

Parameters:

Set to Current Year

Set to Prior Year

Date Range:

4/1/2025

3/31/2026

\*Select date (2025-04-01 to 2026-03-31)

Pages:

High Level

Executive Summary

YOY

Overview

Detailed Breakdown

Commitments

Fund

By Month

Documentation

Data Dictionary



Analyze

Compare performance against prior years and track monthly revenue trends.



Explore

Deep dive into fund classifications or use "Drill Through" for appeal details.



Export

Print or save these views easily by exporting the workbook to a .pdf format.

# Business Context

## *Problem Addressed*

Leadership and finance stakeholders need a clear, trusted view of gross revenue performance—by fund, time, and classification—while retaining the ability to investigate underlying transactions without relying on analysts for follow-up.

## *Primary Users*

- Executive, Board and finance leadership
- Development / revenue operations
- Analysts supporting forecasting and reporting
- Fundraising teams performance monitoring
- Gift Administration's daily tracking, verifying and reconciling activity

## *Decisions Supported*

- Monitor revenue performance against commitments
- Identify fund-level trends and anomalies
- Move directly from high-level summaries to transaction detail during reviews, meetings or when resolving ad hoc inquiries

## **My Role**

### *Technical Analyst - End-to-End Power BI Design & Delivery*

- Designed the dashboard structure and navigation model to support both high-level overview and operational drill-down
- Implemented context-preserving drill-through and tooltips to enable self-service analysis without loss of analytical meaning
- Built views that balance monthly trends, commitments, and fund classification to reflect real stakeholder questions
- Established data governance accountability, including a shared data dictionary and links to source systems, to build trust and support executive reporting

## *Technical Applications*

Data engineering: SQL, SQL Server, SSIS

Data modeling: star schema / transformations

Analytics & DAX: time intelligence, commitments vs actuals

UX & Delivery: stakeholder engagement, requirements gathering, reverse engineering and documenting legacy architecture, UAT testing and follow up

Governance: dictionary, ownership, access assumptions

**This solution was designed to reduce dependence on analysts and the IT department while increasing decision confidence through transparent, governed, and context-preserving reporting.**

As of Jan 30, 2026, Gross Revenue has increased to \$247,725,381, a +12.4% shift YOY. While revenue is up, Gift Volume has declined by 13.0%, signaling a shift toward larger, concentrated donations. Crucially, 8.0% of total revenue is allocated to 'Highest Priority' funds, highlighting a continued reliance on restricted giving for the majority of our growth.

Appeal Area	Budget Risk Status	Gross Revenue Budget %
Community Giving	At Risk	81.38%
Estate Giving	At Risk	83.08%
Events	Critical	59.15%
Gift-in-Kind	Exceeding Target	176.19%
Major Gifts	On Track	97.19%
Other Revenue	Critical	0.41%
<b>Total</b>	<b>At Risk</b>	<b>88.48%</b>

# Gross Revenue: YOY

FY2026

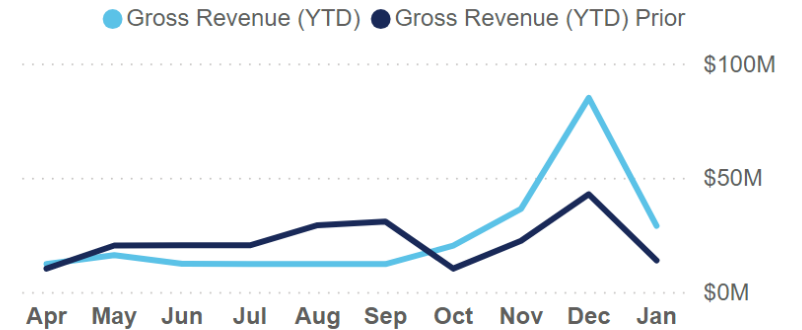
**Current YTD**  
From 2025-04-01 to 2026-01-30

**Same Period Last Year**  
From 2024-04-01 to 2025-01-30

Appeal Area	Gross Revenue	#Gifts	Budget	Budget %	GR Prior	#Gifts Prior	Budget Prior	Budget %
<b>Community Giving</b>	<b>\$9,471,921</b>	<b>1,314</b>	<b>\$11,638,800</b>	<b>81.38%</b>	<b>\$6,882,988</b>	<b>1,497</b>	<b>\$11,084,567</b>	<b>62.10%</b>
Community/Staff (incl. 50/50 raffle)	\$2,090,458	809	\$2,346,300	89.10%	\$1,648,557	959	\$2,234,567	73.78%
Direct Response (DM, TM & Digital)	\$2,227,301	469	\$3,885,000	57.33%	\$3,121,583	510	\$3,700,000	84.37%
Leadership (incl. UIC)	\$4,002,810	4	\$4,200,000	95.31%	\$2,000,010	2	\$4,000,000	50.00%
Tribute	\$1,030,422	20	\$1,050,000	98.14%	\$106,961	10	\$1,000,000	10.70%
Unsolicited/Doctor Solicited	\$120,930	12	\$157,500	76.78%	\$2,310	7	\$150,000	1.54%
<b>Estate Giving</b>	<b>\$6,019,273</b>	<b>12</b>	<b>\$7,245,000</b>	<b>83.08%</b>	<b>\$4,206,070</b>	<b>12</b>	<b>\$6,900,000</b>	<b>60.96%</b>
<b>Events</b>	<b>\$28,002,980</b>	<b>13</b>	<b>\$47,344,500</b>	<b>59.15%</b>	<b>\$39,004,535</b>	<b>16</b>	<b>\$45,090,000</b>	<b>86.50%</b>
<b>Gift-in-Kind</b>	<b>\$123,952</b>	<b>18</b>	<b>\$70,350</b>	<b>176.19%</b>	<b>\$60,687</b>	<b>18</b>	<b>\$67,000</b>	<b>90.58%</b>
<b>Major Gifts</b>	<b>\$204,092,356</b>	<b>32</b>	<b>\$210,000,000</b>	<b>97.19%</b>	<b>\$166,954,786</b>	<b>42</b>	<b>\$200,000,000</b>	<b>83.48%</b>
<b>Other Revenue</b>	<b>\$14,900</b>	<b>1</b>	<b>\$3,675,000</b>	<b>0.41%</b>	<b>\$14,900</b>	<b>1</b>	<b>\$3,500,000</b>	<b>0.43%</b>
Transfers	\$14,900	1	\$3,675,000	0.41%	\$14,900	1	\$3,500,000	0.43%
<b>TOTAL</b>	<b>\$247,725,381</b>	<b>1,390</b>	<b>\$279,973,650</b>	<b>88.48%</b>	<b>\$220,472,619</b>	<b>1,597</b>	<b>\$266,641,567</b>	<b>82.69%</b>

**Prior FY**  
From 2024-04-01 to 2025-03-31

Appeal Area	Gross Revenue	#Gifts	Budget	Budget %
Community Giving	\$11,209,280	1,892	\$11,084,567	101.13%
Estate Giving	\$7,546,316	20	\$6,900,000	109.37%
Events	\$39,005,523	20	\$45,090,000	86.51%
Gift-in-Kind	\$71,445	22	\$67,000	106.63%
Major Gifts	\$207,013,316	53	\$200,000,000	103.51%
Other Revenue	\$3,042,018	4	\$3,500,000	86.91%
<b>TOTAL</b>	<b>\$267,887,897</b>	<b>2,011</b>	<b>\$266,641,567</b>	<b>100.47%</b>



# Gross Revenue

FY2026

Designed to mirror common finance questions and solve for recurring data requests

## Current YTD

From 2025-04-01 to 2026-01-30

Appeal Area	Gross Revenue	Gifts GR	GAP	Gifts GAP	GAP % of GR	GAP Budget	Digital	Gifts Digital	Digital % of GR	Budget	Budget %
<b>Community Giving</b>	<b>\$9,471,921</b>	<b>1,314</b>	<b>\$915,353</b>	<b>1,314</b>	<b>9.66%</b>	<b>\$1,204,000</b>	<b>\$4,063,536</b>	<b>908</b>	<b>42.90%</b>	<b>\$11,638,800</b>	<b>81.38%</b>
Community/Staff (incl. 50/50 raffle)	\$2,090,458	809	\$313,569	809	15.00%		\$2,075,225	803	99.27%	\$2,346,300	89.10%
Direct Response (DM, TM & Digital)	\$2,227,301	469	\$278,660	469	12.51%		\$866,576	97	38.91%	\$3,885,000	57.33%
Leadership (incl. UIC)	\$4,002,810	4	\$200,422	4	5.01%					\$4,200,000	95.31%
Tribute	\$1,030,422	20	\$104,563	20	10.15%		\$1,001,236	5	97.17%	\$1,050,000	98.14%
Unsolicited/Doctor Solicited	\$120,930	12	\$18,139	12	15.00%		\$120,500	3	99.64%	\$157,500	76.78%
<b>Estate Giving</b>	<b>\$6,019,273</b>	<b>12</b>	<b>\$224,791</b>	<b>12</b>	<b>3.73%</b>	<b>\$268,000</b>	<b>\$15,460</b>	<b>4</b>	<b>0.26%</b>	<b>\$7,245,000</b>	<b>83.08%</b>
<b>Events</b>	<b>\$28,002,980</b>	<b>13</b>	<b>\$400,444</b>	<b>13</b>	<b>1.43%</b>	<b>\$481,000</b>	<b>\$28,002,980</b>	<b>13</b>	<b>100.00%</b>	<b>\$47,344,500</b>	<b>59.15%</b>
<b>Gift-in-Kind</b>	<b>\$123,952</b>	<b>18</b>					<b>\$19,653</b>	<b>9</b>	<b>15.86%</b>	<b>\$70,350</b>	<b>176.19%</b>
<b>Major Gifts</b>	<b>\$204,092,356</b>	<b>32</b>	<b>\$1,414,824</b>	<b>31</b>	<b>0.69%</b>	<b>\$1,697,000</b>	<b>\$15,178</b>	<b>6</b>	<b>0.01%</b>	<b>\$210,000,000</b>	<b>97.19%</b>
<b>Other Revenue</b>	<b>\$14,900</b>	<b>1</b>								<b>\$3,675,000</b>	<b>0.41%</b>
Transfers	\$14,900	1								\$3,675,000	0.41%
<b>TOTAL</b>	<b>\$247,725,381</b>	<b>1,390</b>	<b>\$2,955,412</b>	<b>1,370</b>	<b>1.19%</b>	<b>\$3,650,000</b>	<b>\$32,116,807</b>	<b>940</b>	<b>12.96%</b>	<b>\$279,973,650</b>	<b>88.48%</b>

## Prior YTD

From 2024-04-01 to 2025-01-30

Appeal Area	Gross Revenue	Gifts GR	GAP	Gifts GAP	GAP % of GR	GAP Budget	Digital	Gifts Digital	Digital % of GR	Budget	Budget %
<b>Community Giving</b>	<b>\$6,882,988</b>	<b>1,497</b>	<b>\$709,713</b>	<b>1,496</b>	<b>10.31%</b>	<b>\$1,143,800</b>	<b>\$4,387,549</b>	<b>1,005</b>	<b>63.74%</b>	<b>\$11,084,567</b>	<b>62.10%</b>
<b>Estate Giving</b>	<b>\$4,206,070</b>	<b>12</b>	<b>\$141,860</b>	<b>12</b>	<b>3.37%</b>	<b>\$254,600</b>	<b>\$9,176</b>	<b>2</b>	<b>0.22%</b>	<b>\$6,900,000</b>	<b>60.96%</b>
<b>Events</b>	<b>\$39,004,535</b>	<b>16</b>	<b>\$200,680</b>	<b>16</b>	<b>0.51%</b>	<b>\$456,950</b>	<b>\$30,001,430</b>	<b>14</b>	<b>76.92%</b>	<b>\$45,090,000</b>	<b>86.50%</b>
<b>Gift-in-Kind</b>	<b>\$60,687</b>	<b>18</b>					<b>\$18,303</b>	<b>7</b>	<b>30.16%</b>	<b>\$67,000</b>	<b>90.58%</b>
<b>Major Gifts</b>	<b>\$166,954,786</b>	<b>42</b>	<b>\$1,768,218</b>	<b>42</b>	<b>1.06%</b>	<b>\$1,612,150</b>	<b>\$22,504</b>	<b>12</b>	<b>0.01%</b>	<b>\$200,000,000</b>	<b>83.48%</b>
<b>Other Revenue</b>	<b>\$14,900</b>	<b>1</b>								<b>\$3,500,000</b>	<b>0.43%</b>
<b>TOTAL</b>	<b>\$220,472,619</b>	<b>1,597</b>	<b>\$2,935,681</b>	<b>1,575</b>	<b>1.33%</b>	<b>\$3,467,500</b>	<b>\$34,441,708</b>	<b>1,043</b>	<b>15.62%</b>	<b>\$266,641,567</b>	<b>82.69%</b>

# Gross Revenue & Commitments

FY2026

## Current YTD

From 2025-04-01 to 2026-01-30

Appeal Area	One-Time-Gift (A1)	Monthly (A2)	Pledge Payment (B)	New Pledges (C)	Actual YTD (A1+A2+B)	Commitments (A1+A2+C)
Community Giving	\$7,126,740	\$300,443	\$2,044,738	\$5,868	\$9,471,921	\$7,433,050
Estate Giving	\$6,019,273				\$6,019,273	\$6,019,273
Events	\$28,002,980				\$28,002,980	\$28,002,980
Gift-in-Kind	\$123,952				\$123,952	\$123,952
Major Gifts	\$86,667,209			\$130,494,867	\$204,092,356	\$217,162,076
Other Revenue	\$14,900				\$14,900	\$14,900
<b>TOTAL</b>	<b>\$127,955,054</b>	<b>\$300,443</b>	<b>\$119,469,884</b>	<b>\$130,500,735</b>	<b>\$247,725,381</b>	<b>\$258,756,232</b>
Total Funds Raised	(A1+A2) \$128,255,497		\$119,469,884	\$130,500,735	\$247,725,381	\$258,756,232
Budget	\$147,459,000		\$142,214,000	\$150,336,000	\$289,673,000	\$297,795,000
% of Budget	86.98%		84.01%	86.81%	85.52%	86.89%

## Prior YTD

From 2024-04-01 to 2025-01-30

Appeal Area	One-Time-Gift (A1)	Monthly (A2)	Pledge Payments (B)	New Pledges (C)	Actual YTD (A1+A2+B)	Commitments (A1+A2+C)
Community Giving	\$4,499,468	\$368,252	\$2,015,267	\$10,324	\$6,882,988	\$4,878,045
Estate Giving	\$4,206,070				\$4,206,070	\$4,206,070
Events	\$39,004,535				\$39,004,535	\$39,004,535
Gift-in-Kind	\$60,687				\$60,687	\$60,687
Major Gifts	\$76,924,320		\$90,030,466	\$118,116,607	\$166,954,786	\$195,040,927
Other Revenue	\$14,900				\$14,900	\$14,900
<b>TOTAL</b>	<b>\$128,056,599</b>	<b>\$368,252</b>	<b>\$92,047,768</b>	<b>\$118,131,182</b>	<b>\$220,472,619</b>	<b>\$246,556,033</b>
Total Funds Raised	(A1+A2) \$128,424,851		\$92,047,768	\$118,131,182	\$220,472,619	\$246,556,033
Budget	\$140,086,050		\$135,103,300	\$142,819,200	\$275,189,350	\$282,905,250
% of Budget	91.68%		68.13%	82.71%	80.12%	87.15%



From 2025-04-01 to 2026-01-30

Month	One-Time-Gifts (A1)	Monthly (A2)	Pledge Payment (B)	New Pledges (C)	Actual YTD (A1+A2+B)	Commitments (A1+A2+C)
+ Apr	\$152,611	\$29,121	\$12,004,497	\$3,008,769	\$12,186,229	\$3,190,501
+ May	\$4,097,756	\$28,491	\$12,014,539	\$3,005,560	\$16,140,786	\$7,131,807
+ Jun	\$318,994	\$28,979	\$12,008,847	\$87,507	\$12,356,820	\$435,479
+ Jul	\$149,628	\$32,336	\$12,003,921	\$750,000	\$12,185,886	\$931,965
+ Aug	\$144,459	\$29,661	\$12,001,918	\$80,000	\$12,176,038	\$254,120
+ Sep	\$138,208	\$35,098	\$12,008,462	\$751,715	\$12,181,768	\$925,021
+ Oct	\$8,164,222	\$34,852	\$12,070,106	\$92,910,183	\$20,269,180	\$101,109,258
+ Nov	\$36,303,212	\$29,626	\$12,198	\$9,200,000	\$36,345,036	\$45,532,838
+ Dec	\$49,594,107	\$26,143	\$35,333,333	\$17,707,000	\$84,953,583	\$67,327,250
+ Jan	\$28,891,856	\$26,136	\$12,063	\$3,000,000	\$28,930,055	\$31,917,992
TOTAL	\$127,955,054	\$300,443	\$119,469,884	\$130,500,735	\$247,725,381	\$258,756,232

# Fund Classification

FY2026

## Current YTD

From 2025-04-01 to 2026-01-30

Appeal Area	Highest Priority	HP Budget	HP % Budget	Core Research	Restricted	Endowed	Total
<b>Community Giving</b>	<b>\$6,082,475</b>	<b>\$7,299,000</b>	<b>83.33%</b>	<b>\$3,041,238</b>	<b>\$1,520,619</b>	<b>\$4,561,857</b>	<b>\$9,471,921</b>
Community/Staff (incl. 50/50 raffle)	\$836,197			\$418,099	\$209,049	\$627,148	\$2,090,458
Direct Response (DM, TM & Digital)	\$3,184,565			\$1,592,283	\$796,141	\$2,388,424	\$2,227,301
Leadership (incl. UIC)	\$1,601,124			\$800,562	\$400,281	\$1,200,843	\$4,002,810
Tribute	\$412,169			\$206,084	\$103,042	\$309,127	\$1,030,422
Unsolicited/Doctor Solicited	\$48,420			\$24,210	\$12,105	\$36,315	\$120,930
<b>Estate Giving</b>	<b>\$2,407,709</b>	<b>\$2,889,000</b>	<b>83.34%</b>	<b>\$1,203,855</b>	<b>\$601,927</b>	<b>\$1,805,782</b>	<b>\$6,019,273</b>
<b>Events</b>	<b>\$11,201,192</b>	<b>\$13,441,000</b>	<b>83.34%</b>	<b>\$5,600,596</b>	<b>\$2,800,298</b>	<b>\$8,400,894</b>	<b>\$28,002,980</b>
<b>Gift-in-Kind</b>				<b>\$12,395</b>	<b>\$74,371</b>	<b>\$37,186</b>	<b>\$123,952</b>
<b>Major Gifts</b>				<b>\$33,458,722</b>	<b>\$200,752,334</b>	<b>\$100,376,167</b>	<b>\$204,092,356</b>
<b>Other Revenue</b>	<b>\$5,960</b>	<b>\$7,117,500</b>	<b>0.08%</b>	<b>\$2,980</b>	<b>\$1,490</b>	<b>\$4,470</b>	<b>\$14,900</b>
Transfers	\$5,960			\$2,980	\$1,490	\$4,470	\$14,900
<b>TOTAL</b>	<b>\$19,697,337</b>	<b>\$30,746,500</b>	<b>64.06%</b>	<b>\$43,319,786</b>	<b>\$205,751,039</b>	<b>\$115,186,355</b>	<b>\$247,725,381</b>

## Prior YTD

From 2024-04-01 to 2025-01-30

Appeal Area	Highest Priority	HP Budget	HP % Budget	Core Research	Restricted	Endowed	Total
Community Giving	\$3,617,306	\$13,521,398	26.75%	\$1,808,653	\$904,326	\$2,712,979	\$6,882,988
Estate Giving	\$1,682,428	\$5,351,873	31.44%	\$841,214	\$420,607	\$1,261,821	\$4,206,070
Events	\$15,601,814	\$24,899,453	62.66%	\$7,800,907	\$3,900,453	\$11,701,360	\$39,004,535
Gift-in-Kind				\$6,069	\$36,412	\$18,206	\$60,687
Major Gifts				\$28,507,139	\$170,742,836	\$85,521,418	\$166,954,786
Other Revenue	\$5,960			\$2,980	\$1,490	\$4,470	\$14,900
<b>TOTAL</b>	<b>\$22,245,681</b>	<b>\$43,772,723</b>	<b>50.82%</b>	<b>\$39,636,796</b>	<b>\$176,345,151</b>	<b>\$102,226,126</b>	<b>\$220,472,619</b>



# Design as Data Culture: Interaction, Self-Service & Transparency

Built-in navigation, drill-through, and tooltips support accessible and confident self-service analysis.

## Analytics Hygiene Fundamentals

- shared definitions
- governed metrics
- context preservation
  - transparency
  - self-service
  - documentation

## 1. Navigation / Interaction

### Enables faster, self-directed analysis without analyst dependency

Stakeholders can move seamlessly between summary and transaction-level views using built-in navigation, drill-through, and tooltips—reducing ad-hoc data requests and enabling questions to be answered in context, i.e. in meeting or in response to impromptu inquiries.

Appeal Area	Gross Revenue	#Gifts	Budget	Budget %
Community Giving	\$9,471,921	1,314	\$11,638,800	8
Community/Staff (incl. 50/50 raffle)	\$2,090,458	809	\$2,346,300	8
Direct Response (DM, TM & Digital)	\$2,227,301	469	\$3,885,000	5
Leadership (incl. UIC)	\$4,002,810	4	\$4,200,000	9
Tribute	\$1,030,422	20	\$1,050,000	9
Unsolicited/Doctor Solicited	\$120,930	12	\$157,500	7
Estate Giving	\$6,019,273	12	\$7,245,000	8
Events	\$28,002,980			5
Gift-in-Kind	\$123,952			7

Date	Name	NET Gross Revenue	GAP	GIF Type	GIF Code	Fund	Report	Chasing Indicator	Re
2025-04-01	Community Giving	\$9,471,921	\$11,638,800	Direct	50/50	Community Giving	Community Giving		8
2025-04-01	Community/Staff (incl. 50/50 raffle)	\$2,090,458	\$2,346,300	Direct	50/50	Community Giving	Community Giving		8
2025-04-01	Direct Response (DM, TM & Digital)	\$2,227,301	\$3,885,000	Direct	50/50	Community Giving	Community Giving		5
2025-04-01	Leadership (incl. UIC)	\$4,002,810	\$4,200,000	Direct	50/50	Community Giving	Community Giving		9
2025-04-01	Tribute	\$1,030,422	\$1,050,000	Direct	50/50	Community Giving	Community Giving		9
2025-04-01	Unsolicited/Doctor Solicited	\$120,930	\$157,500	Direct	50/50	Community Giving	Community Giving		7
2025-04-01	Estate Giving	\$6,019,273	\$7,245,000	Direct	50/50	Community Giving	Community Giving		8
2025-04-01	Events	\$28,002,980		Direct	50/50	Community Giving	Community Giving		5
2025-04-01	Gift-in-Kind	\$123,952		Direct	50/50	Community Giving	Community Giving		7

- Drill-through preserves fund, time, and classification filters.

- Direct links to the source (CRM/FMS)
- Expandable hierarchy.

## 1. Contextual Insight

### Preserves analytical context while exploring detail

Tooltips and drill-throughs maintain fund, time, and classification context when users investigate individual transactions, preventing misinterpretation and ensuring insights remain decision-ready rather than exploratory.

Current YTD		From 2025-04-01 to 2026-01-30			
Appeal Area	Gross Revenue	Gifts GR	GAP	Gifts GAP	GAP %
Community Giving	\$9,471,921	1,314	\$915,353	1,314	
Community/Staff (incl. 50/50 raffle)	\$2,090,458	809	\$313,569	809	
Direct Response (DM, TM & Digital)	\$2,227,301	469	\$278,660	469	
Leadership (incl. UIC)	\$4,002,810	4	\$200,422	4	
Tribute	\$1,030,422	20	\$104,563	20	
Unsolicited/Doctor Solicited	\$120,930	12	\$18,139	12	
Estate Giving	\$6,019,273	12	\$224,791	12	
Events	\$28,002,980				
Gift-in-Kind	\$123,952				
Major Gifts	\$204,092,356				
Other Revenue	\$14,900				
Transfers	\$14,900				
TOTAL	\$247,725,381				

Gift Range:	Amt (GR)	#Gifts	% GR
\$10,000,000+	\$20,000,000	2	71.42%
\$5,000,000 - \$9,999,999	\$5,000,020	1	17.86%
\$2,500,000 - \$4,999,999	\$3,000,000	1	10.71%
\$1,000 - \$9,999	\$1,000	1	0.00%
\$100 - \$999	\$1,800	6	0.01%
\$1 - \$99	\$60	2	0.00%
Total	\$28,002,980	13	100.00%

- Hovering reveals Gift Range distribution.

## 3. Data Governance

### Builds trust through transparent, governed data access

A shared data dictionary with defined ownership and direct links to source systems (CRM/FMS) ensures users understand definitions, provenance, and limitations—supporting confident use in executive and financial reporting.

Description	Synonyms	Last Updated
Commitments represent the total financial obligation or intent expressed by donors during a specific reporting period. Unlike "Gross Revenue," which only accounts for money currently in the bank, Commitments provide a comprehensive view of the foundation's fundraising momentum and future revenue pipeline. The total of One-Time Gifts, Monthly Gifts, and New Pledges.	Commitments	2026-01-31
Business Logic/Calculation	Category	Data Type Role
Gift[One-Time Gifts] + Gift[Monthly Gifts] + Gift[New Pledges]	Column	Currency Fact
Owner/SME	Email	
Jim Lo, Chief Information Officer		
Lauren Groom, Chief Financial Officer		
Mala Palek, Vice President, Community Giving		

Prior YTD		From 2024-04-01
Appeal Area	Gross Revenue	Gifts
Community Giving	\$6,882,988	
Community/Staff (incl. 50/50 raffle)	\$1,648,557	
Direct Response (DM, TM & Digital)	\$3,121,583	
Leadership (incl. UIC)	\$2,000,010	
Tribute	\$106,961	

⊖ Sep	\$138,208
⊖ Oct	\$8,164,222
Community Giving	\$134,034
Estate Giving	\$3,913
Events	\$900
Gift-in-Kind	\$6,400
Major Gifts	\$8,004,076
Other Revenue	\$14,900
⊖ Nov	\$36,303,212
Community Giving	\$2,953,181
Events	\$1,450
Gift-in-Kind	\$15,248
Major Gifts	\$33,333,333

# Gross Revenue

Detail

Date	Name	NXT	Gross Revenue	GAP	Gift Type	Gift Code	Fund	Appeal	Closing Solicitor	Reference
2025-04-01	Hassan, Tariq ID13495	<a href="#">🔗</a>	\$5,445	\$817	Recurring Gift Pay- Cash	Credit Card	Longevity & Vitality Appeal	Sustainer Upgrade Campaign F'69	null	HF-GFT- RESTRICTED- EDU5-1002
2025-04-03	Cohen, Gabriel ID11009	<a href="#">🔗</a>	\$545	\$82	Recurring Gift Pay- Cash	Credit Card	Learners First Fund	Legacy Futures Fund F'93	null	HF-GFT- REVIEW- APPEAL-1047
2025-04-03	Petrova, Elena ID11138	<a href="#">🔗</a>	\$2,723	\$408	Recurring Gift Pay- Cash	Credit Card	Healthy Aging Fund	Digital Donor Engagement F'93	null	HF-GFT- RESTRICTED- EDU3-1024
2025-04-03	Vega, Arjun ID2002110	<a href="#">🔗</a>	\$5	\$1	Recurring Gift Pay- Cash	Direct Debit	Neuroimplant Innovation Fund	Season of Gratitude Appeal F'26	Aisha Patel; Carlos Vega	HF-GFT-INTL- TRACKING-895
2025-04-04	Leong, Elias ID2000315	<a href="#">🔗</a>	\$5	\$1	Recurring Gift Pay- Cash	Direct Debit	Neuroimplant Innovation Fund	Season of Gratitude Appeal F'26	Aisha Patel; Carlos Vega	HF-GFT-INTL- TRACKING-895
2025-04-04	Al-Farsi, Carlos ID2000572	<a href="#">🔗</a>	\$5	\$1	Recurring Gift Pay- Cash	Direct Debit	Neuroimplant Innovation Fund	Season of Gratitude Appeal F'26	Aisha Patel; Carlos Vega	HF-GFT-INTL- TRACKING-895
2025-04-06	O'Reilly, Sean ID33	<a href="#">🔗</a>	\$50	\$8	Recurring Gift Pay- Cash	On-line	Vision 2030 Medical Discovery Appeal	Leadership Giving Challenge F'26	Arjun Bhattacharya; Maya Sethi; Omar Khalil; Yuki Nakamura	HF-GFT-ONLINE- GIVE-182
2025-04-07	Singh, Sofia ID2001391	<a href="#">🔗</a>	\$5	\$1	Recurring Gift Pay-	Direct Debit	Neuroimplant Innovation	Season of Gratitude	Aisha Patel; Carlos Vega	HF-GFT-INTL- TRACKING-895
TOTAL			\$2,227,301	\$278,660						

Commitments Amount

Description

Commitments represent the total financial obligation or intent expressed by donors during a specific reporting period. Unlike "Gross Revenue," which only accounts for money currently in the bank, Commitments provide a comprehensive view of the foundation's fundraising momentum and future revenue pipeline. The total of One-Time Gifts, Monthly Gifts, and New Pledges.

Synonyms

Commitments

Last Updated

2026-01-31

Business Logic/Calculation

Gift'[One-Time Gifts] + 'Gift'[Monthly Gifts] + 'Gift'[New Pledges].

Category

Column

Data Type







Currency

Role

Fact

Owner/SME

Email

-  Jim Lo, Chief Information Officer
- 
-  Lauren Groom, Chief Financial Officer
- 
-  Mala Palek, Vice President, Community Giving
- 

# Data Model

