



eTapestry's Executive Reports

What is it?

Providing a tool that can give you the "big picture" of what's working, and what isn't, was the basis for creating eTapestry's Executive Reports. This unique package of reports goes beyond a simple listing of gifts and donor names, to give you the executive level information senior staff and board members find most useful. Executive Reports can help you answer some of the following questions.

What percentage of donors that are renewing their support from one year to the next?

Which donors give gifts in multiple and/or consecutive years – or months?

Which accounts are the best prospects for major gifts?

How do my giving results compare from one time frame to another?

How many donors lapsed, upgraded, downgraded, or were new?

How does it work?

Executive Reports are added directly to the Reports/Exports menu of your eTapestry database. Each report can be customized to be run on a specific query of your data. Just like all eTapestry reports, each features "drill down" capabilities allowing you go beyond just surface numbers and get to the specifics of any item.

Giving Dynamics – designed to show the overall health of your fundraising, it lets you compare any two time frames to analyze the progress giving. Use it to compare "this years giving" to "last years giving". Identify donors that are New, Lapsed, Recaptured, Upgrade, Downgrade, or Same. Drill downs let you identify the individual donors from any group.

Donor Renewal Rates – measures your ability to retain donors and identifies the number and percentage of donors who have renewed their support from one time frame to another. Compares established donors to new donors.

Status	# of Donors	% of Donors	1/1/03 - 12/31/03	1/1/04 - 12/31/04	\$ Changed	% Changed
Total:	1071		\$2,208,295.77	\$2,429,263.67	\$1,152,967.90	59
Lapsed	316	29	\$206,985.90	\$0.00	(\$206,985.90)	(100)
New	431	40	\$0.00	\$765,103.76	\$765,103.76	0
Recaptured	80	7	\$0.00	\$95,070.00	\$95,070.00	0
Downgrade	74	6	\$227,114.69	\$119,109.64	(\$108,004.95)	(47)
Same	74	6	\$271,035.00	\$271,035.00	\$0.00	0
Upgrade	96	8	\$601,469.60	\$1,169,248.27	\$667,788.67	133

Giving Dynamics gives you a picture of the "overall health" of your fundraising and identifies donors as lapsed, new, recaptured, upgraded, downgraded, or the same.

Recency Report – quickly identify how many donors quit giving each year and then easily capture the list of lapsed donors for mailing or emailing. See the impact those lost donors have had on giving.

Consecutive Months and Years Giving Report – easily segment donors by consecutive months or years of giving. Or see how many donors have given 3 of the last 5 years.

For Impact – rank your donors on 5 categories that affect their interest and ability to support your organization and let eTapestry build a Qualified Prospect Interest (QPI) Rating. The QPI can be used to identify the best prospects for gifts to your organization and help you focus your fundraising efforts.

Summary

eTapestry's Executive reports give you the information you need to truly plan, strategize, and analyze your fundraising activities. The Executive Reports are available for an additional 5% of your base eTapestry service fee. There is a minimum monthly fee of \$5.



Executive Reports (cont.)



Donor Renewal Rates Report
Base : All Donors - A

State	11/01-12/31/01	11/02-12/31/02	11/03-12/31/03	11/04-12/31/04
New Donors	326	374	342	434
New Donors Renewed	---	123	62	98
New Donor Renewal Rate	---	37%	22%	28%
Established Donors	67	190	210	321
Established Donors Renewed	---	43	117	146
Established Donor Renewal Rate	---	64%	56%	46%
Total Donors *	392	464	552	755
Total Donors Renewed *	---	166	179	244
Total Donor Renewal Rate	---	42%	36%	43%

*When viewing donor lists, donors that contribute as a New Donor and, in a future time period, as an Established Donor will only appear once.

Recency Report - This report provides the user with the ability to report on the number of donors that have given in a specific year who have not given since that year. The recency report shows the last year of donor gifts for 2 to 100 years. Each year displays the number of donors who gave in that year but have not given since. This report indicates when donors begin to lapse and if the organization is losing donors over several years.

Donor Renewal Rate Report - This report will reflect the renewal rates of donors for up to five different periods of time. The donors are separated into 2 different categories plus totals per year, New and Established. The report will indicate the renewal rates for each of these groups. The renewal rate is based on the established or new donors in the prior year who then give in the current year.

Recency Report
Base : All Donors - A

Year	Donors whose last gift was this year	Total Donors: 1991
2005	105	
2004	741	
2003	398	
2002	240	
2001	378	
2000	105	

Consecutive Months Report
Base : All Donors - A
4 of the last 36 months

Consecutive Years Report
Base : All Accounts - A
2 of the last 10 years

Donor	# of Transactions	Received
Allen Jones	5	\$500.00
Tracy Bowers	3	\$150.00
Steve Smith	2	\$33,010.00
John Marshall	20	\$2,200.00
Franklin Associates	3	\$470.00
Ed Smith	6	\$295.96
John Cook	2	\$600.00
Lloyd Dicklar	2	\$2,035.00
Margie L. Simpson	2	\$1,910.00
Greene Smith	2	\$548.00
William Woodruff	2	\$1,936.00
John Doe	3	\$200.00
ABC Company	2	\$1,350.00

For Impact Master Prospect List - This report will analyze donors based on the For Impact Fields. The For Impact fields let you evaluate prospects on their **Capacity** to give, **Relationship** to the organization, **Timing**, **Past Giving** history, and **Philanthropic** history. It will return donors with their rating, along with Lifetime Giving and Received Amounts. This is ideal for targeting major gift donors.

For Impact Master Prospect List
Base : All Donors - A

Name	Qualified Prospect Interest (QPI) Rating	Lifetime Pledged Amount	Lifetime Received Amount	Total # of Transactions
John Marshall	85	\$1,200.00	\$2,245.00	24
Freylon Tucker	85	\$0.00	\$0.00	0
Ed Smith	78	\$120.00	\$295.96	6
Vicki L. Burns	75	\$0.00	\$0.00	0
Steven Merritt	72	\$0.00	\$0.00	0
Allen Jones	70	\$50.00	\$500.00	6
Lloyd Dicklar	68	\$0.00	\$2,035.00	3
ABC Company	65	\$0.00	\$1,350.00	2
Philip Rouse	65	\$0.00	\$50,000.00	8
Donald Smith	61	\$1,200.00	\$548.00	9

Consecutive Months/Years Report - This report provides the ability to report on donors that have given over a defined period of consecutive months/years or any time within a defined number of months/years. For example, the report is able to return all donors that gave consecutively for the last 5 years or who gave consecutively 3 out of the last 5 years or who gave at anytime within a defined range of months or years.

For Sales Support:
877-4BERACHA (423-7224) Ext. 2
Solutions@Beracha.org
www.Beracha.org