Critical Statistics

CSRconnect Ad Hoc Reporting

YourCause + blackbaud

Better Together.

Notes:

The purpose behind this guide is to provide clients a standard set of metrics they can report on throughout the year.

Giving DataSource - Alex

- **Example Filters to Include:**
  - Donation Create Date (Use Relative Dates for Maximum Efficiency)
  - Donation Type
  - Employee Status
  - Employee Attributes (Business Unit, Division, Department, etc.)
  - Employee Locations (Work Country, Work City, etc.)
  - EmployeeCustomSegment
  - GrantRequest Status
  - Grant Project Name
  - Engagement Element Name
  - Giving Campaign Name
- **Example Rows to Include to Break Out Metrics by a Specific Field:**
  - EmployeeCustomSegment
  - Employee Attributes (Business Unit, Division, Department, etc.)
  - Employee Locations (Work Country, Work City, etc.)
  - Charity Category
  - Donation Type
- **Example Measures to Include/Questions You May Ask Yourself:**
  - How many donors have given in total during x period of time?
    - Count Distinct of Employee ID
  - What is the total amount donors have given during x period of time?
    - Transaction Amount
  - How many donations have been made during x period of time?
    - Transaction ID
  - What is the average amount given during x period of time?
    - Transaction Amount
- **NOTE:** Giving DataSource should be utilized by clients who do not have Payroll OR for clients who want to report out on actual transactions that have happened and not include theoretical pledges.

Volunteer Participation DataSource - Dria

- **Example Filters to Include:**
  - Participation Date (Use Relative Dates for Maximum Efficiency)
  - Is Waitlist (True vs False)
  - Employee Status
  - Employee Custom Segment
  - Employee Attributes (Business Unit, Division, Department, etc.)
  - Employee Locations (Work Country, Work City, etc.)
  - Charity Category
  - Event Classification (Team vs Individual)
  - Event Type
  - Event Category
  - General Tags
  - Event Campaign Name
- **Example Rows to Include to Break Out Metrics by a Specific Field:**
  - Employee Custom Segment
  - Employee Attributes (Business Unit, Division, Department, etc.)
  - Employee Locations (Work Country, Work City, etc.)
  - Charity Category
- **Example Measures to Include/Questions You May Ask Yourself:**
  - How many volunteers have participated during x period of time?
    - External Employee ID or Affiliate Employee ID (Employee)
  - How many hours were volunteered during x period of time?
    - Employee Hours vs Guest Hours vs Total Hours
    - Number Formatting - System usually defaults to a whole number so you need to edit the formatting to show two decimals
  - What is the average number of hours volunteered during x period of time?
    - Employee Hours vs Guest Hours vs Total Hours
    - Number Formatting - System usually defaults to a whole number so you need to edit the formatting to show two decimals

Overall Pro-Tips: - Dria

- Before creating your report, consider the questions you are trying to answer using data. What is the story you want to tell?
    - Make sure to include the correct date filter in your report
    - If you are trying to decide between date fields, think about what you want to see in the results of your report.
        - Ex: Offline Donations and Donation Date vs Donation Create Date
    - Think about whether or not inactive employees should show in your report? Most clients will include inactive employees in their participation metrics.
- Consider who your audience is when building reports. Visualizations may be more impressive in an Impact Report whereas straight numbers may make more sense for an Executive Leadership report.
- Remember to add your filters first to minimize the data you are working with and then add your measures and rows.
- When building reports, you can have a Summary tab such as what we have shown you today. However, you can also make a copy of your report and then add on whichever fields you would like to see in a detailed report.
    - Make sure to remember to include the employee's unique identifier first if you want the detail report to be employee-specific.
- You can combine each of these reports into one Dashboard in order to see all summary totals in one place.
- Build your reports in advance so they will be ready anytime they are needed.
- Once your reports are complete, familiarize yourself with your statistics and reference our latest Industry Review for details on how your programs compare to the industry.
    - Click **HERE** to download the latest and past Industry Reviews