Sunlight University Fundraising

**General Description**

The Institutional Outreach Office (IOO) of Sunlight University is tasked with obtaining donations for its Annual Fund from a variety of donors - graduating seniors, alumni, parents, faculty, administrators, staff, corporations, or other friends of the university.

**Basic Operations**

The financial year lasts from July 1 to June 30. Each fall, all potential donors to the Annual Fund receive letters and emails, emphasizing their close ties to Sunlight University. The recipients are directed to return a pledge stating how much money they plan to contribute for the coming year and the method of payment. Payment can be sent as a whole or donors can choose to make regular payments (4 or 6) during the year.

The letters/emails sent out include a reminder of the amount of money the donor gave the previous year and reminder letters/emails are sent if payments are over a month late.

Several fundraising events are held during the year. The IOO solicits donations at fall homecoming and a spring golf outing, among other events.

Each class has a class representative who helps by contacting members of his or her graduating class. An additional letter/email from the class coordinator is sent 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 phone drive during which current students and other volunteers call potential donors and solicit pledges. All alumni who have not contributed by the end of May receive phone calls from their class coordinator asking them for a donation. If the class coordinator is unable to contact his or her classmates, a university representative 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 five donor groups based on the contribution – Platinum (above $20000), Gold ($15000 – $20000), Silver ($10000 - $15000), Bronze ($5000 to $10000), Regular (below $5000).

**Task**

You have been asked to develop a database system that the office manager will be able to maintain. The system will be used to keep information about donors, donations, class contacts, volunteers etc.

**Information Needs**

**Pledges**: An Annual Fund Gift form is sent with all letters/emails soliciting funds, with blanks for the donor to fill in the applicable information, as follows: donor details, date of pledge, amount pledged, payment details. When pledges are received by class representatives or during the phone drive, the same information is collected.

**Lists of Class Representative and Volunteers**

**Annual Report to Donors:**This is produced in the summer and lists names, not amounts and which category each person is in. The report also includes 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 group, and the class total for each donor circle.

**Monthly Report:** This is an internal report used to evaluate the progress of the fundraising for the year so far. It gives the totals and percentages of pledges and gifts received for the current month in all categories.

**Payments Due Report:**A monthly report listing the pledge payments that were due that month but were not received.

**Event Report**IOO would like to generate reports showing who attends each of the fundraising events, and what pledges and gifts were received from the attendees.

In addition to the forms and reports listed here, there are several others that would be useful.