

BizInsight 7 for Blackbaud Raisers Edge

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Appeal Cost Breakdown

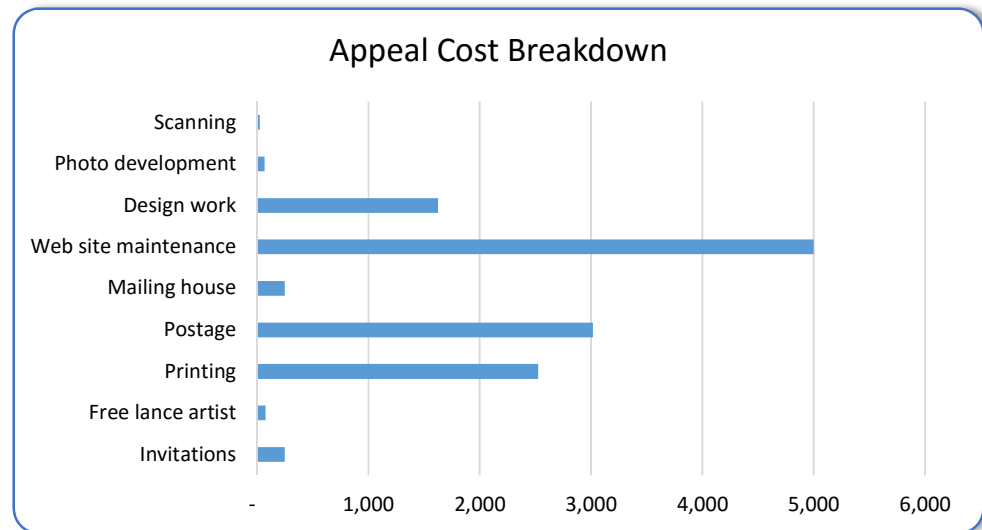
- BizInsight SuperFunctions detail the breakdown of expenses by appeal
- Report easily updates with selection of appeal from drop down data validation
- Excel table changes as new expenses update in report

Appeal Cost Breakdown

Appeal

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Expense Description	Date	Amount
Invitations	3/1/2000	250
Free lance artist	9/25/1999	75
Printing	10/11/1999	2,525
Postage	11/1/1999	3,016
Mailing house	1/0/1900	250
Web site maintenance	1/0/1900	5,000
Design work	1/0/1900	1,625
Photo development	7/18/1999	68
Scanning	7/18/1999	25
Total		12,834



Appeal Goal

- BizInsight SuperFunctions detail appeal goals, gifts, and donors
- Simple Excel functions update the % of Goal and % Response
- Report easily updates with the entry of a year and BizInsight Refresh

Appeal Goal Summary

Year 2009

Appeal	Appeal Goal	Gift Amount	Over (Under)	% of Goal Amount	No. Solicited	No. Donors	% Response
--	-	67,850	67,850	0.0%	-	59	0.0%
Annual Mailing	1,000,000	6,000	(994,000)	0.6%	24	2	8.3%
Direct Mailing	-	20,500	20,500	0.0%	35	6	17.1%
Event	-	13,480	13,480	0.0%	14	11	78.6%
Annual Newsletter	250,000	12,615	(237,385)	5.0%	6,568	4	0.1%
Celebrity Auction	100,000	2,000	(98,000)	2.0%	2,509	1	0.0%
Internet/Web Site solicitations	-	6,475	6,475	0.0%	1,117	5	0.4%
Year End Appeal	500,000	50,025	(449,975)	10.0%	1,212	2	0.2%
Unsolicited	-	30,825	30,825	0.0%	75	5	6.7%
Proposal Appeal	10,000,000	1,600	(9,998,400)	0.0%	15	1	6.7%
Open House Letter	-	100	100	0.0%	9	1	11.1%
Millennium Direct Mailing	-	500	500	0.0%	7,503	1	0.0%
Total	11,850,000	211,970	(11,638,030)	1.8%	19,081	98	0.5%

Appeal Summary by Campaign

- BizInsight SuperFunctions detail the amount of the campaign goal attained by appeal
- Over/Under and % of Goal calculated with simple Excel formulas
- Report updates with the selection of a year and appeal

Appeal Summary by Campaign

Year **2009**
Appeal **Annual Mailing**

Campaign Name	Campaign Goal	Gift Amount	Over (Under)	% of Goal	No. Donors
Annual Campaign	2,000,000	6,000	(1,994,000)	0.3%	2
Total	2,000,000	6,000	(1,994,000)	0.3%	2

Appeal Summary by Fund

- BizInsight SuperFunctions detail the amount of the fund goal attained by appeal
- Over/Under and % of Goal calculated with simple Excel formulas
- Report updates with the selection of a year and appeal

Appeal Summary by Fund

Year **2009**
Appeal **Direct Mailing**

Fund Name	Fund Goal	Gift Amount	Over (Under)	% of Goal	No. Donors
Smith-Brown Scholarship Fund	1,000,000	10,000	(990,000)	1.0%	1
Annabelle Johnson Endowment	500,000	325	(499,675)	0.1%	2
Library Books	-	10,000	10,000	0.0%	1
Playground Site	500,000	175	(499,825)	0.0%	2
Total	2,000,000	20,500	(1,979,500)	1.0%	6

Campaign Performance Analysis

- BizInsight SuperFunctions detail donors, gifts, and goals of each campaign by year
- Simple Excel formulas calculate averages and % Goal
- Report updates with the selection of a year

Campaign Performance Analysis

Year

2009

Campaign	Average		No. Gifts	Average Gift	Total Given	Goal	Over (Under)	% Goal
	No. Donors	Per Donor						
	0	78	139	1,387	192,855	-	192,855	0.0%
Annual Campaign	3	2,167	3	2,167	6,500	2,000,000	(1,993,500)	0.3%
Disaster Relief Campaign	4	3,154	4	3,154	12,615	10,000,000	(9,987,385)	0.1%
Total	85	7,793	146	6,708	211,970	12,000,000	(11,788,030)	1.8%

Event Expense Report

- BizInsight SuperFunctions detail the breakdown of expenses by event
- Report easily updates with selection of event from drop down data validation
- Simple Excel formulas calculate the under (over) budget and amount due columns

Event Expense Report

Event

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Expense	Budgeted	Expense Amount	Amount Paid	Date Paid	Under (Over)		Vendor ID
					Budget	Amount Due	
Printing	16,649	11,706	11,706	7/30/2016	4,943	-	1
Supplies	29,381	28,613	-	6/14/2016	768	28,613	84
Catering	84,215	75,759	75,759	6/25/2016	8,456	-	46
Table rental	15,128	14,378	4,793	7/16/2016	750	9,585	11
Green fees	75,121	54,327	54,327	4/13/2016	20,794	-	72
Cart rental	12,193	11,849	-	7/15/2016	344	11,849	35
Hole monitor	6,678	15,069	-	5/24/2016	(8,391)	15,069	4
Room rental	84,584	69,285	-	4/4/2016	15,299	69,285	6
Music	1,182	1,928	1,928	6/19/2016	(746)	-	81
Photography	1,811	1,515	758	5/20/2016	296	758	14
Postage	187	113	-	6/10/2016	74	113	7
Soft drinks	1,753	1,291	1,291	4/29/2016	462	-	30
Beer & wine	3,769	3,033	1,517	7/25/2016	736	1,517	86
Florist	1,458	1,128	1,128	5/22/2016	330	-	74
Awards	415	180	180	7/20/2016	235	-	41
Advertising	19,982	14,120	4,707	6/22/2016	5,862	9,413	96
Appetizers	19,590	13,202	-	6/20/2016	6,388	13,202	31
Graphic design	19,922	14,642	4,881	7/7/2016	5,280	9,761	54
Parking	1,738	1,860	620	7/11/2016	(122)	1,240	18
Total	395,756	333,998	163,593		61,758	170,405	

Event Income Report

- BizInsight SuperFunctions detail the breakdown of income received by event and year
- Report easily updates with selection of event and year from drop down data validation
- Simple Excel functions calculate the Amount Due

Event Income Report

Year 2009
 Event Afternoon Tea

Constituent	Address	City	State	Zip	Total Amount Paid	Receipt Amount	Amount Due
Ms. Lucy Gaylor Avdeenko	595 Ferry Road	Kennebunkport	ME	4046	75	75	-
The\Bean Grinder	158 Craven Way	Cincinnati	OH	45201	1,000	1,000	-
Mrs. Melissa Christina Elzy	8877 Salamander Way	New York	WV	80921	75	75	-
Mr. George Davis Finley	74 St. Ives Road	Oak Grove	WI	97267	75	75	-
Ms. Claudia Louise Ivery	83 Broad Street	Raleigh	SC	33318	75	75	-
Mr. Hampton Louis Judson, III	578 Michigan Avenue	Chicago	IL	60657	75	75	-
Ms. Allison Goodson	148 Laurel Avenue	Essex	MD	21221	225	180	45
Mr. Kenneth Parker	557 Dogwood Court	Omaha	NE	68147	150	150	-
Dr. Madison Rhoads Parker	557 Dogwood Court	Omaha	NE	68147	75	75	-
Mr. Jack Campbell	8790-B Holbrook Way	Felton	DE	19979	75	75	-
Miss Bethany Margaret Taylor	9801 North Virginia Way	Flat Rock	IL	62427	75	75	-
Mr. Alexander Duke Hamilton	12 Jane Way	Edinburg	IL	62531	75	75	-
Total					2,275	2,230	45

Event Summary Report

- BizInsight SuperFunctions detail event dates, capacity, income, and expenses
- Report easily updates with selection of year
- Simple Excel functions calculate the Net

Event Summary Report

Year

2009

Event	Campaign Code	Campaign	Start Date	Capacity	Invited	Total Income	Total Expenses	Net
Afternoon Tea		7 Playground Campaign	6/20/2009	100	125	-	1,225	(1,225)
Spring Auction	--	--	4/4/2009	200	375	-	4,057	(4,057)
Spring Ball	--	--	4/18/2009	1,000	-	17,910	4,350	13,560
Starlight Concert	--	--	8/22/2009	1,500	1,000	720	1,000	(280)
Alta Tennis Tournament	--	--	6/6/2009	50	100	475	7,000	(6,525)
Total						19,105	17,632	1,473

Fund Performance Analysis

- BizInsight SuperFunctions detail donors, gifts, and goals of each Fund by year
- Simple Excel formulas calculate averages and % Goal
- Report updates with the selection of a year

Fund Performance Analysis

Year

2008

Fund Name	Average		No. Gifts	Average Gift	Total Given	Goal	Over (Under)	% Goal
	No. Donors	Per Donor						
Smith-Brown Scholarship Fund	6	2,467	12	1,233	14,800	1,000,000	(985,200)	1.5%
International Relief Fund	18	2,591	43	1,085	46,640	5,000,000	(4,953,360)	0.9%
2008 Membership Fund	13	4,150	15	3,597	53,950	200,000	(146,050)	27.0%
2008 Annual Fund	8	3,284	10	2,627	26,270	1,000,000	(973,730)	2.6%
Computer Lab Fund	4	3,669	11	1,334	14,675	2,000,000	(1,985,325)	0.7%
Library Books	4	829	17	195	3,315	-	3,315	0.0%
Natural Disaster Relief Fund	15	11,280	35	4,834	169,205	2,000,000	(1,830,795)	8.5%
Botanical Garden Fund	15	2,307	28	1,236	34,600	500,000	(465,400)	6.9%
Camp Kids Scholarship	6	833	9	556	5,000	2,000,000	(1,995,000)	0.3%
Playground Site	11	203	15	149	2,235	500,000	(497,765)	0.4%
Computer Equipment	1	2,000	2	1,000	2,000	-	2,000	0.0%
Acquisition Fund	6	238	6	238	1,425	500,000	(498,575)	0.3%
Library Fund	4	5,175	9	2,300	20,700	3,000,000	(2,979,300)	0.7%
Annabelle Johnson Endowment	1	3,000	1	3,000	3,000	500,000	(497,000)	0.6%
President's Development Fund	2	5,750	2	5,750	11,500	500,000	(488,500)	2.3%
Building Fund	11	3,685	27	1,501	40,530	10,000,000	(9,959,470)	0.4%
	0	2	2	300	600	-	600	0.0%
Science Center Fund	1	300	3	100	300	5,000,000	(4,999,700)	0.0%
Richard Mosley Memorial Fund	1	25,000	1	25,000	25,000	1,000,000	(975,000)	2.5%
Total	129	77,060	248	56,034	475,745	34,700,000	(34,224,255)	1.4%

Gift Analysis

- BizInsight SuperFunctions detail constituent gifts over time to estimate future gifts
- Simple Excel formulas calculate variances
- Report updates with the selection of a date

Gift Analysis

Date 12/31/2009

Constituent	Target Donation	Target	Max Date	Latest Gift	Max Gift	Variance to Target	Variance to Max	YTD Gift	Prior YTD Gift
Miss Laura Bethany Patterson	\$30,000 - \$39,999	39999	7/13/2009	\$ 30	\$ 150	\$ (39,969)	\$ (39,849)	\$ 30	\$ 300
Thomas Collin Dubose	--	0	1/14/2008	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ -	\$ 2,500
Mr. Mark Daniel Adamson, III	--	0	11/15/2009	\$ 75	\$ 5,000	\$ 75	\$ 5,000	\$ 275	\$ 8,550
All Track International	\$50,000 - \$59,999	59999	5/15/2009	\$ 5,000	\$ 5,000	\$ (54,999)	\$ (54,999)	\$ 5,000	\$ -
Mrs. Allison Eve Andrews, Ph.D.	\$0 - \$499	499	5/17/2009	\$ 10,000	\$ 10,000	\$ 9,501	\$ 9,501	\$ 10,000	\$ 10,025
Mrs. Elizabeth Ann Ashton	\$0 - \$499	499	11/28/2009	\$ 75	\$ 7,500	\$ (424)	\$ 7,001	\$ 150	\$ 7,550
Autumn Industries, Inc.	\$10,000 - \$19,999	19999	4/1/2009	\$ 1,500	\$ 1,000	\$ (18,499)	\$ (18,999)	\$ 1,500	\$ 1,150
Ms. Lucy Gaylor Avdeenko	--	0	5/11/2009	\$ 75	\$ 1,000	\$ 75	\$ 1,000	\$ 75	\$ 1,225
Ms. Julie Marie Bach	\$1,000 - \$4,999	4999	6/25/2009	\$ 15	\$ 250	\$ (4,984)	\$ (4,749)	\$ 365	\$ 100
Baldwin Entertainment Corporation	\$20,000 - \$29,999	29999	3/23/2009	\$ 5,000	\$ 5,000	\$ (24,999)	\$ (24,999)	\$ 5,000	\$ 250
The\Flower Patch	--	0	5/29/2009	\$ 100	\$ 1,000	\$ 100	\$ 1,000	\$ 100	\$ 2,000
The\Bean Grinder	\$10,000 - \$19,999	19999	2/11/2009	\$ 1,000	\$ 1,000	\$ (18,999)	\$ (18,999)	\$ 1,000	\$ -
Mr. Geoffrey Todd Beckner, Jr.	\$0 - \$499	499	7/1/2009	\$ 30	\$ 40	\$ (469)	\$ (459)	\$ 70	\$ -
Miss Wendy Zoe Thomas	\$5,000 - \$9,999	9999	11/26/2009	\$ 75	\$ 75	\$ (9,924)	\$ (9,924)	\$ 75	\$ 150
Mrs. Kathleen Rose Bently	\$1,000 - \$4,999	4999	10/28/2008	\$ 50	\$ 300	\$ (4,949)	\$ (4,699)	\$ -	\$ 350
Business Information Systems	\$1,000 - \$4,999	4999	8/1/2008	\$ 250	\$ 250	\$ (4,749)	\$ (4,749)	\$ -	\$ 500
Mr. Jason Douglas Campbell	\$5,000 - \$9,999	9999	2/20/2008	\$ 500	\$ 500	\$ (9,499)	\$ (9,499)	\$ -	\$ 500
Carter Pharmaceuticals, Inc.	--	0	11/22/2009	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 2,000
The\Chip 'N Dip	--	0	5/17/2008	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	\$ 1,000

Top 10 Donors

- Report derived through completion of Gift Analysis
- Excel Rank, Max, Min and LARGE functions used to create report
- Report updates with the selection of a date in the Gift Analysis report

Top 10 Donors

As of 12/31/2009

Rank	Constituent Code	Constituent Name	Address	City	State	Zip	Amount Given
1	221	Mr. Richard Joseph Jefferson	9453 Division Lane	Salt Lake City	UT	84111	155,050
2	325	Mrs. Michelle Taylor	3327 Dawson Street	Pittsburgh	PA	15208	25,000
3	280	M.D.,Dr. Robert Carlos Hernandez	9956 Lakeview Drive	Sedona	NH	86336	23,900
4	288	Tyler & Hanson Associates	110 Main Street	Kansas City	MO	64111	21,500
5	290	Jefferson Manufacturing	9453 Division Lane	New Brunswick	NJ	8933	21,000
6	229	Ph.D.,Mr. Roger Brian Langley	18 Hassell Street	San Antonio	TX	78218	20,500
7	217	Jr.,Mr. Dean Pierce Isley	81 Winston Way	Tacoma	WA	98413	20,000
8	217	Jr.,Mr. Dean Pierce Isley	81 Winston Way	Tacoma	WA	98413	20,000
9	306	Mrs. Kristy Graham	55 Ashford Drive	Dallas	TX	75239	10,310
10	616	--	110 Wickford Street	Fredericksburg	VA	22401	10,050

Gift-In-Kind

- Report details constituent physical gifts
- Report updates with the selection of a year

Gift-In-Kind Report

Year

2009

Constituent Code	Constituent	Date	Fund	Gift Value	Reference
194	Crenshaw	3/1/2009	Acquisition Fund	100	Office Suppliew
249	Quinn	12/22/2009	Smith-Brown Scholarship Fund	5,000	Textbooks
Total				5,100	

Proposal Analysis

- BizInsight SuperFunctions detail constituent asks and dates funds are expected
- Simple Excel formulas calculate Days Open
- Report updates with the selection of a proposal

Proposal Analysis

Proposal

General Proposal

Constituent	Type of Gift	Amount Asked	Amount Funded	Difference	Date Asked	Date Expected	Date Funded	Days Open
Bach	Cash	2,000	-	(2,000)	2/1/2008	12/31/2009 --		3,342
Campbell	Planned Gift	1,002,000	2,000	(1,000,000)	2/2/2005	6/30/2004	4/3/2004	(305)
Davis & Johnson Pharmaceuticals	Cash	15,000	15,000	-	7/9/2003	12/31/2003	11/2/2006	1,212
Total		1,019,000	17,000	(1,002,000)				