HELLER CONSULTING
technology geeks. nonprofit experts.

# Your Financial Goals and RE® Codes

Reports in Raiser's Edge rely on the clear articulation of your fundraising goals. The first step in examining Raiser's Edge is to understand your current goals as well as the goals articulated in your strategic plan for the future. There are several ways you can think about the dollars you raise, and your future plans. It is helpful to examine your goals from a number of angles:

**Are your goals based on:**

- **WHO gave the gift?**
  - Examples could include: Foundations, Corporations, Individuals, Staff, Board
- **HOW we raised the money?**
  - Examples could include: Events, Mass Appeals, Grant Solicitation, Personally Solicited or: Development Council A, Development Council B
- **DESIGNATION of the gift?**
  - Examples could include: Undesignated, Scholarship Fund, Patient Care, Building Fund
- **SIZE of the gift?**
  - Examples could include: Major gifts (gifts over $X), Sustaining gifts (gifts under $X)
- **WHAT TYPE of gift?**
  - Examples could include: Trusts, Stock, Pledges, Cash, Estate Gifts

Your goals most likely include aspects of more than one of these categories: WHO, HOW, DESIGNATION, SIZE and TYPE. Reports will be more efficient and accurate if the categories are not mixed together to create your total goal. For example, if your goals currently look like this:

| | | |
|---|---|---|
| $1 Million | Board Member Gifts | Who |
| $2 Million | Annual Giving | How |
| $2 Million | Scholarship Fund | Designation |
| $1 Million | Special Events | How |
| $1 Million | Estates | Type |
| $1 Million | Major Gifts | Size |
| | Businesses & Foundations | Who |
| $10 Million | | Total Goal |

Creating accurate and reliable reports to match these goals could get tricky. If a Board Member (WHO) gave a Major Gift (SIZE) to the Scholarship Fund (DESIGNATION), that gift could fall into three of the above categories. The reports will require manual manipulation, which creates a risk of error and inconsistency.

 

What works better for reliable and accurate reporting is to state your goal by one category at a time, as suits your organization's needs in the planning process. For example, you may find it helpful to think of your goals as:

| **Revenue by Donor Group** | **Revenue by Designation** | **Revenue by Fundraising Method** |
| --- | --- | --- |
| \$1M Board Members | \$4M Undesignated | \$4M Personal Solicitation |
| \$4M Individuals and Families | \$1M Patient Care Funds | \$1M Special Events |
| \$2M Medical Staff | \$2M Scholarship Funds | \$2M Annual Appeals |
| \$2M Businesses and Foundations | \$2M Building Funds | \$2M Grant Solicitation |
| <u>\$1M Employees</u> | <u>\$1M Endowments</u> | <u>\$1M Planned Giving Solicitation</u> |
| \$10M TOTAL GOAL | \$10M TOTAL GOAL | \$10M TOTAL GOAL |

**Application to Raiser's Edge**

We recommend organizing your RE codes to maximize financial reporting capabilities based on your goals.

- **WHO gave the gift**
  - Constituent code or Constituent Attributes for more secondary considerations.
- **HOW we raised the money**
  - Fundraising methods are best tracked in Campaign and Appeal. For additional ways to report on how the money was raised, Gift Attributes and Solicitor relationship codes work well. For example, your organization may have four Development Councils, each with a fundraising goal. The fundraising efforts of the Development Councils may include a combination of methodologies, and/or may be mixed in with existing fundraising efforts. E.g., Dev Council A may solicit major gifts and may also fill ten additional tables at your Gala event. In this case, the production of the Dev Council is best tracked as a Gift Attribute or through Solicitor codes, rather than Appeal or Campaign codes.
- **DESIGNATION of the gift**
  - Fund codes. Fund ID can be segmented to assist in organizing the codes and make reporting easier. For more on designing Fund codes, see our Fund code documentation.
- **SIZE of the gift**
  - Use standard reports based on gift size.
- **WHAT TYPE of gift**
  - Use standard financial reports based on Gift Type.

 

When **HOW we raised the money** looks like a **WHO gave the gift**:

Some organizations have fundraising efforts which are defined by the group being solicited. For example, you may have a Development Officer and fundraising program devoted to Corporations and Foundations. In those cases, reporting on giving by Constituent Code may not provide us with an accurate reflection of the production of the Corporations and Foundations development program. In those cases, we advise our clients to establish Campaign Codes or to use Solicitor or Gift Attributes to ensure accurate reporting.

### Would you like RE reporting that meets your needs? We can help.

Through our experience at over 600 organizations across the nation, we've developed a clear, sound process for optimizing our clients' use of the Raiser's Edge software. Our services include system assessments, data conversions, data cleanup (including codes / tables and duplicates), process design and documentation, query and report setup, and training. For our clients with advanced needs, we can develop Crystal Reports, integrate with other databases, and perform custom programming. These services provide our clients a solid foundation for effective use of this powerful fundraising tool. Contact us today to find out how we can help you!

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