Reporting

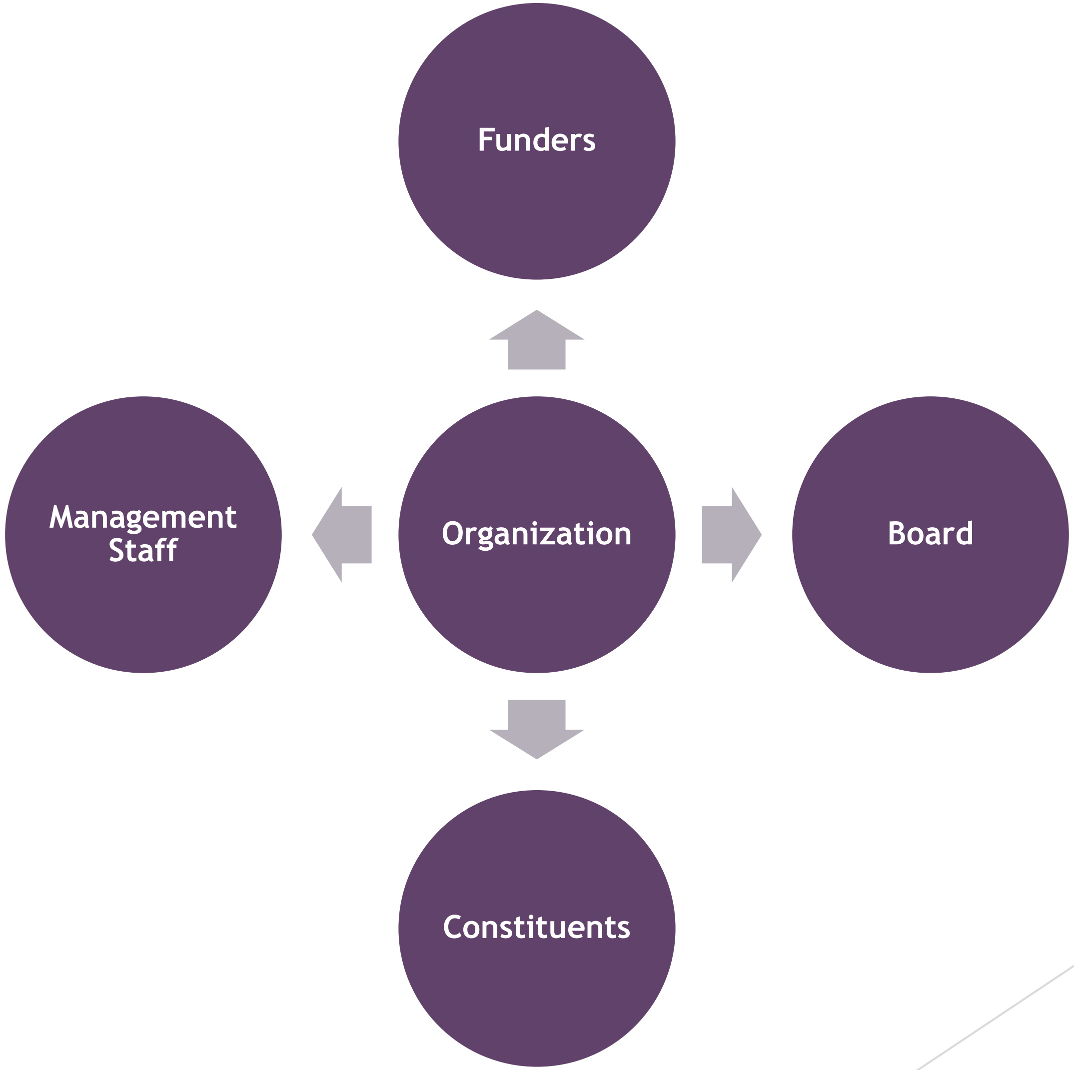
Raiser's Edge

W4SIGHT
PEOPLE ◆ PROCESS ◆ TECHNOLOGY

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

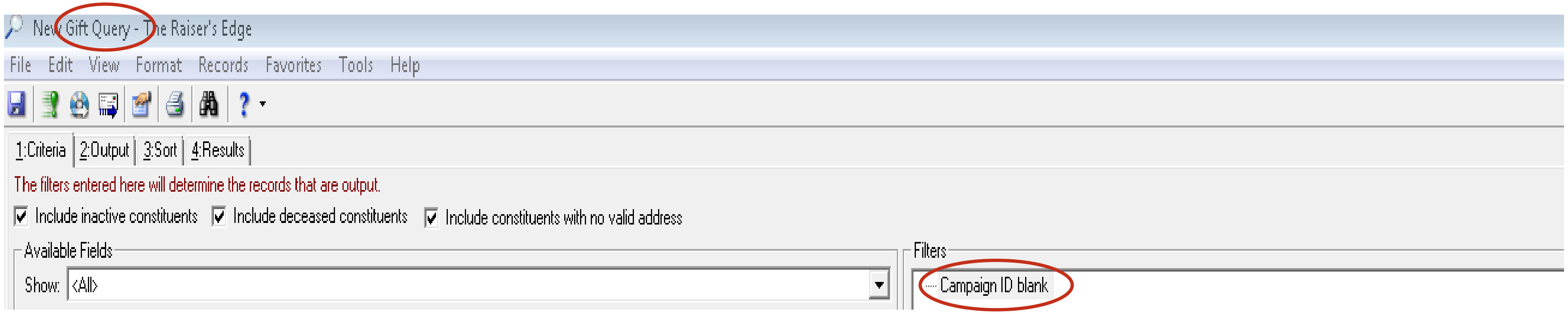
- Review Campaign/Fund/Appeal codes – align with budget
  - Campaign – source of contributions (Individuals, Corp, Foundations, Special Events)
  - Funds – what is the money used for (general operating/unrestricted, Program 1, Program 2)
  - Appeals/Events – how the money was raised
  - Package

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



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 used 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?

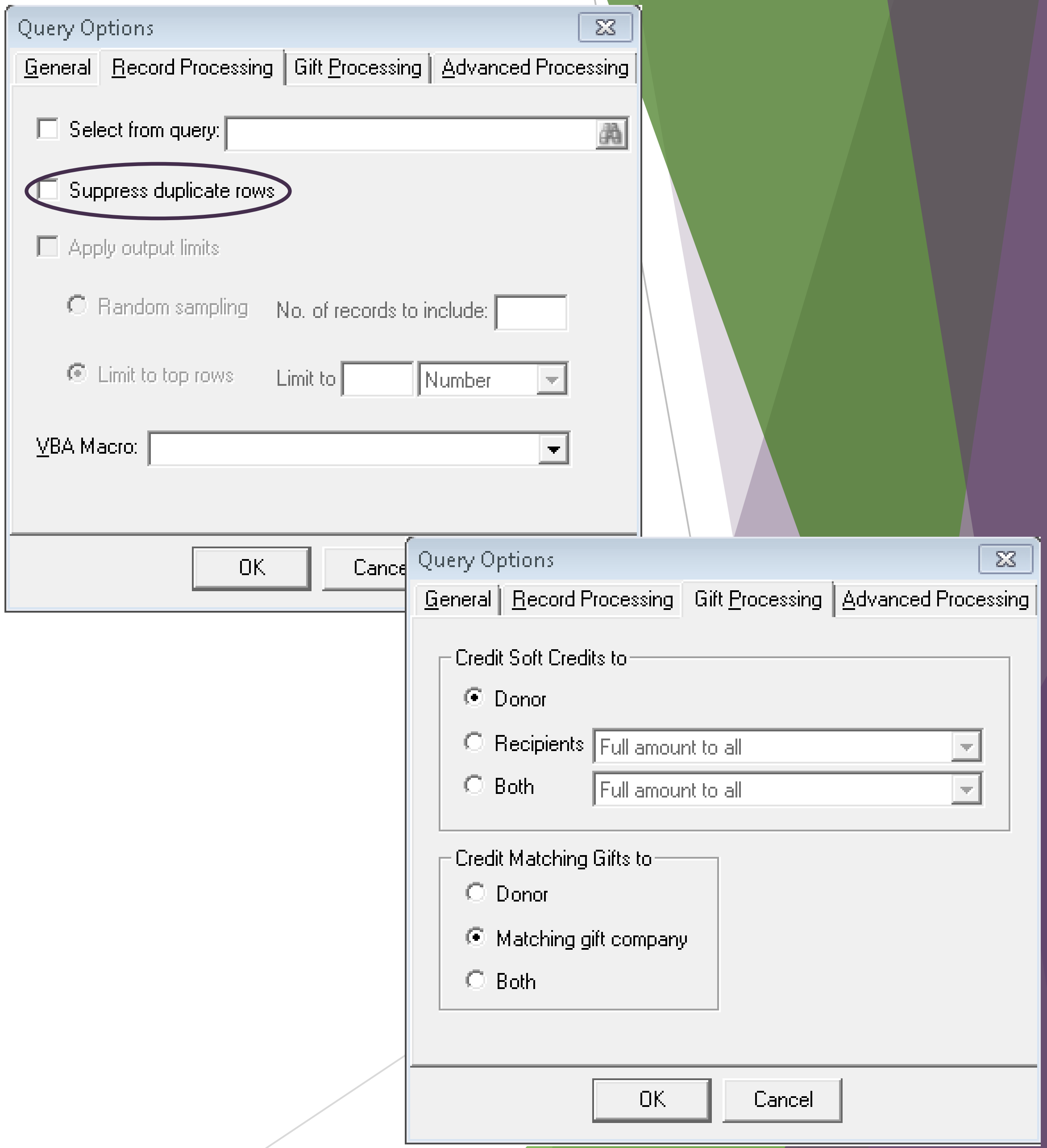
- Query
- Export
- Dashboards
- Standard Reports
- Custom Reports

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.

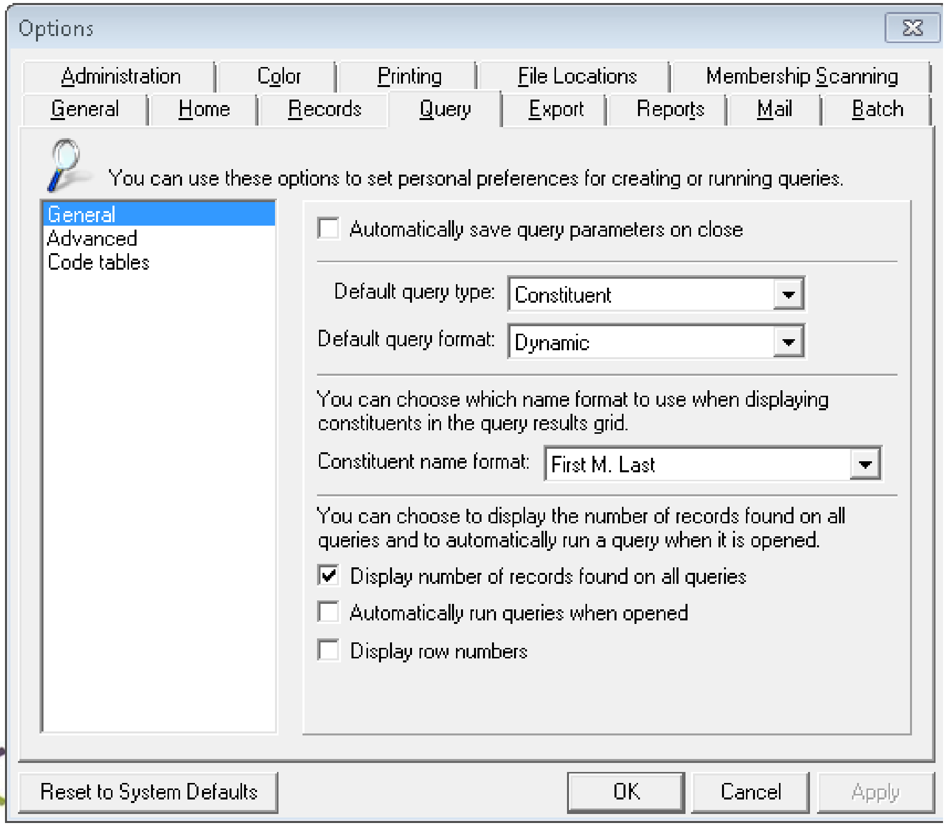
Query

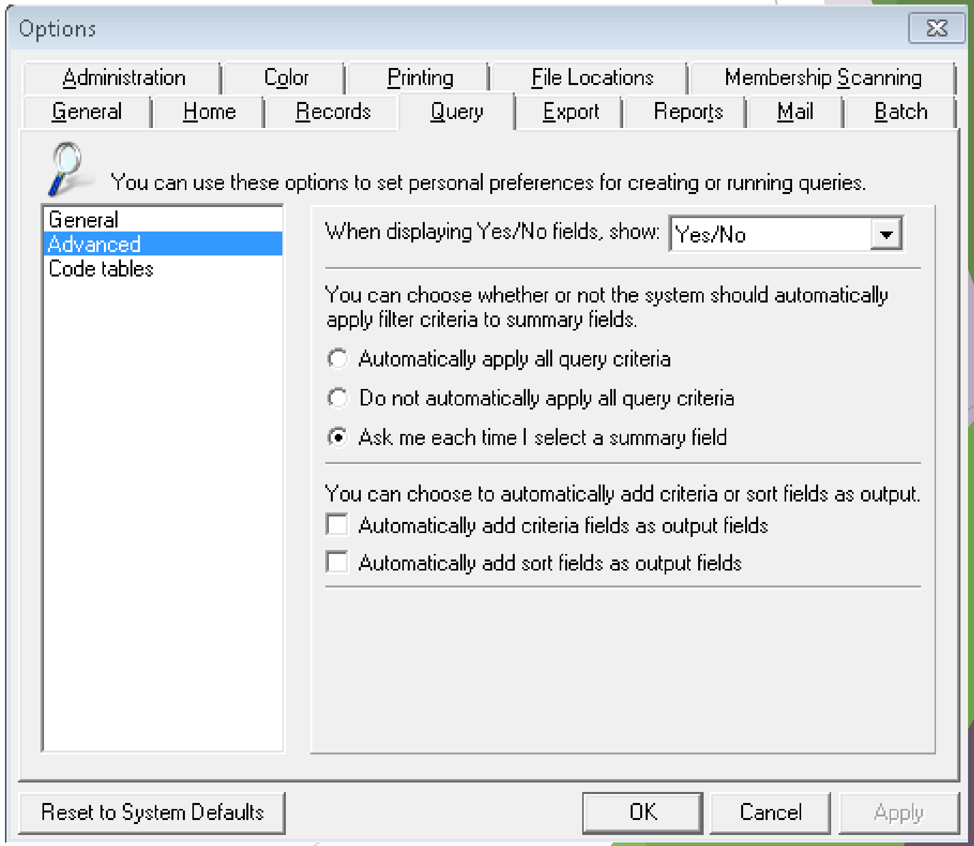
- You know how to build a query but did you know…
  - How to suppress duplicate rows
  - Show gift credit to soft credit instead of donor
  - The difference between static and dynamic queries



Query

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

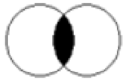




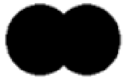
Query

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

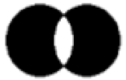
AND:
A record must exist in both queries to be included in the merged query. The merged query using the AND operator consists of alumni who live in South Carolina:



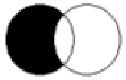
OR:
Records that exist in either query are included in the merged query. However, records that exist in both queries are present only once in the merged query. The merged query using the OR operator consists of all alumni and all South Carolina residents:



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

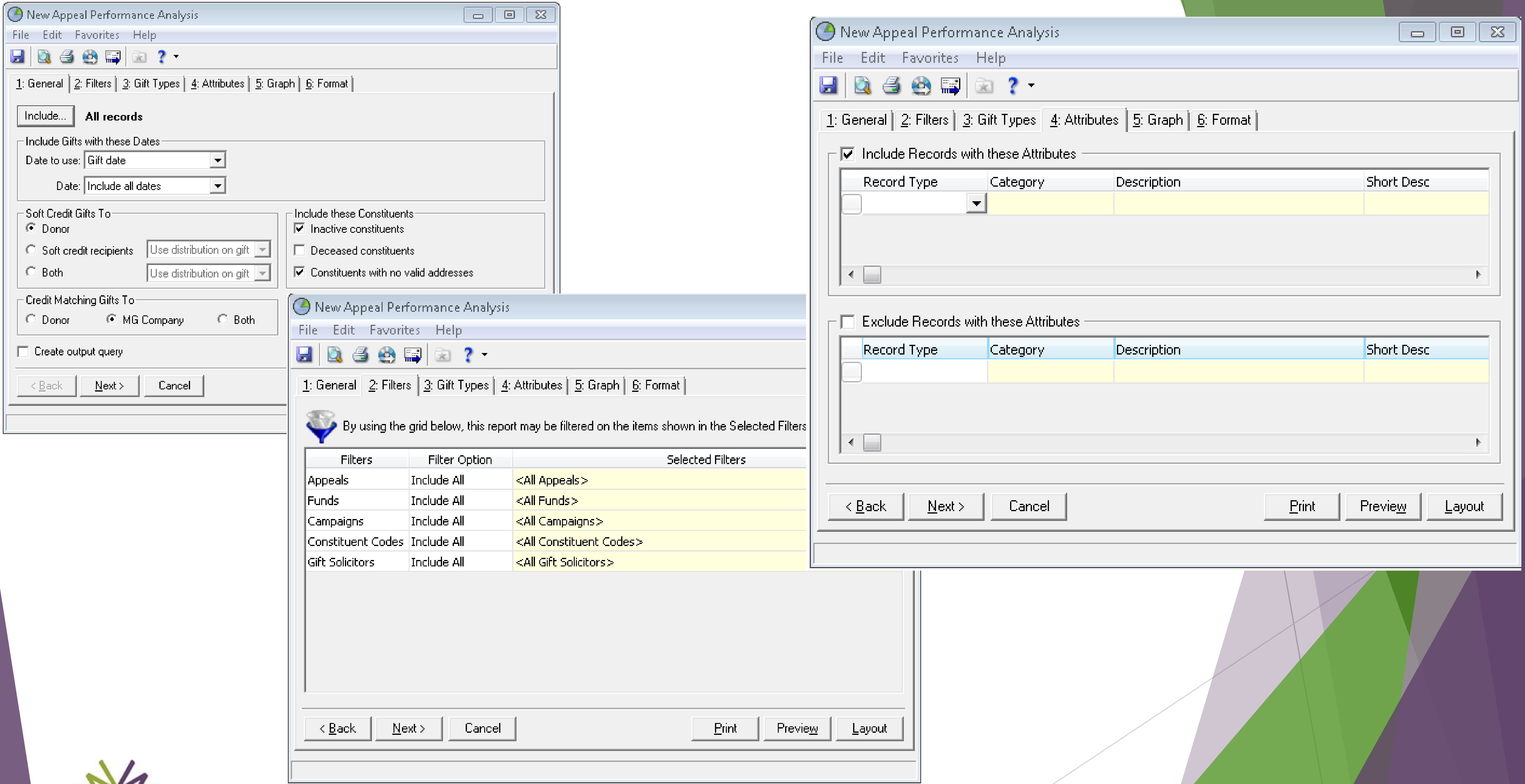
Standard vs. Custom Reports

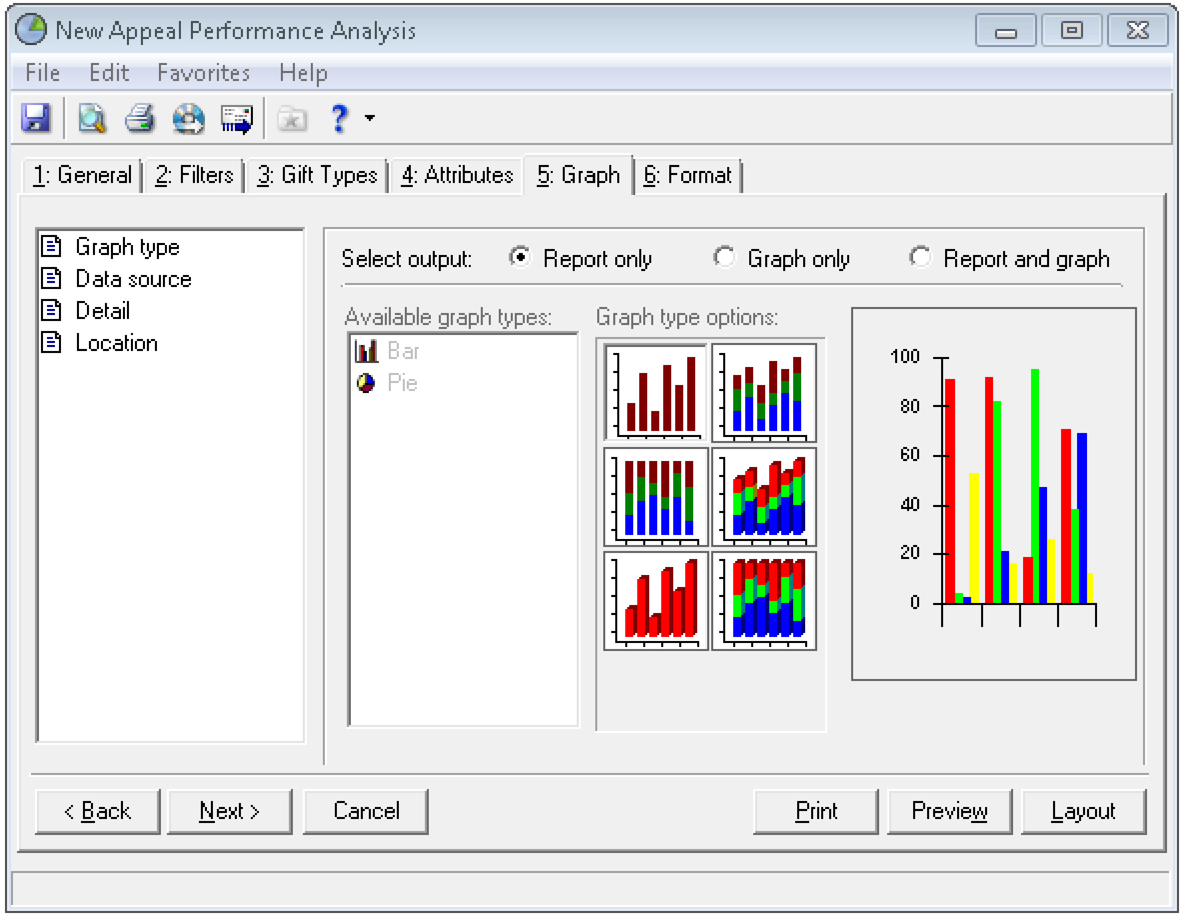
Standard	Custom
Little Control over Formatting	Full control over formatting
No technical skills required	Technical Skills Required
Included with Raiser's Edge	Additional Crystal Reports Licenses required
Over 130 standard reports included	None included

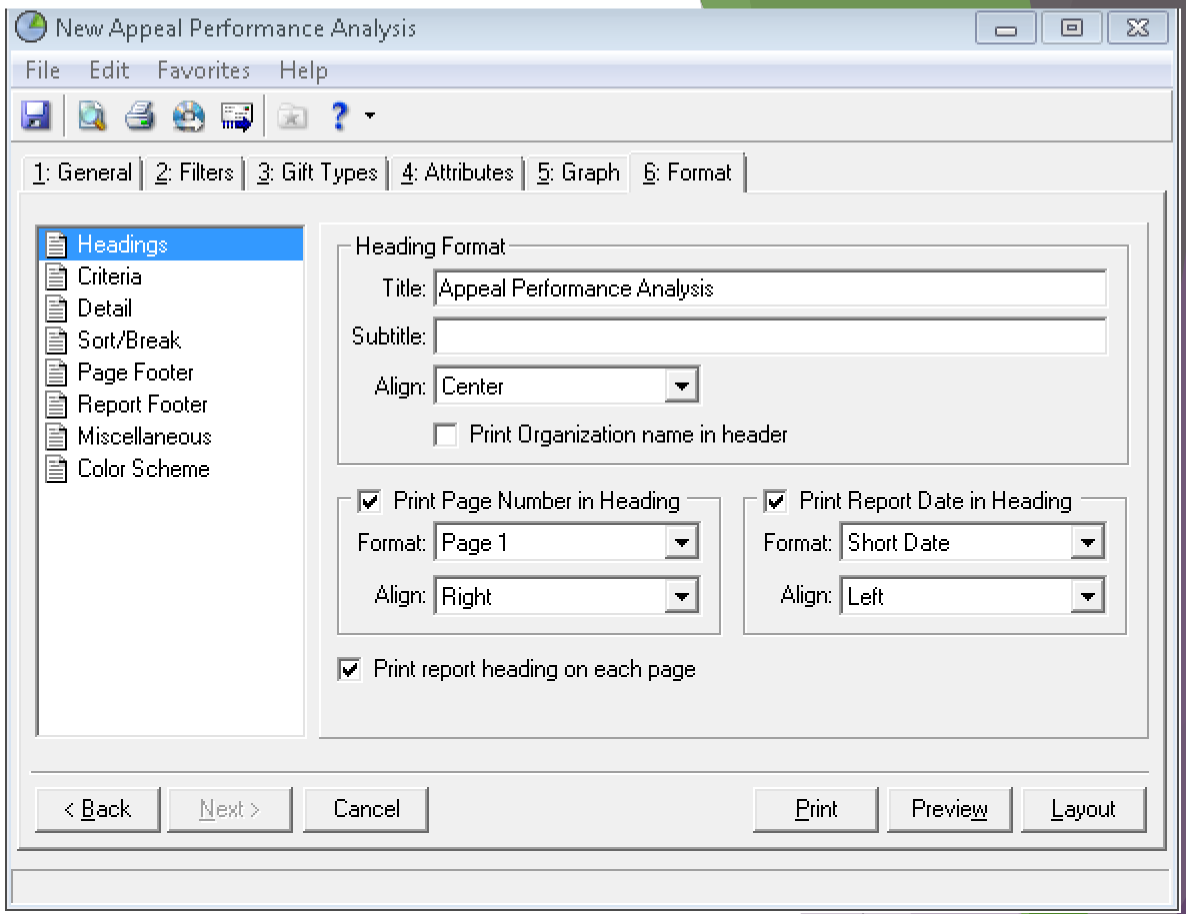
Reports

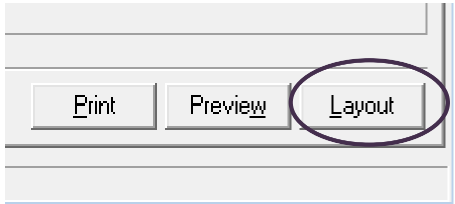
- Functionality:
  - Tabs of similar functionality, functions similarly to Mail function set up
  - Filter results two ways:
    - Input query
    - Report filters in Report set-up

    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
Include these Constituents
Inactive constituents
Deceased constituents
Constituents with no valid addresses
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
Exclude Records with these Attributes
Record Type Category Description Short Desc
< 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)

Query
- Criteria

Input

Export
- Output

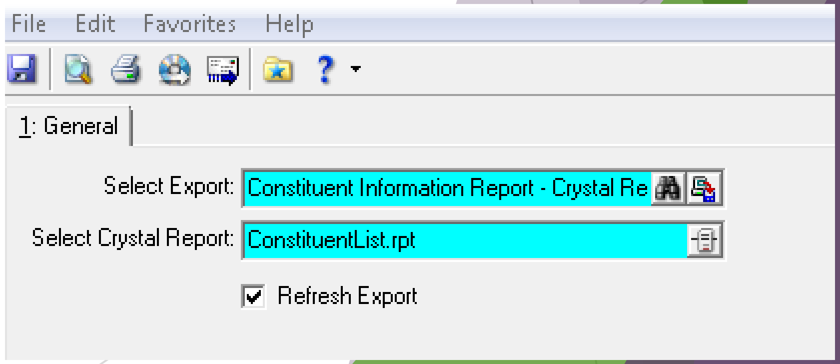
Input

Crystal Report
- Format

Input

RE Custom Report

Run



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

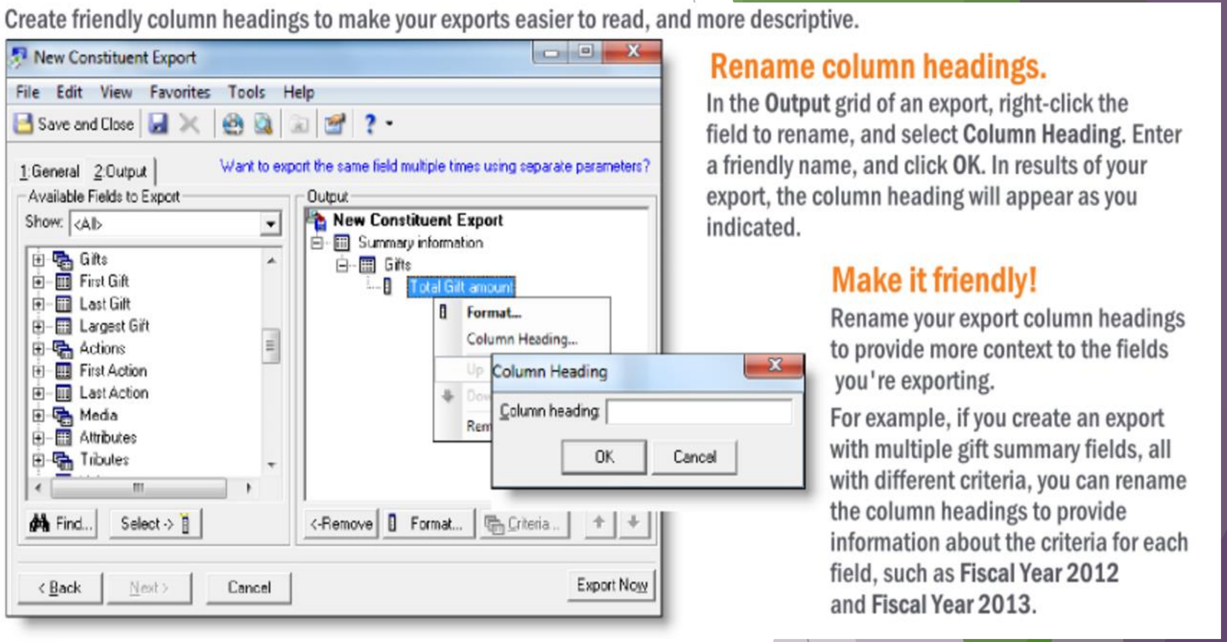
Report Purpose	Best strategy
Donor Retention	Donor Retention Canned Report
Event Analysis	Event Summary Report
Campaign/Appeal Analysis	Appeal/Campaign/Fund Performance Analysis Report
Board Giving Analysis	Solicitor Performance Analysis Appeal Performance Analysis
Actual vs Goal Fundraising	Appeal/Campaign/Fund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

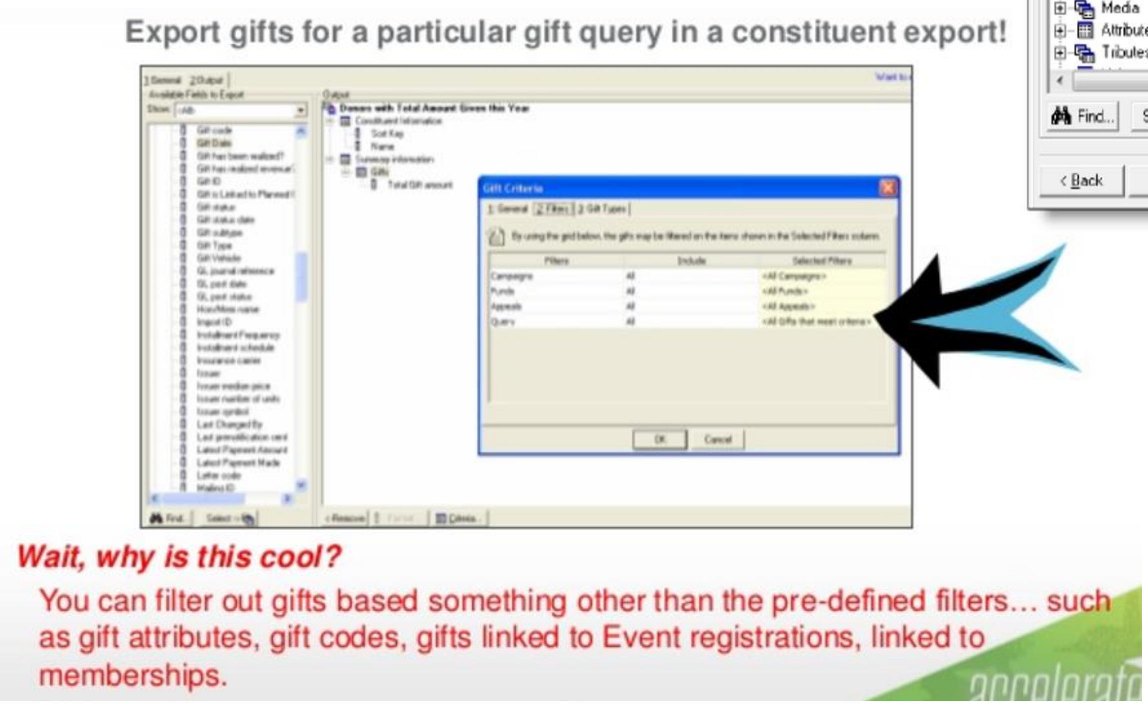
Query Tips & Tricks

- 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



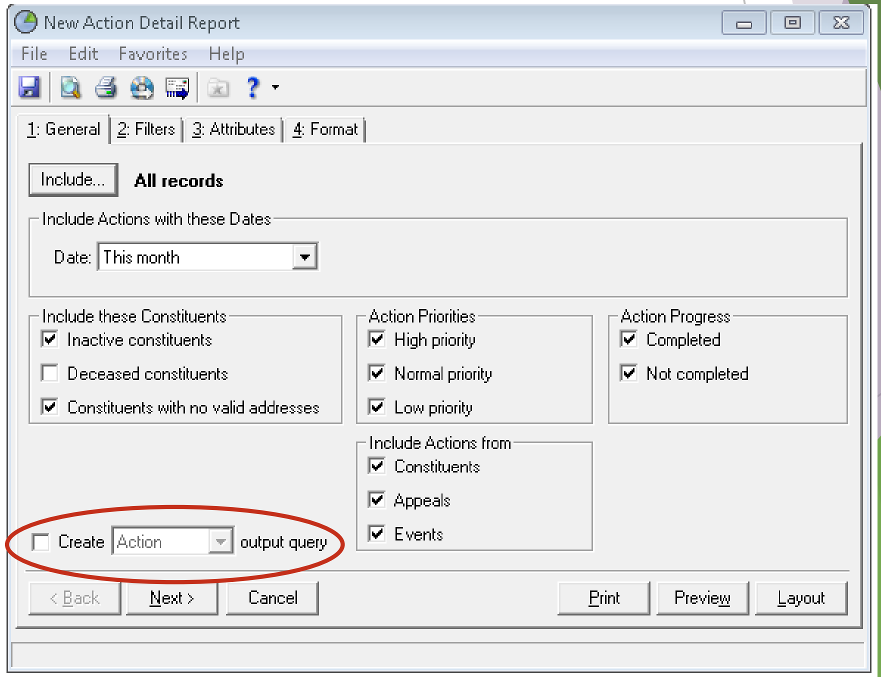


Dashboard/Query Tips & Tricks

- 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



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.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/re7ent/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