Reports from The Raiser's Edge® for a New Head of Fundraising

How can The Raiser's Edge help a new head of fundraising—for example, vice president or director of development or advancement—get a sense of what's going on in the department and what areas might need immediate attention while settling into the job? This document proposes some rationale and reports to focus on data of immediate concern to a new head of fundraising.

The expectation is that the new head of development can ask for these reports from the database administrator (DBA), not that the new head will set them up. If your DBA is unfamiliar with these reports or how to set them up properly, your DBA can contact Blackbaud customer support for assistance. If the DBA is then not able to produce them for you, you have identified an immediate area of concern because it's going to be difficult to learn about your new department and to captain it in an informed way.

The text in the parentheses following each report is the report category on the Reports page of The Raiser's Edge that the standard ("canned") report can be found in.

Any immediate funding crises that need handling?

How are things going as compared to previous years and budget? Does the department seem to be holding its own, giving you time to settle in and assess the big picture, or is funding significantly declining and need to be immediately addressed?

- **Comparisons and Summaries** (Demographic and Statistical): A "Comparison" report can show you the performance of two time periods and their variance; run this for this fiscal year-to-date as compared to last fiscal year-to-date. A "Summary" report can be run for 3 to 5 time periods, so consider running this for this fiscal year-to-date and the past 3 to 5 fiscal years-to-date. Run this report by either or both campaign and fund, though other options are available if you are interested.

- **Campaign** and **Fund Performance Analysis** (Campaigns, Funds and Appeals): If your copy of The Raiser's Edge has been set up properly, the campaigns and funds should have goals recorded and these reports will show you the performance to date against those goals. One strategy is have the database administrator only use the year-to-date goal in the report rather than the entire year's goal, especially if it is not close to the end of the fiscal year.

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(This could only be done if someone has done monthly budgeting, and it will require your DBA to update these goals in RE each month, usually not a difficult or time-consuming procedure. This also assumes that the goals are the same as the budget numbers or will at least provide similar information.)

- These reports, as well as the Appeal version, can be used to show you the performance to date of any specific fundraising areas of immediate concern such as an impending event or recent appeal.

Opportunities for early wins to impress the new boss and board.

Everyone's happier with a new employee if there are fairly quick results, even if an intention in the hiring was to address long-term issues. Here's how The Raiser's Edge can help you identify the "low-hanging fruit."

- **LYBUNT** and **SYBUNT Reports** (Analytical): These reports will show you those that have given Last/Some Year But Unfortunately Not This year. Of course these are great prospects to start with.
    - While I think it's easier to ask a lapsed donor to renew their gift than to ask a recent donor who has given more in the past to give more now, there is the **Comparative Report** (Analytical). It will show you those who have given less in a certain time frame than in a previous time frame (e.g., less so far this year than they gave last year), perhaps most useful near the end of a fiscal year.

- **Pledge Status Report** (Pledge and Recurring Gifts): Get this report for only outstanding pledges. This will not only let you know who your important major donors are to make contact with (see next section), but might provide you the opportunity to bring in money already committed early if your management colleagues are nervous about cash flow. For example, you might be able to encourage pledges that are due in the early part of the calendar year to get paid before December 31 for the tax benefit to the donor. Or you might be able to get pledges due shortly after the end of the fiscal year to be paid earlier if you provide your recognition clubs based on payments rather than pledges.

Good opportunities for easy connections with major donors.

After reaching out to the board, who should you introduce yourself to next? Consider these options.

- **Pledge Status Report** (Pledge and Recurring Gifts): See notes on this report above.

- **Recent Gifts List** (this is a Dashboard panel, not a report): Put this panel on your dashboard and check daily, using it as an easy opportunity to quickly note donors of large gifts whom you can easily call and thank—just click on the donors' names on the dashboard to see their records with contact details. This dashboard can be set up to only show gifts of a certain amount and higher so you can focus on the big donors.

- **Top Donors Report** (Analytical): Just what it says, a list of the organization's top donors using whatever criteria you wish, such as this year, past few years, or lifetime. Easy to pick up the phone, introduce yourself, and say thanks to open the door to communication with these donors.

Ensure important fundraising activities don't fall between the cracks from the transition.

- **Past Due (Pledge) Report** (Pledge and Recurring Gifts): You want to ask your staff if pledge reminders are going out, and perhaps see and confirm them. Regardless, you need to ensure that all pledges are getting paid and if not, are getting followed up on.

- **Action Detail Report** (Actions): While actions are not used as frequently as they should be by most organizations using The Raiser's Edge, this report will help you do one of two things:

    1. Show you what's coming up that your predecessor and other staff scheduled to do that you want to ensure still happens as these actions may indicate commitments to prospects and donors.

    2. If the report shows very little and you have a staff, work with your staff to get them using the system to inform you and leave a history of their interactions with your constituents.

- **Prospect Pipeline** (this is a Dashboard panel, not a report; only available if your organization has the RE:Search/Prospect module for The Raiser's Edge): Run this for both Prospect Status and Proposal Status to understand your major gifts program, in conjunction with the Action Detail Report above, to ensure the proper continuance of your major gifts activities. This might also help identify excellent ask opportunities for the near future.

- **Outstanding Proposal Report** (Prospect Research; only available if your organization has the RE:Search/Prospect module for The Raiser's Edge): Another way to see if there are major gifts activities in progress that need continued attention and might create opportunity for early fundraising success.

- The brevity of this list should not be read to imply there are not other important activities to ensure are occurring properly.

These reports are intended to focus on what you will probably want to know and monitor right away as the new head of development. See my book for fundraisers, *Fundraising with The Raiser's Edge: A Non-Technical Guide* (Wiley, 2010), Chapter 7, for other reports and procedures you will want to consider for the long-term operation of your department.

If you like computers and would like to have direct access to these reports yourself rather than rely on your database administrator, these reports can be set up as favorites on your RE Home page. Some of these reports are also available as dashboard panels and could be set up on your Dashboard page instead for a better on-screen experience.

Congratulations on your new position, and all the best of success!