# **Project: Beta University Annual Fund**

## Purpose of the Beta University Annual Fund Project

Through this project, I gain hands-on experience in working independently while thoroughly analyzing the entire document to create accurate and well-structured deliverables. This process enhances my analytical reasoning skills. Successfully completing the project will also boost my confidence. Additionally, designing input and output screens based on the project description helps improve my logical reasoning and critical thinking abilities. This project serves as the first step towards developing a comprehensive database.

* **General Description**

The Development Office of Beta University seeks to obtain donations for its Annual Fund from a variety of donors. The fund collects over ten million dollars each year. Donors include graduating seniors, alumni, parents, faculty, administrators, staff, corporations, or other friends of the university. There are approximately 100,000 potential donors. The Annual Fund is directed by Suzanne Hayes, who is responsible for raising funds and keeping track of donations. Suzanne wishes to create a database to help with both of these major responsibilities.

* **Basic Operations**

Suzanne tries to raise funds in several ways during each fiscal year, which extends from July 1 to June 30. Each fall, all potential donors to the Annual Fund receive personalized letters from her, emphasizing their close ties to Beta University. The letters contain reply envelopes and forms on which the donors can fill in the amount they are pledging to contribute that year, and the method of payment they choose. Payment can be sent as a single check in the envelope, donors can choose deferred payments over a period of a year, or they can provide their credit card numbers to pay in a single lump sum. Often, the employer of the donor or of the donor’s spouse has a program to make a matching gift to the university, and the donor provides the contact information on the envelope. A letter acknowledging the gift and thanking the donor is sent as soon as the pledge is received. Suzanne is responsible for following up with the employer to collect the matching gift, which is paid in a single lump sum by the corporation.

Several fundraising events are held during the year. Suzanne solicits donations at a fall carnival, a holiday dinner dance, and a spring golf outing, among other events. Each class has a class coordinator who helps by contacting members of his or her graduating class. An additional letter from the class coordinator is made to ask for larger donations from reunion classes, those who are marking an important anniversary of graduation – whether five years, ten years, etc. – prior to their reunion celebration weekend. Each spring there is a phonothon during which current students and other volunteers call other potential donors and solicit pledges. All alumni who have not contributed by the end of May receive telephone calls from their class coordinator asking them for a donation. If the class coordinator is unable to contact his or her classmates, Suzanne or a volunteer makes these calls instead.

The donations are categorized by the group they are from, by the year of the donor (if applicable) and by size. There are ten “donor circles”, which are categorized by the size of the gift – President’s Circle for gifts over $50,000, Platinum Circle for gifts over $25,000, and so on. Gifts under $100 are not listed as belonging to a circle. An annual report listing all donors by category, year and donor circle is published and mailed to all actual and potential donors during the summer. The report does not list the actual amount each person contributed.

* **Information Needs**

At present, Suzanne has a mailing list on a word processor that is used to generate labels and letters to potential donors. She would like to be able to personalize the letter further by adding a reminder of the amount of money the donor gave the previous year. A spreadsheet is used to keep track of pledges and donations. Large pledges from individual donors are ordinarily paid in monthly installments rather than in one payment, but currently there is no way to keep track of those payments. When a database is developed, Suzanne would like to be able to send reminders if payments are over a month late.

An Annual Fund Gift form is sent with all letters soliciting funds, with blanks for the donor to fill in the applicable information, as follows:

**Beta University Annual Fund Gift -** Donor Name, Donor Address, Donor Category, Year of Graduation, Date of Pledge/Gift, Amount Pledged, Amount Enclosed, Payment Method, Number of Payments Chosen, Credit Card Number, Matching Corporation Name, Matching Corporation Address, Name of Spouse (if matching gift is from spouse’s employer),

When pledges are received by class representatives or during the phonothon, the same information is collected on similar forms.

* **The following reports are needed:**

**Annual Report to Donors -** This report was described previously. This report is an important fundraising tool for the following year’s drive, since it is mailed to each potential donor. The report should list donor name, donor address (amounts should not be included). The donor names have to be categorized by donor category. The report should include summaries, including the total amount raised from all sources, the total for each class, the percent participation for each class, the total for each category, the grand total for each donor circle, and the class total for each donor circle.

**Monthly Pledge Report** - This is an internal report that is generated at the end of each month. Suzanne uses this report to evaluate the progress of the fundraising for the year so far. The report gives the totals and percentages of pledges and gifts received for the current month in all categories. The report should list the donor name, donor address, pledge date, and pledge amount. The report should include summaries, including the total pledged amount from all donor categories and including the total payment amount from all donor categories.

**Payments Due Report** - This is an internal report that is generated at the end of each month. Suzanne uses this report to list the pledge payments that were due that month but were not received. The report should list the donor name, donor address, donor amount due, donor date due, donor pledge amount, donor payment amount (received so far), and donor previous payment date (if any).

**Event Attendee Pledge Report** - Suzanne would like to generate a report that shows who attends each of the fundraising events, and what pledges and gifts were received from the attendees. The report should list the event name, attendance name, attendance address, amount pledged, amount paid, payment method, number of payments chosen, credit card number, matching corporation name, matching corporation address, spouse name(if spouse’s employer also matches gifts) , spouse matching corporation name, spouse matching corporation address.

**Class Representative Contact List** - For each class representative, Suzanne would like a list of classmates to be contacted. The report should list the classrep name, classrep address, classrep telephone number, classrep last year’s donation amount, and classrep this year’s donation pledge amount, and classrep this year’s payment amount.

**Phonothon Volunteer Contact List** - Each volunteer caller is given a list with information about the potential donors he or she is expected to call, including the name, address, telephone number, category, graduation year (if applicable), last year’s donation amount, this year’s donation pledge amount, and this year’s donation payment amount.

* **Project Steps**

**Step 1.1 – Using Microsoft Word, create every input document that provides information to be stored in the database. For each input document, also provide a description/purpose (write out) of each input document.**

* **Beta University Annual Fund Gift Form:**Figure 1(a) is Annual Fund Gift Form which is send with all letters soliciting funds, with blanks for the potential donors to fill in the applicable information. Also, the same form of information is collected on similar forms when pledges are received by class representatives or during the phonothon. This form can be useful to solicits donations at a fall carnival, a holiday dinner dance, and a spring golf outing, among other events.

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Annual Fund Gift Form

|  |  |  |
| --- | --- | --- |
| Donor’s First Name: Type Here.. |  | Donor’s Last Name: Type Here.. |

Donor’s Address:

|  |  |  |
| --- | --- | --- |
| Street: Type Here.. | City: Type Here.. | ZIP Code: Type Here.. |
| State: Type Here.. | Country: Type Here.. |  |

Donor’s Category:

|  |  |  |
| --- | --- | --- |
| Graduating Senior | Alumni | Parents |
| Faculty | Administrator | Staff |
| Corporation | Others |  |

Year of Graduation: Type Here..

Date of Pledge/Gift: Type Here..

Amount Pledged: Type Here..

Amount Enclosed: Type Here..

Payment Method:

|  |  |  |
| --- | --- | --- |
| Credit Card / Debit Card | Deferred For 1 year | Cheque |

Number of Payments Chosen: Type Here..

|  |  |
| --- | --- |
| Credit Card Number: Type Here.. | Card Expiration Date: Type Here.. |
|  | CVV: Type Here.. |

Matching Corporation Name: Type Here..

Matching Corporation Address:

|  |  |  |
| --- | --- | --- |
| Street: Type Here.. | City: Type Here.. | ZIP Code: Type Here.. |
| State: Type Here.. | Country: Type Here.. |  |

Name of Spouse (if matching gift is from spouse’s employer): Type Here..

Figure: 1(a): Annual Fund Gift Form

**Step 1.2 – Using Microsoft Word, create every routine report to be produced using the database. For each routine report, also provide a description/purpose (write out) of each routine report.**

* **Annual Report to Donors:**

The given annual report provides information on donors from the previous year, including their names, addresses, and total amounts donated. This data is categorized by donor category, which may be useful for future fundraising events. Additionally, the report details last year’s participation percentage for each class and includes class-wise totals and grand totals for each donor circle. This information will help analyze which donor class contributes more funds.

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Annual Report to Donors

**From:** yyyy to yyyy

**Date of Report:**

|  |  |  |
| --- | --- | --- |
| Name | Address | Donor category |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Total for Each Class | Participation for Each Class (%) | The Total for Each Category | Grand Total for Each Donor Circle | The Class Total for Each Donor Circle |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| Donor category | Total donation | Percentage participation |
| Graduating Senior |  |  |
| Alumni |  |  |
| Parents |  |  |
| \_\_\_\_\_\_\_\_\_ |  |  |

**Total Donation:** \_\_\_\_\_\_\_\_\_\_

* **Monthly Pledge Report:**

The given Monthly Pledge Report is generated at the end of each month. This report tracks the progress of fundraising throughout the year. This report provides details of total pledges, percentage of pledges and gift received according to categories. Along with donor name, address, pledge date and pledge amount, this report gives total pledge and total payment amount as well.

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Monthly Pledge Report

**Month:** mm/yyyy

**Date of Report:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Donor Name | Donor  Address | Category | Pledge Date | Gift Received | Payment Amount | Pledge Amount |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Total: |  |  |  |  | \_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_ |

* **Payments Due Report:**

The given Payment Due Report provides a list of pending pledge amounts that were due last month but have not yet been received. This report provides information about due payments, including the amount due, due date, previous payment date, as well as the donor's name and address.

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Payments Due Report

**Date of Report:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Donor Name | Donor Address | Due Date | Due Amount | Pledge Amount | Payment Amount | Previous Payment Date |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Total: |  |  | \_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_ |  |

* **Event Attendee Pledge Report:**

The given Event Attendee Pledge Report describes who attended each of the fundraising events and details the pledges and gifts received from the attendees. It also includes information on payment methods and matching corporation details. This report will help evaluate the maximum and minimum funds received at each event and provide details on potential donors.

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Event Attendee Pledge Report

**Date of Report:**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Event name | Attendees name | Attendees address | Amount pledge | Amount paid | Payment method | Number of payments chosen | Credit card number | Corporation name | Corporation address |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Spouse name | Spouse corporation name | Spouse corporation address | Gifts |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

* **Class Representative Contact List:**

The given report is the Class Representative Contact List, which provides information on all class representatives. The report includes contact details, donation amounts, and pledge amounts for both the previous year and the current year.

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Class Representative Contact List

**Date of Report:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Classrep Name | Classrep Address | Classrep Telephone Number | Last year donation amount | This year pledge amount | This year payment amount |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Total: |  |  | \_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_ |

* **Phonothon Volunteer Contact List:**

The given report is the Phonothon Volunteer Contact List, which will be provided to volunteers to contact potential donors for fundraising or event invitations. This list includes the contact details of donors along with their category, graduation year, donation amount, pledge amount, and payment amount for both the previous year and the current year.

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Phonothon Volunteer Contact List

**Date of Report:**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Donor Name | Donor  Address | Telephone Number | Category | Graduation Year | Last year donation amount | This year’s pledge amount | This year’s payment amount |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

**Step 1.3 – Using Microsoft Word, create every input and output screen for each routine transaction to be performed against the database. For each input and output screens, also provide a description/purpose (write out) of each input and output screen for each routine transaction.**

Assume the data from the input documents is already stored in some unknown form, and do not include transactions that simply insert new records, update existing records, or delete existing records.

**Step 1.3.a – Data Entry**

The user manages to add new records of new donors or new members of already existing alumni groups. The user inputs the following details of the new donor, name, year if applicable and pledge amount. The output displayed by the screen would show, size and group the donor belongs to as well as the new total amount of money that will be coming from that group.

**1.3.b – Data Deletion**

The user is able to delete existing records that will no longer be useful, for example, members of groups or donors dropping out. The user simply enters the members’ name and the screen displays the group, size and year and the members’ records are cleared.

**1.3.c - Locating transactions that are over a month late**

The user retrieves and views already existing data of transactions for that month which will show the already paid and the yet to be paid. To do this the user enters the class group name for alumni, and the size for individual donors, then the screen will display the names of people in their specific groups including their coordinators and the individual donor names in their different categories according to size.

**1.3.d – Monthly instalments of large pledges**

The user types in the group name and size and the screen displays the records of monthly installments donated by individuals in that group.

**Step 1.4 – Provide (write out) an initial list of assumptions for the project.**

* Each donor should have a unique ID to differentiate donors with the same name.
* Each Company should have a unique ID to differentiate Company with the same name.
* Potential donors (those who donate regularly) should be distinguished from other donors.
* No credit card information will be stored in the system for security reasons, only the payment method needs to be recorded.
* Delete non-working phone numbers to streamline the Phonothon process.
* Donations and donors should be categorized by sources such as fundraising events, Phonothon, etc.
* The system will need to track installment payments and remind donors of missed payments.
* To maintain a clean and efficient database, information of donors who have made only a single donation (one-time donors).