

Appendix C: Types of Reports as Output Requirements

Membership and development automation is undertaken in part because of the demands of generating a wide variety of printed products. The most ubiquitous of these are labels and lists which are straightforward reports with few specialized requirements. But many other products, including solicitation letters and envelopes for personalized mailings which are highly sensitive to appearance, or graphical reports based on analysis of disaggregated campaign income data, make special demands on software capabilities. The quality and variety of output products desired in a membership and development system needs to be carefully assessed. The following list of types of reports is intended to describe the generic features of a variety of report classes and to illustrate them with examples of named reports from a variety of different systems. Obviously all users will not name their reports the same way, but the kinds of reports they want are likely to be covered by these categories. If users describe the reports needed by the repository and those provided by each system in these common terms, it will be easier to assess whether reporting requirements are met.

In addition to examining the pre-defined reports provided with each application system, users should assess the capabilities of the report writing tools that either permit the pre-defined reports to be modified or new reports to be written. As an exercise, users should evaluate the ease of modification by redesigning some reports to match exactly the formats in use in the repository, even though the formats offered by the application may do equally well in practice. Does the system require learning a complex report writing language, filling out a reporting template, or drawing a picture of reports using a What-You-See-Is-What-You-Get (WYSIWYG) facility?

Users should recognize that there is often a tradeoff between a full panoply of pre-written reports and a powerful report writer. Vendors with one may forego providing the other. Whatever the user ultimately finds, certain features will be important to development that are rarely important in other contexts, such as the abilities to merge reports into boilerplate text, to write page oriented reports and to provide interfaces to multi-font printing. To many development offices envelope printing, intelligent membership cards and output onto ticket stock are also important.

The following list describes types of reports by their functional characteristics and lists some sample report titles.

Textual Reports**Accounts:**

Balance sheets, by fund
Budgets
Cash drawer report
Income & Expense statements

Actions Schedules:

Action Candidates
Action Priorities
Advanced ticket sales
Contacts to make
Gift requests due
Gift reports due
History:
 Campaign History
 Donor History
 Events History
 Facilities History
 Visits

Cards:

Membership cards
Name tags
Place cards
Pledge cards
Rolodex
Self-mailing post cards (reminders, confirmations)

Contracts:

Coupons (as part of tickets & published)
Gift Agreement terms
Pledges

Forms (page oriented reports):

Class/Tour Registration
Deed of Gift
Phone-a-thon record
Profile (client, member, donor etc.)
Visitor/Event/Exit Survey Form

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Identification cards:

Decreasing balance (intelligent magnetic) gift cards
Membership cards
Parking permits

Journals:

Cash receipts
Credit card sales
Daily gifts

Labels:

Mail labels
Mailers (envelopes)

Letters:

Invitations
Reminders (renewal, event, etc.)
Solicitations
Thank you letters

Lists:

Client list by type (Donor, Member, Prospect, Volunteer)
Recognition list
Registrants list (Class/Tour Roster)

Management Summary Reports:

Audience analysis report
Campaign progress against incremental goals
Contributions analysis by appeal, year, fund etc.
Pledge analysis and maturity reports
Program evaluation/ survey reports
Promotions/media effectiveness
Solicitor effectiveness

Notices & Transmittal Forms:

Bills
Expect notice
Gift acknowledgement
Group tour confirmation
Invoices
Renewal notices

Statements - corporate accounts and matchings

Receipts:

Acknowledgements
Cash drawer report/signed by cashier
Gift Receipt
Tickets

Schedules & Calendars:

Daily (Group, Room, Tour etc.) Reservations Schedule
Events
Individuals work schedule
Facility actions schedule

Statistical Reports:

Averages across time periods
Deviations from mean, median and mode
Percentages within categories
Total and subtotal in categories

Ticklers:

Automatic reporting at set time or interval
Online reminders
To do lists

Transaction summary reports:

Giving (daily/weekly/monthly/quarterly)
Hours/Work reports
Matching gifts
Membership renewals/up + down grades
Project Progress Report
Sales Reports

Worksheets (in the form of Checklists):

Campaign planning
Event planning

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Graphic Reports

Business Graphics:

Statistical reports as bar charts, graphs, pie charts

Maps and Plans:

Events within facility

Membership & participation on regional maps

Timelines and Calendars:

Calendars as graphic displays of schedules and ticklers