

PeopleSoft®

PeopleSoft Enterprise Contributor Relations 8.9 Reports

April 2005

PeopleSoft Enterprise Contributor Relations 8.9 Reports
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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

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Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft Contributor Relations Reports

This appendix provides an overview of Contributor Relations reports and discusses how to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

Contributor Relations Reports: A to Z

This table lists the Contributor Relations reports, sorted alphanumerically by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
AV702 Graduates to Alumni	Lists graduates selected for the process and their constituent types. (Crystal)	Contributor Relations, Constituent Information, People, Process Biodemo Information, Graduates to Alumni	AV_RUNCTL_CONFR
AV703 Pledge Schedule Aging	Lists past-due pledge amounts by time period and business unit. (Crystal)	Contributor Relations, CR Reports, Giving Reports, Pledge Schedule Aging	AV_RUNCTL_PLAGE
AVBIOBIT, AVORGBIO Biographic Profile	Generate standard or customized bio bits and briefs to summarize information about prospects in the system. (Crystal)	<ul style="list-style-type: none">• Contributor Relations, CR Reports, Biographic Reports, Biographic Profile• Contributor Relations, CR Reports, Biographic Reports, Biographic Profile - Org• Contributor Relations, CR Reports, Biographic Reports, Biographic Profile - Workset	AV_BIO_BIT_RPT (person), AV_BIO_BIT_RPT_E (org), AV_BIO_BIT_RPT_W (workset)

Report ID and Report Name	Description	Navigation	Run Control Page
AVCAMPRO Campaign Progress	Summarizes the progress of a campaign in relation to its goals. The report includes information about the financial goal, current gifts, deferred gifts, and so on. If you choose to include related campaigns in the report, a campaign summary is generated that totals the progress for the campaign and its related campaigns of a lower reporting level together. (SQR)	Contributor Relations, CR Reports, Giving Reports, Campaign Progress Report	AV_RUNCTL_CAMPR
AVDESDNR Designation Donor List	Lists all the donors who have made a commitment to a particular designation that matches the parameters you define on the Designation Donor List report page. (SQR)	Contributor Relations, CR Reports, Giving Reports, Designation Donor List	AV_RUNCTL_DESDN
AVGCINIT Giving Club Initialization report	Summarizes differences for all giving clubs active as of the process date, ordered by giving club and fiscal year. Also helps to identify differences between prior giving club data and recalculated data so that you can review and add memberships. (SQR)	Contributor Relations, Session Management, Giving Clubs, Process Giving Clubs	AV_RUNCTL_GCLUBS
AVPCAE, GFTINC, GFTINCII, and GFTINCIV CAE report	Summarizes gift income by following standards created by the Council for the Advancement and Support of Education (CASE) and the Council for the Advancement of Education (CAE). (SQL, Crystal)	Contributor Relations, CR Reports, Giving Reports, CAE Report	AV_RUNCTL_CAE
AVROLE Role Assignments report	Summarizes information about the prospect assignments for a resource for a particular role. (SQR)	Contributor Relations, CR Reports, Role Assignments	AV_RUNCTL_ROLE

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Graduates To Alumni

Run Date: 01/22/2002

Run Time: 3:03 pm

Institution: PSUNV PeopleSoft University
Academic Career: UGRD
Completion Term: 0430
Run Mode: Report Only

<u>ID</u>	<u>Name</u>	<u>Degree Conferred Date</u>	<u>Constituent Type Action</u>
AV0001	Gallegher,Shawn	05/23/2001	Insert
AV0002	Isenberg,Robin	05/23/2001	Insert
AV0004	Holmgren,June	05/23/2001	* Already Alumni
AV0005	Martino,Bernard	05/23/2001	Insert
AV0008	Carroll,James	05/23/2001	Insert
AV0009	Crosbie,Edward	05/23/2001	Insert
AV0010	Kuney,Dara	05/23/2001	Insert
AV0011	Silver,Jonathan	05/23/2001	Insert
AV0012	Waters,Twaya	05/23/2001	Insert
AV0013	Newton,Dorian	05/23/2001	Insert
AV0016	Saxton,Jeremy	05/23/2001	Insert
AV0017	Graham,Tina	05/23/2001	Insert
Total Students: 12		Total Inserts: 11	Total Already Alumni: 1

Pledge Schedule Aging Report

Run Date: 09/13/2002

Run Time: 8:36 am

Institution: PeopleSoft University

	<u>Session Number</u>	<u>Pledge Number</u>	<u>Constituent ID / Name</u>	<u>ID Type / Constituent Type</u>	<u>Expected Date</u>	<u>Expected Amount</u>	<u>Days Past Due</u>
0 - 30 Days							
PSUNV							
	101	222	AV4150 Frank & Bill's Poi Shack	Organization Association	09/01/2002	125,000.00 USD	12
	103	228	AV4150 Frank & Bill's Poi Shack	Organization Association	09/01/2002	150,000.00 USD	12
	101	217	AV0036 Sargent,Russell	Person Friend	08/14/2002	50,000.00 USD	30
	Business Unit Total	PSUNV		Payments	3	325,000.00 USD	
0 - 30 Days	Total			Payments	3	325,000.00 USD	

Pledge Schedule Aging Report

Run Date: 09/13/2002

Run Time: 8:36 am

Institution: PeopleSoft University

<u>Session Number</u>	<u>Pledge Number</u>	<u>Constituent ID / Name</u>	<u>ID Type / Constituent Type</u>	<u>Expected Date</u>	<u>Expected Amount</u>	<u>Days Past Due</u>
61 - 90 Days						
PSUNV						
101	222	AV4150 Frank & Bill's Poi Shack	Organization Association	07/01/2002	125,000.00 USD	74
101	220	AV4140 Mullett's Barber Shoppe	Organization Fund-Raising Consortia	07/01/2002	50,000.00 USD	74
101	219	AV0044 Llendo,Ramon	Person Friend	06/30/2002	12,500.00 USD	75
72	143	DM0049 Nguyen,Kimberly	Person Non-Alum Spouse of Alumni	07/01/2002	5,000.00 USD	74
Business Unit Total	PSUNV		Payments	4	192,500.00 USD	
61 - 90 Days	Total		Payments	4	192,500.00 USD	

Pledge Schedule Aging Report

Run Date: 09/13/2002

Run Time: 8:36 am

Institution: PeopleSoft University

<u>Session Number</u>	<u>Pledge Number</u>	<u>Constituent ID / Name</u>	<u>ID Type / Constituent Type</u>	<u>Expected Date</u>	<u>Expected Amount</u>	<u>Days Past Due</u>
91 - 180 Days						
MEDBU						
106	244	AV900042 Give a helping hand	Organization Corporation	04/15/2002	1,500.00 USD	151
106	243	AV900041 Software Inc.	Organization Corporation	06/06/2002	500.00 USD	99
Business Unit Total	MEDBU		Payments	2	2,000.00 USD	
<hr/>						
91 - 180 Days	Total		Payments	2	2,000.00 USD	

Pledge Schedule Aging Report

Run Date: 09/13/2002

Run Time: 8:36 am

Institution: PeopleSoft University

	<u>Session Number</u>	<u>Pledge Number</u>	<u>Constituent ID / Name</u>	<u>ID Type / Constituent Type</u>	<u>Expected Date</u>	<u>Expected Amount</u>	<u>Days Past Due</u>
> 180 Days							
MEDBU							
	106	246	AV900044 EDS USED CARS	Organization Corporation	09/06/2001	5,000.00 USD	372
	106	245	AV900043 Al's used Cars	Organization Corporation	09/06/2001	4,000.00 USD	372
	106	244	AV900042 Give a helping hand	Organization Corporation	09/06/2001	750.00 USD	372
	106	244	AV900042 Give a helping hand	Organization Corporation	12/30/2001	750.00 USD	257
	106	243	AV900041 Software Inc.	Organization Corporation	09/06/2001	500.00 USD	372
	106	243	AV900041 Software Inc.	Organization Corporation	12/06/2001	500.00 USD	281
	106	243	AV900041 Software Inc.	Organization Corporation	03/06/2002	500.00 USD	191
	106	242	AV900040 Kohnes Coffee Shop	Organization Corporation	03/01/2002	655.65 USD	196
	Business Unit Total	MEDBU		Payments	8	12,655.65 USD	
PSUNV							
	101	218	AV0036 Sargent,Russell	Person Friend	03/15/2002	50,000.00 USD	182
	101	217	AV0036 Sargent,Russell	Person Friend	02/14/2002	50,000.00 USD	211
	Business Unit Total	PSUNV		Payments	2	100,000.00 USD	
> 180 Days	Total			Payments	10	112,655.65 USD	

Pledge Schedule Aging Report**Institution:** PeopleSoft University

Run Date: 09/13/2002

Run Time: 8:36 am

Grand Totals

0 - 30 Days:	3	325,000.00	USD
31 - 60 Days:	0	0.00	USD
61 - 90 Days:	4	192,500.00	USD
91 - 180 Days:	2	2,000.00	USD
> 180 Days:	10	112,655.65	USD
<hr/>			
Payments	19	632,155.65	USD

Employment Information:

Current:

ID: Start Date
End Date:

Phone:

Giving To University

Total Giving

Pledge Balance 1,000.00 USD

Last Gift Date

Five Largest Gift Designations

<u>Institution</u>	<u>School/College</u>	<u>Designation Business Unit</u>	<u>Designation</u>	<u>Amount</u>
--------------------	-----------------------	----------------------------------	--------------------	---------------

Involvement

<u>Types</u>	<u>Description</u>	<u>Category</u>	<u>Start Date</u>	<u>End Date</u>	<u>Received Date</u>
Activity	Marching Band	Music	09/01/1993	04/03/1998	
Activity	School Paper	Media	11/10/1993	04/03/1998	
Affiliation	Republican Party	Political	07/01/1996		
Activity	United Way	Charitable	06/01/1998		
Survey Results	Excellent - Highest Rating	Perceived Value of Education			07/23/1998

Planned Giving

Bequest

<u>Giving Category</u>	<u>Bequest Date</u>	<u>Estimate Estate Value</u>	<u>Estimate Benefit to Institution</u>
Bequest	6/19/98	2,000,000.00 USD	5,000,000.00

Trust

<u>Giving Category</u>	<u>Name</u>	<u>Inception Date</u>	<u>Start Date</u>
Trust	Gallegher Family Trust	01/01/1980	03/15/1982

Gift Annuity

<u>Giving Category</u>	<u>Name</u>	<u>Inception Date</u>	<u>Start Date</u>
Gift Annuity	Gallegher Family Annuity	06/05/1996	06/16/1997

Pooled Income Fund

<u>Giving Category</u>	<u>Name</u>	<u>Inception Date</u>	<u>Estimate Benefit to Institution</u>
Pooled Income	PSUNV Pooled Income Fund	06/04/1992	1,600.00 USD

Assets

<u>Type</u>	<u>Description</u>	<u>Date</u>	<u>Amount</u>
Auto	1998 Mercedes Benz	07/24/1998	858.60 USD
RealEstate	3 acre ranch	07/24/1998	1,500,000.00 USD

Ratings

<u>Type</u>	<u>Indicator</u>	<u>Min</u>	<u>Max</u>	<u>Rating Date</u>
Household Income	Rank Percentile 98	1,000,000.00 USD	1,500,000.00	07/24/1998

Family Relationships:

<u>Spouse Name</u>	<u>ID</u>	<u>Status</u>	
<u>Spouse Constituent Info</u>			
<u>Spouse Name</u>	<u>ID</u>	<u>Constituent Type</u>	
<u>Spouse Class Year</u>			
<u>Spouse Name</u>	<u>ID</u>	<u>Class Year</u>	<u>Alumnus Type</u>
<u>Spouse Deceased Info</u>			
<u>Spouse</u>	<u>ID</u>	<u>Deceased Date</u>	
<u>Family:</u>			
<u>Name</u>	<u>ID</u>	<u>Relationship</u>	<u>Status</u>
<u>Family Constituent Info</u>			
<u>Name</u>	<u>ID</u>	<u>Constituent Type</u>	
<u>Family Class Year</u>			
<u>Name</u>	<u>ID</u>	<u>Class Year</u>	<u>Alumnus Type</u>
<u>Family Deceased Info</u>			
<u>Name</u>	<u>ID</u>	<u>Deceased Date</u>	
<u>Other Relationships:</u>			
<u>Name:</u>	<u>ID</u>	<u>Relationship</u>	<u>Status</u>
<u>Other Constituent Info</u>			
<u>Name</u>	<u>ID</u>	<u>Constituent Type</u>	

Other Class Year

<u>Name</u>	<u>ID</u>	<u>Class Year</u>	<u>Alumnus Type</u>
-------------	-----------	-------------------	---------------------

Other Deceased Info

<u>Name</u>	<u>ID</u>	<u>Deceased Date</u>
-------------	-----------	----------------------

Organization Relationships:

<u>Name</u>	<u>ID</u>	<u>Relationship</u>
Bechtel Power Company	AV1010	Board Member or Officer
Lambert Manufacturing	AV2000	Board Member or Officer

Organization Constituent Info

<u>Name</u>	<u>ID</u>	<u>Constituent Type</u>
Lambert Manufacturing	AV2000	Corporation
Bechtel Power Company	AV1010	Foundation

Legacy Academic Information:

Institution:	PeopleSoft University
Campus:	Main Hacienda Campus
School/College:	College of Liberal Arts
Degree Year:	1998
Degree:	Bachelor of Engineering
Major 1:	Computer Science
Minor 1:	Management Information Systems

Summary

Brief summary goes here.

Narrative

Extended narrative goes here.

Assigned Individuals

Assigned Staff

<u>Name</u>	<u>Purpose</u>	<u>Start Date</u>	<u>End Date</u>
Mario Capozzelli	Prospect Manager	07/24/1998	
Darla Perkins	Solicitor	08/10/1998	

Assigned Volunteers

<u>Name</u>	<u>Purpose</u>	<u>Start Date</u>	<u>End Date</u>
Christopher Whittey	Secretary/Treasurer	08/10/1998	

Institution: GLAKE
 Campaign: ODYSSEY - Great Lakes University Capital Campaign
 Reporting Level: 1

Financial Goal:	200,000,000.00 USD	Current Operations to Date:	432,000.00
Percent of Goal:	0.17%	Capital Projects to Date:	96,000.00
		Endowment to Date:	192,000.00

Current Gifts

Total Commitments to Date:	336,000.00
Cash/GIKs to Date:	336,000.00

Outright Gifts to Date:	336,000.00
Pledges To Date:	0.00
Pledge Payments to Date:	0.00
Gifts-in-Kind to Date:	0.00

Nbr Donors:	16
Nbr New Donors:	16
Nbr Volunteers:	0
Nbr Prospects:	0
Nbr Open Asks:	0
Amt Open Asks:	0.00
Nbr Declined Asks:	0
Amt Declined Asks:	0.00

Deferred Gifts

Irrevocable Gifts-Present Value:	0.00
Irrevocable Gifts-Market Value:	0.00
Revocable Gifts-Present Value:	0.00
Revocable Gifts-Market Value:	0.00

Institution: GLAKE
Campaign: ANNFND01 - Great Lakes University Annual Campaign 2001
Reporting Level: 2

Financial Goal:	25,000,000.00 USD	Current Operations to Date:	0.00
Percent of Goal:	0.00%	Capital Projects to Date:	0.00
		Endowment to Date:	0.00

Current Gifts

Total Commitments to Date:	0.00	Nbr Donors:	0
Cash/GIKs to Date:	0.00	Nbr New Donors:	0
		Nbr Volunteers:	0
		Nbr Prospects:	0
Outright Gifts to Date:	0.00	Nbr Open Asks:	0
Pledges To Date:	0.00	Amt Open Asks:	0.00
Pledge Payments to Date:	0.00	Nbr Declined Asks:	0
Gifts-in-Kind to Date:	0.00	Amt Declined Asks:	0.00

Deferred Gifts

Irrevocable Gifts-Present Value:	0.00
Irrevocable Gifts-Market Value:	0.00
Revocable Gifts-Present Value:	0.00
Revocable Gifts-Market Value:	0.00

Institution: GLAKE
Campaign: ODYSSEY - Campaign Summary

Financial Goal:	200,000,000.00 USD	Current Operations to Date:	432,000.00
Percent of Goal:	0.17%	Capital Projects to Date:	96,000.00
		Endowment to Date:	192,000.00

Current Gifts

Total Commitments to Date:	336,000.00
Cash/GIKs to Date:	336,000.00

Outright Gifts to Date:	336,000.00
Pledges To Date:	0.00
Pledge Payments to Date:	0.00
Gifts-in-Kind to Date:	0.00

Nbr Donors:	16
Nbr New Donors:	16
Nbr Volunteers:	0
Nbr Prospects:	0
Nbr Open Asks:	0
Amt Open Asks:	0.00
Nbr Declined Asks:	0
Amt Declined Asks:	0.00

Deferred Gifts

Irrevocable Gifts-Present Value:	0.00
Irrevocable Gifts-Market Value:	0.00
Revocable Gifts-Present Value:	0.00
Revocable Gifts-Market Value:	0.00

Report Complete

Business Unit:FDNBU
Designation: BUSINESS - Business Dean's Fund

Constituent Name <u>Organizations</u>	ID	Cnst Type	Commitment Amt	Pledge Balance
American Enrichment Foundation	AV1012	Foundation	5,000.00 USD	0.00 USD
Arizona Fundraising Consortium	AV1014	Consortia	1,333.33	0.00
Association of Business Execs	AV1015	Assoc	1,333.34	0.00
Bechtel Foundation	AV1011	Corp Fdn	2,500.00	0.00
Bechtel Power Company	AV1010	Corp	1,333.34	0.00
Smythe Family Foundation	AV1013	Family Fdn	1,333.33	0.00
Society of Catholic Ministries	AV1016	Religious	2,500.00	0.00
Group Count: 7		SubTotal Commit Amt:	15,333.34	SubTotal Pledge Bal: 0.00
<u>Individuals</u>				
Armstrong,Ron	AD5203	Staff	990.00	0.00
Ayelet-Metapelet,Hevatzelet	AD7000	Faculty	2,010.00	0.00
Bessmer,Jay	AD5202	Sp of Alum	1,333.33	0.00
Bish,Jane	AD5200	Alumni	670.00	0.00
Fong,Lilly	AD1080	AlumNonDeg	330.00	0.00
Kirkland,Shari	AD5002	Student	660.00	0.00
Reiter,Eric	AD5211	Other	1,333.33	0.00
Smith,Amy	AD5025	Alumni	666.66	0.00
Smith,TIna	AD5030	Friend	673.34	0.00
Group Count: 9		SubTotal Commit Amt:	8,666.66	SubTotal Pledge Bal: 0.00
Total Count: 16		Total Commitment Amt:	24,000.00	Total Pledge Balance: 0.00

Report Complete

Report ID: AVGCINIT

PeopleSoft
GIVING CLUB INITIALIZATION REPORT

Page No. 1
Run Date 10/25/2004
Run Time 15:02:23

Institution: PSUNV
User: PS
Run Control: test

<u>ID</u>	<u>Org ID</u>	<u>GClub</u>	<u>Fiscal Year</u>	<u>Level New/ Old</u>	<u>Status New/ Old</u>	<u>Amt New/</u>	<u>Old</u>	<u>Added By New/</u>	<u>Old</u>
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** Section 1: Differences between New and Old Data

No differences found

** Section 2: New Memberships Added

No Memberships Added

** Section 3: Memberships Removed

AV0020		ALPHA	2004	---- / DELTA	---- / M	0.00 /	5,000.00	---- /	U
AV0001		ANNUAL	2004	---- / SILVER	---- / M	0.00 /	10,000.00	---- /	U

Section 3 Totals: 2

Total Rows: 2

End of Report

Organization Info

Organization Name: Briggs Motor Company Organization ID: AV1000

Service Indicators

Service Indicator	Reason	Contact	Active Date
Campaign 2000	Major Prospect		11/18/1998
President	Long List		11/18/1998
Constituent Information			
Constituent Type	Start Date		
Corporation	07/21/1998		

Location Address

Address 1000 Ford Drive
Dearborn, Michigan 48111

E-Mail Address	FBerry@BriggsCO.org
URL Address	LOC1@url
Phone	Business 313 5551234
Phone	Main 313 3333333

Address 1000 Ford Drive Suite 100F
Dearborn, Michigan 48111

E-Mail Address	SBullard@BriggsCO.org
URL Address	loc2@url
Phone	Business 313 5555678
Phone	Main 333 2222222

Org Financial Info

Revenue	\$10.00 CAD
Assets	\$20.00
Contribution Total	\$0.00

Person to Organization Relationships

Name	ID	Relationship
James Carroll	AV0008	Board Member or Officer
Dara Kunev	AV0010	Board Member or Officer
Jane Smith		Trustee or Officer
	AV0017	Employee

Organization to Organization Relationships

Orgnatization Name	ID	Relationship
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Involvement

Category	Start Date	End Date	Received Date
Charitable			05/15/1998

Giving to Institution

Total Giving to Institution

Pledge Balance

Last Gift Date

PeopleSoft
ROLE ASSIGNMENTS REPORT - SUMMARY

Page No. 1
Run Date 07/20/2001
Run Time 17:18:45

Report ID: AVROLE

Institution: PSUNV
Role: Prospect Manager
Time Frame: Current
Descending by Count

Staff ID	Name	Number of Assignments
AV0023	Gilbert, Anne	10
AV0022	Capozzelli, Mario	1
AV0025	Franken, Alan	1
AV0028	Nicholson, Donald	1

PeopleSoft
ROLE ASSIGNMENTS REPORT - DETAIL

Page No. 2
Run Date 07/20/2001
Run Time 17:18:45

Report ID: AVROLE

Staff ID: AV0023

Assigned Prospect	Prospect ID	Active	Campaign	Start Date	End Date	Sps Link
Szymborski, William	DM0040	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Chang, Zheng	DM0041	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Bhardwaj, Ramesh	DM0042	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Pesaran, Ahmad A	DM0043	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Keyser, Matthew	DM0044	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Mihalic, Mark	DM0045	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Yolshina, Laurie	DM0046	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Barbin, Nancy	DM0047	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Casantsev, Frank	DM0048	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N
Nguyen, Kimberly	DM0049	Y	AF2002 Annual Fund Campaign, 2002	2001/02/01	2002/06/30	N

GIFT INCOME REPORT: DONOR PURPOSES AND SOURCES

7/25/2001

Institution:
Great Lakes University

CURRENT OUTRIGHT GIFTS AT FACE VALUE (DO NOT INCLUDE DEFERRED GIFTS HERE)												
INDIVIDUALS				ORGANIZATIONS					TOTAL			
A	P	G	P	O	F	C	B	R	F	C	O	TOTAL
U	A	R	A	T	O	O	U	E	U	O	T	OUTRIGHT
M	R	A	R	H	U	R	S	L	N	N	H	GIFTS AT
N	E	N	E	E	N	P	I	I	D	S	E	FACE
I	N	D	N	R	D	O	N	G	-	O	R	VALUE
	T		T		A	/	E	I	R	R		
	S		S		T	A	S	O	A	T		
					I	T	S	U	I	I		
					O	I	E	S	S	A		
					N	O	S		I			
					S	N			N			
						e			~			
A	B	C	D	E	F	G	H	I	J			
A. Unrestricted	281,001.59	0.00	0.00	1,508,990.01	6,333.33	7,621.22	2,500.00	1,333.33	1,333.34	1,809,112.82		
B. Restricted(1 through 9)	1,524,113.28	0.00	0.00	51,169.99	50,666.64	30,666.72	20,000.00	10,666.64	10,666.72	1,697,949.99		
1. Academic Divisions	2,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	17,666.67		
2. Athletics	2,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	24,000.00		
3. Faculty and Staff Compensation	1,002,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	1,024,000.00		
4. Research	2,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	24,000.00		
5. Public Service and Extension	2,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	24,000.00		
6. Library	2,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	24,000.00		
7. Operation and Maintenance of Physical Plant	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
8. Student Financial Aid	2,326.66	0.00	0.00	6,340.00	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	24,000.00		
9. Other Restricted Purposes	507,826.66	0.00	0.00	6,789.99	6,333.33	3,833.34	2,500.00	1,333.33	1,333.34	529,949.99		
C. Total Current Operations(A+ B)	1,805,114.87	0.00	0.00	1,560,160.00	56,999.97	38,287.94	22,500.00	11,999.97	12,000.06	3,507,062.81		

PART II: OUTRIGHT GIFTS FOR CAPITAL PURPOSES

A. Property, Buildings, and Equipment	4,653.32	0.00	0.00	12,680.00	12,666.66	7,666.68	5,000.00	2,666.66	2,666.68	48,000.00
B. Endowment- Unrestricted	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
C. Endowment-Restricted	6,979.98	0.00	0.00	19,020.00	18,999.99	11,500.02	7,500.00	3,999.99	4,000.02	72,000.00
D. Loan Funds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
E. Total Capital (A through D)	11,633.30	0.00	0.00	31,700.00	31,666.65	19,166.70	12,500.00	6,666.65	6,666.70	120,000.00

DEFERRED GIFTS (FUTURE COMMITMENTS) AT FACE VALUE(FV) AND AT PRESENT VALUE (PV)									
INDIVIDUALS								TOTAL DEFERRED GIFTS AT FACE VALUE (FV)	TOTAL DEFERRED GIFTS AT PRESENT VALUE (PV)
A L U M N I	P A R E N T S	G P R A R E D N T S	O T H E R	F V	P V	F V	P V		
A	B	C	D	FV	PV	FV	PV		
A. Endowment-Unrestricted	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
B. Endowment-Restricted	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
C. Other Purposes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D. Total Deferred Gifts	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

PART III: DEFERRED GIFTS

- A. Endowment-Unrestricted
- B. Endowment-Restricted
- C. Other Purposes
- D. Total Deferred Gifts

SUMMARY REPORT										
INDIVIDUALS				ORGANIZATIONS						TOTAL OUTRIGHT AND DEFERRED GIFTS AT FACE VALUE
A L U M N I	P A R E N T S	G P R A R E D N T S	O T H E R	F O U N D A T I O N S	C B O U R S E P I O N S	R E L I G I O U S	F C U N D S - O T H E R	O T H E R		
A	B	C	D	E	F	G	H	I	J	
A. Total Outright Gifts for Current Operations at Face Value (Part I, Line C)	1,805,114.87	0.00	0.00	1,560,160.00	56,999.97	38,287.94	22,500.00	11,999.97	12,000.06	3,507,062.81
B. Total Outright Gifts for Capital Purposes at Face Value (Part II, Line E)	11,633.30	0.00	0.00	31,700.00	31,666.65	19,166.70	12,500.00	6,666.65	6,666.70	120,000.00
C. Total Deferred Gifts at Face Value (Part III, Line D, FV Columns)	0.00	0.00	0.00	0.00						0.00
D. Grand Total of Support at Face Value	1,816,748.17	0.00	0.00	1,591,860.00	88,666.62	57,454.64	35,000.00	18,666.62	18,666.76	3,627,062.81

SUMMARY REPORT

- A. Total Outright Gifts for Current Operations at Face Value (Part I, Line C)
- B. Total Outright Gifts for Capital Purposes at Face Value (Part II, Line E)
- C. Total Deferred Gifts at Face Value (Part III, Line D, FV Columns)
- D. Grand Total of Support at Face Value

Part IV: Other Program Data

Report the number of individuals or entities who have contributed and the total amount they contributed, not the number of payments or multiple contributions from those individuals or entities.

I. Gifts from Individuals

A. Gifts from individuals for all purposes

	NUMBER OF DONORS	AMOUNT
1. Alumni	8	\$1,807,508.17
a. Undergraduate degree/diploma holders	6	\$1,793,554.93
b. Graduate degree/diploma holders	1	\$9,333.24
c. Non-degree/diploma holders	1	\$4,620.00
2. Parents	0	\$0.00
3. Grandparents (for precollegiate independent schools)	0	\$0.00
4. Faculty and staff	3	\$1,544,200.00
5. Students	1	\$9,240.00
6. Other Individuals	<u>4</u>	<u>\$47,660.00</u>
7. Total	<u>16</u>	<u>\$3,408,608.17</u>

B. Individuals-number of record

	NUMBER OF RECORD
1. Alumni	12
a. Undergraduate degree/diploma holders	10
b. Graduate degree/diploma holders	2
c. Non-degree/diploma holders	0
2. Parents	2
3. Grandparents (for precollegiate independent schools)	0
4. Faculty and staff	11
5. Students	4
6. Other Individuals	<u>6</u>
7. Total	<u>35</u>

C. Individuals contributing gifts for current operations

	NUMBER OF DONORS	AMOUNT
1. Alumni	8	\$1,799,174.87
a. Undergraduate degree/diploma holders	6	\$1,790,204.93
b. Graduate degree/diploma holders	1	\$5,999.94
c. Non-degree/diploma holders	1	\$2,970.00
2. Parents	0	\$0.00
3. Grandparents (for precollegiate independent schools)	0	\$0.00
4. Faculty and staff	3	\$1,529,200.00
5. Students	1	\$5,940.00
6. Other Individuals	<u>4</u>	<u>\$30,960.00</u>
7. Total	<u>16</u>	<u>\$3,365,274.87</u>

D. Individuals contributing gifts for either current operations or capital purposes

	NUMBER OF DONORS	AMOUNT
1. From living individuals	18	\$3,408,770.67
2. Through estate settlements	<u>0</u>	<u>\$0.00</u>
3. Total	<u>18</u>	<u>\$3,408,770.67</u>

E. Value of three largest gifts from individuals

1. From living individuals	1,500,000.00	\$ 1,000,000.00	\$ 500,000.00
2. Through estate settlements	0.00	\$ 0.00	\$ 0.00

F. Governing board members (current and honorary) contributing gifts for current operations or capital purposes

	NUMBER OF DONORS	AMOUNT
	0	\$ 0

G. Deferred gifts (future commitments): Charitable remainder trusts, gifts to pooled income funds, and gift annuities

	NUMBER OF DONORS		AMOUNT
1. Number Established			\$0.00
2. Face Value			\$0.00
3. Present Value	0		\$0.00

II. Gifts from Organizations

A. Contributions from foundations

	NUMBER OF DONORS		AMOUNT
1. Personal and family	1		18,666.62
2. Other foundations and trusts, excluding corporate foundations	1		70,000.00

B. Three largest gifts from above foundations

2,500.00	\$1,333.33	\$0.00
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C. Gifts from corporations/businesses

1. Three largest gifts from corporations/businesses	3,787.88	\$2,500.00	\$1,333.34
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	NUMBER		AMOUNT
2. Number of corporations/businesses contributing and dollar value of contributions (excluding matching gifts)	2		\$53,666.76
a. Number and dollar value of company products	0		\$0.00
b. Number and dollar value of other property	0		\$0.00
3. Number of matching gifts from corporations/businesses and total amount.	1		\$3,787.88

III. Other Fund-raising and Related Data

A. Gifts by donors for endowment

1. Academic divisions corpor		\$0.00
2. Athletics corpor		\$0.00
3. Faculty and staff compensation		\$0.00
4. Research		\$0.00
5. Public service and extension		\$0.00
6. Library		\$0.00
7. Operation and maintenance of physical plant		\$0.00
8. Student financial aid		\$48,000.00
9. Other restricted purposes		\$0.00
10. Total		<u>\$48,000.00</u>

B. Support of intercollegiate athletics

	NUMBER OF DONORS		AMOUNT
1. Gifts restricted for athletics for current operations	16		\$24,000.00
2. Gifts restricted for athletics for capital purposes	0		\$0.00

C. Pledges (unconditional promises) (not to be included in gift totals)

	NUMBER OF DONORS		AMOUNT
1. Outstanding pledge balances for current operations	0		\$0.00
2. Outstanding pledge balances for capital purposes	0		\$0.00

D. Testamentary commitments

(bequest intentions)

(not to be included in gift totals)

NUMBER OF
DONORS

AMOUNT

1. Persons who have made provision for the institution
in their estate plans through their will during
the fiscal year

0

2. Face value of such provisions

0

\$0.00

3. Present value of such provisions

0

\$0.00

E. Other institutional data

(as of end of reporting fiscal year)

AMOUNT

1. Educational and general expenditures
and mandatory transfers.

\$0.00

2. Market value of endowment and similar funds
(including quasi-endowment)

\$0.00