



Gift Records and Gift Reports

Raiser's Edge Training: 02/14/2012

Josh Hammar

Agenda

- ▶ 1. Gift Tab
- ▶ 2. Gift Records
- ▶ 3. Gift Types
- ▶ 4. Tips & Tricks
- ▶ 5. Finding that “Just-Right” Report
- ▶ 6. Questions



1. Gift Tab

- ▶ Only on constituent records (individual and organizations)
- ▶ Listing of individual/organization's gift records
- ▶ Gift records are ALWAYS linked to at least one:
 - ▶ Constituent
 - ▶ Appeal/package
 - ▶ Fund
- ▶ Gift records CAN link to:
 - ▶ Event records
 - ▶ Proposal records
 - ▶ Tribute records (ie. individuals marked as "Honor/Memorial")
 - ▶ Other individuals/organizations (soft credit)
 - ▶ Matching gifts



2. Gift Records

▶ The Basics

- ▶ Gift Type
- ▶ Gift Date
- ▶ Gift Amount
- ▶ Fund
- ▶ Appeal & Package
- ▶ Pay Method

▶ The Details

- ▶ Gift Subtype
- ▶ Gift Notes
- ▶ Soft Credit
- ▶ Matching Gift
- ▶ Tribute
- ▶ Split Gift

The screenshot shows a software window titled "New Gift for Anonymous Miscellaneous, 132997". The window has a menu bar (File, Edit, View, Gift, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar are several tabs: "Gift" (checked), "Miscellaneous", "Soft Credit", "Matching Gifts", "Tribute", "Attributes", and "Split Gift".

The main form area contains the following fields and controls:

- Constituent:** Anonymous Miscellaneous (ID: 132997)
- Gift type:** Cash
- Gift subtype:** (empty)
- Gift date:** 2/14/2012
- Amount:** \$100.00
- Campaign:** Annual
- Fund:** Seattle University Fund
- Appeal:** UG12AG.FMAF
- Package:** WG
- Solicitors:** (empty)
- Pay method:** Personal Check (with an "EFT?" checkbox)
- Bank:** (empty)
- Reference:** (empty)
- Acknowledge:** Not Acknowledged
- Letter:** Standard Receipt (with a "Ben" button)
- Receipt:** Received (with a date field containing 2/12/20 and a value field containing \$100.00)
- Check no./date:** 12345 (with a date field containing 2/10/20)
- Date added:** (empty)

3. Gift Types

▶ Expectancies vs. Payments

Expectancies (“Not Yet” Donation)	Payments (“Now” Donation)
	Cash Stock/Property Stock/Property (Sold) Gift-in-Kind Other
Pledge	Pay-Cash Pay-Stock/Property Pay-Stock/Property (Sold) Pay-Other Pay-Gift-in-Kind
MG Pledge	MG Pay-Cash MG Pay-Other MG Pay-Gift-in-Kind
Recurring Gift	Recurring Gift Pay-Cash
Planned Gift	<i>(Realized Planned Gifts)</i>

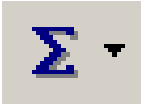
3. Gift Types

▶ Fundraising Total vs. Cash-in-Door Total

Fundraising Performance Total	Cash-in-Door Total
Cash	Cash
Recurring Gift Pay-Cash	Pay-Cash
Pledge	MG Pay-Cash
MG Pledge	Recurring Gift Pay-Cash
Stock/Property	Stock/Property
Stock/Property (Sold)	Stock/Property (Sold)
Gift-in-Kind	Pay-Stock/Property
Planned Gift	Pay-Stock/Property (Sold)
Other	MG Pay-Stock/Property
	MG Pay-Stock/Property (Sold)
	Other
	Pay-Other
	MG Pay-Other



4. Tips & Tricks

- ▶ Gift tab: Columns and Customization
 - ▶ Adding/removing columns
 - ▶ Color-coding gift types
- ▶ Gift Reports: K.Y.C. (Know Your Criteria)
 - ▶ Gift Types, Date Ranges, and Filters make all the difference!
 - ▶ Best Practice: Review criteria each time you run report
 - ▶ Contact Adv Services to troubleshoot
- ▶ Quick gift summary → Look for the sigma 
 - ▶ Donor, Fund, or Appeal
 - ▶ Built-in Filters vs. Filter Queries
 - ▶ Real-Life scenario: Donor giving to specific program/school



5. Finding that “Just Right” Report

Dozens of
“Canned”
Gift Report
Templates

!!!

Reports • Financial Reports

New Open Delete...

Reports

- Action Reports
- Analytical Reports
- Campaigns, Funds, and Appeals Reports
- Custom Reports
- Demographic and Statistical Reports
- Event Management Reports
- Financial Reports**
- Membership Reports
- Pivot Reports
- Pledge and Recurring Gift Reports
- Profiles, Lists, and Directories
- Prospect Research Reports
- Tribute Reports
- Volunteer Reports

Name
A - Arts & Sciences Giving by Donor - FY11
A - Arts & Sciences Giving by Donor - Last Fiscal Year
A - Arts & Sciences Giving by Donor - This Fiscal Year
A - AS Giving by Donor - Cash, New Pledges, PG - Last
A - AS Giving by Donor - Cash, New Pledges, PG - This
A - Center for the Arts Campaign Report - all gifts
A - Fund template
A - History Alumni Giving History
A - MAP and Rowe fund gifts
AD - Athletic Cash Gifts from Alumni Last Fiscal Year
AD - Athletic Giving - Rec Center Only - Last Fiscal Year
AD - Athletic Giving - Rec Center Only - This Fiscal Year
AD - Athletic Giving All gifts - Last Fiscal Year
AD - Athletic Giving All gifts - This Fiscal Year
AD - Athletic Giving All gifts and installments - This FY
AD - Athletic Giving All gifts with pledges - This Fiscal Year
AD - Athletic Giving Gifts and Pledges - This Fiscal Year
AD - Fitness Center Giving - All Dates
AD - Volleyball Donor Recognition List
AG - 09 Funds Supported By Direct Mail Appeals
AG - 09 Online Giving By Appeal

5. Finding that “Just Right” Report

- ▶ “Canned” reports often fit the bill.
- ▶ What are you looking for?
 - ▶ List of Donors? **Gift Detail and Summary Report**
 - ▶ Fund Totals at one point-in-time? **Fund Performance Analysis**
 - ▶ Fund Totals over multiple FYs? **Fund Comparison Summary**
 - ▶ Donor giving levels? **Donor Category Report**
 - ▶ Cash Flows from future pledge payments? **Cash Flow Report**
 - ▶ Not sure? **Ask Advancement Services**
- ▶ Custom Reports – when no “canned” report will do.
 - ▶ Talk to Advancement Services.
 - ▶ Time-intensive, but do-able.



6. Questions?

▶ Resources

- ▶ Adv Srvcs website: www.seattleu.edu/adv_services/home.aspx
 - ▶ Forms
 - ▶ Documentation
 - ▶ Up-to-date!

- ▶ Set up a meeting
 - ▶ Email
 - ▶ Phone
 - ▶ In person – ADMN 305B

- ▶ Thank you!

