



Dashes and Vizzes

- We use Raiser's Edge 7.93
- We access the data through Query/Export
- BUT ALSO, through access to the backend SQL tables (the preferred method).
- We load the data into Tableau
- Here are some samples from 50+ reports, dashboards, and vizzes (Tableau-speak for visual data).

- Most Vizzes are INTERACTIVE
- We can print them out or export as PDFs
- But they are much more useful in their native Tableau environment
- Many of these are not meant for broad consumption. They use concatenated field names and not really formatted using best practices. Many are for internal analytical use.

Examples of Strategic/ Leadership level reports

This was for our two governing boards. With one click it shows absolute value totals or averages.



Five Year Trends and Year-To-Date Progress through January 2017

Five Year Trend by Dollars Donated

University	Gift Date by FY						Grand Total
	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	
UA SW	\$917,591	\$748,175	\$1,551,941	\$687,878	\$858,443	\$211,824	\$4,975,852
UAA	\$7,725,282	\$8,943,643	\$7,077,366	\$6,784,573	\$4,531,729	\$7,814,516	\$42,877,109
UAF	\$13,028,802	\$5,597,672	\$12,573,334	\$10,063,353	\$7,537,482	\$5,376,700	\$54,177,345
UAS	\$400,826	\$637,367	\$775,316	\$471,480	\$446,282	\$768,844	\$3,500,116
Grand Total	\$22,072,502	\$15,926,858	\$21,977,957	\$18,007,284	\$13,373,937	\$14,171,884	\$105,530,422

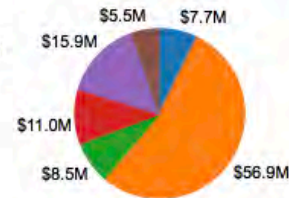
Five Year Trend by Number of Donors

University	Gift Date by FY						Grand Total
	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	
UA SW	183	106	116	99	101	62	388
UAA	2,778	2,345	2,432	2,924	2,616	2,439	8,566
UAF	3,703	4,232	4,540	4,461	4,528	4,323	11,777
UAS	187	125	150	124	156	132	465
Grand Total	6,856	6,669	7,085	7,461	7,259	6,838	20,510

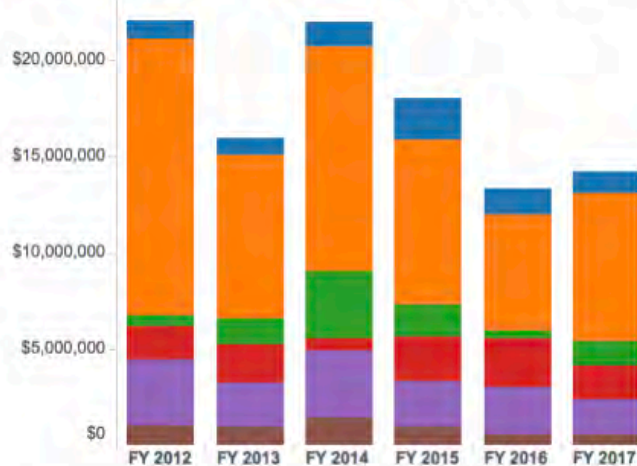
Legend Constituent Type

- Alumni
- Corporation
- Estate/Trust
- Foundation
- Friend
- Other Oras

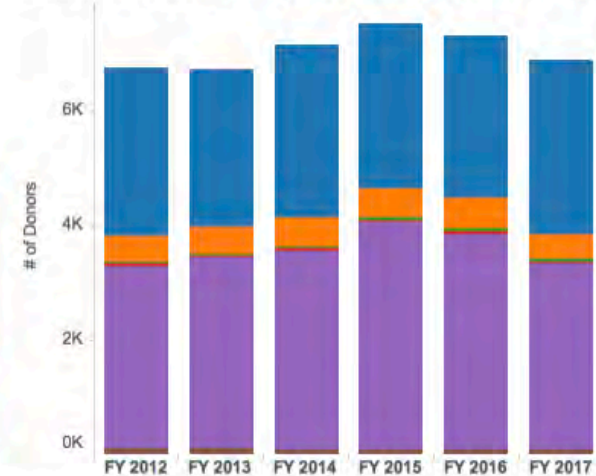
FY12-17 Dollars by Constituent Type



Number of Dollars by constituency, FY12-17



Number of Donors by constituency, FY12-17



The same information, but produced daily. Useful for managers. Users can select the specific Gift Type and SubType.



FY17 Daily Measures Year to Date

Filter Notes

Add Philanthropic Grants not received by the Foundation by clicking "Cash, Grants".

Add Irrevocable Planned Gifts by clicking "Planned Gifts, Null".

Type and Subtype

(Multiple values) ▼

MAU-Campus

(All) ▼

Top Measures

Campus	Total Dollars		# of Donors		# of Gifts	
	FY 2017		FY 2017		FY 2017	
	Q4	Total	Q4	Total	Q4	Total
UA SW	\$3,145	\$211,824	13	62	13	202
UAA	\$641,478	\$7,814,426	146	2,438	162	3,285
UAF	\$398,402	\$5,372,605	1,527	4,322	1,755	14,261
UAS	\$59,220	\$768,844	24	132	31	415
System Total	\$1,102,245	\$14,167,699	1,704	6,836	1,961	18,163

Planned Giving Net Present Value

Campus	Total Dollars	# of PG Donors	# of PG Gifts
	FY 2017	FY 2017	FY 2017
UAA	\$700,001	2	2
UAF	\$0	3	3
UAS	\$0	1	1
Grand Total	\$700,001	6	6

Year of Gift Date

■ FY 2017

Planned Giving Face Value

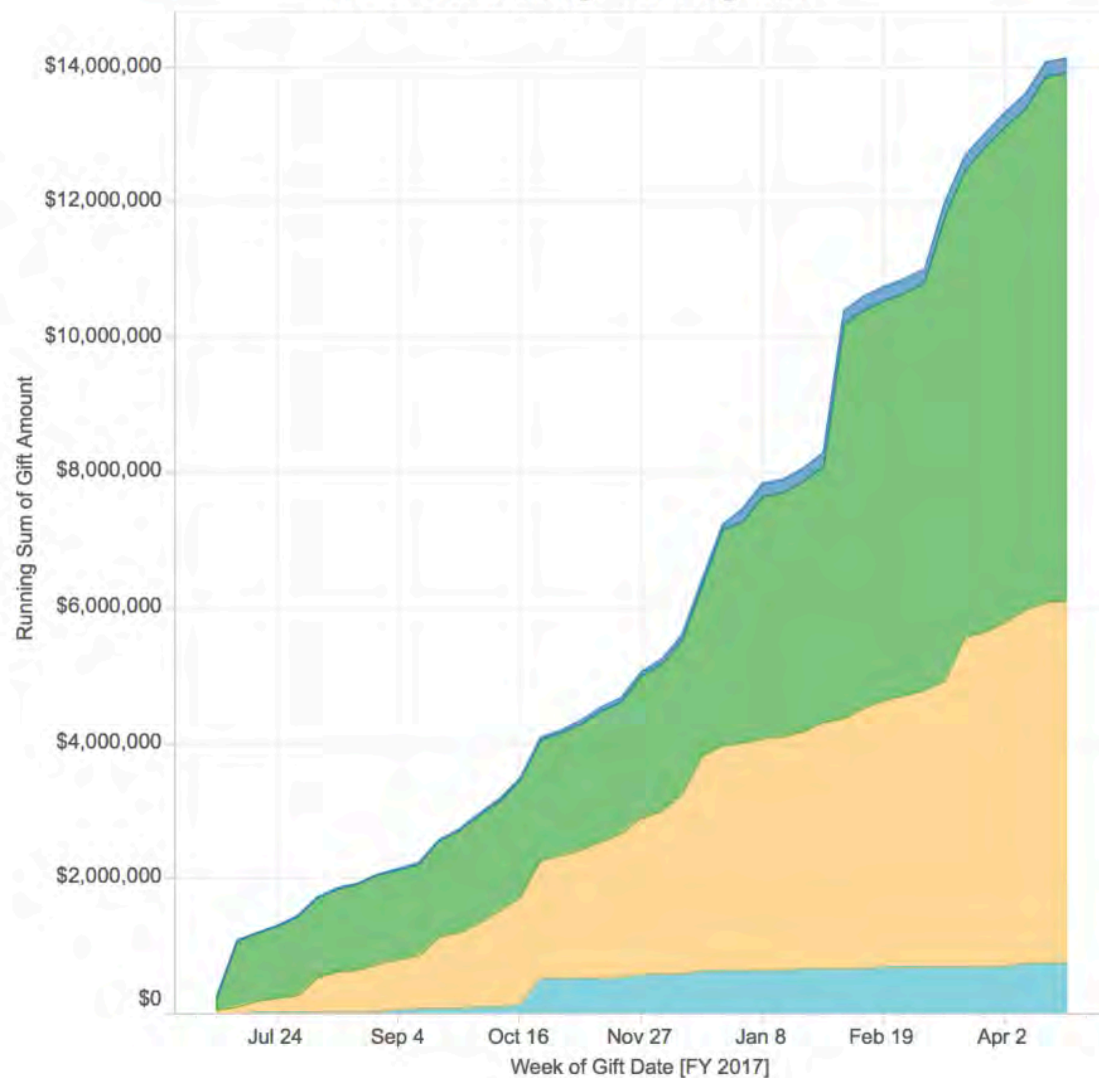
Campus	Total PG Dollars	# of PG Donors	# of PG Gifts
	FY 2017	FY 2017	FY 2017
UAA	700,001	2	2
UAF	5,002	3	3
UAS	1	1	1
Grand Total	705,004	6	6

**Running gift totals over
FY. Again, users can select
Gift Types and Subtypes.**



Weekly Running Total

FY17 UA Fundraising - Running Total



Type and Subtype

- ☐ (All)
- ☒ Cash, Null
- ☐ Cash, Annuity
- ☐ Cash, Grant
- ☒ Cash, Membership
- ☒ Gift-In-Kind, Null
- ☒ MG Pay-Cash, Null
- ☐ MG Pledge, Null
- ☒ Other, Null
- ☐ Pay Gift-In-Kind, Null
- ☐ Pay Stock/Property, Null
- ☐ Pay-Cash, Null
- ☐ Pay-Cash, Annuity
- ☐ Pay-Cash, Phoneathon Pledge
- ☐ Planned Gift, Null
- ☐ Planned Gift, Annuity
- ☐ Planned Gift, Real Estate
- ☒ Pledge, Null
- ☒ Pledge, Membership
- ☒ Pledge, Phoneathon Pledge
- ☒ Recurring Gift Pay-Cash, Null
- ☐ Recurring Gift Pay-Cash, Membership
- ☐ Recurring Gift Pay-Cash, Phoneathon ...
- ☐ Recurring Gift Setup, Null
- ☐ Recurring Gift Setup, Phoneathon Ple...
- ☒ Stock/Property, Null
- ☐ Stock/Property, Annuity

MAU-Campus

- ☒ (All)
- ☒ UA SW
- ☒ UAA
- ☒ UAF
- ☒ UAS

- ☒ UA SW
- ☒ UAA
- ☒ UAF
- ☒ UAS

Month to Month Comparison. Shows where we were same time last FY. Clicking on campus allows users to drill down into constituent types (alumni, corporations, foundations, etc.)



Monthly Comparison Report FY 2016-17

Month at a Glance

Year of Gift Date

■ FY 2016

■ FY 2017

Top Measures Month Over Month

MAU-Campus	Total Dollars Through March		# of Donors Through March		# of Gifts Through March	
	FY 2016	FY 2017	FY 2016	FY 2017	FY 2016	FY 2017
UA SW	\$821,444	\$208,679	78	56	227	189
UAA	\$3,568,467	\$7,170,228	2,238	2,333	2,951	3,056
UAF	\$6,087,458	\$4,969,615	3,856	3,774	11,213	12,352
UAS	\$226,621	\$709,624	134	123	434	384
System Tot..	\$10,703,990	\$13,058,146	6,200	6,187	14,825	15,981

Filter Notes

Add Philanthropic Grants not received by the Foundation by clicking "Cash, Grants".

Add Irrevocable Planned Gifts by clicking "Planned Gifts, Null".

MAU-Campus

- ☒ (All)
- ☒ UA SW
- ☒ UAA
- ☒ UAF
- ☒ UAS

Month over Month

MAU-Campus	Difference in Dollars Through March	Difference in Donors Through March	Difference in Gifts Through March
	FY 2017	FY 2017	FY 2017
UA SW	-74.60%	-28.21%	-16.74%
UAA	100.93%	4.24%	3.56%
UAF	-18.36%	-2.13%	10.16%
UAS	213.13%	-8.21%	-11.52%
Grand Total	21.99%	-0.21%	7.80%

Type and Subtype

- ☐ (All)
- ☒ Cash, Null
- ☐ Cash, Annuity
- ☐ Cash, Grant
- ☐ Cash, Membership
- ☒ Gift-In-Kind, Null
- ☒ MG Pay-Cash, Null
- ☐ MG Pledge, Null
- ☒ Other, Null
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- ☐ Recurring Gift Setup, Phoneathon Pl...
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- ☐ Stock/Property, Annuity

Planned Giving Net Present Value

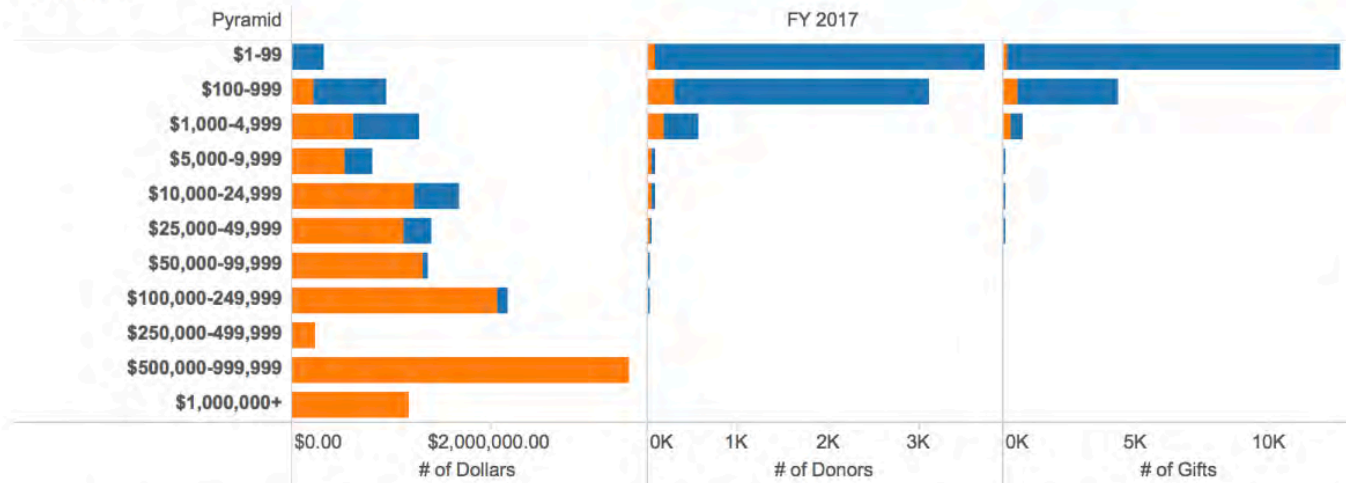
MAU-Campus	Total Dollars Through March		# of PG Donors Through March		# of PG Gifts Through March	
	FY 2016	FY 2017	FY 2016	FY 2017	FY 2016	FY 2017
UAA	\$55,177	\$700,001	70	2	72	2
UAF	\$0	\$0	1	2	2	2
UAS		\$0		1		1
Grand Total	\$55,177	\$700,001	71	5	74	5

Planned Giving Face Value

Pyramids. The same information, but segmented by pyramid giving levels. Clicking on Fiscal year filter allows users to select multiple years and view side-by-side.

FY2017 Pyramids

Pyramids



Key Indicator

- ☒ Individual
- ☒ Organization

Campus

- ☒ (All)
- ☒ UA SW
- ☒ UAA
- ☒ UAF
- ☒ UAS

Key Indicator

- ☒ (All)
- ☒ Individual
- ☒ Organization

Gift Type/Sub-type

(Multiple values)

Year of Gift Date by FY

FY 2017

Pyramids Numbers

		# of Dollars	# of Donors	# of Gifts
Key Indicator	Pyramid	FY 2017	FY 2017	FY 2017
Individual	\$1-99	\$324,154.22	3,641	12,513
	\$100-999	\$737,441.56	2,804	3,743
	\$1,000-4,999	\$662,776.15	373	455
	\$5,000-9,999	\$283,540.57	40	49
	\$10,000-24,999	\$452,711.39	29	35
	\$25,000-49,999	\$279,782.64	8	9
	\$50,000-99,999	\$50,000.00	1	1
	\$100,000-249,999	\$100,000.00	1	1
	Total	\$2,890,406.53	6,238	16,806
Organization	\$1-99	\$8,713.42	92	188
	\$100-999	\$220,359.26	315	614
	\$1,000-4,999	\$627,895.11	199	316
	\$5,000-9,999	\$540,673.04	53	87
	\$10,000-24,999	\$1,232,363.50	58	80
	\$25,000-49,999	\$1,137,326.41	29	38
	\$50,000-99,999	\$1,325,293.40	17	21
	\$100,000-249,999	\$2,066,733.09	10	13
	\$250,000-499,999	\$250,000.00	1	1
	\$500,000-999,999	\$3,397,120.00	5	5
	\$1,000,000+	\$1,175,000.00	1	1
	Total	\$11,981,477.23	601	1,364
Grand Total		\$14,871,883.76	6,839	18,170

Similar information, but
viewed as year over
year gains or losses.

Overview

Select Months

(All)

Campus

(All)

Constituent Type

(All)

KUAC, Museum

(All)

Pyramid Segments

(Multiple values)

% Difference in \$ Raised

-48.32%

48.32%

Dollars

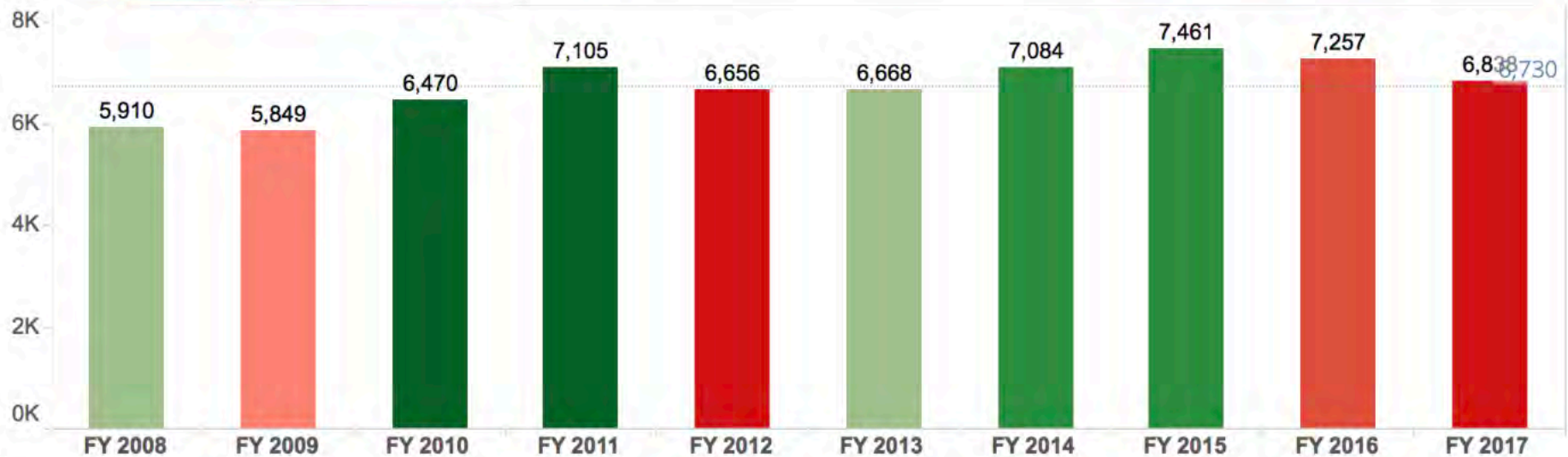


% Difference in Number of Donors

-6.37%

10.62%

Donors



Teamwork • Excellence • Service • Trust

Same information, but
shows gains and losses
at all pyramid segments.

Overview Heatmap %

Campus

(All) ▼

Constituent Type

(All) ▼

KUAC, Museum

(All) ▼

Pyramid Segments

(Multiple values) ▼

Heat Map \$ % Difference in \$ Raised

-111.7%  335.2%

Gift Date by FY

Pyramid	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017
1: \$1-99		2.9%	20.5%	4.0%	-0.8%	-1.0%	8.0%	28.7%	15.2%	-5.7%
2: \$100-999		-1.5%	1.5%	16.7%	3.4%	-3.1%	5.1%	7.9%	1.7%	-19.0%
3: \$1,000-4,999		-17.2%	10.2%	19.1%	0.2%	4.7%	15.7%	2.5%	-3.3%	-8.2%
4: \$5,000-9,999		-13.6%	14.8%	-0.2%	6.4%	-5.5%	-7.5%	22.1%	16.7%	-25.1%
5: \$10,000-24,999		-23.9%	14.3%	-8.7%	-7.0%	-12.6%	41.3%	-3.9%	9.7%	-6.9%
6: \$25,000-49,999		-42.4%	21.5%	23.2%	73.4%	-8.8%	19.8%	9.5%	-4.0%	-36.6%
7: \$50,000-99,999		-31.0%	40.4%	39.6%	17.8%	-29.3%	70.4%	-51.8%	-34.3%	50.2%
8: \$100,000-249,999		0.4%	1.3%	15.2%	-0.1%	30.7%	-3.4%	-35.1%	-1.6%	2.9%
9: \$250,000-499,999		16.8%	-20.2%	-26.1%	12.3%	10.3%	-39.6%	1.8%	-23.8%	-59.0%
10: \$500,000-999,999		-25.1%	-68.0%	-100.0%		-37.4%	335.2%	-32.6%	-81.6%	310.5%
11: \$1,000,000+		10.7%	-66.8%	-43.7%	119.0%	-72.4%	17.2%	-4.0%	-55.6%	17.5%

% Difference in Number of Donors

Heat Map Donors -100% 900%

Gift Date by FY

Pyramid	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017
1: \$1-99		0.0%	15.0%	5.8%	-11.6%	3.9%	4.7%	9.8%	-3.5%	-0.7%
2: \$100-999		0.1%	4.0%	14.0%	-0.6%	-0.3%	3.6%	6.1%	-3.8%	-10.8%
3: \$1,000-4,999		-5.5%	7.4%	19.7%	-0.5%	1.3%	9.2%	2.6%	-3.0%	-5.5%
4: \$5,000-9,999		-26.6%	17.4%	19.8%	11.3%	-5.6%	-2.9%	14.1%	15.9%	-29.0%
5: \$10,000-24,999		-39.0%	51.1%	14.1%	-7.4%	-20.0%	56.7%	-7.4%	23.0%	-18.7%
6: \$25,000-49,999		-43.3%	52.9%	3.8%	66.7%	-4.4%	16.3%	-12.0%	20.5%	-30.2%
7: \$50,000-99,999		-36.4%	50.0%	19.0%	8.0%	-11.1%	16.7%	-39.3%	-23.5%	38.5%
8: \$100,000-249,999		15.4%	-6.7%	14.3%	12.5%	11.1%	5.0%	-38.1%	-7.7%	-8.3%
9: \$250,000-499,999		25.0%	-20.0%	-25.0%	33.3%	0.0%	-50.0%	0.0%	0.0%	-50.0%
10: \$500,000-999,999		0.0%	-75.0%	-100.0%		-50.0%	600.0%	-14.3%	-83.3%	300.0%
11: \$1,000,000+		150.0%	-40.0%	-33.3%	50.0%	-33.3%	0.0%	0.0%	-50.0%	0.0%

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Or viewed as a
traditional table

Key Indicator	Campus	(All) ▾	Key Indic...	(All) ▾	Major-Ann...	(Multiple ... ▾						
Individual												
Organization												
Total												
Campus	Key Indicat..		FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017
UA SW	Individual	\$ by CASE	75,916	69,565	201,272	84,693	104,914	59,735	115,634	55,103	80,796	46,666
		% of Total	10.27%	0.83%	5.50%	7.17%	11.43%	7.98%	7.45%	8.01%	9.41%	22.03%
		# of Donors	188	123	97	142	160	83	84	77	65	46
	Organization	\$ by CASE	663,066	8,308,529	3,456,705	1,096,473	812,677	688,440	1,436,306	632,775	777,647	165,157
		% of Total	89.73%	99.17%	94.50%	92.83%	88.57%	92.02%	92.55%	91.99%	90.59%	77.97%
		# of Donors	22	22	24	25	23	23	32	22	36	16
	Total	\$ by CASE	738,981	8,378,094	3,657,977	1,181,166	917,591	748,175	1,551,941	687,878	858,443	211,824
		% of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
		# of Donors	210	145	121	167	183	106	116	99	101	62
UAA	Individual	\$ by CASE	725,853	640,315	1,320,345	3,173,673	1,555,281	1,051,760	2,552,598	1,215,027	1,049,167	824,960
		% of Total	3.23%	4.24%	21.11%	38.60%	20.13%	11.76%	36.07%	17.91%	23.15%	10.56%
		# of Donors	2,211	2,080	2,541	3,056	2,525	2,115	2,199	2,650	2,353	2,225
	Organization	\$ by CASE	21,720,705	14,446,720	4,934,324	5,048,708	6,170,001	7,891,784	4,524,718	5,569,546	3,482,262	6,989,556
		% of Total	96.77%	95.76%	78.89%	61.40%	79.87%	88.24%	63.93%	82.09%	76.85%	89.44%
		# of Donors	271	305	327	264	253	230	232	274	261	214
	Total	\$ by CASE	22,446,558	15,087,035	6,254,668	8,222,381	7,725,282	8,943,543	7,077,316	6,784,573	4,531,429	7,814,516
		% of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
		# of Donors	2,482	2,385	2,868	3,320	2,778	2,345	2,431	2,924	2,614	2,439
UAF	Individual	\$ by CASE	1,294,663	1,097,266	1,216,509	1,511,051	2,623,360	1,703,074	1,975,162	3,185,374	2,591,036	1,906,903
		% of Total	19.86%	18.75%	17.48%	31.29%	20.14%	30.42%	15.71%	31.65%	34.38%	35.47%
		# of Donors	2,845	2,905	3,044	3,195	3,328	3,809	4,121	4,057	4,087	3,929
	Organization	\$ by CASE	5,223,083	4,754,246	5,742,798	3,317,526	10,405,442	3,894,558	10,598,173	6,877,929	4,946,397	3,469,797
		% of Total	80.14%	81.25%	82.52%	68.71%	79.86%	69.58%	84.29%	68.35%	65.62%	64.53%
		# of Donors	333	299	324	380	375	422	419	403	441	394
	Total	\$ by CASE	6,517,746	5,851,513	6,959,307	4,828,577	13,028,802	5,597,632	12,573,334	10,063,303	7,537,432	5,376,700
		% of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
		# of Donors	3,178	3,204	3,368	3,575	3,703	4,231	4,540	4,460	4,528	4,323
UAS	Individual	\$ by CASE	116,957	49,713	51,455	117,128	106,441	317,814	111,553	117,167	134,087	111,877
		% of Total	28.42%	15.41%	19.27%	18.03%	26.56%	49.86%	14.39%	24.85%	30.05%	14.55%
		# of Donors	159	196	209	171	155	96	111	99	128	99
	Organization	\$ by CASE	294,645	272,860	215,519	532,387	294,385	319,553	663,764	354,313	312,195	656,967
		% of Total	71.58%	84.59%	80.73%	81.97%	73.44%	50.14%	85.61%	75.15%	69.95%	85.45%
		# of Donors	30	34	39	28	32	29	39	25	28	33
	Total	\$ by CASE	411,602	322,573	266,974	649,514	400,826	637,367	775,316	471,480	446,282	768,844
		% of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
		# of Donors	189	230	248	199	187	125	150	124	156	132
Grand Total		\$ by CASE	30,114,887	29,639,215	17,138,927	14,881,639	22,072,502	15,926,718	21,977,907	18,007,234	13,373,587	14,171,884
		% of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
		# of Donors	5,910	5,849	6,470	7,105	6,656	6,668	7,084	7,460	7,257	6,838

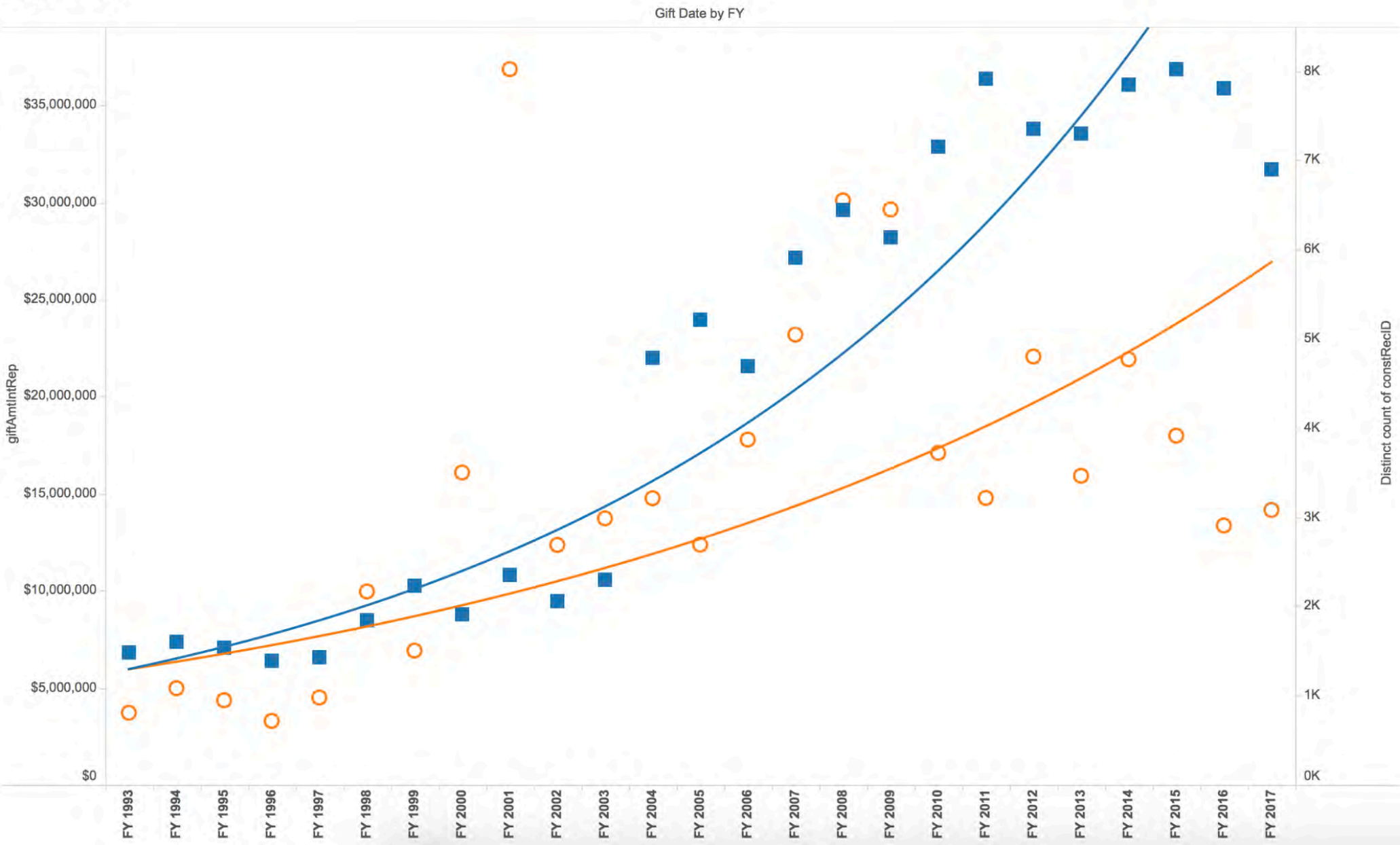
Tableau allows the user to select any two measures and compare graphically. In the case, for one campus we look at the relationship between dollars raised and numbers of donors.



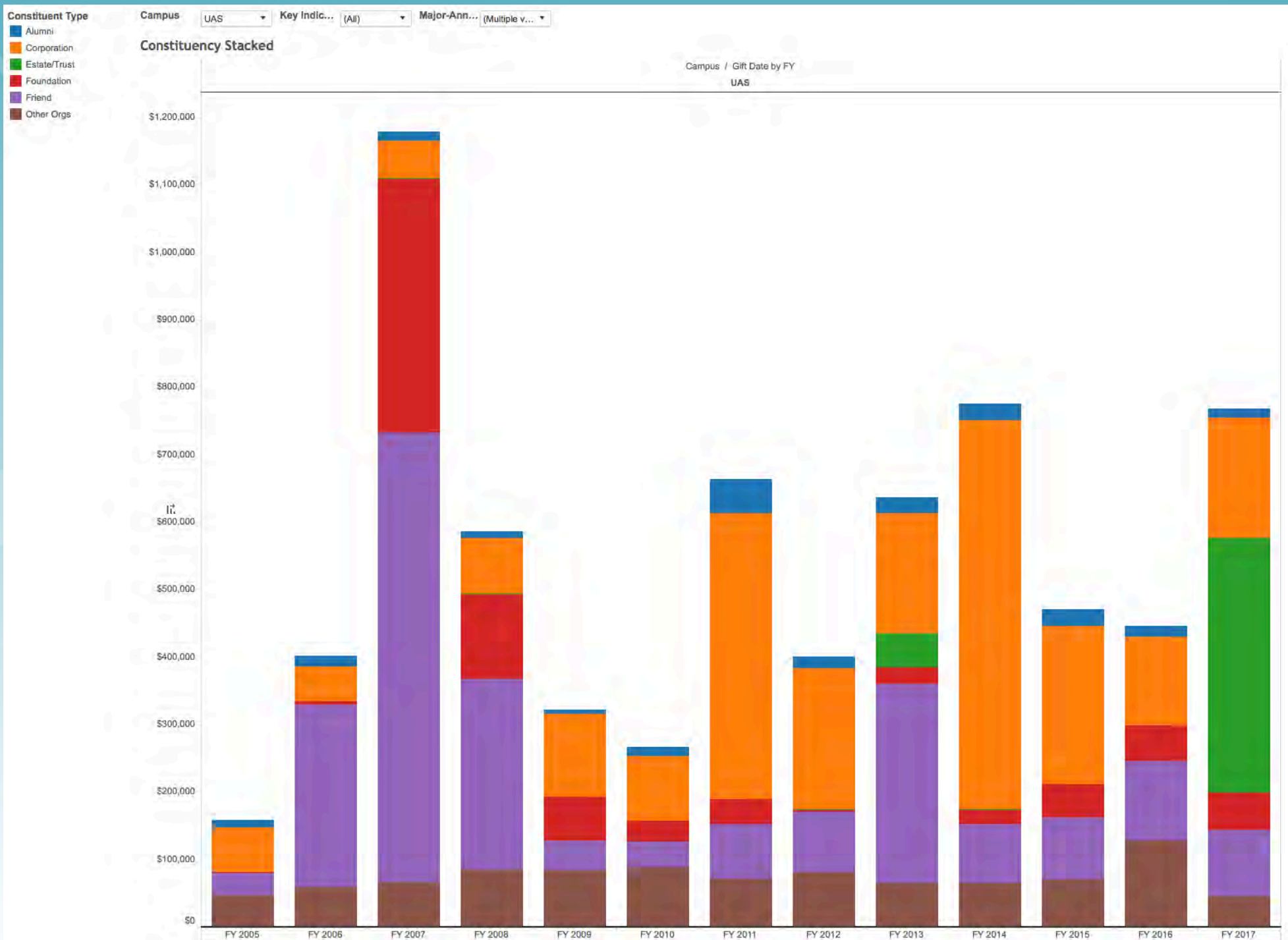
Teamwork • Excellence • Service • Trust

Same thing here, but instead trend lines help show how growth in numbers of donors is outpacing growth in number of dollars. Again, filters let user elect specific gift types, pyramid segments and constituent types.

Donors over \$



**A traditional bar chart, but
Tableau lets users select
information from one viz to act
as a filter on another viz.**



Teamwork • Excellence • Service • Trust

A grid but broken down by academic units. Development officers always want to see how their units are doing compared to others.

University... (Multiple ... ▾) Gift Type ... (Multiple ... ▾) Date by FY Last 2 years

Academic Units Year-To-Date SPECIAL NOTE: THIS REPORT IS IN TESTING MODE. Totals are 95-99% accurate for UAA and UAF. UAS is less reliable due to Gift SubType reporting issues.

		Date by FY				
University Campus	Academic Unit	Constituent	\$ Amount		# Donors	
			FY 2016	FY 2017	FY 2016	FY 2017
UAA	ANSEP	Alumni	\$12,913	\$12,564	20	26
		Corporation	\$1,077,011	\$512,550	12	8
		Foundation	\$50,000	\$985,500	1	3
		Friend	\$5,525	\$5,810	8	8
		Other Orgs	\$28,000	\$22,500	1	1
		Total	\$1,173,449	\$1,538,924	42	46
	Athletics and Recreation	Alumni	\$176,187	\$21,100	114	71
		Corporation	\$242,439	\$77,845	24	12
		Estate/Trust		\$702,500		2
		Foundation	\$14,000	\$7,644	3	3
		Friend	\$132,525	\$62,350	360	91
		Other Orgs	\$1,053	\$1,924	3	3
		Total	\$566,204	\$873,364	504	182
	College of Arts and Sciences	Alumni	\$68,682	\$31,698	171	209
		Corporation	\$307,430	\$84,954	42	23
		Estate/Trust	\$3,750	\$431,636	1	2
		Foundation	\$110,112	\$15,000	5	2
		Friend	\$89,822	\$55,376	215	203
		Other Orgs	\$13,529	\$85	3	2
		Total	\$593,324	\$618,749	437	441
	College of Business and Public Policy	Alumni	\$19,465	\$19,865	115	138
		Corporation	\$409,932	\$1,045,738	17	25
		Estate/Trust	\$1,417	\$417,983	1	2
		Foundation	\$66,132	\$53,974	4	5
		Friend	\$25,605	\$24,001	38	26
		Other Orgs	\$49,855		2	
		Total	\$572,406	\$1,561,561	177	196
	College of Education	Alumni	\$3,805	\$6,540	74	94
		Corporation	\$2,600	\$1,350	2	2
		Estate/Trust	\$50		1	
		Friend	\$13,038	\$5,875	45	16
		Other Orgs	\$0		1	
		Total	\$19,493	\$13,765	123	112
	College of Engineering	Alumni	\$13,718	\$13,450	94	82
		Corporation	\$68,930	\$139,676	15	11

**This dash lets our gift
processing team view how
many transactions they are
entering monthly.**

Total Gifts and Percentage

Campus:
 Gift Date FY:
 Gift Type and Sub-type:

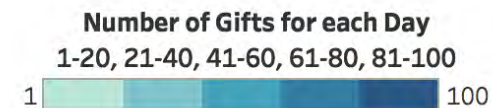
Total Gifts

Campus	giftDate												Grand Total
	FY 2016												
	Q1			Q2			Q3			Q4			
	July	August	Septem..	October	Novem..	Decemb..	January	February	March	April	May	June	
UA Statewide	26	36	30	39	24	45	23	25	21	48	21	31	369
UAA	308	565	634	1,164	574	590	307	323	904	722	283	351	6,725
UAF	1,049	989	1,070	2,690	1,345	1,945	1,293	1,510	1,424	1,910	1,407	1,448	18,080
UAS	42	64	70	127	91	93	78	75	65	95	74	54	928
Grand Total	1,425	1,654	1,804	4,020	2,034	2,673	1,701	1,933	2,414	2,775	1,785	1,884	26,102

Total Gifts Percentage

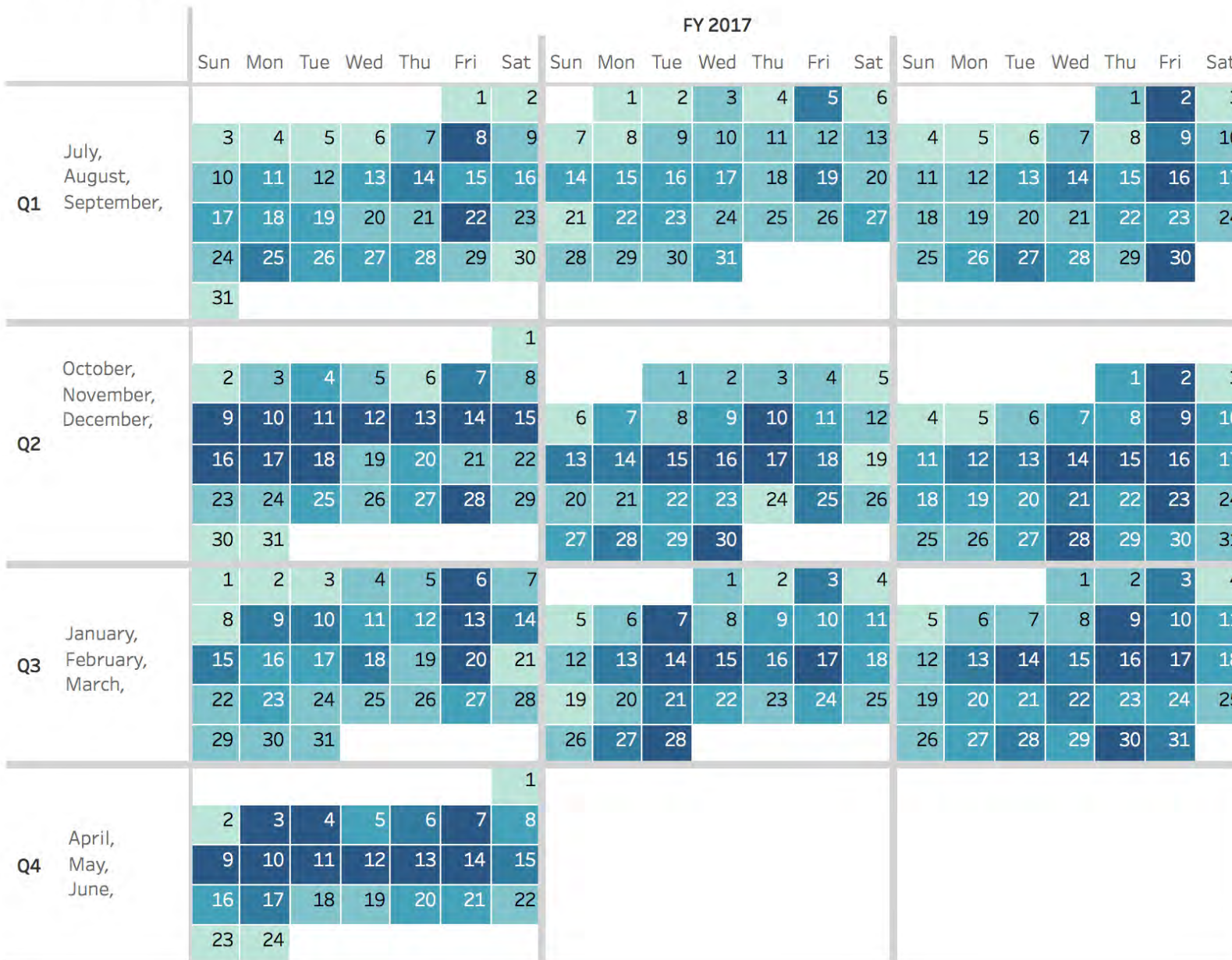
Campus	giftDate FY 2016											
	Q1			Q2			Q3			Q4		
	July	August	Septem..	October	Novem..	Decemb..	January	February	March	April	May	June
UA Statewide	7.05%	9.76%	8.13%	10.57%	6.50%	12.20%	6.23%	6.78%	5.69%	13.01%	5.69%	8.40%
UAA	4.58%	8.40%	9.43%	17.31%	8.54%	8.77%	4.57%	4.80%	13.44%	10.74%	4.21%	5.22%
UAF	5.80%	5.47%	5.92%	14.88%	7.44%	10.76%	7.15%	8.35%	7.88%	10.56%	7.78%	8.01%
UAS	4.53%	6.90%	7.54%	13.69%	9.81%	10.02%	8.41%	8.08%	7.00%	10.24%	7.97%	5.82%
Grand Total	5.46%	6.34%	6.91%	15.40%	7.79%	10.24%	6.52%	7.41%	9.25%	10.63%	6.84%	7.22%

Same info, but viewed as a heat map. This helps the manager plan for leave outages and temporary staffing needs.



Heat Map Viz

Select Fiscal Year
FY 2017



Select Campus

- ☐ UA Statewide
- ☐ UAA
- ☒ UAF
- ☐ UAS

KUAC, Museum, Other

- ☒ All Other
- ☒ UAF KUAC
- ☒ UAF Museum

Foundation/Non Foundation

- ☒ UAA
- ☒ UAF
- ☒ SW
- ☒ UAS
- ☒ Foundation
- ☒ Non Foundation UAA
- ☒ Non Foundation UAF
- ☒ Non Foundation UAS
- ☒ Non Foundation SW

Every report you have seen so far used a SINGLE data set.
One data set can drive dozens of dashes, vizzes, and reports

Onto Development Officer Performance.

A quick view of contact reports (Actions in Raiser's Edge) broken down by campus and stage. Allows managers to view trends in what kind of contact is taking places.

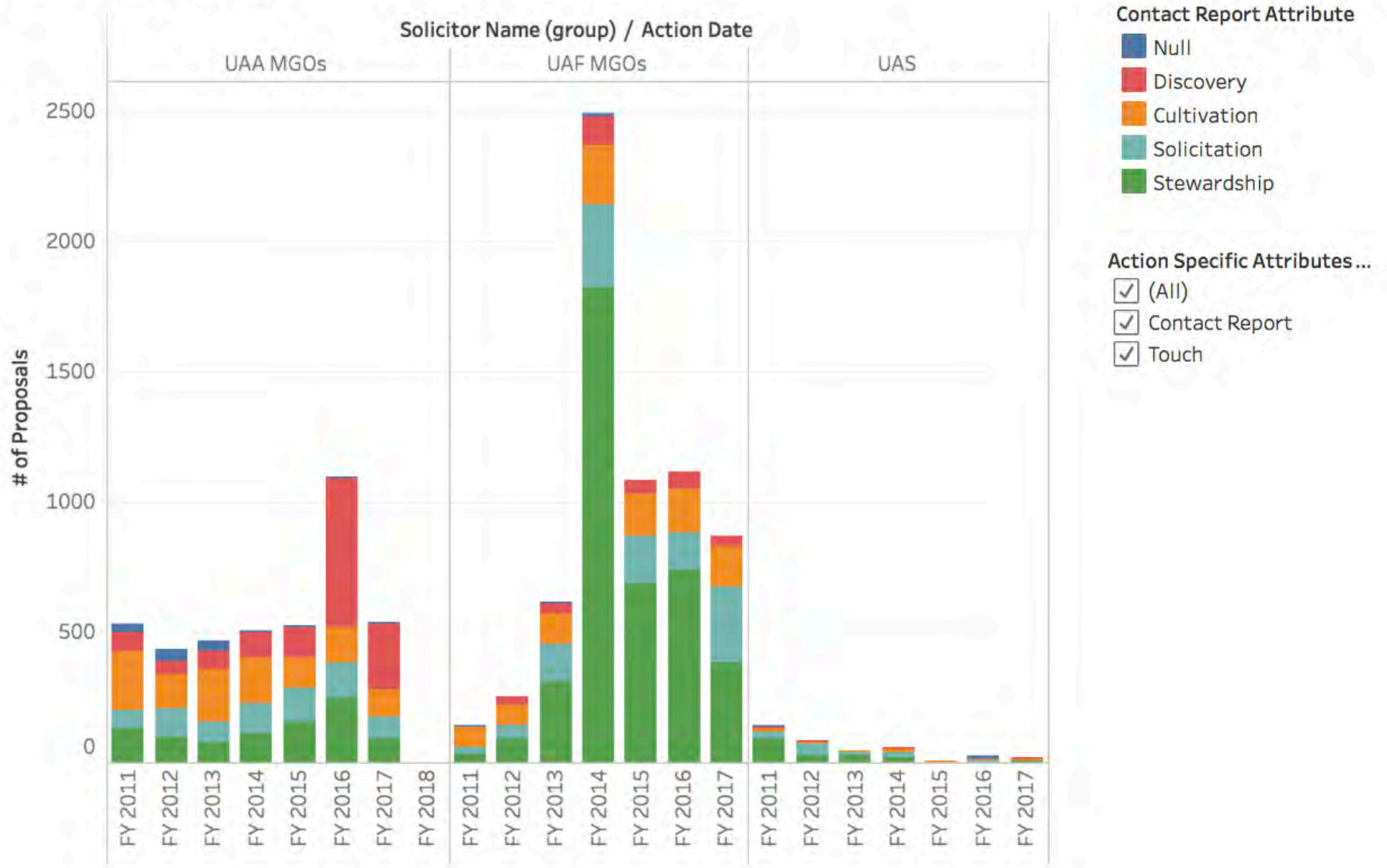
All DOs	Summary CR Attribute	Summary CR Category	UAF DO CR	UAF DO CAT	UAA DO CR	UAA DO CAT	UAS	Individual Re
---------	----------------------	---------------------	-----------	------------	-----------	------------	-----	---------------

Contact Reports by CR Attribute

		Action Date							Grand
		FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	
UAA MGOs	Null	32	44	39	3	2	1	2	
	Discovery	71	53	68	99	122	575	258	
	Cultivation	228	130	202	177	120	138	102	1
	Solicitation	70	109	81	118	129	133	84	
	Stewardship	132	97	76	110	155	248	91	
	Total	533	433	466	507	528	1,095	537	1
UAF MGOs	Null	1		3	9				
	Discovery	7	35	40	112	52	63	39	
	Cultivation	78	74	117	226	157	168	159	
	Solicitation	24	54	143	322	183	144	292	
	Stewardship	34	91	312	1,822	690	740	380	
	Total	144	254	615	2,491	1,082	1,115	870	
UAS	Null	8					7		
	Discovery	5	2		3			1	
	Cultivation	15	11	8	16	3	11	1	
	Solicitation	24	46	14	19	1	2	11	
	Stewardship	90	28	24	18	1	3	4	
	Total	142	87	46	56	5	23	17	
Grand Total		819	774	1,127	3,054	1,614	2,233	1,422	1

**Same info presented
graphically.**

CR Attribute Trend



Contact reports again by what medium

Contact Reports by Category

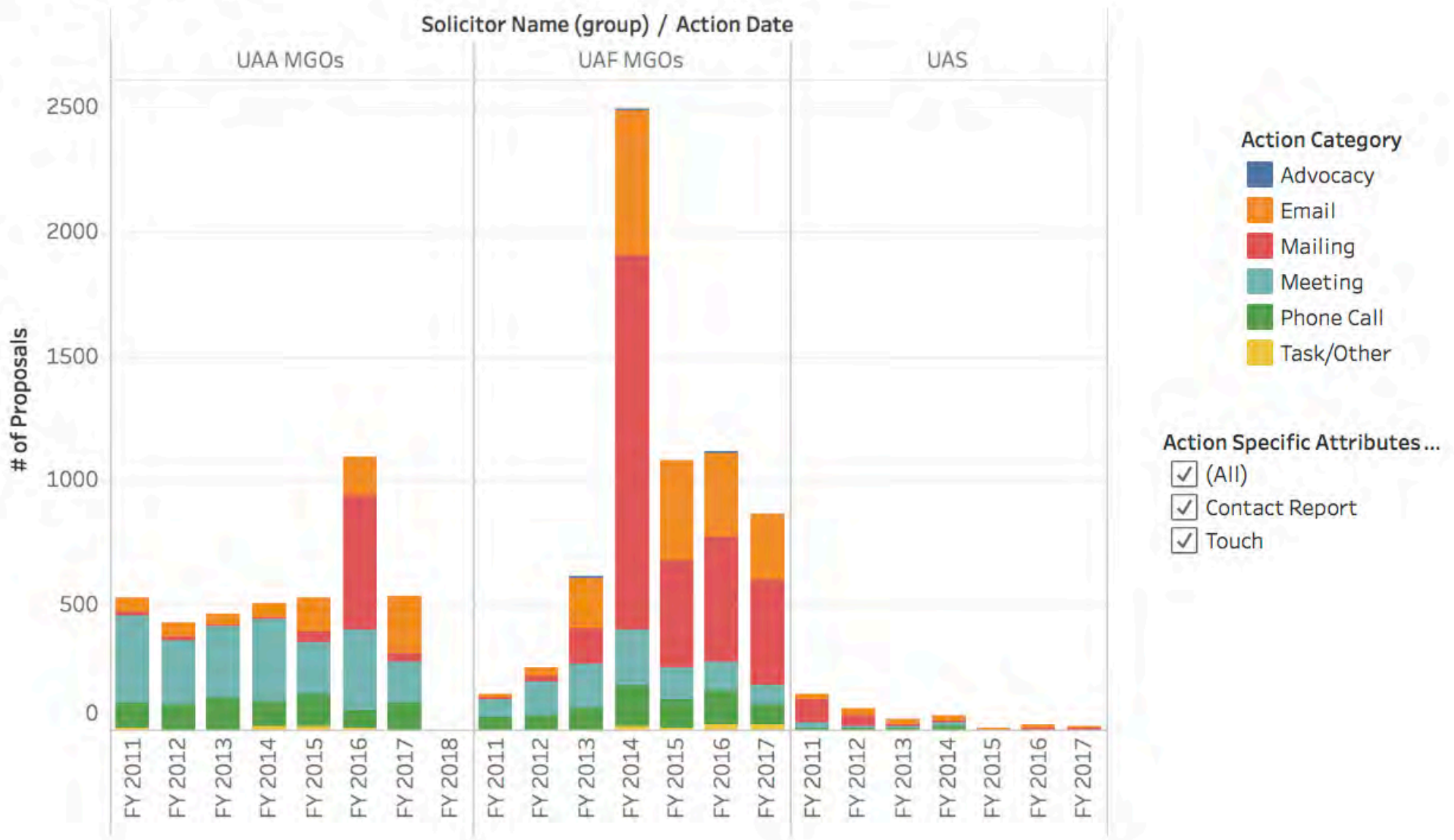
		Action Date								Grand T
		FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018	
UAA MGOs	Email	63	62	44	56	133	155	232		
	Mailing	12	13	4	10	46	537	35		
	Meeting	354	261	286	327	205	324	165		1,
	Phone Call	100	94	129	103	129	74	102	1	
	Task/Other	4	3	3	11	15	5	3		
	Total	533	433	466	507	528	1,095	537	1	4,
UAF MGOs	Advocacy			1	1		1			
	Email	13	40	209	586	399	342	268		1,
	Mailing	3	23	141	1,502	433	500	420		3,
	Meeting	77	133	179	222	130	116	85		
	Phone Call	49	56	83	166	111	135	78		
	Task/Other	2	2	2	14	9	21	19		
	Total	144	254	615	2,491	1,082	1,115	870		6,
UAS	Email	23	31	21	18	4	15	9		
	Mailing	87	39	6	7	1	2	1		
	Meeting	25	10	11	20		4	3		
	Phone Call	5	6	6	11		1	4		
	Task/Other	2	1	2			1			
	Total	142	87	46	56	5	23	17		
Grand Total		819	774	1,127	3,054	1,614	2,233	1,422	1	11



And visually

Teamwork • Excellence • Service • Trust

Category Trend



Same information, but
presented as a single report for
manager to use with the
development officer

Individual Report

Solicitor Name	Action Category	Contact Report Attribu..	Action Date		
			FY 2015	FY 2016	FY 2017
	Email	Discovery	1	2	
		Cultivation	24	7	7
		Solicitation	19	9	5
		Stewardship	43	11	8
		Total	87	29	20
	Mailing	Cultivation			2
		Solicitation	1		
		Stewardship	24	66	28
		Total	25	66	30
	Meeting	Discovery	5		
		Cultivation	15	3	14
		Solicitation	12	5	2
		Stewardship	11	8	11
		Total	43	16	27
	Phone Call	Discovery			1
		Cultivation	8	12	2
		Solicitation	1	3	1
		Stewardship	5	3	
		Total	14	18	4
	Task/Other	Solicitation	1		
		Stewardship			1
		Total	1		1
	Total		170	129	82

Same information
presented by team and grid
and bars viewed together.

UAF DOs Attribute Numbers

Data updated on 4/28/2017 6:20:54 AM

Action Specific Attributes...

(All)

Action Date

This year

Contact	Solicitor Name								
Report Attr.									
Discovery	1	1	2	9	8	6		1	16
Cultivation	34	44	5	80	3	5		3	21
Solicitation	7	12	2	35	207	4		14	22
Stewardship	62	32	2	72	78	14	7	14	82
Grand Total	104	89	11	196	296	29	7	32	141

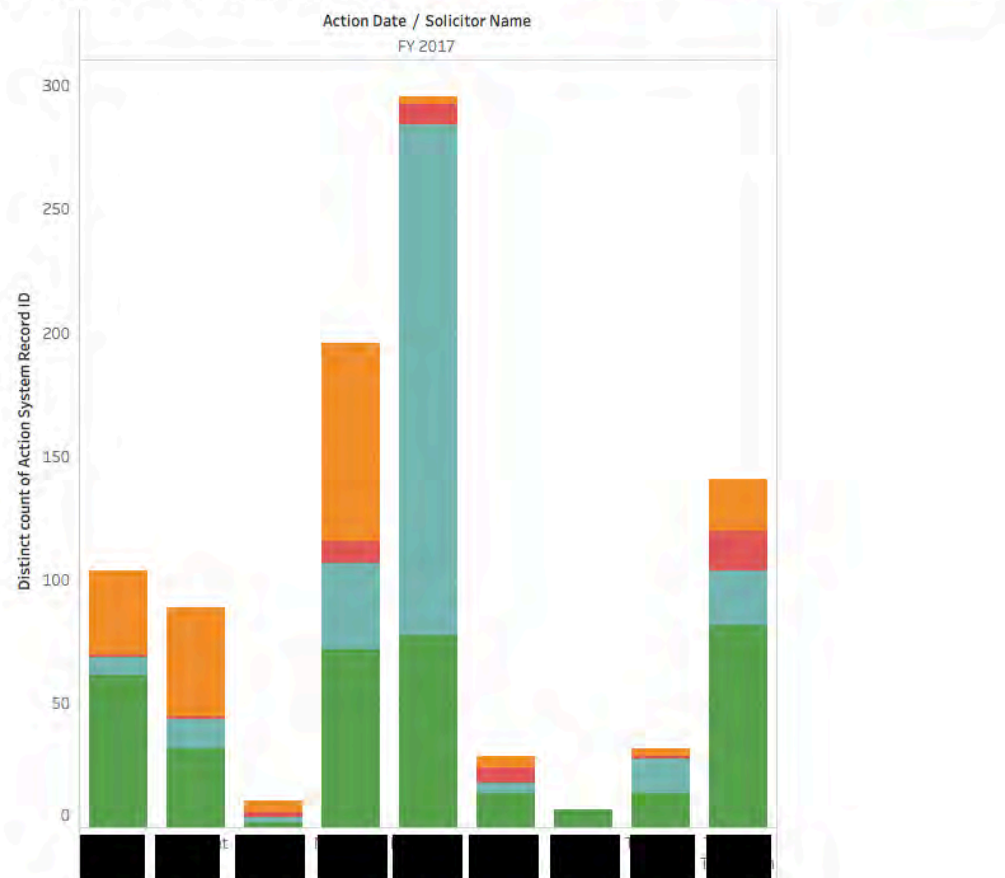
FY 2017 UAF DOs by CR Attribute

Cultivation

Discovery

Solicitation

Stewardship



More Development Officer performance - Proposals

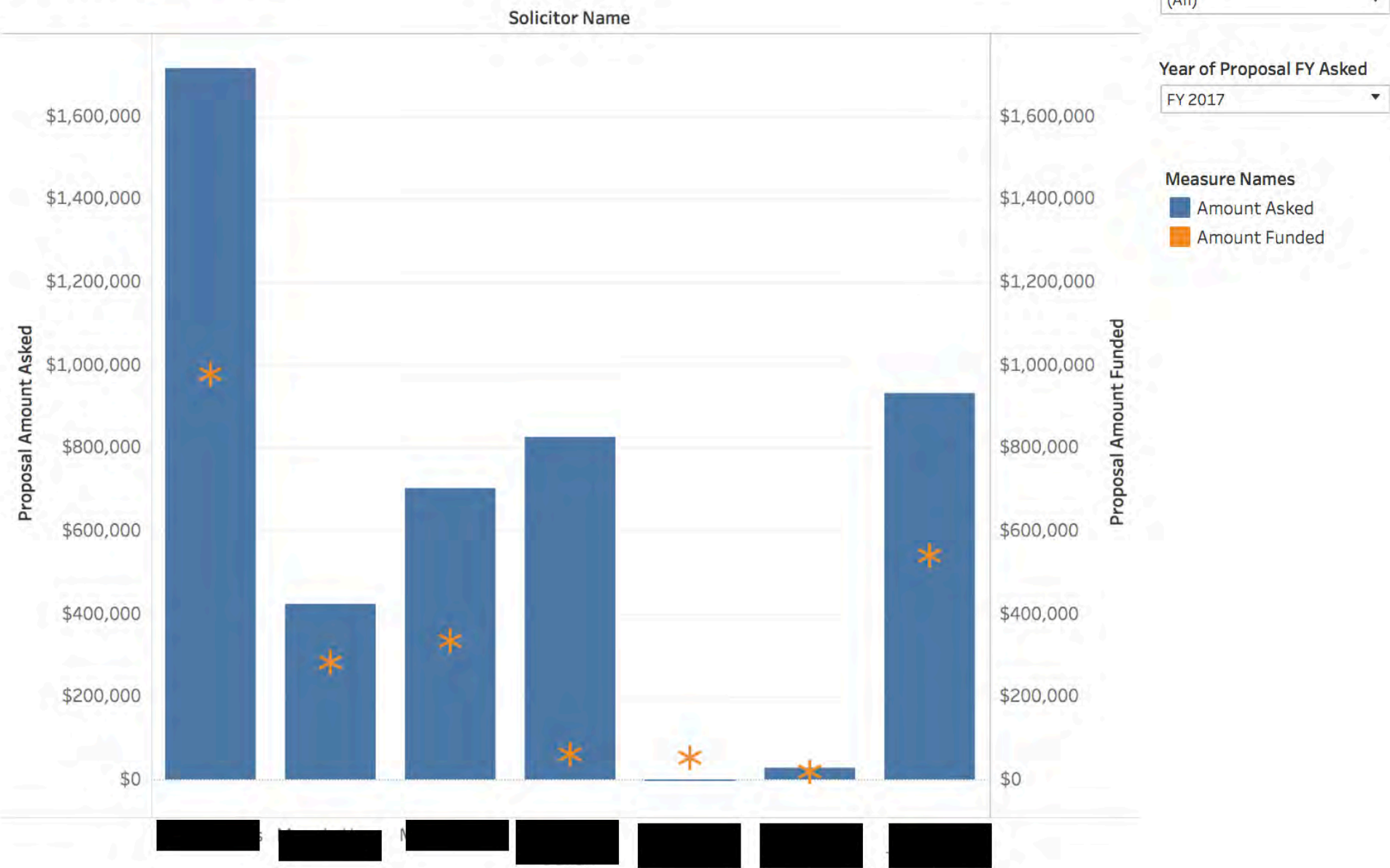
UAF Asked-Funded Bars



UAF Asked-Funded Table

		Solicitor Name						
Purpose								
Annual Gift	Amount Asked	\$347,000	\$47,000	\$17,500	\$44,000		\$26,500	
	Amount Funded	\$333,931	\$49,000	\$12,500	\$30,000		\$18,500	
General Gift	Amount Asked	\$10,000		\$10,000				\$19,000
	Amount Funded	\$12,500		\$10,000				\$19,000
Major Gift	Amount Asked	\$1,356,650	\$375,000	\$425,200	\$780,000	\$2	\$0	\$913,200
	Amount Funded	\$630,323	\$232,965	\$311,199	\$30,000	\$52,000	\$0	\$520,200
Planned Gift	Amount Asked	\$1	\$1	\$250,001				
	Amount Funded	\$0	\$0	\$0				
Grand Total	Amount Asked	\$1,713,651	\$422,001	\$702,701	\$824,000	\$2	\$26,500	\$932,200
	Amount Funded	\$976,754	\$281,965	\$333,699	\$60,000	\$52,000	\$18,500	\$539,200

UAF Asked Vs Funded



Individual Summary

Year of Proposal FY Asked

FY 2016

Solicitor Name

Purpose

Annual Gift	# of Proposals	12
	Amount Asked	\$340,976
	Amount Funded	\$290,881
General Gift	# of Proposals	7
	Amount Asked	\$380,000
	Amount Funded	\$62,830
Major Gift	# of Proposals	5
	Amount Asked	\$392,475
	Amount Funded	\$180,333
Planned Gift	# of Proposals	1
	Amount Asked	\$10,000
	Amount Funded	\$0
Grand Total	# of Proposals	25
	Amount Asked	\$1,123,451
	Amount Funded	\$534,044

Proposals

Funded-Unfunded

Purpose	Funded	Unfunded	Grand Total
Annual Gift	10	2	12
General Gift	6	1	7
Major Gift	4	1	5
Planned Gift		1	1
Grand Total	20	5	25

Can you show all of
this stuff on one page?
Sure.

Give credit to Advizor Solutions for this idea. The development officer can drill down into their contact activity and prioritize by status and wealth rating.

Solicitor Name

[Redacted]

Select Action Category

(All)

CR-Touch

(All)

Solicitor Type

(All)

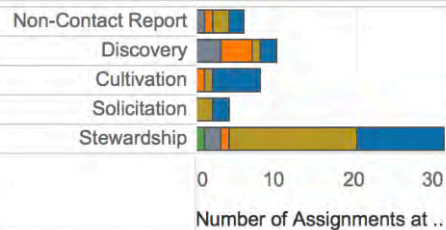
Legend Action Category

Task/Other Phone Call Meeting Mailing Email

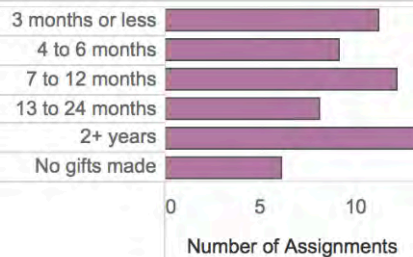
Time Since Last Contact



Last Step



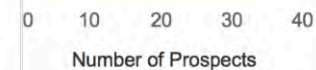
Time Since Last Gift



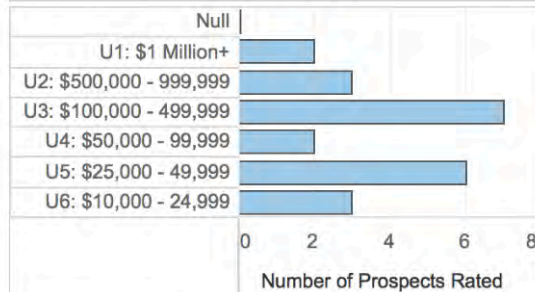
Status

1:High-AG-High level AG,
not MG or PG1:High-MG in life, 5 yr
\$25K+ pledge, maybe
PG/AG prospect2:Med-MG in life, 5 yr
\$25K+ pledge, maybe
PG/AG prospect

No Status



Unity Rating*



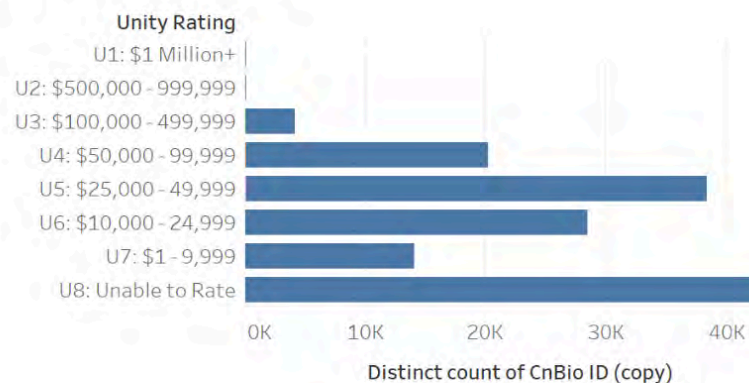
*Unity Rating is the combined rating of the 2013 Wealth Engine screening with Prospect Research rankings into a single rating system.

List of Last Contact and Last Gift

Constituent Name	Bio Record ID	Last Action solicitor	Months Since Contact	Months Since Gift
[Redacted]	151736	[Redacted]	12.0	12.0
[Redacted]	PCOTH191	Dwyer, Emily Thomas Da..	2.0	2.0
[Redacted]	3985	NAF Development Offi..	3.0	22.0
[Redacted]	76990	[Redacted]	8.0	7.0
[Redacted]	151244	[Redacted]	15.0	
[Redacted]	151692	Care, Thomas	19.0	19.0
[Redacted]	144916	[Redacted]	5.0	71.0
[Redacted]	138427	[Redacted]	5.0	51.0
[Redacted]	30036081	[Redacted]	1.0	
[Redacted]	569	Richard, Robert	1.0	0.0
[Redacted]	60657	[Redacted]	2.0	35.0
[Redacted]	1150	[Redacted]	2.0	1.0
[Redacted]	30296406	[Redacted]	9.0	1.0
[Redacted]	2463	Richard, Robert	1.0	7.0
[Redacted]	133781	[Redacted]	16.0	
[Redacted]	143202	[Redacted]	0.0	12.0
[Redacted]	30212152	[Redacted]	6.0	152.0
[Redacted]	55786	Richard, Robert	22.0	340.0
[Redacted]	30135855	[Redacted]	1.0	7.0
[Redacted]	30392030	[Redacted]	16.0	
[Redacted]	137562	[Redacted]	7.0	26.0
[Redacted]	145944	[Redacted]	10.0	1.0
[Redacted]	30057131	[Redacted]	9.0	2.0
[Redacted]	30133115	[Redacted]	1.0	6.0
[Redacted]	149485	[Redacted]	44.0	
[Redacted]	30056655	Richard, Robert	1.0	4.0
[Redacted]	855	[Redacted]	2.0	14.0
[Redacted]	145079	[Redacted]	4.0	5.0
[Redacted]	9634	[Redacted]	1.0	16.0
[Redacted]	30312203	[Redacted]	1.0	4.0
[Redacted]	123574	[Redacted]	3.0	12.0
[Redacted]	30090231	[Redacted]	5.0	16.0

Similar idea here, but
we can select multiple
development officers.

URating by Solicitor



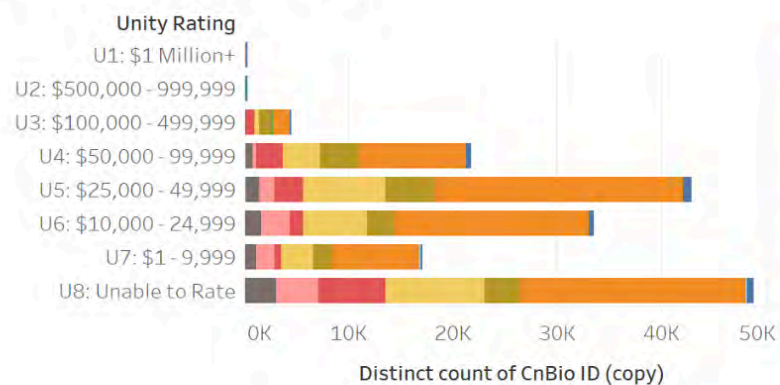
Solicitor Key

- Null
- Ann T. Ringstad
- Beth Johnson
- Bobi Rinehart
- Emily C. Drygas
- Gregory J. Gallagher
- Harry W. Need
- Hild M. Peters
- Jayna L. Combs
- Kelly A. Donnelly
- Lynne E. Johnson
- Margaret J. Hess
- Megan K. Riebe
- Megan M. Bean
- Megan S. Olson
- Morgan A. Dulian
- Naomi E. Horne
- Suzanne S. Bishop
- Tammy J. Tragis-McCook
- Teresa A. Thompson
- Tlisa A. Northcutt

List

CnBio ID	CnBio Name	CnRelEdu 1 ..	
20			\$4,037
26		Null	\$30
40		Null	\$250
53		(BA) Bachel..	\$225
55		Null	\$1,000
56		Null	\$2,695
58		Null	\$25
64		Null	\$25
76		Null	\$50
82		Null	\$50
84		Null	\$12,260
102		Null	\$425
105		Null	\$100
118		Null	\$25
146		(BS) Bachelo..	\$279,740
147		Null	\$100
161		(BA) Bachel..	\$756
		(BS) Bachelo..	\$756
163		(BBA) Bache..	\$72,214
181		Null	\$248,041
198		Null	\$100
207		Null	\$100
212		Null	\$1,500
213		Null	\$1,125
265		Null	\$2,770
301		Null	\$35
326		Null	\$120
335		Null	\$100
348		Null	\$460
350		Null	\$300
354		Null	\$250
363		(BS) Bachelo..	\$310
370		Null	\$25
379		Null	\$115
382		Null	\$1,380
388		Null	\$135

URating By Constituency



Constituent Code

- Advisory Board Member
- Advocate/Voter
- Alumni
- Board of Regents
- Board of Trustees
- Corporation
- Donor
- Employee
- Foundation
- Non-Profit
- Prospect
- Scholarship Recipient
- Student
- Volunteer

Annual Giving retention rates, year over year.

Gift Type - SubType

(Multiple values) ▼

University

(All) ▼

Constituent Type

(All) ▼

Pyramids

(All) ▼

KUAC Museum

(All) ▼

	Grand Total	FY 2012	FY 2013
FY 2012	100.00%	77.60%	22.40%

	Grand Total	FY 2013	FY 2014
FY 2013	100.00%	77.09%	22.91%

	Grand Total	FY 2014	FY 2015
FY 2014	100.00%	76.06%	23.94%

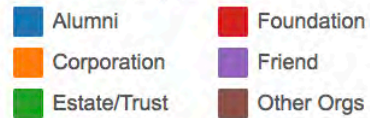
	Grand Total	FY 2015	FY 2016
FY 2015	100.00%	67.74%	32.26%

	Grand Total	FY 2016	FY 2017
FY 2016	100.00%	49.64%	50.36%

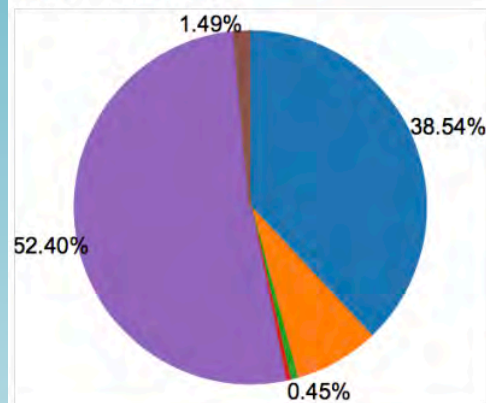
and over all time. So from all AG donors in 2012, what year was the last year they gave?

Retention - Percentage of Donors

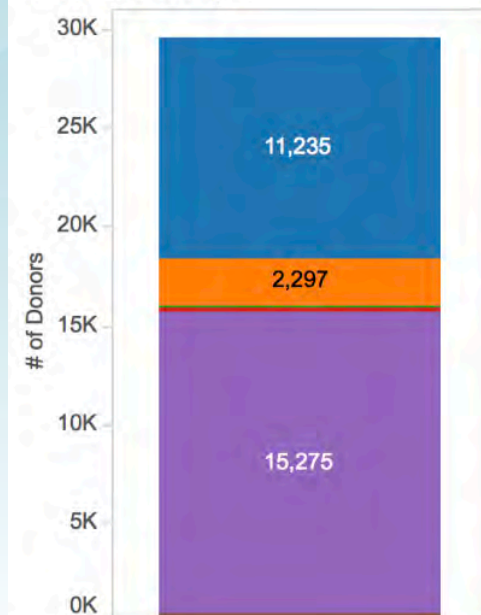
Constituent Type



Who are they?



Who are they?



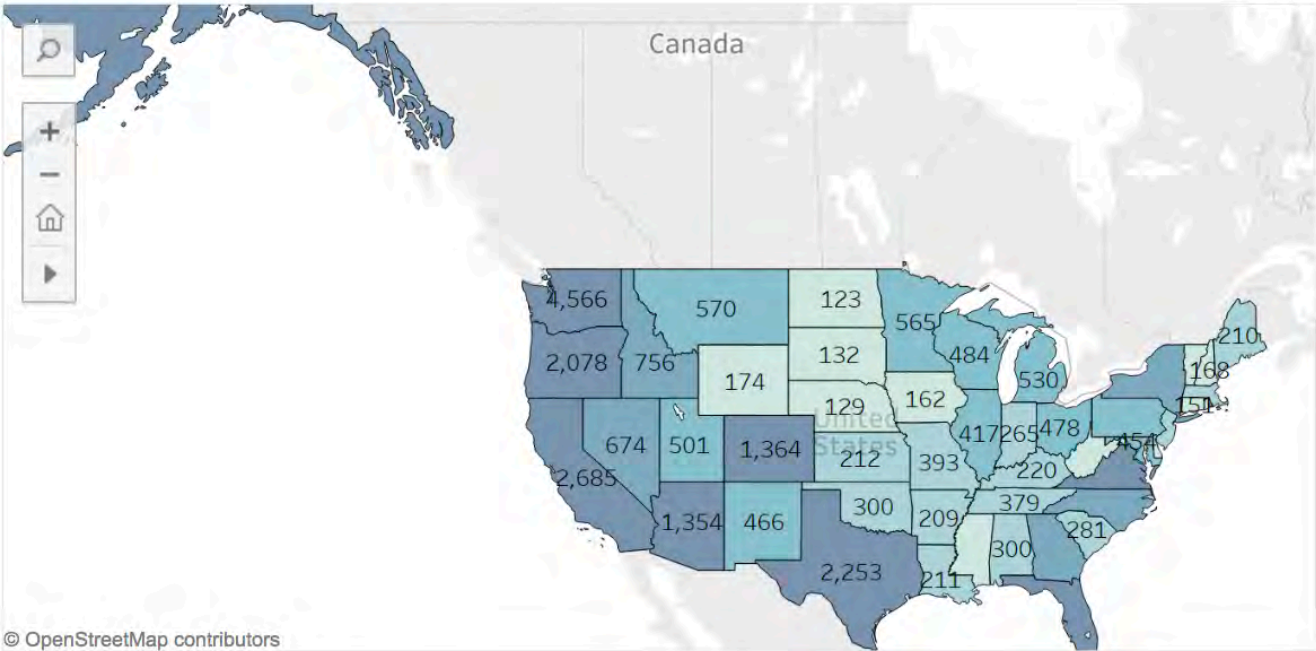
Year of Gift Date by FY	Last Date of Gift											Grand Total
	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	
FY 2007	24.31%	5.77%	4.62%	4.73%	4.90%	4.74%	4.46%	4.73%	6.00%	8.37%	27.38%	100.00%
FY 2008		24.41%	5.21%	5.30%	5.77%	5.79%	5.09%	5.13%	6.03%	8.87%	28.40%	100.00%
FY 2009			22.76%	6.92%	6.15%	6.36%	5.57%	5.66%	6.39%	9.18%	31.00%	100.00%
FY 2010				27.22%	6.90%	7.04%	6.14%	5.89%	6.37%	9.47%	30.97%	100.00%
FY 2011					27.57%	8.64%	6.71%	6.70%	7.45%	12.12%	30.81%	100.00%
FY 2012						28.01%	8.09%	8.19%	8.39%	12.11%	35.21%	100.00%
FY 2013							31.60%	9.39%	9.21%	12.48%	37.33%	100.00%
FY 2014								36.30%	11.43%	13.48%	38.79%	100.00%
FY 2015									37.81%	18.01%	44.19%	100.00%
FY 2016										49.64%	50.36%	100.00%
FY 2017											100.00%	100.00%

Retention - Numbers of Donors

Year of Gift Date by FY	Last Date of Gift											Grand Total
	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	
FY 2007	1,353	321	257	263	273	264	248	263	334	466	1,524	5,566
FY 2008		1,442	308	313	341	342	301	303	356	524	1,678	5,908
FY 2009			1,331	405	360	372	326	331	374	537	1,813	5,849
FY 2010				1,760	446	455	397	381	412	612	2,002	6,465
FY 2011					1,959	614	477	476	529	861	2,189	7,105
FY 2012						1,864	538	545	558	806	2,343	6,654
FY 2013							2,107	626	614	832	2,489	6,668
FY 2014								2,570	809	954	2,746	7,079
FY 2015									2,801	1,334	3,274	7,409
FY 2016										3,602	3,654	7,256
FY 2017											6,836	6,836

All about alumni.
Demographic info by
selecting state or city.

Map Where in the USA?



Count of alumni in states

1 1,000

Campus

(Multiple values)

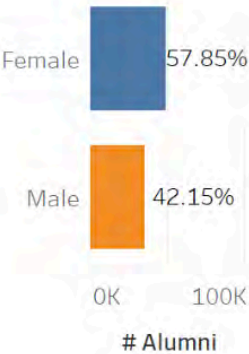
College-School

(All)

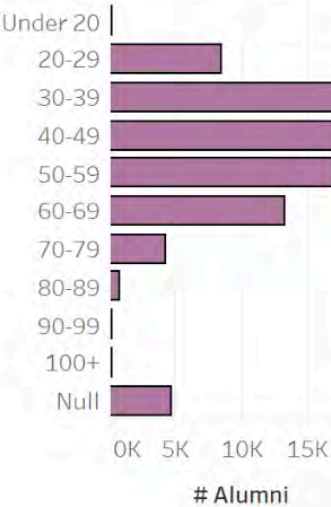
Names

Bio ID	Last Name	First Name
53		
63		
146		
161		
163		
231		
322		
363		
390		
405		
470		
491		
506		
521		
528		
580	Hayes	James
779		
786		
789		
794	Wren	Richard
800		
817	Logan	John
826		

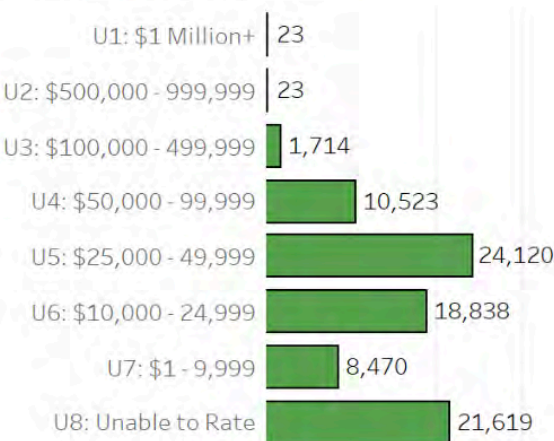
Sex



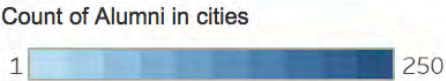
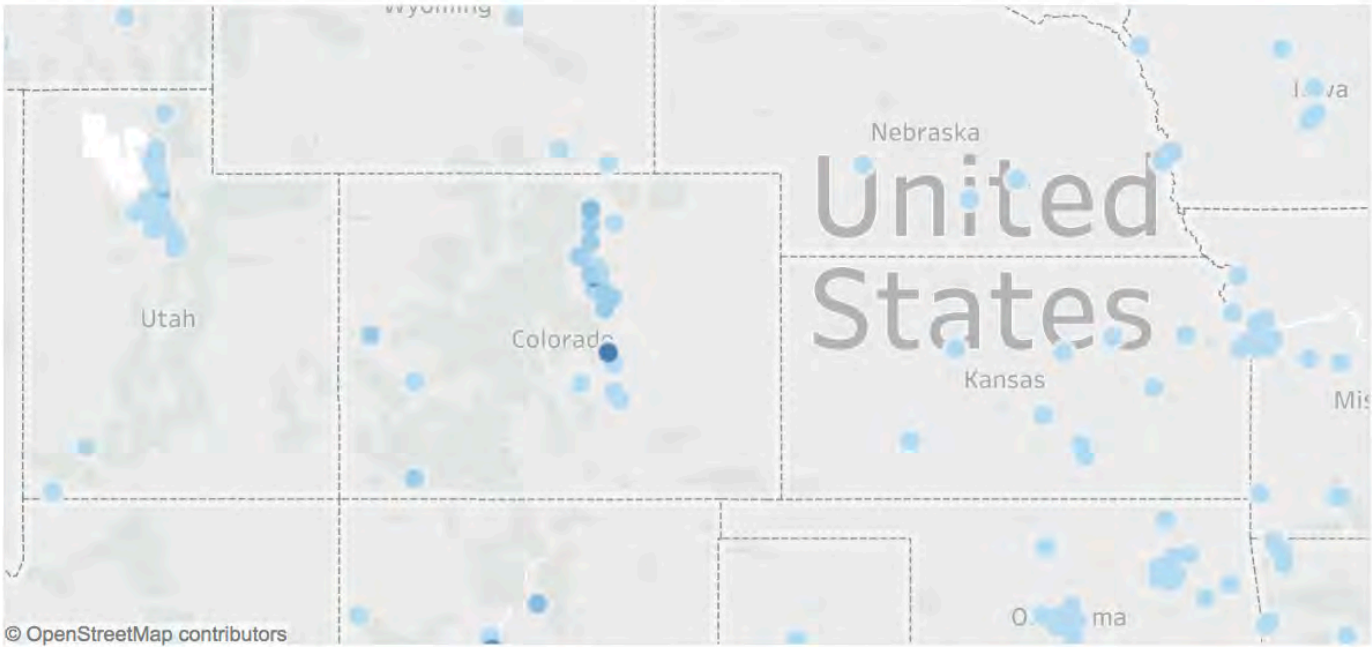
Age



Wealth Ratings



Map Where in the USA Cities?



Campus

(Multiple values)

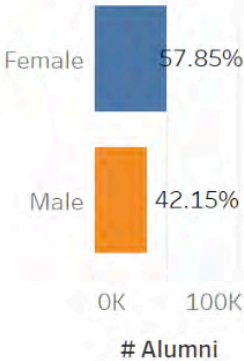
College-School

(All)

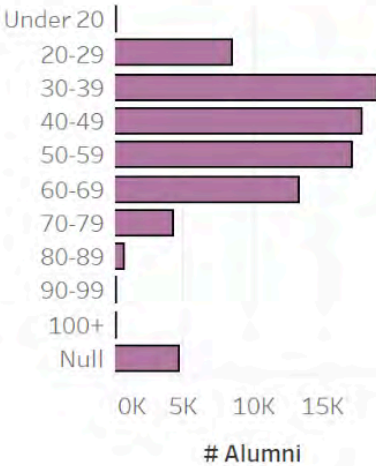
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528		
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789		
794		
800		

Sex



Age



Wealth Ratings



**By state, how many prospects
in each wealth rating segment
and how many proposals made
to each segment.**

Preferred Ad..	Rating Segment ..	# of Proposals	# of Rated Persons
AK	1: \$5MM+	0	3
	2: \$1MM-\$5MM	6	40
	3: \$500K-\$1MM	7	61
	4: \$300K-\$500K	5	129
	5: \$200K-\$300K	24	299
	6: \$100K-\$200K	103	2,286
	7: \$75K-\$100K	45	3,140
	8: \$50K-\$75K	87	9,950
AL	4: \$300K-\$500K	0	1
	5: \$200K-\$300K	0	2
	6: \$100K-\$200K	0	10
	7: \$75K-\$100K	0	11
	8: \$50K-\$75K	1	28
AP	7: \$75K-\$100K	0	1
	8: \$50K-\$75K	0	1
AR	5: \$200K-\$300K	0	1
	6: \$100K-\$200K	0	5
	7: \$75K-\$100K	0	5
	8: \$50K-\$75K	0	24
AZ	2: \$1MM-\$5MM	0	1
	3: \$500K-\$1MM	0	2
	4: \$300K-\$500K	0	2
	5: \$200K-\$300K	0	8
	6: \$100K-\$200K	0	48
	7: \$75K-\$100K	0	71
	8: \$50K-\$75K	4	227
CA	1: \$5MM+	0	1
	2: \$1MM-\$5MM	0	7
	3: \$500K-\$1MM	0	6
	4: \$300K-\$500K	3	23
	5: \$200K-\$300K	0	43
	6: \$100K-\$200K	1	235
	7: \$75K-\$100K	4	260
	8: \$50K-\$75K	5	575

The only viz/report that took longer than 1 hour to make. # of Donors acquired compared to # of donors lost (last year they gave).

Acquired vs Lost

University Name

(All) ▼

First Gift Fund Category

(All) ▼

Constituent Code

(All) ▼

Include Deceased?

(All) ▼

College/School

(All) ▼

Last Gift Fund Category

(All) ▼

Key Indicator

(All) ▼

Include No Valid Addresses?

(All) ▼

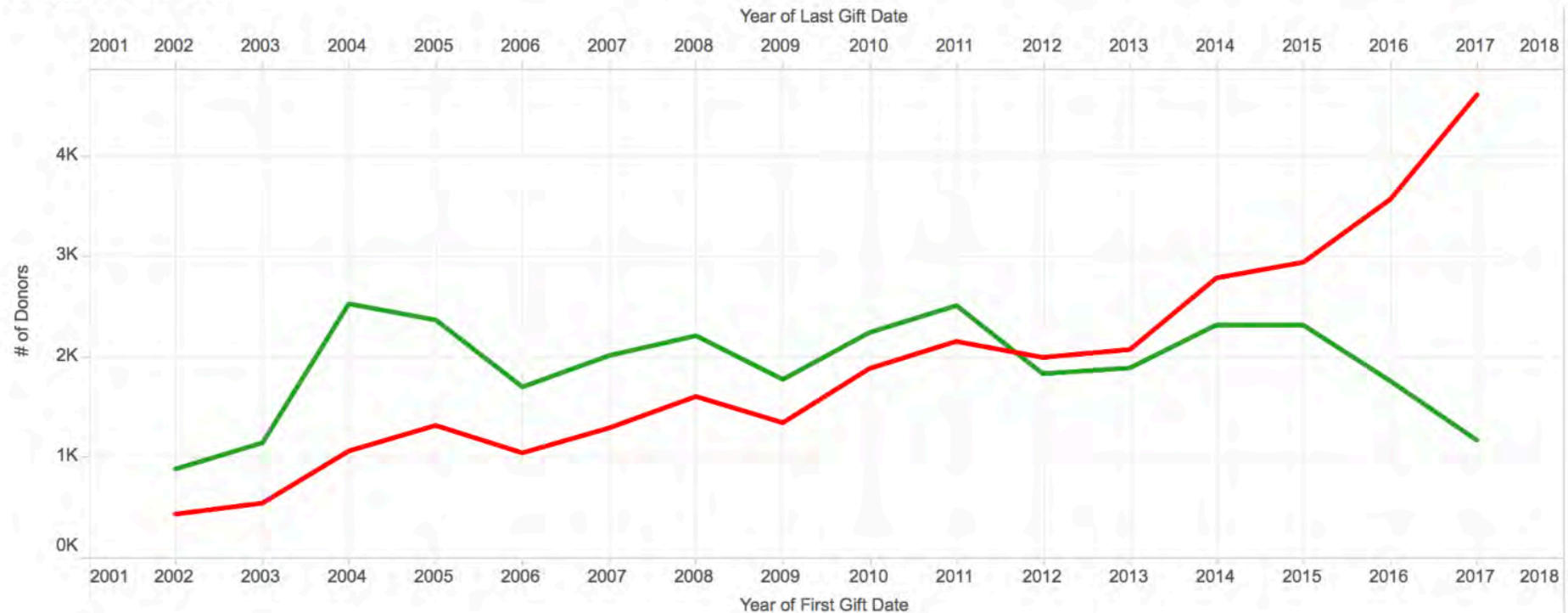
Acquired

First Gift Date															
FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017
886	1,144	2,530	2,367	1,703	2,015	2,212	1,777	2,244	2,511	1,835	1,891	2,319	2,316	1,762	1,171

Lost

Last Gift Date															
FY 2002	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017
438	546	1,066	1,320	1,047	1,295	1,608	1,346	1,886	2,156	1,997	2,074	2,787	2,942	3,567	4,608

Acquired and Lost



I can't stress enough!! These are interactive and meant to be used that way via Tableau Server.

I'm not a programmer. I had to learn how write some calculation statements and re-learn some statistics lingo. But other than that, most of these took less than an hour to make once we had the data.