Reports | Mail | Batch

You can use these options to set personal preferences for creating or running queries.

General
Advanced
Code tables

When displaying Yes/No fields, show:

You can choose whether or not the system should automatically apply filter criteria to summary fields.

Automatically apply all query criteria
 Do not automatically apply all query criteria
 Ask me each time I select a summary field

You can choose to automatically add criteria or sort fields as output.

Automatically add criteria fields as output fields
 Automatically add sort fields as output fields

Reset to System Defaults OK Cancel Apply



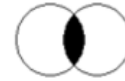
Query

- ▶ You know how to build a query but did you know...
 - ▶ You can merge queries
 - ▶ What do those operators mean anyways?



AND:

A record must exist in both queries to be included in the merged query. The merged query using the AND operator consists of alumni who live in South Carolina:



OR:

Records that exist in either query are included in the merged query. However, records that exist in both queries are present only once in the merged query. The merged query using the OR operator consists of all alumni and all South Carolina residents:



XOR:

Records that exist in the primary query only or in the secondary query only are included in the merged query. The record cannot exist in both queries. The merged query using the XOR operator consists of South Carolina residents who are not alumni and alumni who do not live in South Carolina:



SUB:

Records that exist only in the primary query and not in the secondary query are included in the merged query. SUB subtracts records in the secondary query from the primary query; records in the secondary query that are also in the primary query are excluded from the merged query. When you use SUB, carefully consider which query is primary and which is secondary. The merged query using the SUB operator consists of South Carolina residents who are not alumni:



Export

- ▶ You know how to build exports but did you know
 - ▶ Export Summary fields multiple times
 - ▶ Some fields are available for output that are not available in query



Dashboards

- ▶ **Functionality:**
 - ▶ Clickable views to Data
 - ▶ Pre-configured reporting components displayed dashboards that you can customize
 - ▶ Share with other users
 - ▶ Hybrid of Report (format) and Query (click-ability) functionality



Standard vs. Custom Reports

Standard	Custom
Little Control over Formatting	Full control over formatting
No technical skills required	Technical Skills Required
Included with Raiser's Edge	Additional Crystal Reports Licenses required
Over 130 standard reports included	None included



Reports

- ▶ Functionality:
 - ▶ Tabs of similar functionality, functions similarly to Mail function set up
 - ▶ Filter results two ways:
 - ▶ Input query
 - ▶ Report filters in Report set-up

NOTE: These filters change based on the report type, but they all function similarly



New Appeal Performance Analysis

File Edit Favorites Help

1: General | 2: Filters | 3: Gift Types | 4: Attributes | 5: Graph | 6: Format

Include... **All records**

Include Gifts with these Dates

Date to use: Gift date

Date: Include all dates

Soft Credit Gifts To

Donor

Soft credit recipients Use distribution on gift

Both Use distribution on gift

Credit Matching Gifts To

Donor MG Company Both

Create output query

< Back Next > Cancel

New Appeal Performance Analysis

File Edit Favorites Help

1: General | 2: Filters | 3: Gift Types | 4: Attributes | 5: Graph | 6: Format

By using the grid below, this report may be filtered on the items shown in the Selected Filters

Filters	Filter Option	Selected Filters
Appeals	Include All	<All Appeals>
Funds	Include All	<All Funds>
Campaigns	Include All	<All Campaigns>
Constituent Codes	Include All	<All Constituent Codes>
Gift Solicitors	Include All	<All Gift Solicitors>

< Back Next > Cancel Print Preview Layout

New Appeal Performance Analysis

File Edit Favorites Help

1: General | 2: Filters | 3: Gift Types | 4: Attributes | 5: Graph | 6: Format

Include Records with these Attributes

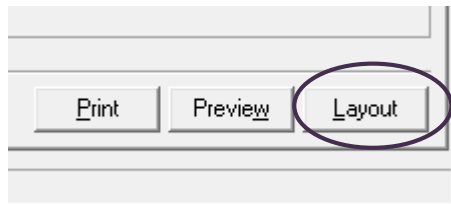
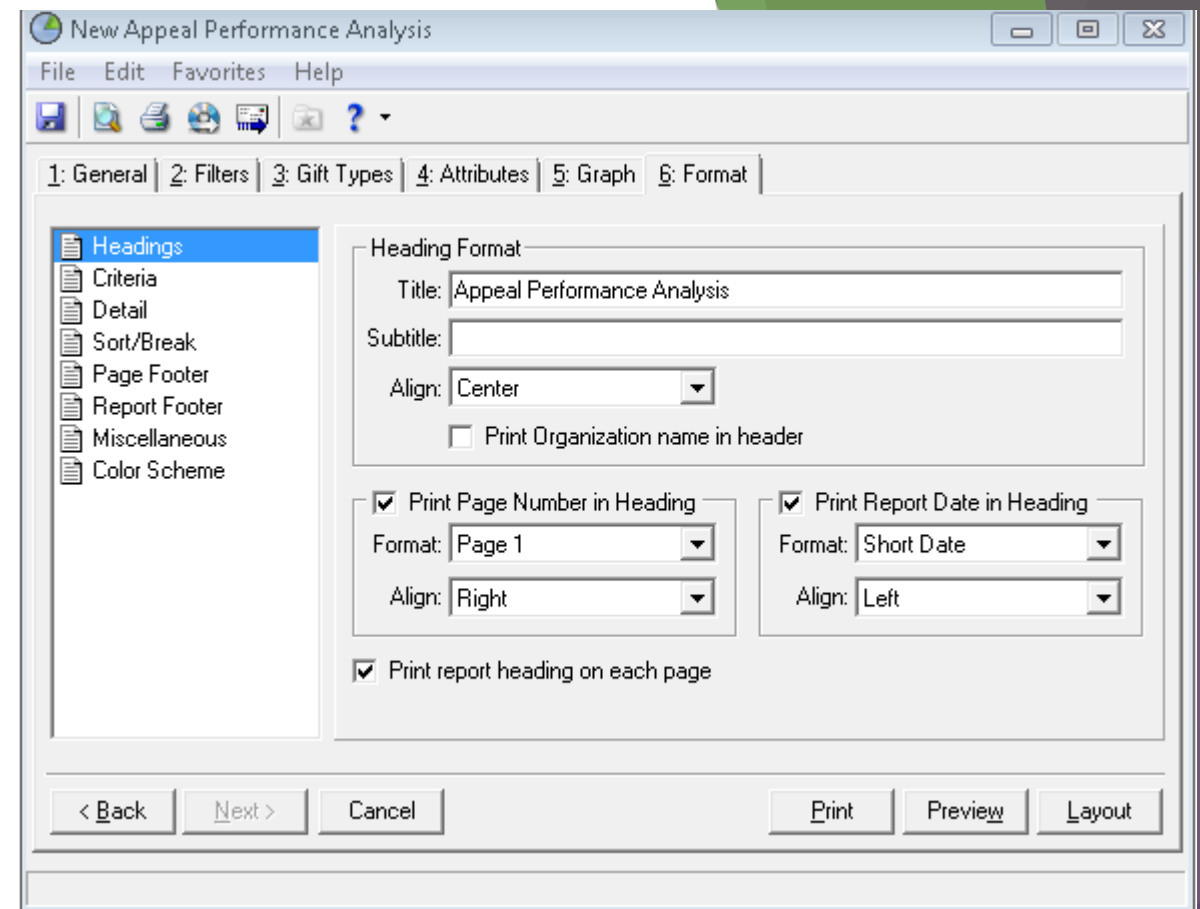
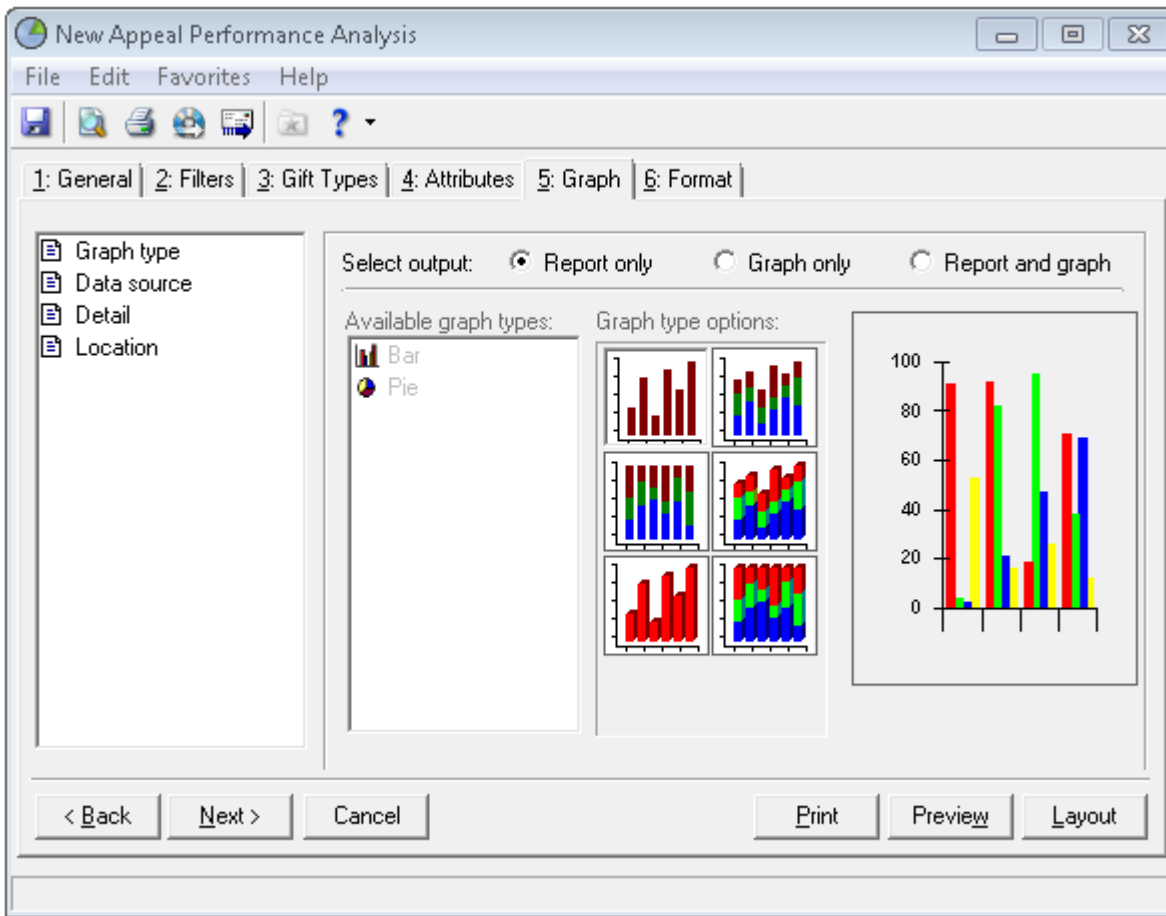
Record Type	Category	Description	Short Desc
<input type="checkbox"/>			

Exclude Records with these Attributes

Record Type	Category	Description	Short Desc
<input type="checkbox"/>			

< Back Next > Cancel Print Preview Layout





Just want to see what the report looks like? Use Layout!



Reporting Mechanics

Report Security

- ▶ Who can see the results?
- ▶ Who can edit the report setup?
- ▶ Other things depending on the system (running reports on things you don't otherwise have access?)

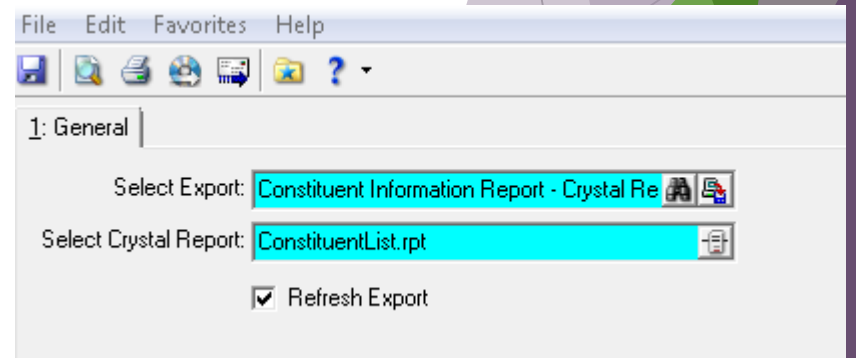
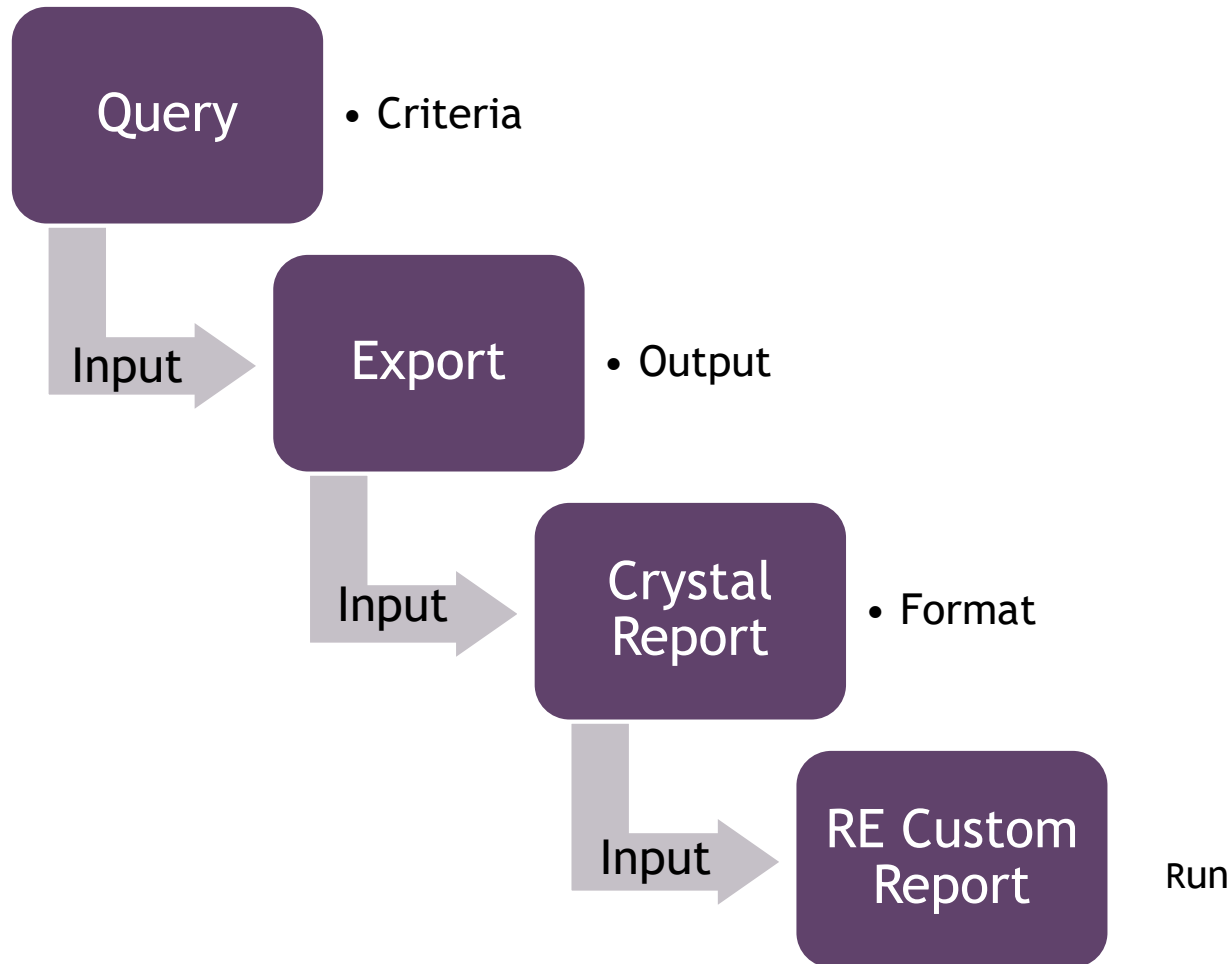


Custom Reports (Crystal Reports)

- ▶ **Functionality:**
 - ▶ You can query 100% of the fields you see and don't see (key links between records)
 - ▶ Beauty is pain. These reports can be formatted to be very visually appealing, but can be a lot of work.



Custom Reports (Crystal Reports)



Key Donor Metrics

Report Purpose	Best strategy
Donor Retention	Donor Retention Canned Report
Donor Recognition Report	Donor Category Report
Lapsed Donor Report	LYBUNT/SYBUNT Report
Actual vs Goal Fundraising	Actual vs. Target Report
Top Donors	Top Donors Report
Gifts Over A Period of Time	Gift Detail Report Gift Summary Report



Key Fundraising Metrics

Report Purpose	Best strategy
Donor Retention	Donor Retention Canned Report
Event Analysis	Event Summary Report
Campaign/Appeal Analysis	Appeal/Campaign/Fund Performance Analysis Report
Board Giving Analysis	Solicitor Performance Analysis Appeal Performance Analysis
Actual vs Goal Fundraising	Appeal/Campaign/Fund Performance Analysis Report
Solicitor Performance	Solicitor Performance Analysis
Pipeline (Major Giving and Grants)	Outstanding Proposal Report Proposal Pipeline Summary Proposal Analysis Report



Query Tips & Tricks

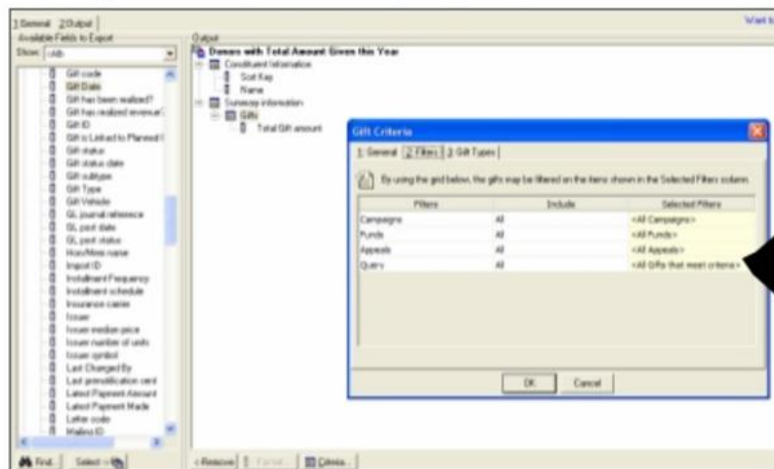
- ▶ Base a query on another query
- ▶ Use your Favorites fields so you don't have to "climb up and down the tree"
- ▶ Reuse your Query fields!
- ▶ Use run-time <ASK> operators to avoid making duplicate queries and reports based on a single or set of filters. Want it all? Choose operator: is<any value>
- ▶ Rename Column Headings (can do this in Export)



Export Tips & Tricks

- ▶ Change Column Heading
- ▶ Marry a gift query with a constituent export

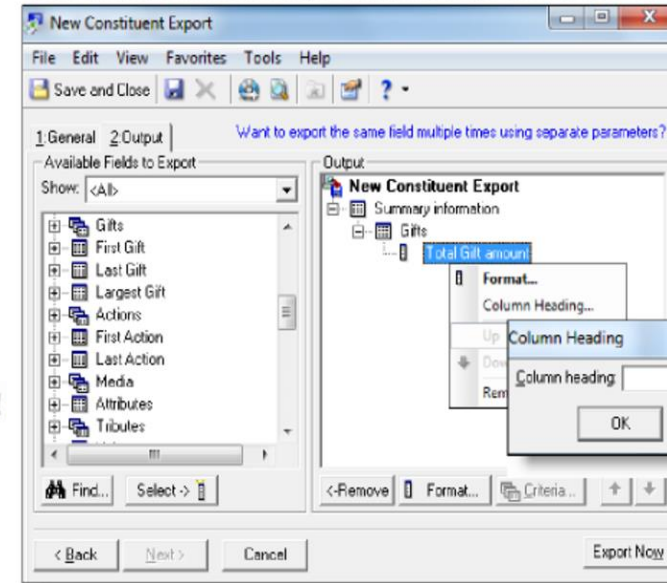
Export gifts for a particular gift query in a constituent export!



Wait, why is this cool?

You can filter out gifts based something other than the pre-defined filters... such as gift attributes, gift codes, gifts linked to Event registrations, linked to memberships.

Create friendly column headings to make your exports easier to read, and more descriptive.



Rename column headings.

In the Output grid of an export, right-click the field to rename, and select Column Heading. Enter a friendly name, and click OK. In results of your export, the column heading will appear as you indicated.

Make it friendly!

Rename your export column headings to provide more context to the fields you're exporting.

For example, if you create an export with multiple gift summary fields, all with different criteria, you can rename the column headings to provide information about the criteria for each field, such as Fiscal Year 2012 and Fiscal Year 2013.



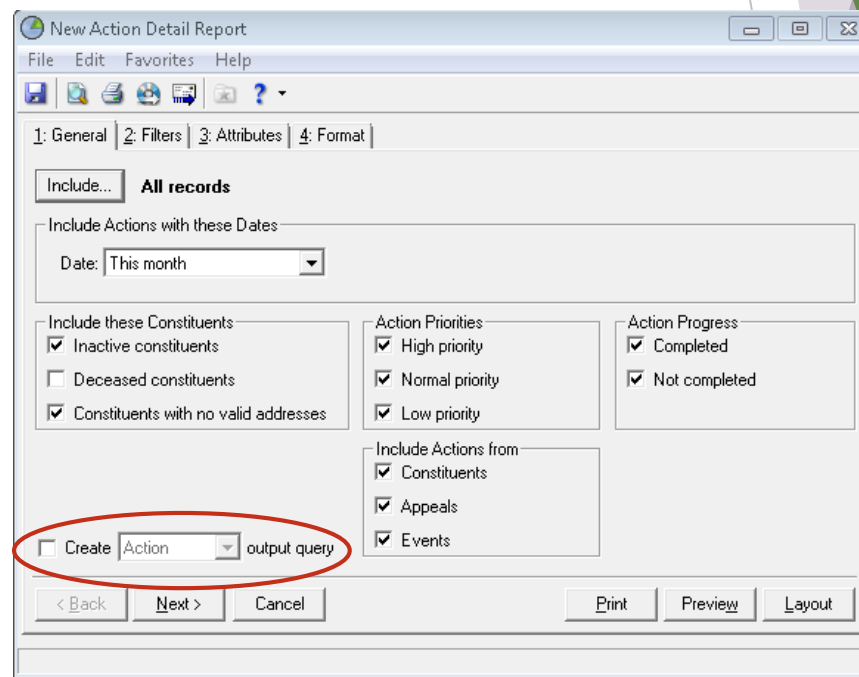
Dashboard/Query Tips & Tricks

- ▶ Rename columns of queries by right-clicking on results, Rename Column
- ▶ Dynamic queries work best
- ▶ Place commonly used queries on dashboard for easy access
- ▶ Create/test/refine your dashboards before sharing them with users. A live link is not preserved.



Reports Tips & Tricks

- ▶ Don't build a custom report when a standard one will do
- ▶ Pivot reports
- ▶ Reporting Hierarchies
- ▶ Create Query from Report



The screenshot shows a software window titled "New Action Detail Report" with a menu bar (File, Edit, Favorites, Help) and a toolbar. Below the toolbar are four tabs: "1: General", "2: Filters", "3: Attributes", and "4: Format". The "General" tab is active. It contains several sections of options:

- Include...** All records
- Include Actions with these Dates**: Date: This month
- Include these Constituents**:
 - Inactive constituents
 - Deceased constituents
 - Constituents with no valid addresses
- Action Priorities**:
 - High priority
 - Normal priority
 - Low priority
- Action Progress**:
 - Completed
 - Not completed
- Include Actions from**:
 - Constituents
 - Appeals
 - Events
- Create Action output query

At the bottom, there are buttons for "< Back", "Next >", "Cancel", "Print", "Preview", and "Layout".



Report Request Form Examples

- ▶ https://www.pdfFiller.com/en/project/126757278.htm?f_hash=434d28&reload=true
- ▶ <https://kb.blackbaud.com/articles/Article/43512>
- ▶ [www.fundlist.info/images/RE7InformationRequestForm_fill-inform .doc](http://www.fundlist.info/images/RE7InformationRequestForm_fill-inform.doc)
- ▶ http://www.supportingadvancement.com/forms/sample_forms/report_request/report_request_11.pdf



Resources

- ▶ Why are there duplicates in my query?
 - ▶ <https://kb.blackbaud.com/articles/Article/52603>
- ▶ Query and Export Guide
 - ▶ <https://www.blackbaud.com/files/support/guides/re7/queryexp.pdf>
- ▶ Reporting and Dashboards
 - ▶ https://www.blackbaud.com/files/resources/recordings/REUserGroups_Reporting.pdf
- ▶ Description of Reports
 - ▶ <https://www.blackbaud.com/files/support/guides/re7/ent/reports.pdf>



Resources

- ▶ Creating a Custom Crystal Report
 - ▶ https://www.blackbaud.com/files/support/guides/re7ent/crystal_tutorial.pdf
- ▶ Create a List of Favorite Fields
 - ▶ <https://www.kb.blackbaud.com/articles/Article/48703>
- ▶ Reporting Hierarchies
 - ▶ <https://kb.blackbaud.com/articles/Article/39948>
- ▶ Put it all together
 - ▶ <https://www.slideshare.net/blackbaud/queries-exports-reports-where-to-go-in-the-raisers-edge>



Resources

- ▶ Default Set

- ▶ <https://kb.blackbaud.com/articles/Article/46148>

- ▶ Import-O-Matic

- ▶ <https://www.omaticsoftware.com/Solutions/RaisersEdge/ImportOmatic.aspx>

- ▶ VLookUp

- ▶ <https://community.blackbaud.com/blogs/10/1098>

