

Donor Giving Categories

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

Donor Giving Categories (sometimes referred to as Giving Clubs) are categories defined by the school to identify donors who have given at a particular level.

Schools define their levels differently and often times have different definitions for what "giving" means to qualify for a level. Schools can have multiple sets of giving categories, but the two most common types of giving categories are for Annual Fund campaigns and for Lifetime giving. See details below for how to configure levels and giving definitions.

Annual Fund

These categories are often published in the Annual Report, listing each donor whose giving has qualified them to be part of a particular giving category for the Annual Fund.

Annual Fund Giving categories must be associated with the Annual Fund Giving Category Group and will automatically look at Annual Fund giving only. The giving category Giving Definition can be set on the AF campaign record (located on the Admin tab of the campaign record). The options for giving category giving definitions are:

- Donations and Pledges
- Donations
- Pledges
- Donations and Soft Credit
- Total Giving (Donations, Soft Credit, Outstanding Pledges, Outstanding Pledge Soft Credit)

On the giving category itself, a description and minimum amount can be set. Any donors who then reach that minimum amount based on the giving definition chosen will have the appropriate giving category set on the giving history record for the Annual Fund campaign.

Lifetime

These categories are used to look at lifetime giving by a donor and classify them into a particular level.

Lifetime Giving categories must be associated with the Lifetime Giving Category Group. The giving category giving definition for the Lifetime group can be set on Campaign 0 (“None”) – most schools select “Donations and Soft Credit”. Optionally, Funds can be excluded from Lifetime giving categories by un-checking the flag on the fund called “Include in Lifetime Giving Category” (using the Fund List query or the Configuration tab of the Fund detail screen).

Any donors who then reach the minimum amount based on the giving definition chosen will have the appropriate giving category set on their record (seen in the “Lifetime Giving Category” field on the Giving History tab of the household or organization record). Lifetime Giving Categories are manually posted using the Development menu option, “Post Household Lifetime Giving Categories.”

Alumni Only and Alumni Years Values

When looking at the “Giving Categories” query on the Development homepage, the Alumni Only field appears by default and the “Alumni Years” field can be displayed by clicking the checkmark in the query design. Both of these fields can be updated directly from this query.

- **Alumni Only:** Filters this category to include only people with the Alumni role.
- **Alumni Years:** Sets the range of years in which the person with the Alumni role graduated in order to be contained within this giving category. This is set to 10 years by default.

Adding New Categories

To create a new giving category, use the green + next to the “Donor Giving Categories” link under Configuration on the Development homepage and set the type, description and minimum amount for the category.
