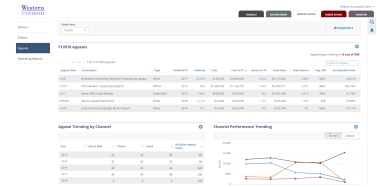


# Appeals Tab

The **Appeals Tab**, located in the Annual giving Layer, is a reporting layer focused on analyzing the performance of your annual giving appeals. The reporting found in the Appeals tab can help you manage, track, and analyze your annual giving performance by evaluating the dollar and donor contributions by channel (i.e. direct mail, phone, etc.), discovering which channels are most effective at engaging certain donor types, and a variety of other helpful reports. In addition, the Appeals Tab allows you to analyze individual appeal performance to track dollars and donors associated with each appeal, average gift, participation rate, and a variety of other insightful metrics that allow you to discover what is working and not working in your annual giving campaign.



The screenshot shows the Appeals Tab interface. At the top, there's a navigation bar with 'Appeals' selected. Below it, a table lists various appeals with columns for Appeal Code, Description, Type, Initiated FY, Solicited, Cost, Cash In FY, Donors In FY, Total Cash, Total Donors, Avg. Gift, and Participation Rate. To the right of the table, there's a chart titled 'Donor Performance Trending' showing a line graph with multiple data series over time.

There are two areas of reporting within the Appeals Tab. At the top is the **Appeals Table**, which displays information at the appeal level. The section below the table contains a variety of appeal related **Viewports**, similar to other reporting tabs in the Fundraiser Performance Management Platform.

The scope of what is included in the Appeals Table and the Appeals Tab Viewports is controlled by the fiscal year selected in the drop down found at the top of the page. By default, the reporting in the Appeals Table and Appeals Tab Viewports will be set to pull up information related to the current fiscal year. The Appeals Tab provides you with the ability of going back and analyzing up to five years of appeals information. By selecting a previous fiscal year from the drop down menu, you will limit the appeals information associated with the selected fiscal year. For the purpose of the Appeals Tab reporting the appeal is included in the selected fiscal year if the appeal was initiated in the selected fiscal year or if there is a gift transaction associated with an appeal in the selected fiscal year.

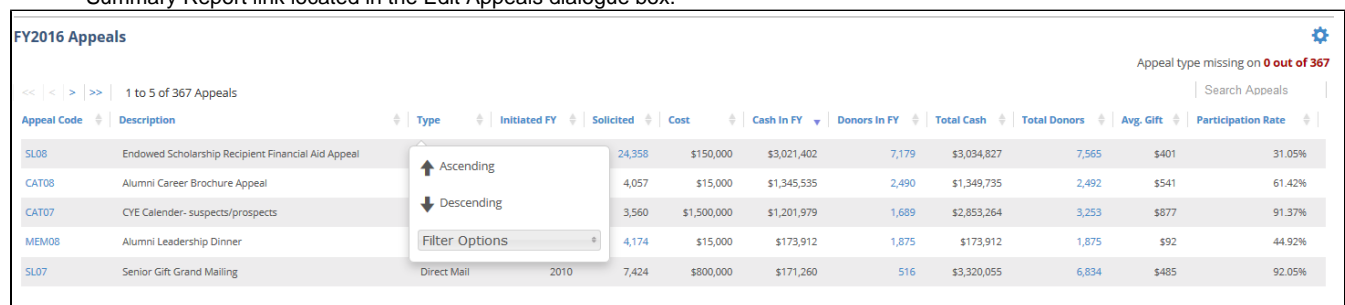
Located at the top of the Appeals Tab, you will also see a summary of how many appeal types (i.e. direct mail, phone, web, etc.) are missing on the appeals that we are receiving from the information your institution is providing to us. The vast majority of the reporting found in the viewports is dependent on having an appeal type associated with each appeal. Any appeals that do not have an appeal type will be highlighted in yellow. If you find that a high number of your appeals do not have appeal types associated with them, this will indicate that you should not read too much into the reports until the appeals have been properly classified. This can be done in your system or within the Platform. This process is explained in greater detail under the **Edit Appeal** section below.

Also located on the top bar within the Appeals Tab is a navigation element that allows you to collapse or expand the Appeals Table. By default the Appeals Table displays 5 appeals, but if you want to expand the Appeals Table, just click on **Expand Appeals Table** icon at the top right which is depicted as *two arrows*. In order to collapse the table, just click the icon again.

## Appeals Table

There are three key features that relate specifically to the Appeals Table:

- **The Appeals Table** - The Appeals Table is the main body of the table that displays the appeal code, name, key metrics and additional navigation elements.
- **Appeal Summary** - You can find the Edit Appeal dialogue box by clicking on the Appeal Code within the Appeals Table. This allows you to manage and track individual appeal information that your system does not track.
- **Donor Summary** - The Summary Report provides summary statistics and visual reports on individual appeal performance. This can be found by clicking on the donor count links found in the Total Donors column of the Appeals Table or by clicking on the View Summary Report link located in the Edit Appeals dialogue box.



The screenshot shows the 'FY2016 Appeals' table. The table has columns: Appeal Code, Description, Type, Initiated FY, Solicited, Cost, Cash In FY, Donors In FY, Total Cash, Total Donors, Avg. Gift, and Participation Rate. A dropdown menu is open over the 'Type' column, showing options: 'Ascending', 'Descending', and 'Filter Options'. The table lists several appeals, including 'Endowed Scholarship Recipient Financial Aid Appeal', 'Alumni Career Brochure Appeal', 'C/E Calendar- suspects/prospects', 'Alumni Leadership Dinner', and 'Senior Gift: Grand Mailing'.

Appeal Code	Description	Type	Initiated FY	Solicited	Cost	Cash In FY	Donors In FY	Total Cash	Total Donors	Avg. Gift	Participation Rate
SL08	Endowed Scholarship Recipient Financial Aid Appeal			24,358	\$150,000	\$3,021,402	7,179	\$3,034,827	7,565	\$401	31.05%
CAT08	Alumni Career Brochure Appeal			4,057	\$15,000	\$1,345,535	2,490	\$1,349,735	2,492	\$541	61.42%
CAT07	C/E Calendar- suspects/prospects			3,560	\$1,500,000	\$1,201,979	1,689	\$2,853,264	3,253	\$877	91.37%
MEM08	Alumni Leadership Dinner			4,174	\$15,000	\$173,912	1,875	\$173,912	1,875	\$92	44.92%
SL07	Senior Gift: Grand Mailing	Direct Mail	2010	7,424	\$800,000	\$171,260	516	\$3,320,055	6,834	\$485	92.05%

Before further describing each of these features, it is important that you understand how the appeals data flows from your institution's system and into the Platform. Each night we receive a file from your institution with a variety of appeal information, including Appeal Code, Appeal Description, Appeal Type, Fiscal Year Initiated, Number Solicited, and Appeal Cost.

The data provided from your institution in the nightly file is the final source of record. If you do not track certain fields in your database, the Appeals Tab has been designed so that you can enter additional fields like cost and number solicited for the benefit of reporting. However,

data you add in the Platform for Appeals does not flow back into your system. Since your institution's data is the final source of record we encourage you to track it in your system and provide it in the nightly file we receive with appeal information. Some examples to illustrate the flow of data are provided in the explanation of Edit Appeal.

## Appeals Table

The Appeals Table displays key information about each annual giving appeal. The appeals that display in the list were either initiated in the selected fiscal year, or the appeal has an associated transaction in the selected fiscal year. On the top right of the Appeals Table, you will see icons that allow you to interact with the table. By clicking on the gear icon you have the ability to **Export** the appeals table into an Excel file. In addition, you will also see an Appeal Search box. This allows you to search for appeals within the selected fiscal year based on Appeal Code, Appeal Description, or Appeal Type. This search will filter the results in the Appeals Table, but does not impact any of the Viewports. On the top of the Appeals Table, you will see **navigation** that allows you to click through the different pages of appeals.

You can **sort and filter** the content of the Appeals Table by the different available columns. Just click on the column header and select to sort or click on the Select Options menu to choose from the available values to filter by.

### The columns of information in the Appeals Table include the following:

- **Appeal Code** - The appeal code is the unique identifier of the appeal that is provided in the information provided by your institution. This unique code allows the Platform to tie the giving information on the transactions to the appeal.
- **Appeal Description** - This is the name of the appeal that is provided by your institution.
- **Appeal Type** - The appeal type that is displayed is the standard appeal types available in Fundraiser Performance Management for reporting purposes. During the implementation process your appeal type codes were mapped to these standard reporting values.
- **Initiated Fiscal Year** - Initiated fiscal year is a field that is provided to us from your institution. It should represent the fiscal year the appeal started. If this information is not included then the Platform will automatically create an Initiated Fiscal Year based on when the first gift transaction is associated with the appeal.
- **Number Solicited** - This is the number of records that were solicited for the appeal. There are three ways that this number can be defined. Your institution may be providing us with the number solicited or a User may enter this information in Edit Appeals. If your institution is providing us with detail on which records actually received the appeal, the Platform will calculate this number and display it as a link so that you can drill into the number and see the records that received the appeal. This is explained in more detail under the Edit Appeal section.
- **Cost** - This is the cost of the appeal. Your institution may be providing this number to us in the nightly files we receive or this information may have been entered by a User of the Platform. This is explained in more detail under Edit Appeal.
- **Cash in FY** - This is the sum of the cash generated by the appeal in the selected fiscal year. This is helpful in distinguishing dollars raised in the current fiscal year for appeals that generate cash for annual giving over multiple periods. This is calculated by the Platform.
- **Donors in FY** - This is the number of constituent records that have been credited with a cash transaction related to each appeal within the selected fiscal year. This is calculated by the Platform.
- **Total Cash** - This is the sum of the cash generated by the appeal. It is calculated by the Platform.
- **Total Donors** - This is the number of constituent records that have been credited with a cash transaction related to each appeal. It is calculated by the Platform.
- **Average Gift** - Average gift is calculated by taking the Total Cash and dividing it by Total Donors. It is calculated by the Platform.
- **Participation Rate** - Participation rate is the percent of solicited records that donated to the appeal. It is calculated by the Platform by dividing Total Donors by Number Solicited. If Number Solicited is not provided by your institution for the appeal or a User does not enter the number into the Platform, the calculation cannot be done and "NA" will be displayed.

## Appeal Summary

For more information, please visit the [Appeal Summary](#) page.

## Donor Summary

The Summary Report provides a Donor Summary view and a Donor List view that you can access by toggling between the two tabs located at the top of the screen. You can access the Summary Report by clicking on the View Summary Report link located on the Edit Appeals dialogue box or by clicking on the Total Donors link from the Appeals Table.

The Donor Summary tab provides a number of charts and tables summarizing the list of donors you clicked to see.

The Donor List tab displays a list of constituent records that donated to the appeal along with some key information related to the donors.

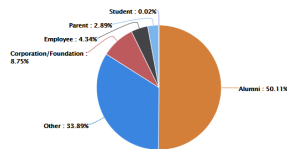


SL08 - Endowed Scholarship Recipient Financial Aid Appeal  
Type: Other  
Initiated Fiscal Year: 2017  
Drop Date: 05/01/2017  
Owner:

Cost: \$150,000.00  
Number Solicited: 24,358  
[Upload List](#)

[Executive Summary](#) | [Donor Summary](#) | [Attachments \(0\)](#)

Primary Relationship Type



Donor Type

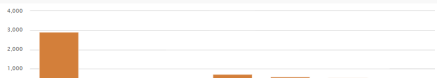


Donors by School of Graduation



School	Donors	
School of Business	236	
School of Arts and Sciences	659	
School of Education	241	
School of Engineering	327	
School of Medicine	260	
School of Arts and Design	163	
Evening School	133	
School of Law	148	
<b>Overall</b>	<b>2,533</b>	

Year Of Graduation



**The following Viewports are available in the Appeals Tab View:**

- FYTD Appeal Type Contribution
- Trailing 5 Fiscal Year Number of Appeals by Channel
- FYTD Appeal Type Performance
- FYTD Comparison Direct Marketing Response Rate Performance
- Trailing 5 Fiscal Year Appeal Activity Levels