Blackbaud Fundraiser Performance Management[™]

DATA REQUEST GUIDE Frequently Asked Questions

Version 2021.1

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Overall

How should I format the files? CSV? Tab Delimited?

The files should be in either a comma separated values (csv) or tab delimited text (txt) format. All files should include column headers. If you are using the csv format, use double quote enclosures for any fields that could contain commas.

How should I name the files?

Name each file the same as it is named in the Data Request Guide. For example, the Entity file should be named "Entity" and should not include a date stamp or any other information that would change the name of the file daily. If splitting a file into multiple files, name the files by adding a letter and short description (e.g., Entity_a_Persons, Entity_b_NonPersons).

Do I need to include header rows?

Yes, include a header row in each of the files. The column header names should match the names used in the Data Request Guide.

Can I break apart the files?

Yes, if you feel it would be easier to provide us the requested file by splitting one file into two or more files you may do so. For example, some customers find it easier to split the entity file into two files, one including person entities and one including non-person entities. Another example may be with Participation History, as various participations may be stored in separate areas/tables in your database (e.g., events are stored separately from undergraduate and alumni participations). If splitting a file into multiple files, name the files by adding a letter and short description (e.g., Entity_a_Persons, Entity_b_NonPersons, Participation_History_Events).

What do I do if I don't have some of the requested data?

If you do not have the requested field, please include the column in your file with the column named in the header and the values blank. For example, if you do not track Occupation or Industry, you would still include those columns in the Entity file and include the header name for the field, but the data in the columns would just be blank.

I am worried that the quality of my data in my database is not good/accurate/complete, etc., what data is needed to make effective Predictive Scores?

Many of our customers are concerned about the completeness and accuracy of their data. Yet, Blackbaud has extensive experience in working with the data you have available and adapting our predictive models and Fundraiser Performance Management to your situation. In general, data fields like giving history and available demographic information, such as age, marital status, school of graduation, class year, event/committee participation, home address, etc. are just some of the many inputs to our models. We have many examples we can share in which we have adapted our models to accommodate for missing or incomplete data.

How secure is the Fundraiser Performance Management?

Blackbaud takes information security very seriously and partners with leading world class datacenters, also compliant with internationally recognized information security standards and frameworks such as the ISO-27001-2013 and SSAE16. Blackbaud Fundraiser Performance Management (BBFPM) is built on a three tier, distinct network architecture in an effort to ensure its requirements for comprehensive defense. Please request our data practices document for further information.

Do I need to send all data each night?

Yes, you should send all data files each night, and not just updates or partial files. Sometimes there is initial concern regarding the processing time for producing full files but following the initial compilation of the files this is typically a non-issue.

How do we validate the data?

Data files are reviewed when received then feedback and guidance is provided by your implementation analyst. We review each file field by field and work with you on resolving any issues. We also provide you several reports to verify key data, such as which entities should be included for modeling and verifying your last five years of giving history.

How are files monitored to ensure that 'good data' is processed if there is an issue with my file generation?

File sizes and the row counts of each file are monitored and checked for significant changes before processing. A file will only be processed if it has not decreased more than 5% in either size or record count compared to the previous day's files. Additionally, a file will not be processed if it is multiple days old. We will keep the data in Fundraiser Performance Management from the most recent successful run. If a file issue persists, the support team will reach out to your system administrator to work to resolve the file monitoring issues.

I am an existing customer and looking at this most recent Data Request Guide, I noticed that my file names are different than the ones in this document, should I rename my files? I noticed that some of the fields I am sending are no longer being requested, should I remove those field(s) from my existing files?

No, please do not rename the file that you are transferring as that will negatively impact the nightly processing of your data. For example, if your file that stores officer activities and/or contacts is named "Officer Contact History.csv" and you notice that the Data Request Guide labels it 3.1a Activity History, you do NOT need to rename the file to reflect the new naming convention. Or, if you notice in the Entity file that you are sending Spouse Prefix, but noticed that the data is not requested in the file according to the Data Request Guide, you should NOT remove the Spouse Prefix field or any other fields you are currently sending. Please do not change the names of any existing files or existing fields and do not remove or reorder the existing fields you are currently sending.

If you have any other data questions or challenges when looking at the files requested in this document that are outside the scope of the newly added fields, please contact support before making changes to the existing processing and files to ensure a consistent and correct transfer of your data.

Initial Implementation

What does my institution get from Blackbaud Fundraiser Performance Management?

Custom Predictive Models – You will receive accurate data for decision making and setting priorities. The custom predictive models allow you to focus on the prospects most likely to deliver annual fund contributions or major gifts. The scoring approach is more predicative than wealth screening alone because it factors in the prospect's inclination to make a gift, is customized specially to your institution, and is kept up-to-date and accurate.

Software Tools – Your management team and users will have daily dashboard-style visibility into the results of your efforts to help you monitor and measure your process. This visibility helps your team develop trust in the organization's metrics as you work together to achieve organizational goals.

The Community Network – The Community Network of subscribing colleges and universities will help you understand your performance compared to your peers. Additionally, Community Network curricula, research and benchmark studies help inform your strategic planning and strategy.

Consulting Resources – The Business Consulting Team will provide your executives and users of all levels with ongoing support through the lifecycle of your subscription. This support expedites your results, as well as provides training and guidance that promotes a rapid return on your investment.

My institution just became a customer, now how do we implement Blackbaud Fundraiser Performance Management?

The implementation process can be broken down into five phases:

1st phase: Initiation – Introductions to your dedicated Customer Care Team and the Implementation process.

2nd phase: Data Collection & Validation – The Customer Care Team works closely with your key stakeholders and data contacts to set the stage for a successful implementation and guides you through a process for translating and mapping your data to Blackbaud via a secure nightly file transfer. This phase is where 95% of the work is done by your institution (the other 5% involves testing Fundraiser Performance Management during Pilot Testing). You will send us all of your data files as requested in the Data Request Guide. We will work with you and send feedback on your data to make sure that it matches closely to what is requested and what you would see in your donor database. At the end of data collection, we will validate that the data and numbers that Fundraiser Performance Management would report match your internal reporting in the form of dollars and donors and identify those constituents who will receive Custom Predictive Scores. To best organize the work and timeline, the data files found in the Data Request Guide are broken down by priority groups. The priority 1 files will contain all of the information for the validation process. We can proceed to the next phase, while your group continues to complete the priority 2 and 3 files.

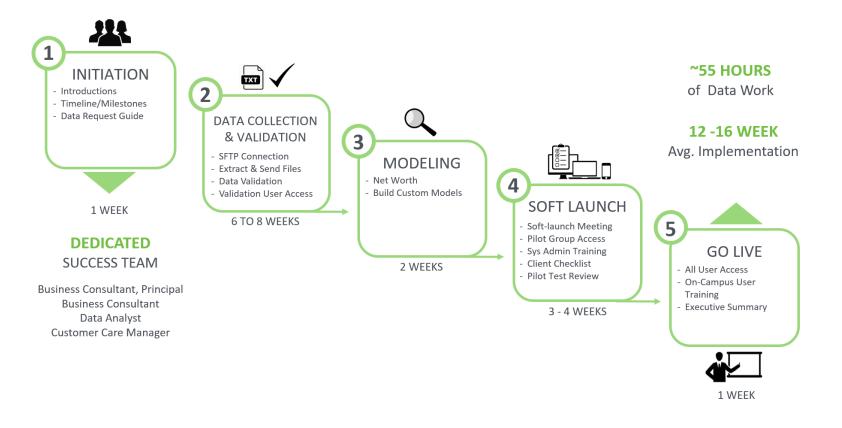
3rd phase Predictive Modeling and Fundraiser Performance Management Build – We will get to work on mapping your data to Fundraiser Performance Management. We append a net worth estimate on the individuals within your identified constituent pool that is a consumer marketing data variable based on a proprietary model that considers individual household financial assets, non-financial assets, and debts. We'll also start work on your custom Predictive Scores that model and reflect your specific constituency, giving history, situation, and goals. The outcome of this phase will be to have all of your data and Predictive Scores in your subscription. We'll also schedule a quick System Administrator training to train a user(s) at your institution on how to create new users, update existing users, set user permissions, perform code mapping, and set staff/officer peer groups.

4th phase Pilot Testing – This phase begins with a soft-launch meeting where we'll go over your Custom Predictive Scores and introduce you to Fundraiser Performance Management with your data incorporated. You will then have an opportunity to conduct live testing of Fundraiser Performance Management with a small select group of key testers before the Go-Live. We perform an additional set of validation around Major Giving and officer metrics to confirm that the officer performance around contacts, activities, proposals, and prospect assignments match your internal performance metrics.

5th phase Go-Live –Your staff members will be trained on Fundraiser Performance Management, grant access to your institution's users, meet with the executive team, and discuss strategies in order to maximize the value of the subscription for everyone focused on advancement.

What is the typical target timeline for Fundraiser Performance Management Implementation?

Most subscribing institutions are up-and-running on Fundraiser Performance Management within sixteen weeks. The typical sixteen week timeline is outlined as follows:



Does implementation of Fundraiser Performance Management require a large-scale database conversion or special staffing?

Fundraiser Performance Management is a web-based software-as-a-service solution that works with any donor database and provides tools, metrics, reports, and business intelligence to help advancement organizations work more efficiently and effective. As such, implementing does not require a large-scale system replacement or database conversion. The tools and reports are ready for you right out of the box. Product enhancements and updates are managed for you and provided as part of your subscription. It is accessed via a web browser and is curated specifically for higher education based on our deep expertise and continuous feedback from members of the Community Network.

An institution's primary tasks are to establish the nightly feed to supply up-to-date fundraising information from your institution's donor management system(s) (see the Data Request Guide) and to validate data translations. With Fundraiser Performance Management there is no software to install or maintain, nor is there the need to have special staff or consultants to establish connectivity.

How does Fundraiser Performance Management ensure the models stay relevant to my institution?

During nightly processing of your data, any new constituents added to the database that match the modeling population criteria are scored that night. Annually, the model performance for your institution is reviewed and shared with you. Adjustments are made, if necessary, to fine-tune performance. We assign scores to alumni, friends, parents, and any other constituents selected for modeling within your database, and we rescore these constituents on an annual basis at the close of your fiscal year.

What reporting capabilities are available?

Fundraiser Performance Management is specifically designed to support the management of higher ed advancement. Users can easily configure dashboards, using ready-made Viewports that provide snapshots of critical, frequently used data and actionable metrics. Drill-down capabilities mean additional details and constituent profiles are just a click away. Additionally, our Targeter tool is specifically designed to enable all types of users to create their own queries and analyze data without the help of a database specialist.

During my initial implementation, what files should I work on first?

During an institution's initial implementation, to best organize the work and timeline, the data files found in the Data Request Guide are broken down by the following priority groups. The Priority 1 Files will help with validating your dollar and donor counts along with looking at all of your constituents and identifying those who will receive predictive scores. This will also give you time to work on the remaining Priority 2 and 3 files while we continue with the implementation project.

Files by priority group:

Priority 1 Files	Priority 2 Files	Priority 3 files	
File 1.1: Entity	File 2.2: Appeals	File 1.2b: Email Addresses	
File 2.1: Donor Transaction History	File 2.3: Appeal Entity	File 1.5b: Giving Societies	
File 1.2a: Addresses	File 3.1a: Activity History	File 1.7: Athletics	
File 1.2c: Phones	File 3.1b: Activity Details	File 1.8: Associated Entities	
File 1.3: Degrees	File 3.2: Staff Information	File 4.2: Customer Specific Codes	
File 1.4: Relationship Type	File 3.3: Prospect Entity	File 4.3: Social Media Links	
File 1.5a: Participation History	File 3.4: Prospect Status	File 4.4: Web Addresses	
File 1.6: Contact Restrictions	File 3.4b: Prospect Stage History		
File 4.1: Code Translation Table	File 3.5: Portfolio Assignments		
	File 3.6a: Proposal		
	File 3.6b: Proposal Comments		
	File 3.7: Proposal Assignment		

File 1.1: Entity

Which entities should I include? Should I include all entities, or only entities I solicit?

Include all entities, regardless of relationship type, relationship status, or whether or not you solicit them. We will work with you to determine which entities are active and should receive custom Predictive Scores, but all entities, including those who are deceased and inactive, are necessary for accurate historical reporting.

Where should I provide names for corporations and other non-persons?

Include names for corporation, foundations, etc. in the first name field.

Can I include non-person entities in a separate file?

Yes, non-person entities can be included in a separate file. Use the same file format for both files, and name them with the file name plus a letter and a short description, such as "Entity_a_Persons" and "Entity_b_NonPersons".

What is Primary Relationship Type? I have a constituent with multiple Relationship Types, how can we identify all of them?

In the Entity file, we request Primary Relationship Type. An entity can only have one primary relationship type, so you need to choose a hierarchy to choose the primary relationship type for entities with multiple relationship types. In the Relationship Type file, you should provide all relationship types for your entities. For example, if one entity is an Undergraduate Alum, a Graduate Alum, and a Past Parent, you can provide all three types in the Relationship Type file. However, for the Entity file, you need to populate the Primary Relationship Type field with only the one relationship type that the institution primarily sees that constituent as based on the determined hierarchy.

Where does this data show up in Fundraiser Performance Management?

Most of this data in this file is biographical information that is displayed on the constituent's Relationship Profile (see Appendix A: Relationship Profile). The Primary Entity ID field indicates which spouse is the primary record in a household. You are also able to lookup entities in Targeter using either the entity ID or the first/last names provided in this file, and can search for entities based on various fields, such as their primary relationship type, birth date, employer, etc.

File 1.2a: Addresses

How many addresses can I provide?

You can provide as many addresses as you have for the entity, but they should all be valid addresses (do not include previous addresses, inactive, former, or invalid addresses).

Should I include postal codes for international addresses?

Yes, you can include postal codes for international addresses in the Zip field.

Is Zip Code or Zip Code with the Zip+4 preferred for an address?

We prefer the Zip Code with the Zip+4, if it is available, for an entity's address (e.g., 91234-8765), but will also accept standard Zip Codes (e.g., 90210).

Where does this show up in Fundraiser Performance Management?

Address information is shown in each constituent's Relationship Profile. You can also search for constituents in Targeter based on address information such as state, zip code, etc. Also, if your institution is having the net worth element appended, then this will be matched based on each constituent's primary home address provided in this file. In Targeter, and anytime there is a list of entities, a user is able to view the results in Map view and see the entities plotted geographically on a map, on which you can zoom in and out, overlay state and county density views, and click on an entity's pin for some quick information (see Appendix: Targeter).

File 1.2b: Email Addresses

How many email addresses can I provide?

You can provide as many active email addresses as you have for the entity, including the Preferred Email address provided in the Entity file.

File 1.2c: Phones

How many phones can I provide?

You can provide as many active phone numbers as you have for the entity. However, only a maximum of one phone number per entity can be indicated as true for each of the four indicators.

How should phones be formatted?

The Phones field is a simple string/text field, which allows you to determine how you would like phone numbers to display in FPM. Some common, easy to read formats include: (123) 456-7890, 123-456-7890, 123-456-7890. You can also include extensions in the same field, e.g., (123) 456-7890 ext. 147.

File 1.3: Degrees

I have some degree information for parents and friends that graduated from other institutions. Should I include this information?

Do not include degree information from other institutions. Only include degree information from your institution.

How do I include constituents with double majors or multiple degree years?

You can include this by sending multiple rows per entity as seen in the examples below.

Example 1: Alumni with a double major in the same degree year.

Entity ID	School of Graduation	Degree Year	Degree of Graduation	Major
12345	BUS	1989	BS	BUSN
12345	AS	1989	BS	ECON

Where does this show up in Fundraiser Performance Management?

School and Degree information is shown on each constituent's Relationship Profile. You can also search for constituents in Targeter based on their school and degree information. We also summarize giving data in reports by school of graduation and year of graduation.

File 1.4: Relationship Type

What is the difference between relationship type and primary relationship type?

In the Entity file, we request Primary Relationship Type. An entity can only have one primary relationship type, so you need to choose a hierarchy to choose the primary relationship type for entities with multiple relationship types. In this file, you should provide all relationship types for your entities. For example, if one entity is an Undergraduate Alum, a Graduate Alum, and a Past Parent, you can provide all three types in this file. One row should be provided for each relationship type, so in this example there would be three rows for this entity.

Where does this show up in Fundraiser Performance Management?

All of a constituent's relationship types are shown in their Relationship Profile. You can also search for constituents in Targeter based on their relationship types.

File 1.5a: Participation History

What types of participations can I include in this file?

This file is very broad and can include any type of participation. Some common types include events, student clubs and activities, Greek organizations, alumni associations, intramural athletics, volunteering, committees, boards etc. Entity giving society membership should be provided in the Giving Societies file 1.5b. We request the Participation Category to differentiate the different types of participations.

I track different participation information in different systems or parts of my database. Can I provide more than one Participation History file?

Yes, you can provide more than one Participation History file if that is more convenient for you. Use the same format for both files, and name them with the file name plus a letter and a short description, such as "ParticipationHistory_a_Events" and "ParticipationHistory_b_Clubs".

Example 2: Alumni with three degrees in different years.

Degree Year

1989

1993

1997

ΒA

MA

PHD

Degree of Graduation

Major

PHIL

PHIL

PHIL

School of Graduation

Entity ID

67890

67890

67890

AS

AS

AS

Where does this show up in Fundraiser Performance Management?

All of a constituent's participations are shown in their Relationship Profile. You can also search for constituents in Targeter based on the specific activities they participated in, or based on the participation category. If dates are provided on the activities, participations also appear on the timeline on a Relationship Profile.

File 1.5b: Giving Societies

Where does this data show up in Fundraiser Performance Management?

Giving societies are shown on the constituent's Relationship Profile. You can also search for constituents in Targeter based on their giving society membership.

File 1.6: Contact Restrictions

Where does this show up in Fundraiser Performance Management?

You can exclude constituents from Targeter queries based on their contact restrictions. For example, you could exclude all constituents from your search that have a contact restriction of "No Contact Whatsoever" or "Do Not Mail", etc. Also Contact Restriction information is displayed on the constituent's Relationship Profile.

File 1.7: Athletics

Should I include intramural athletic activities?

Intramural athletic participation should be included in the Participation History file. This file should include only NCAA athletics or the intercollegiate equivalent thereof if the institution competes in a different collegiate level.

Where does this data show up in Fundraiser Performance Management?

Athletic activities are shown on the constituent's Relationship Profile (see Appendix: Relationship Profile). You can also search for constituents in Targeter based on athletic activities they participated in. For example, so you could search for all alumni who participated in basketball.

File 1.8: Associated Entities

What is an associated entity?

The Associated Entities file is intended to include any and all associations between your constituents, including spouses, parents, children, siblings, aunts, uncles, co-workers, employees, employees, former roommates, and any other professional connections or social connections, etc. The file and the data shows who is related/connected to whom within your database.

I have an Associated Entity record where the Entity is a constituent in our database, but the Associated Entity is not a constituent so I know their name and their Associated Relationship Type, but they do not have an ID in our database, is that ok to send to Blackbaud?

Yes, Blackbaud would still want you to send that Associated Entity record. If you do not have the Associated Entity ID of an associated entity, you can simply leave the Associated Entity ID field blank or null for that particular record, but still supply the constituent's Entity ID, the associated person's Name, Associated Relationship Type, and if applicable School of Graduation and Class Year. This happens frequently with children, parents, or grandparents of constituents.

Where does this data show up in Fundraiser Performance Management?

When viewing a constituent's Relationship Profile, the Relationship Network section shows the constituent's Spouse, Parents, Children, and all other entities related to that constituent. If the Associated Entity ID was provided and matches a record in the Entity file, the displayed Associated Entity Name will be a hyperlink that allows the user to click through to the Associated Entity's own Relationship Profile. If an Associated Entity ID is not provided, the name will still appear but not as a hyperlink.

*Note: the following examples are provided for illustration only. Some fields show descriptions, even though codes are preferred in the file.

Example 1: John Smith (Entity ID 1111) is the parent of Mary Smith (Entity ID 2222). And Mary Smith is the child of John Smith. John Smith did not graduate from your institution, but Mary Smith graduated from the School of Business with the Class Year of 2018.

Entity ID	Associated Entity Associated Entity ID Name		Associated Relationship Type	Associated Entity School of Graduation	Associated Entity Class Year
2222	1111	John Smith	Parent		
1111	2222	Mary Smith	Child	School of Business	2018

Example 2: Adam Jones (Entity ID 3333) is the Brother of Beth Jones (Entity ID 4444). And Beth Jones is the Sister of Adam Jones. Adam Jones graduated from the College of Arts and Sciences at your institution in 2014, Beth Jones graduated from the School of Medicine with the Class Year of 2007.

Entity ID	Associated Entity Associated Entity ID Name		Associated Relationship Type	Associated Entity School of Graduation	Associated Entity Class Year
4444	3333	Adam Jones	Brother	College of Arts and Sciences	2014
3333	4444	Beth Jones	Sister	School of Medicine	2007

File 2.1: Donor Transaction History

Which transactions should I include?

Include all available transactions regardless of whether the individual is active or deceased, and regardless of whether the transaction is hard credit or soft credit. You should include your entire history of transactions and not limit to only recent transactions, as the complete history is needed for calculations such as lifetime giving and determining who has never donated.

Can I include this information in more than one file?

Yes, you can split up the files however you like. Many institutions provide gifts and pledges in separate files, or include hard credits and soft credits in separate files. If splitting the files, use the same file format in all files, and name them with the file name plus a letter and a short description, such as "DonorTransactionHistory_a_Gifts" and "DonorTransactionHistory_b_Pledges".

What is the difference between legal amount and credit amount?

The legal amount is the hard credit amount the entity received for the transaction. Either one entity can receive the full amount of the transaction as the legal amount or it can be split between entities associated with the transaction. The credit amount is the full amount of the transaction, whether hard or soft credit. All entities associated with the transaction should receive the full amount as their credit amount. Whenever counting dollars, Blackbaud uses the legal amount field so that we avoid double counting. Whenever counting donors, we use the credit amount to see how much the donor was credited with. Please see the examples below for more detail.

*Note: the following examples are provided for illustration only. They do not include all fields requested for this file, and some fields show descriptions, even though codes are preferred in the file.

Example 1: John Smith makes a Pledge of \$1,000 to the annual fund on July 12, 2018. On December 31, 2018 John pays \$500 of the pledge. John's wife, Sally, is also credited with the transactions. John receives the full legal amount for both the pledge and the pledge payment, and both John and Sally receive the full credit amount. The pledge is marked as a commitment transaction and the pledge payment is marked as a cash transaction.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator
John Smith	1000	1000	7/12/2018	Pledge	1	0	1
Sally Smith	0	1000	7/12/2018	Pledge	1	0	1
John Smith	500	500	12/31/2018	Pledge Payment	1	1	0
Sally Smith	0	500	12/31/2018	Pledge Payment	1	1	0

Example 2: The Smith Foundation gives \$5,000 to the Smith Scholarship Fund. John and Sally Smith are the individuals associated with the foundation. The Smith Foundation receives the full legal amount and credit amount for the gift, while John and Sally receive the full credit amount for the gift. The gift is marked as both a cash transaction and a commitment transaction.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator
Smith Foundation	5000	5000	08/19/2018	Gift	0	1	1
John Smith	0	5000	08/19/2018	Gift	0	1	1
Sally Smith	0	5000	08/19/2018	Gift	0	1	1

Example 3: Adam Johnson makes an annual fund gift of \$300. Coca-Cola provides a matching gift of \$300. Adam receives the full legal and credit amount for his gift, and Coca-Cola receives full legal and credit amount for the matching gift. Adam also receives the credit amount for the matching gift.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator
Adam Johnson	300	300	06/23/2018	Gift	1	1	1
Coca-Cola	300	300	06/23/2018	Matching Gift	1	1	1
Adam Johnson	0	300	06/23/2018	Matching Gift	1	1	1

What is the Campaign Project Code field, how is it used in FPM, and how does it compare to the larger capital campaign in FPM?

Campaign Project Code can be used to report subtotals within a larger capital campaign. The overall totals of the capital campaign can be viewed via the Campaign Reporting dashboard, whereas the Project Reporting dashboard will show you the totals for each Campaign Project Code against a defined goal. The system administrator at your organization can set up your capital campaigns and define the goals for your campaign projects within FPM.

What is the cash indicator, and what types of transactions are considered cash? Are stocks considered cash?

The cash indicator is used to flag any transaction that is considered cash or a cash equivalent by your institution (e.g., gifts and pledge payments). Essentially includes everything except pledges. Since many institutions liquidate stocks or assets as soon as they come in, stock gifts or payments are often considered cash.

What is the commitment indicator?

The commitment indicator is used to flag transactions that involved someone making the decision to donate. These include gifts and pledges, but not pledge payments.

What is the fiscal year field?

The fiscal year field is used for the institution to specify the fiscal year that a particular transaction should be attributed to and therefore its dollars and donors counted in. For the vast majority of institutions and transactions, the fiscal year would and should correspond to or be based on the Transaction Date that the transaction was given. However, for some institutions, a fiscal year may be different than the one tied to their Transaction Date, for any number of reasons. Another example may be a gift that the institution intends to attribute to a previous or future annual campaign year or reunion year. Please see the examples below for more detail.

*Note: the following examples are provided for illustration only. They do not include all fields requested for this file, and some fields show descriptions, even though codes are preferred in the file.

Example 1: Bob Nelson pledges a series of multiyear pledge transactions for \$5000 for each of the next 3 years on 12/10/2012 (based on the date timeframe, technically FY2013), but the institution wishes to have one pledge counted in fiscal year 2014, another one in 2015, and another in 2016 instead, they are can specify on each of Bob's pledge transactions the Fiscal Year they wish to attribute it to.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Commitment Indicator	Pledge Indicator	Fiscal Year
Bob Nelson	5000	5000	12/10/2012	Pledge	1	1	2014
Bob Nelson	5000	5000	12/10/2012	Pledge	1	1	2015
Bob Nelson	5000	5000	12/10/2012	Pledge	1	1	2016

Example 2: Sam Anderson makes an annual fund gift of \$100 on 5/20/2014 that his institution attributes to the Annual Fund's 2013 Campaign. So, Sam's transaction has the Fiscal Year be 2013, instead of the typical timeframe based 2014 fiscal year.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Cash Indicator	Commitment Indicator	Fiscal Year
Sam Anderson	100	100	05/20/2014	Gift	1	1	2013

Example 3: Adam Johnson makes a gift of \$300 on 5/23/2015. His employer Coca-Cola provides a matching gift of \$300 but it does not come in until 8/15/2015. The institution would still like Coca-Cola's gift to count toward fiscal year 2015, even though it came in after the fiscal year ended. Adam receives the full legal and credit amount for his original gift and is attributed to fiscal year 2015. Coca-Cola receives full legal and credit amount for the matching gift and it is attributed to 2015 as well. Adam also receives the credit amount for the matching gift attributed to 2015 also.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Cash Indicator	Commitment Indicator	Fiscal Year
Adam Johnson	300	300	05/23/2015	Gift	1	1	2015
Coca-Cola	300	300	08/15/2015	Matching Gift	1	1	2015
Adam Johnson	0	300	08/15/2015	Matching Gift	1	1	2015

What is the donor indicator field?

The donor indictor field is used to indicate that the entity on the transaction is counted as a donor for this specific transaction for the institution. Typically, Blackbaud counts a donor as any entity with a credit amount greater than \$0 for the transaction. However, if based on your business rules and internal donor counting procedures your institution limits who counts as a donor for certain transactions or situations (e.g., third party gifts, payments on personal pledges made by a foundation, spousal credits), you can specify using the donor indicator if that entity should or should not be counted as a donor for that transaction.

How should I include pledge write-off information?

For clients using RENXT, please see the document 'Raiser's Edge to FPM Data Mapping Guide v2021.1' for information on how to send write-off information.

If a pledge transaction has been totally written off, exclude it from the Donor Transaction History file. For pledge transactions that have been only partially written off, subtract the amount written off from the original pledge amount and send the difference in the legal amount and credit amount fields where appropriate. See example below for a partially written off pledge. If you are unable to adjust the legal and credit amounts due to system limitations, please discuss alternative solutions with your FPM Implementation Analyst.

*Note: the following example is provided for illustration only. It does not include all fields requested for this file, and some fields show descriptions, even though codes are preferred in the file.

Example: Bob Nelson makes a Pledge of \$5,000 to the annual fund on November 30, 2017. On December 31, 2017 Bob pays \$3,000 of the pledge. In March 2018, Bob indicates that he will not fulfill the rest of his \$5,000 pledge this fiscal year, so the remaining \$2,000 is written off.

Before Write-Off:

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator	Pledge Payment Indicator	Pledge Indicator
Bob Nelson	5000	5000	11/30/2017	Pledge	1	0	1	0	1
Bob Nelson	3000	3000	12/31/2017	Pledge Payment	1	1	0	1	0

After Write-Off:

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator	Pledge Payment Indicator	Pledge Indicator
Bob Nelson	3000	3000	11/30/2017	Pledge	1	0	1	0	1
Bob Nelson	3000	3000	12/31/2017	Pledge Payment	1	1	0	1	0

Where does this data show up in Fundraiser Performance Management?

We display aggregated transaction data in reports and group by a variety of fields including school/unit giving designations, gift bands, donor type, and primary relationship type to provide analysis of dollar and donor performance for your institution. We also display transaction history and analytics for each constituent on their Relationship Profile (see Appendix: Relationship Profile). You can also search for constituents in Targeter based on transaction history information such as giving amounts, dates, and designations.

File 2.2: Appeals

What if I don't have a lot of information on appeal type, cost, number of solicited, or drop date?

This information provides a lot of value in the reporting, but is not required, so provide as much information as you have. You are also able to edit this information in Fundraiser Performance Management, so including even the appeal code will allow you to add the type, drop date, etc.

Why is the appeal type field important?

The appeal type field is important as we will map each type to one of the following values for reporting: Crowdfunding, Direct Mail, Email, Event, Officer, Other, Phone, Social Media, Text Message, Volunteer, and Web. If you are not able to determine the type of all appeals programmatically in the Appeals file, you can still enter the appeal types manually through Fundraiser Performance Management.

Where does this show up in Fundraiser Performance Management?

The Appeals tab in the Annual Fund layer displays a number of reports of your appeal channel performance, including dollars, donors, average gift, participation, and more. You can also search for constituents in Targeter that have given to certain appeals. If the drop date and, via the Appeal Entity file, solicitation lists are provided, appeals can also appear on the timeline on a Relationship Profile.

File 2.3: Appeal Entity

We don't have the solicitation lists for who was sent an appeal stored in our database, but we do have the lists in other locations like Excel spreadsheets, etc, can we add those lists to Fundraiser Performance Management somehow?

While Blackbaud prefers receiving the solicitation lists using the Appeal Entity file out of your database as part of the nightly feed, you are also able to edit this information in Fundraiser Performance Management by uploading the list/spreadsheet via Fundraiser Performance Management.

Where does this show up in Fundraiser Performance Management?

This file allows you to do drill through on an appeal and see the actual list of entities that were solicited. We also display appeal history for each constituent on their Relationship Profile (see Appendix: Relationship Profile) if the drop date for the appeal was also provided in the Appeals file.

File 3.1a: Activity History

How do I show that multiple entities were involved in an activity? Multiple officers?

You include one row for each entity contacted for each officer. If two officers contacted five entities, there would be ten rows of data: five rows for the first officer and the five entities, and five rows for the second officer and the five entities.

Why is the activity type field important?

This field is important as we will map each activity type to one of the following values for reporting: Activity (non-contact), Event, Letter/Email, Other Contact, Phone, Social Media, Text Message, and Visit.

Where does this show up in Fundraiser Performance Management?

The Contacts tab in the Major Giving layer displays a number of reports summarizing your officers' performance with respect to contacts, including visits per month, contacts by purpose, and prospects that have not been contacted in 90+ or 180+ days. Activities and officer visits are also included in Console so that an officer and their manager can see their contacts, visits, first time visits, performance over time, and their tracking towards accomplishing activity-based goals. If providing School/Unit, you can evaluate how much of your officers' effort is being allocated to each school and unit. You can see all of a constituent's contacts in their Relationship Profile. You can also search for constituents in Targeter based on when they were contacted or how long it has been since their last contact.

File 3.1a: Activity Details

What is the purpose of the End of Record Indicator?

This field is exclusively for file reading purposes. The indicator clearly marks the end of a record, which allows you to keep new line characters such as line feeds or carriage returns in the Description field without causing formatting errors.

Where does this show up in Fundraiser Performance Management?

The Contacts tab in the Major Giving layer, and for each constituent on their Relationship Profile (see Appendix: Relationship Profile) allows the ability to drill through and see the details for individual contacts. The subject and description provided in this file are shown on the detailed contact view.

File 3.2: Staff Information

Which staff members should I include in this file?

This file should include all current Advancement staff members, officers, and volunteers, as well as any former officers, volunteers, or other staff that are connected to activity/contact, proposal, or portfolio assignment data. This file should also include other non-Advancement staff connected to activity/contact, proposal, or portfolio assignment data, such as support staff, deans, presidents, vice presidents, etc.

Staff ID	First Name	Last Name	Gift Officer Indicator	Volunteer Indicator	Active Indicator
123	Current	GiftOfficer	1	0	1
456	Current	Volunteer	1	1	1
789	Current	Staff	0	0	1
147	Current	Dean	0	0	1
258	Current	President	0	0	1
987	Former	GiftOfficer	1	0	0
654	Former	Volunteer*	0	1	0
321	Former	Staff*	1	0	0
741	Former	Dean*	0	0	0
852	Former	President*	0	0	0

*Note: the following examples are provided for illustration only.

*only send if currently assigned any to constituents, or attached to any previous activity/contact or proposal records

Where does this show up in Fundraiser Performance Management?

This file is used to define the Staff IDs used in your Activity History file, Assignment History file, and Proposal Assignment file. We also allow you to assign a staff ID to a user, so that they can see information in the dashboards relating to them. In order to assign a user a staff ID in Fundraiser Performance Management, it must exist in this file. In addition, we have a tool that allows you to classify officers into peer groups so that they are compared against other officers in their peer groups. Peer groups can be used to separate full time major gift officers from annual fund officers, and from officers managing only a few prospects. You are also able to search for constituents in Targeter based on their assigned Gift Officer.

File 3.3: Prospect Entity

What is the difference between prospect ID and entity ID? What if my database does not have separate Prospect ID records?

In some donor management systems a prospect record is used to associate one or many constituent records together. Officers are then assigned to the prospect record rather than assigning them to each constituent record. For example, a prospect record could be created for a husband, a wife, and their foundation. The record would have a single prospect ID, and each of the entities would have a different entity ID. Generally, Advance is the only system that supports this, so if your system does not support this you do not need to supply this file. Anywhere you see Prospect ID in the other files, just use the same ID you use for Entity ID.

Where does this show up in Fundraiser Performance Management?

This file is used to link prospect IDs to entity IDs, so that information linked to prospects, like proposals, can also be linked to the entities in the prospect record. You can view the related prospects that are tied to an entity on a constituent's Relationship Profile.

File 3.4: Prospect Status

Why is the current prospect stage important?

The current prospect stage field is important as we will map each code to one of the following values for reporting purposes: Identification, Qualification, Cultivation, Solicitation, Stewardship, Permanent Stewardship, and Disqualified.

Where does this show up in Fundraiser Performance Management?

Prospect information is displayed in each constituent's Relationship Profile. We also display reports of your assigned prospects aggregated by prospect stage, and can also search for constituents in Targeter based on their prospect rating, classification, and current prospect stage.

I have more than one rating/score that my advancement team uses, how can I get all this information in FPM if there is only one Prospect Rating field?

FPM requests just a single Prospect Rating is sent in the Prospect Status file. Any additional ratings/scores can be sent as a custom field via the 4.2 Customer Specific Codes file.

File 3.4b: Prospect Stage History

Is this file required?

This is an optional file.

Should I send current prospect stage in this file?

Yes, you should include all current prospect stages in this file as well as the history. For the current stage, the Stage End Date should be blank/null. You will also send current prospect stage in File 3.4a Prospect Status.

Where does this show up in Fundraiser Performance Management?

Detailed prospect information can be accessed via a constituent's Relationship Profile in the Prospect Records section. You can click on the prospect record to see more detail, including the prospect stage history.

File 3.5: Portfolio Assignments

What assignments should I include in this file?

You should only include current portfolio assignments in this file. You can include prospect research portfolios as well as officer portfolios. Former or inactive assignments should not be included in this file if it is possible to exclude them.

Why is the assignment type field important?

The assignment type is used to distinguish primary gift officers from non-primary or secondary gift officers and volunteers. We will map each assignment type to one of the following values for reporting purposes: Primary, Non-Primary, and Volunteer. Assignment Type allows for an Officer to see who their primary assigned constituents in their portfolio are and to distinguish between their primary assigned constituents and their non-primary assigned constituents. On a constituent level, assignment type allows the user to see when looking a record which staff member is their Primary officer, Non-Primary officer, or Volunteer manager.

Where does this show up in Fundraiser Performance Management?

You can view all of an officer's assignments in the Prospect Assignments tab in the Major Giving layer. This information is also used in reports to summarize officers' portfolio performance, such as the number of assigned prospects without contact in 90+ days, portfolio giving, and the number of prospects by donor status. Prospect assignments and officer portfolios are also included in Console so that an officer and their manager can see their portfolio, performance over time, and their tracking towards accomplishing a portfolio-based goal. You can also see a constituent's assigned officer(s) in their Relationship Profile.

File 3.6a: Proposal

How are the various date and amount fields used? Chronologically in the development and solicitation cycle of a proposal how are each of the dates and amounts used and related?

Proposal reporting is presented in the context of a fiscal year, so the date fields determine whether a proposal is reported in a particular fiscal year. The development and solicitation cycle of a proposal and the dates and amounts can be typically thought of and tracked chronologically as follows:

- The date that internal work on a proposal begins or a proposal is created by a staff member would correspond to the proposal's start date.
- Proposals that are still in development internally and have not yet been submitted/asked require a target ask date and a target amount in order for us to project the future proposal pipeline.
- Any proposal that has been submitted to a prospect requires an ask date for us to determine when it was submitted, and an ask amount for us to determine the amount submitted.
- Proposals that have been submitted and not yet granted, an expected amount and expected date would be used to see how much can be expected to be granted for that proposal and when it may be granted.
- Any proposal that has been accepted/granted requires a granted date for Blackbaud to determine when it was accepted, and a granted amount for us to determine the amount accepted.
- Any proposal that has been declined by a prospect requires a stop date for us to determine when it was declined.

My institution and database does not store many dates or amounts for our proposals, which of the many dates and amounts are most important to include if possible to have Proposal reporting in Fundraiser Performance Management?

While Blackbaud requests all of the amounts and dates that we do to populate the numerous reports for analyzing the proposals and officer's performance, Blackbaud understands that some institutions may not have every field and date tracked on a proposal. Please inform Blackbaud Support or your Implementation team to tell them which field(s) you may not be able to include and Blackbaud can consult on the impact and provide any potential solutions. To utilize the majority of the proposal based information and metrics in Fundraiser Performance Management, Blackbaud requires the Ask Date, Ask Amount, Granted Date, and Granted Amount fields be sent in the Proposal file for any submitted and granted proposals.

Why is the proposal status field important?

This field is important as we will map each proposal status to one of the following values for reporting: In Development, Submitted/Pending, Approved, and Declined.

What is the purpose of the active indicator field?

This field is used to exclude invalid proposals from the platform if you are unable to filter them out of the file. Any valid past, current, or future proposal should be marked as active, including those that are approved and/or declined. Invalid proposals should not be included in this file if it is possible to exclude them.

What if my database does not have the Proposal Stage field?

For the Proposal Stage field, Blackbaud has found that this field is typically seen in only Advance databases, so if your institution does not have an Advance database, it is acceptable for your institution to send the Proposal Stage field with the Proposal Stage column header but with blank or null data in the column.

What is the difference between Campaign Project Code and Project of Interest Code?

Campaign Project Codes can be used to report subtotals within a larger capital campaign. Proposals associated with those codes are summarized via the Project Reporting Dashboard.

Project of Interest codes are used in different ways by different FPM clients. For some clients, those codes may be initiatives within a Campaign Project. Other clients choose to use those codes for proposal designations that are separate from their capital campaigns. You can filter proposals via the Project of Interest code in FPM both on Console and in the Major Giving > Proposals dashboard.

Where does this show up in Fundraiser Performance Management?

You can view all of an officer's proposals for a fiscal year in the Proposals Tab in the Major Giving layer. The tab also provides numerous reports for analyzing the officers' proposal performance, such as the value and number of proposals submitted and granted by month. Proposals are also viewable on Relationship Profile.

File 3.6b: Proposal Comments

Is this file required?

This is an optional file.

What is the purpose of the End of Record Indicator?

This field is exclusively for file reading purposes. The indicator clearly marks the end of a record, which allows you to keep new line characters in the Description field without causing formatting errors.

Where does this show up in Fundraiser Performance Management?

The Proposals tab in the Major Giving layer, and for each constituent on their Relationship Profile (see Appendix: Relationship Profile) allows the ability to drill through and see the details for individual proposals. The comments provided in this file are shown on the detailed proposal view.

File 3.7: Proposal Assignment

Why is the assignment type field important?

The assignment type is used to distinguish primary gift officers from non-primary or secondary gift officers on each proposal. We will map each assignment type to one of the following values for reporting: Primary and Non-Primary.

What is the active indicator for? How does it affect the reporting in Fundraiser Performance Management?

We will only show proposals in Fundraiser Performance Management if an officer has an active assignment to the proposal. Assignments should remain active even after the proposal is accepted or declined. Proposal assignments should only become inactive if the proposal was transferred to another officer or if an officer should no longer be associated with the proposal. An example would be if an officer initiated a proposal before moving to another institution, and another officer took over the proposal.

Where does this show up in Fundraiser Performance Management?

The Proposals Tab in the Major Giving layer shows all of the proposals assigned to a specific officer, so in order for a proposal to be included in the reports it must be assigned to the officer in this file. Proposals and analytics are also included in Console so that an officer and their manager can see their proposals, performance over time, and their tracking towards accomplishing proposal based goals. Like Proposals and Assignment History, the names of officers assigned to proposals are also viewable on Relationship Profile

File 4.1: Code Translation Table

I am sending many of my fields in the other Blackbaud files as codes, how should I send the translations/definitions of those codes so that Blackbaud know what each code stands for?

We have a number of starred fields throughout the Blackbaud Data Request Guide, which indicates that we prefer codes for that field. You then use the Code Translation Table file to define the codes for Blackbaud. To identify for Blackbaud what file and what field each code corresponds to, Blackbaud requests that you specify for each code the File Name (Entity, Degrees, Activity History, etc.) and the Field Name (Marital Status, Major, Activity Type, etc.). Blackbaud also asks that you supply the code used for the field in the Customer Code column and the translation/description of what that code means in the Customer Definition column.

File Name	Field Name	Customer Code	Customer Definition
Entity	Marital Status	М	Married
Entity	Marital Status	S	Single
Entity	Marital Status	D	Divorced
Entity	Marital Status	W	Widowed
Entity	Primary Relationship Type	AL	Alumni
Entity	Primary Relationship Type	CF	Corporation/Foundation
Entity	Primary Relationship Type	FR	Friend
Entity	Primary Relationship Type	PA	Parent
Degrees	School of Graduation	BUS	School of Business
Degrees	School of Graduation	EDU	School of Education
Degrees	School of Graduation	LAW	School of Law
Appeals	Appeal Type	DM	Direct Mail
Appeals	Appeal Type	РН	Phone
Appeals	Appeal Type	EM	Email

*Note: the following sample format/layout examples are provided for illustration only.

Where does this show up in Fundraiser Performance Management?

We have a number of starred fields throughout the data request guide, which indicates that we prefer codes for that field. You then use this file to define the codes. In Fundraiser Performance Management, we will display the descriptions that are provided in this file, rather than the codes that are provided in the other files.

File 4.2: Customer Specific Codes

Is this file required?

These files are optional. You can discuss your needs for customer specific codes with your Data Analyst.

I have multiple scores that I want to send, how should I send this data?

If providing more than one score, please use separate files for each score. For example, if an affinity rating and a wealth screening is being provided, affinity ratings would be included in "CustomerSpecificCodes_Mealth".

Where does this show up in Fundraiser Performance Management?

This file allows you to send custom ratings, scores, codes, values or appends (either internal or third party) to be loaded into Fundraiser Performance Management. We will then create a filter and/or an accompanying column in Targeter that will allow you to search for constituents based on your custom data.

File 4.3: Social Media Links

Is this file required?

This is an optional file. Alternatively, users can manually enter social media links directly in Fundraiser Performance Management through a constituent's Relationship Profile.

Where does this show up in Fundraiser Performance Management?

This file allows you to send links to social media sites (Facebook, Twitter, LinkedIn) for your constituents to be loaded into Fundraiser Performance Management. Social media links are displayed in each constituent's Relationship Profile. You can also search for constituents in Targeter based on having links to these social media sites and can add a column to any list to display links to these social media sites.

File 4.4: Web Addresses

Is this file required?

This is an optional file.

Where does this show up in Fundraiser Performance Management?

This file allows you to send links to websites for your constituents to be loaded into Fundraiser Performance Management. Website links are displayed in each constituent's Relationship Profile.

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Type(s): Athletics:	N/A		Business Address:	Best Buy		Net Worth: Wealth Capacity:	\$5,000,000 - \$9,999,999 5/5
Participations:	Alumni Affairs C Alumni Network			328 Sunflower Pkwy Hollywood, FL 33021 USA		Wealth Capacity: Demonstrated Philanthropy:	5/5
Affiliations:	View Details (2) N/A		Preferred Phone:	Map (651) 362-2453		Annual Giving Ask Amount:	\$25000+
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	niversity Specific Fie	elds (9)	Contact Restrictions:	N/A		Officer(s): Assigned Volunteer(s):	N/A
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						Affinity Cluster:	Apathetic Wealth
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335	Check in with James and Mary	Lee Ferri	Letter/Email- 3	12/22/2020	Information	Unmeasured	Completed	School of Business	Disqualification	1
783	Check in with Mary and James	Lee Ferri	Letter/Email- 3	12/01/2020	Cultivation	Unmeasured	Completed	School of Music	Add to Portfolio	
85	Call with James	George Snyder	Phone-4	07/31/2019	Stewardship	Unmeasured	Completed	School of Education	Ready for Cultivation	
721	Visit with James and Mary	George Snyder	Visit-1	02/27/2019	Solicitation	Unmeasured	Completed	School of Health Sciences	Ready for Solicitation	
003	Check in with James	Lee Ferri	Letter/Email- 3	01/06/2018	Stewardship	Unmeasured	Completed	Continuing Education	Disqualification	
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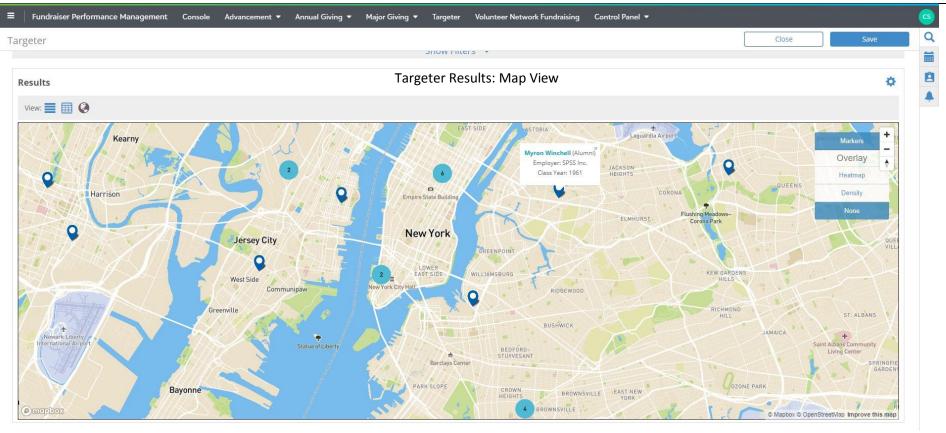
Appendix B: Targeter

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Appendix B: Targeter

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1000	141 Richard	Fink	NM	87319	Alumni	96	N/A \$98) \$	0 Not Contacted	1	lo Primary Assigned
1001	09 Robert	Maier	ТХ	78779	Alumni	98	prospect \$7,63	\$30	0 Not Contacted		Paul Cash
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1001	33 Nancy	Lane	MN	55588	Alumni	96	N/A \$90	5 \$13	5 Not Contacted	Ν	No Primary Assigned
	er									Close	Save
Add a						Targete	er Results: Cros	s Tab View			Save
						Targete	er Results: Cros	s Tab View			bscribers (0)
Add a						Targete		s Tab View			bscribers (0)
View:	Query	ê	Primary Rel	lationship Type	ě	Targete		s Tab View			bscribers (0) Subscriber
Add a View:	Query	*	Primary Rel	lationship Type	÷ Alumni	-		s Tab View	Parent		bscribers (0) Subscriber
Add a View: Curren	Query	¢	Primary Rel	lationship Type		-	Show Filters 💙		Parent 292	Su	Export
Add a View: Curren Cultiva	Query	é	Primary Rel	lationship Type		Apply	Show Filters 🔹	\$ Other		Sul ¢ Overall	bscribers (0) Subscriber
Add a View: Currer Cultiva Identif	Query	¢ _	Primary Rel	lationship Type		Apply 821	Show Filters 💙	Other 30	292	Su	Export
Add a view: Curren Curren Cultiva Identif Qualifi	Query	9	Primary Rel	lationship Type		Арріу 821 736	Show Filters 💙	Other 30 29	292 356	Sul	Export 1,174 1,144
Add a view: Current Current Cultiva Identifi Solicita	Query Query	¢	Primary Rel	lationship Type		Apply 821 736 804	Show Filters 💙	 Other 30 29 33 	292 356 297	Su Su Overall 31 23 33	Export 1,174 1,167

Appendix B: Targeter



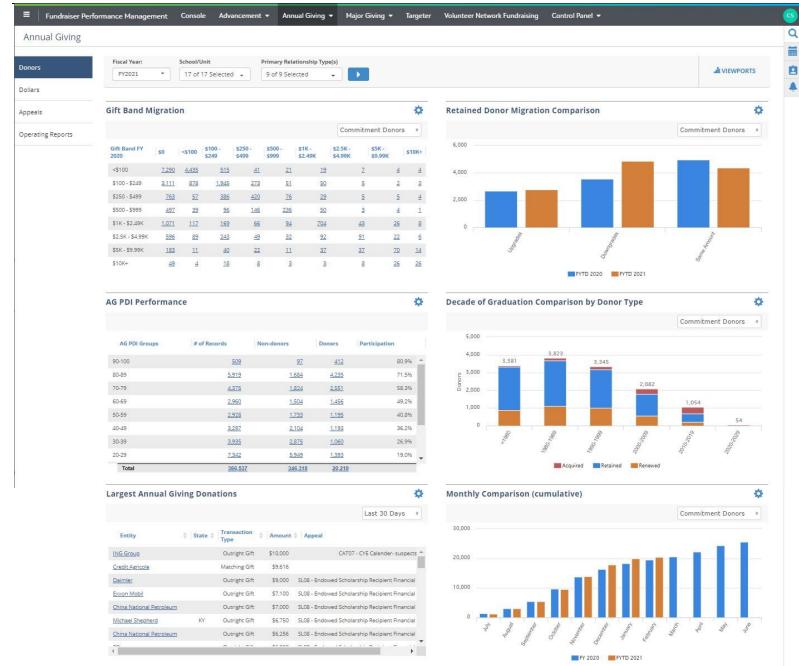
Appendix C: Advancement Layer

=	Fundraiser Perfe	ormance Management	Console	Advancement 👻	Annual Giving 🔻	Major Giving 👻	Targeter	Volunteer Network Fundraising	Control Panel 👻		8
Adv	ancement										Q
<i></i>											
Executi	ve Summary	Fiscal Year:								all VIEWPORTS	2
Operat	ing Reports	112021									
-		Visit Compariso	n hy Office			\$	Eirct 1	Time Major Donors by Mon	th (cumulativo)	¢	
Campa	ign Reporting	visit compariso	ii by office	:1			FIISU	Time major bonors by more	(cullulative)		
Project	Reporting				Visits	Entities Visited				\$100,000 *	
Report	Library	Permitted Officers	Total	lew Dev telationships Rela	eloping tionships	ixisting Relationships	4 510	10			
		Bryon Haas	<u>90</u>	<u>32</u>	<u>48</u>	10	Major Donors N				
		Mary Matson	87	<u>19</u>	18	52	Majo	0			
		Paulette Sonnega	<u>82</u>	<u>45</u>	<u>39</u>	2	Time				
		Bea Tsiominas	<u>69</u>	25	<u>19</u>	26	First '				
		Nick Weller	<u>63</u>	<u>28</u>	25	10				5 8 A 8	
		Susan Zheng	<u>58</u>	37	17	8		Polenne, Manual	Contractor Contractor	Marcy Non	
		Opal McClain	<u>57</u>	22	11	<u>24</u>		8	å		
		Joseph Daley	<u>49</u>	<u>30</u>	<u>14</u>	5 -		FY 2	020 📕 FYTD 2021		
		Overall	<u>1,279</u>	<u>595</u>	<u>460</u>	<u>291</u>					
		School of Gradu	ation Com	parison		\$	Mont	hly Comparison (cumulativ	e)	\$	
					С	ash Amount 🔹				Commitment Amount •	
		\$10,000,000					\$75,00	00,000			
		\$5,000,000					\$50,00	00,000	F	1 . T . T .	
		so					\$25,00	00.000	L.I.I.		
		And the	Bush	V Deglige	or Engin	Medic					
		School	chool of	Le loug	to loou	hool of		50 50 5 5	8 8 8	Provide and American	
		5	0°	4 6	9	S		Cooperation Street	Services Services	March March May Muno	
									020 FYTD 2021		
		Designation Pur	pose Com	parison		¢	Donoi	r Type Comparison		¢	
					Commitm	ent Amount 🔹				Commitment Amount •	
		Designation Purpos	e	FYTD 2020	\$ FYTD 2021	% Change		40,000,000			
		Current Operations - U	nrestricted	\$14,946,9	\$39,726,957	165.8%	s	30,000,000		-	
		Current Operations - R	estricted	\$13,367,2	\$18,563,963	38.9%		20,000,000			
		Endowment - Unrestric		\$773,4		276.1%	Am				
		Capital		\$2,196,2	\$1,859,448	-15.3%	S	10,000,000			
		Overall		\$31,283,	807 \$ 63,059,377	101.6%		so			
								dunad	lained	Jewed	
								6	2	Q.	
								FYTD :	2020 FYTD 2021		

Appendix C: Advancement Layer

e Summary	Period	Measurement	School/Unit		Primary Relationship Ty			.at	I VIEWPORTS
ing Reports	Fiscal Year to Date 🔹	Commitment	• 17 of 17 s	elected 🝷	9 of 9 selected	-			
	Overall Performance St	ummary							\$
ign Reporting									
t Reporting	Key Measurement	FYTD 2017	FYTD 2018				FYTD 2021 Unit C		hange
Library	Total Donors		<u>15,873</u>	<u>16,843</u>	<u>17,237</u>	<u>18,883</u>	20,745	1.862	9.9%
	Total Giving	5	21,697,767	\$24,621,017	\$48,140,022	\$31,283,807	\$63,059,377	\$31,775,569	101.6%
	Average Giving		\$1,367	\$1,462	\$2,793	\$1,657	\$3,040	\$1,383	83.5%
	Median Giving		\$50	\$50	\$50	\$50	\$75	\$25	50.0%
	Maximum Contribution		\$2,544,698	\$2,000,025	\$18,809,413	\$2,501,100	\$18,434,781	\$15,933,681	637.1%
	Retained Donors		<u>8,942</u>	<u>9.717</u>	<u>10.130</u>	<u>11,327</u>	12,189	862	7.6%
	Retention Rate		39.4%	38.7%	39.1%	43.6%	47.2%	3.6%	8.4%
	Primary Relationship T	ype Summary							\$
					Giving Performance				
	Primary Relationship Type	# FYTD 2017	‡ FYTD			FYTD 2020 \$ FY	TD 2021 🕴 Unit Change	e 👙 🖇 Chan	nge 🔅
	Anonymous		50	\$0	50	\$100,000	\$18,434,781	\$18,334,781	18,334.8%
	Alumni		\$10,190,691	\$8,610,616	\$34,788,252	\$9,969,518	\$14,556,745	\$4,587,227	46.0%
	Corporation/Foundation		\$7,426,722	\$9,611,323	\$8,193,513	\$12,050,827	\$14,087,942	\$2,037,115	16.9%
	Other		\$2,835,319	\$4,296,706	\$2,570,467	\$4,765,036	\$11,733,341	\$6,968,304	146.2%
	Estate		\$612,972	\$872,821	\$631,841	\$1,697,794	\$3,690,302	\$1,992,507	117,4%
	Employee		\$477,662	\$1,115,207	\$1,831,602	\$2,617,677	\$425,251	(\$2,192,426)	-83.8%
	Parent		\$154,090	\$114,205	\$124,270	\$82.782	\$119,911	\$37,129	44.9%
	Student		\$310	\$135	\$75	\$170	\$11,100	\$10,930	6,429.6%
	Total		\$21,697,767	\$24,621,016	\$48,140,022	\$31,283,807	\$63,059,377	\$31,775,569	101.6%
					Donor Performance				
	Primary Relationship Type	\$ FYTD 2017		2018 \$ F	YTD 2019 🎄 🕴	FYTD 2020 🍦 🕴 FYT			
	Alumni		<u>10,044</u>	2018 \$ F	YTD 2019	<u>13,217</u>	13,805	588	4.4%
				2018 \$ F	YTD 2019 🎄 🕴				
	Alumni Other Parent	\$ FYID 2017	<u>10.044</u> <u>3.471</u> <u>1.254</u>	2018 \$ F	YTD 2019 \$ 1 10.851 3.954 1.258	<u>13217</u> <u>3255</u> <u>1279</u>	<u>13.805</u> <u>3.881</u> 1 <u>.655</u>	588 626 376	4,4% 19.2% 29.4%
	Alumni Other	PYTD 2017	<u>10.044</u> <u>3.471</u>	2018 \$ F1 10.834 <u>3.756</u>	YTD 2019 0 1 10.851 3.954	<u>13,217</u> <u>3,255</u>	<u>13,805</u> <u>3,881</u>	588 626	4.4% 19.2%
	Alumni Other Parent	PYTD 2017	<u>10.044</u> <u>3.471</u> <u>1.254</u>	2018 \$ F	YTD 2019 \$ 1 10.851 3.954 1.258	<u>13217</u> <u>3255</u> <u>1279</u>	<u>13.805</u> <u>3.881</u> 1 <u>.655</u>	588 626 376	4,4% 19.2% 29.4%
	Alumni Other Parent Corporation/Foundation	\$ FYTD 2017	10.044 3.471 1.254 788	2018	VTD 2019 0 1 10.851 3.954 1.258 822	<u>13,217</u> <u>3,255</u> <u>1,279</u> <u>814</u>	13.805 3.881 1.655 970	588 626 376 156	4.4% 19.2% 29.4% 19.2%
	Alumni Other Parent Corporation/Foundation Employee	FYTD 2017	10.044 3.471 1.254 788 292	2018	VTD 2019 0 1 10.851 3.954 1.258 822 322	<u>13,217</u> <u>3,255</u> <u>1,279</u> <u>814</u> <u>297</u>	13.805 3.881 1.655 970 335	588 626 375 156 98	4.4% 19.2% 29.4% 19.2% 33.0%
	Alumni Other Parent Corporation/Foundation Employee Estate	FYTD 2017	10.044 3.471 1.254 788 292 15	2018	YTD 2019 0 1 <u>10851</u> <u>2954</u> <u>1268</u> <u>822</u> <u>322</u> <u>18</u>	13.217 3.255 1.279 814 297 17	13.805 3.881 1.655 970 395 21	588 626 376 156 98 4	4.4% 19.2% 29.4% 19.2% 33.0% 23.5%
	Alumni Other Parent Corporation/Foundation Employee Estate Student	FYTD 2017	<u>10.044</u> <u>3.471</u> <u>1.254</u> <u>788</u> <u>292</u> <u>15</u> <u>9</u>	2018 0 P 10.834 3.755 1.132 804 295 18 4	YTD 2019 0 1 10851 2.954 1.268 822 322 18 18 2	12.217 2.255 1.279 814 297 12 12 22 23 2	13.805 3.881 1.655 970 395 21 21 12	588 626 376 156 98 4 4 14	4,4% 19,2% 29,4% 19,2% 33,0% 23,5% 465,7%
	Alumni Other Parent Corporation/Foundation Employee Estate Student Anonymous Total		10.044 3.471 1.254 788 292 15 2 2 2 2 2 0	2018 () P 10.834 2.755 1.132 804 2.255 1.8 4 4 0	YTD 2019 0 1 10.851 3.954 1.268 822 322 18 2 2 0 0	13217 3255 1279 814 297 17 2 3 1 2 1	13.805 3.881 1.655 370 335 21 12 12 1	588 626 376 156 98 4 14 0	4.4% 19.2% 29.4% 19.2% 33.0% 23.5% 466.7% 0.0% 8.9%
	Alumni Other Parent Corporation/Foundation Employee Estate Student Anonymous		10.044 3.471 1.254 788 292 15 2 2 2 2 2 0	2018 () P 10.834 2.755 1.132 804 2.255 1.8 4 4 0	YTD 2019 0 1 10.851 3.954 1.268 822 322 18 2 2 0 0	13217 3255 1279 814 297 17 2 3 1 2 1	13.805 3.881 1.655 370 335 21 12 12 1	588 626 376 156 98 4 14 0	4,4% 19,2% 29,4% 19,2% 33.0% 23,5% 466,7% 0.0%
	Alumni Other Parent Corporation/Foundation Employee Estate Student Anonymous Total		10.044 3.471 1.254 788 292 15 2 2 2 2 2 0	2018 (P) P 10.834 2.755 1.132 201 2.95 18 4 0 15.843	YTD 2019 0 1 10.851 3.954 1.268 822 322 18 2 2 0 0	13217 3255 1279 814 297 17 2 3 1 2 1	13.805 3.881 1.655 370 335 21 12 12 1	588 626 376 156 98 4 14 0	4.4% 19.2% 29.4% 19.2% 33.0% 23.5% 466.7% 0.0% 8.9%
	Alumni Other Parent Corporation/Foundation Employee Estate Student Anonymous Total Monthly Giving Summa	ъ гу то 2017 рто	10.044 3.471 1.254 788 292 15 9 0 15.873 0 15.873	2018 P 10.824 2.755 2.75 2.7	YTD 2019 () 1 10.851 3.354 1.268 822 322 18 2 2 0 17.237 Giving Performance FYTD 2020	13217 2255 1279 814 297 17 3 1 18.883 1 18.883	13.805 3.881 1.555 270 295 21 12 1 20.745 Unit Change	588 626 376 156 98 4 14 0 1,862 1,862	4.4% 19.2% 29.4% 19.2% 33.0% 23.5% 466.7% 0.0% 9.9%
	Alumni Other Parent Corporation/Foundation Employee Estate Student Anonymous Total Monthly Giving Summa	ary	10.044 3.471 1.254 288 292 15 2 2 0 0 15.873	2018 P 10.824 2.755 2.75 2.7	YTD 2019 0 1 10.851 2.954 1.268 822 322 18 2 0 17.237 Giving Performance	12.217 2.255 1.279 814 227 17 2 2 1 2 1 18.883	13.805 3.881 1.655 970 395 21 12 1 20.745	588 626 376 156 98 4 14 0 1,862	4.4% 19.2% 29.4% 19.2% 33.0% 23.5% 466.7% 0.0% 9.9%
	Alumni Other Parent Corporation/Foundation Employee Estate Soudent Anonymous Total Monthly Giving Summa	ъ гу то 2017 рто	10.044 3.471 1.254 788 292 15 9 0 15.873 0 15.873	2018 (P) P 10.834 2.756 1.132 834 2.255 1.8 4 0 16.849 P PYTD 2019	YTD 2019 () 1 10.851 3.354 1.268 822 322 18 2 2 0 17.237 Giving Performance FYTD 2020	13217 2255 1279 814 297 17 3 1 18.883 1 18.883	13.805 3.881 1.555 270 295 21 12 1 20.745 Unit Change	588 626 376 156 98 4 14 0 1,862 1,862	4.4% 19.2% 29.4% 19.2% 33.0% 22.5% 466.7% 0.0% 9.9%

Appendix D: Annual Fund Layer



<mark>p</mark> 28

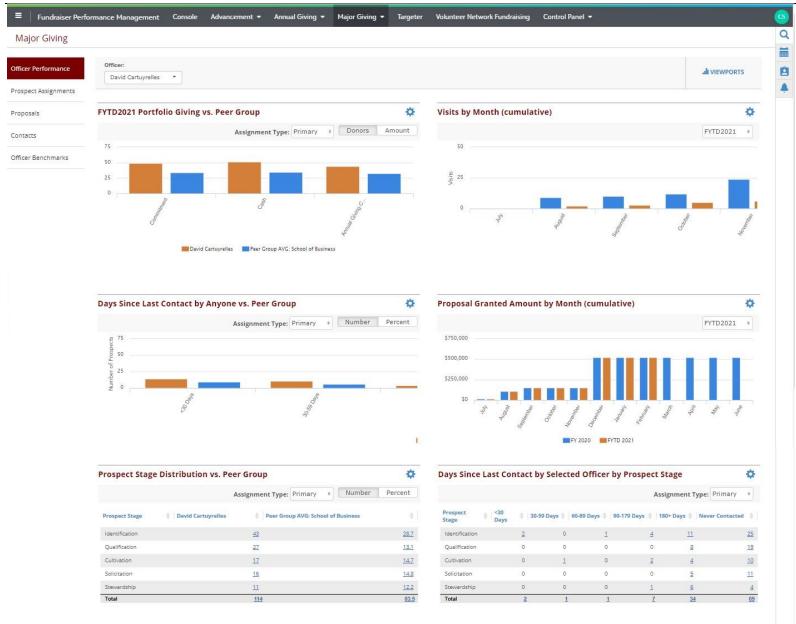
Appendix D: Annual Fund Layer

ors	Fiscal Year:	School/Unit T7 of 17 Selected		elationship Type(s)									-12	
peals	FY2021 Ap	opeals												\$
erating Reports												Appea	l type missing	g on 0 out of 344
erating keports	-<< >	>> 1 to 5 of 344 Appeals											Q. Searc	h Appeals
	Appeal Code	Description		Туре	Initiated FY	Solicited	Cost	Cash In FY 🔻	Donors In FY	Annual Giving Cash	Annual Giving Donors			articipation late
	SL08	Endowed Scholarship Recipient I	Financial Aid Appe	al Other	2020	24,358	\$150,000	\$2,225,830	5,640	\$2,239,255	6	6,069	\$368	24.91%
	CAT07	CYE Calender- suspects/prospec	ts	Officer	2015	3,551	\$1,500,000	\$1,145,201	1,672	\$2,796,485	1	3,240	\$863	91.24%
	SL07	Senior Gift Grand Mailing		Direct Mail	2015	15,000	\$800,000	\$142,195	491	\$3,390,491	6	6,821	\$497	45.47%
	MEMOS	Alumni Leadership Dinner		Other	2021	6,457	\$15,000	\$124,657	1,388	\$124,657	ł	1,388	\$89	21.49%
	L8AN1	School of Art and Design Alumni	Board	Other	2021	517	\$15,000	\$109,900	214	\$109,900		214	\$513	41.39%
	EVTD2021	Channel Performance				\$	EVT	D2021 Dono	or Type Per	formance by Cl	hannel			\$
	TTDEOLT	channel renormance				~		DIGITOGIC	, i i jpe i ei	formance by c	indimici -		Donors	20.72
	Туре	Cash % C	ash Donor	5 % Donors	Avg. Casl	h Gift	Тур	e	4 Acquire	d ¢	Retained		Renewed	÷
	Type Direct Mail	Cash % C \$212,800			Avg. Casl	n Gift \$168		e rect Mail	4 Acquire	d \$	Retained	<u>579</u>		‡ <u>392</u>
			3.8%	1.263			Dir	rect Mail	0 Acquire		Retained		1	
	Direct Mail	\$212,800	3.8% 5.5%	<u>1.263</u> 2,405	6.2%	\$168	Dir	rect Mail	0 Acquire	<u>292</u>	Retained	579	1	<u>392</u>
	Direct Mail Phone	\$212,800 \$314,576	3.8% 5.5% 1.8%	<u>1,263</u> 2,405 1,155	6.2% 1.9%	\$168 \$130	Dir Em	rect Mail nail	4 Acquire	<u>292</u> <u>104</u>	Retained	<u>579</u> <u>387</u>	2	<u>392</u> <u>664</u>
	Direct Mail Phone Email	\$212,800 \$314,576 \$101,504	3.8% 5.5% 1.8% 12.1%	1.263 2,405 1,155 5,328	6.2% 1.9% 5.7%	\$168 \$130 \$87	Dir Em Of	rect Mail nail ficer	4 Acquire	292 104 301	Retained	<u>579</u> <u>387</u> <u>2,706</u>	2	<u>392</u> <u>664</u> 485
	Direct Mail Phone Email Web Officer Other	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383	3.8% 5.5% 1.8% 12.1% 23.6% 53.2%	1.253 2.405 1.155 5.328 3.492 8.753	6.2% 1.9% 5.7% 6.4% 7.3%	\$168 \$130 \$87 \$129 \$383 \$384	Dir Em Of Ph	rect Mail hail ficer her one	0 Acquire	292 104 301 1.767 98 529	Retained	579 387 2,706 5,365 1,755 3,352		392 664 485 1.621 552 1.447
	Direct Mail Phone Email Web Officer Other Overall	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383 \$5,673,185	3.8% 5.5% 1.8% 12.1% 23.6% 53.2% 100%	1,263 2,405 1,155 5,328 3,492	6.2% 1.9% 5.7% 6.4%	\$168 \$130 \$87 \$129 \$383 \$383 \$384 \$280	Dir Err Of Ph We Ov	rect Mail hail ficer one eb eeall		292 104 201 1.767 38 529 2.995		<u>579</u> <u>387</u> <u>2,706</u> <u>5,365</u> <u>1,755</u>		392 664 485 1.621 552 1.447 4.879
	Direct Mail Phone Email Web Officer Other Overall	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383	3.8% 5.5% 1.8% 12.1% 23.6% 53.2% 100%	1.253 2.405 1.155 5.328 3.492 8.753	6.2% 1.9% 5.7% 66.4% 7.3% 13.3% 100%	\$168 \$130 \$87 \$129 \$383 \$344 \$280	Dir Err Of Ph We Ov	rect Mail hail ficer one eb eeall		292 104 301 1.767 98 529		579 387 2,706 5,365 1,755 3,352		392 664 485 1.621 552 1.447
	Direct Mail Phone Email Web Officer Other Overall	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383 \$5,673,185	3.8% 5.5% 1.8% 12.1% 23.6% 53.2% 100%	1.253 2.405 1.155 5.328 3.492 8.753	6.2% 1.9% 5.7% 6.4% 7.3%	\$168 \$130 \$87 \$129 \$383 \$383 \$384 \$280	Dial Em Or Ph W V V V V V V V V V V V V V V	rect Mail hail ficer one ab rerall		292 104 201 1.767 38 529 2.995		579 387 2,706 5,365 1,755 3,352		392 664 485 1.621 552 1.447 4.879
	Direct Mail Phone Email Web Officer Other Overall	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383 \$5,673,185	3.8% 5.5% 1.8% 12.1% 23.6% 53.2% 100%	1.253 2.405 1.155 5.328 3.492 8.753	6.2% 1.9% 5.7% 66.4% 7.3% 13.3% 100%	\$168 \$130 \$87 \$129 \$383 \$344 \$280	Dir Err Of Ph We Ov	rect Mail hail ficer one ab rerall		292 104 201 1.767 38 529 2.995		579 387 2,706 5,365 1,755 3,352		392 664 485 1.621 552 1.447 4.879
	Direct Mail Phone Email Web Officer Overal FYTD2021	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383 \$5,673,185	3.8% 5.5% 1.8% 12.1% 23.6% 53.2% 100%	1.253 2.405 1.155 5.328 3.492 8.753	6.2% 1.9% 5.7% 66.4% 7.3% 13.3% 100%	\$168 \$130 \$87 \$129 \$383 \$344 \$280	Diri Err Of Oc Ph Oc Ov Ov FYT	rect Mail hail her one eb b rerall D2021 Direc		292 104 201 1.767 38 529 2.995		579 387 2,706 5,365 1,755 3,352		392 664 485 1.621 552 1.447 4.879
	Direct Mail Phone Email Web Officer Other Overall	\$212,800 \$314,576 \$101,504 \$688,240 \$1,340,679 \$3,015,383 \$5,673,185	3.8% 5.5% 1.8% 12.1% 23.6% 53.2% 100%	1.253 2.405 1.155 5.328 3.492 8.753	6.2% 1.9% 5.7% 66.4% 7.3% 13.3% 100%	\$168 \$130 \$87 \$129 \$383 \$344 \$280	Dial Em Or Ph W V V V V V V V V V V V V V V	rect Mail hail her one eb b rerall D2021 Direc		292 104 201 1.767 38 529 2.995		579 387 2,706 5,365 1,755 3,352		392 664 485 1.621 552 1.447 4.879

Appendix D: Annual Fund Layer

Period		easurement	School		Primary Relationship Type(s)				
Fiscal Year to Dat	te *	Commitment	• 17 0	f 17 selected 🔹	9 of 9 selected	-			
Overall Perfor	rmance Summ	ary							
Key Measurement		FYTD 2017	F	YTD 2018 F	YTD 2019 FYTD	2020 FYTD :	021 Unit Cha	nge % Ci	hange
Total Donors			15.702	16.657	17.043	18.663	20.507	1,844	
Total Giving			\$3,991,705	\$4,260,221	\$4,216,943	\$4,922,331	\$5,313,570	\$391,239	
Average Giving			\$254	\$256	\$247	\$264	\$259	(\$4)	
Median Giving			\$50	\$50	\$50	\$50	\$75	\$25	
Maximum Contributi			\$126,060	\$159,542	\$167,643	\$151,071	\$180.171	\$29,100	
Retained Donors	1011		8.813	9,579	9.987	11,169	11.999	830	
Retention Rate			39.1%	38.5%	38,9%	43.4%	46.9%	3.6%	
Retained Done	or Migration S	ummary							
					Giving Performance				
Migration	FY	D 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Cha	ange
Upgrades		\$1,164,180		\$1,436,934	\$1,414,150	\$1,613,427	\$1,828,879	\$215,451	
Downgrades		\$1,012,176		\$991,144	\$876,998	\$1,050,283	\$1,037,077	(\$13,205)	
Same Amount		\$591,061		\$637.527	\$722,991	\$746.763	6700.007		
Total		\$2,767,417		\$3,065,606	\$3,014,140 Donor Performance	\$3,410,474	\$733,086 \$3,599,043	(\$13,676) \$188,569	
Migration		\$2,767,417 FYTD 2017	FYTD 2018	\$3,065,606 FYTD 2019	\$3,014,140 Donor Performance PYTD 2020	\$3,410,474 FYTD 2021	\$3,599,043 Unit Change		ge
Migration Upgrades		\$2,767,417 FYTD 2017 2,256	FYTD 2018	\$3,065,606 FYTD 2019 2,131	\$3,014,140 Donor Performance FYTD 2020 <u>2.193</u>	\$3,410,474 FYTD 2021 <u>2,674</u>	\$3,589,043 Unit Change 2,783	\$188,569 % Chang 109	ge
Migration Upgrades Downgrades		\$2,767,417 FYTD 2017 <u>2,26</u> <u>2,47</u>	FYTD 2018	\$3,065,606 FYTD 2019 2,131 3,574	\$3,014,140 Donor Performance PYTD 2020 2,193 3,629	\$3,410,474 FYTD 2021 2,674 3,551	\$3,699,043 Unit Change <u>2.763</u> 4.853	\$188,569 % Chang 109 1,302	
Migration Upgrades		\$2,767,417 FYTD 2017 2,256	FYTD 2018	\$3,065,606 FYTD 2019 2,131	\$3,014,140 Donor Performance FYTD 2020 <u>2.193</u>	\$3,410,474 FYTD 2021 <u>2,674</u>	\$3,589,043 Unit Change 2,783	\$188,569 % Chang 109	
Migration Upgrades Downgrades Same Amount		\$2,767,417 FYTD 2017 2.25 2.47 4.02	FYTD 2018	\$3,065,666 PYTD 2019 2,131 3,574 2,874 9,579	\$3,014,140 Donor Performance FVTD 2020 2,193 3,629 4,155	\$3,410,474 FYTD 2021 2,674 3,551 4,344	\$3,599,043 Unit Change 2,783 4,853 4,353	\$188,569 % Chany 109 1,302 -581	
Migration Upgrades Downgrades Same Amount Total		\$2,767,417 FYTD 2017 2.25 2.47 4.02	FYTD 2018	\$3,065,666 FYID 2019 2.131 3.572 3.874 9.379	S3,014,140 Donor Performance PTD 2020 2,153 3,652 4,155 9,987 Glving Performance	\$3,410,474 FYTD 2021 2,574 2,551 2,954 11,159	\$3,899,643 Unit Change 2.783 4.853 4.352 11.999	\$188,569 % Chan 109 1.302 -\$81 830	
Migration Upgrades Downgrades Same Amount Total Gift Band Summ		\$2,767,417 FYTD 2017 2,25 2,47 4,07 8,81 9,81 9,81 9,81 9,81 9,81 9,81 9,81	FYTD 2018 1 5 5 3 3	\$3,065,666 FYID 2019 2.131 3.572 3.874 9.379	S3,014,140 Donor Performance PYTD 2020 2.193 3.629 4.165 9.997 Giving Performance 219 FYTD 2020	\$3,410,474 FYTD 2021 2,574 2,551 2,954 11,159	\$3,899,643 Unit Change 2,783 4,853 4,853 4,853 11,599	\$188,569 % Chan 109 1.302 -381 830	lange
Migration Upgrades Downgrades Same Amount Total Gifft Band Summ Gifving Level Less than \$25		\$2,767,417 FYTD 2017 2,25 2,47 4,07 8,81 9,81 9,81 9,81 9,81 517 517 51	FYTD 2018	\$3,065,666 FYTD 2019 2.131 3.572 3.572 9.572 8 FYTD 20 8 FYTD 20 517,557	\$3,014,140 Donor Performance PYTD 2020 2,193 3,623 4,165 9,987 Giving Performance 219 519,177	\$3,410,474 FYTD 2021 2.674 3.551 4.544 11.159 FYTD 2021 516,967	\$3,899,643 Unit Change 2.783 4.353 4.353 11.399 Unit Chang \$19,369	\$188,569 % Chan 109 1,302 -381 830 	lange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Giving Level Less than \$25 \$25 to \$49		\$2,767,417 FYTD 2017 2,255 2,477 4,07 8,81 9,81 9,91 9,917 512 512	FYTD 2018 1 5 5 6 9 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	\$3,065,666 PYTD 2019 2,131 3,574 3,574 9,579 8 8 PYTD 20 517,557 \$118,331	\$3,014,140 Donor Performance PYTD 2020 2,193 3,623 4,155 9,987 Giving Performance 219 219 5,987 9,987 Silo,177 \$107,866	\$3,410,474 FYTD 2021 2.674 3.551 4.524 11.159 FYTD 2021 FYTD 2021 \$16.567 \$120,691	\$3,899,643 Unit Change 2.253 4.353 4.353 11.359 Unit Change \$19,369 \$110,333	\$188,569 % Chan 109 1,302 -581 830 830 830 830 (\$10,358)	lange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Gifting Level Less than \$25 \$25 to \$49 \$50 to \$59		\$2,767,417 FYTD 2017 2,255 2,247 4,077 8,81 9,977 8,917 512 512 516	FYTD 2018	\$3,065,666 PYTD 2019 2,131 3,574 3,574 3,577 9,579 8 8 PYTD 20 8 PYTD 20 10 10 10 10 10 10 10 10 10 1	\$3,014,140 Donor Performance PYTD 2020 2.193 3.629 4.165 9.987	\$3,410,474 FYTD 2021 2,674 3,551 4,554 11,169 FYTD 2021 516,967 \$120,691 \$212,996	\$3,899,043 Unit Change 2.263 4.353 4.353 11.959 Unit Chang \$19,369 \$110,333 \$229,683	\$188,569 % Charg 109 1.302 -561 830 - 561 830 - 515 (310,358) \$16,745	lange
Migration Upgrades Downgrades Same Amount Total Giff: Band Summ Giff: Band Summ Giving Level Less than \$25 \$25 to 549 \$50 to \$59 \$100 to \$249		\$2,767,417 FYTD 2017 2,25 2,47 8,81 FYTD 2017 \$11 \$12 \$16 \$10 \$12 \$16 \$10 \$10 \$11 \$12 \$16 \$10 \$10 \$11 \$12 \$16 \$14 \$15 \$15 \$15 \$15 \$15 \$15 \$15 \$15 \$15 \$15	FYTD 2018	\$3,065,666 FYTD 2019 2,131 3,5274 2,5274 2,5274 9,579 8 PYTD 20 9,579 8 PYTD 20 9,579 5,577 5,112,331 5,191,930 5,411,289	\$3,014,140 Donor Performance FYTD 2020 2,153 3,652 4,165 9,387 Giving Performance FYTD 2020 \$19,177 \$107,866 \$177,766 \$417,643 \$	\$3,410,474 PYTD 2021 2,551 4,544 11.159 PYTD 2021 516,967 \$120,891 \$212,936 \$459,263	\$3,899,643 Unit Change 2,2783 4,853 4,853 4,853 11,929 Unit Chang 519,369 5110,333 5229,683 5611,540	\$188,569 % Chang 109 1.302 -581 830 \$30 \$30 \$30 \$30 \$30 \$30 \$30 \$30 \$30 \$	iange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Giving Level Less than \$25 525 to \$49 550 to \$49 5100 to \$249		\$2,767,417 FYTD 2017 2,25 2,47 4,07 4	PYTD 2018 1 5 5 3 9 PYTD 201 3 9 PYTD 201 3 2 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	\$3,065,666 FYTD 2019 2,131 3,573 3,874 2,579 3,874 2,579 3,874 3,874 3,875 5,17,557 5,118,231 5,191,580 5,112,289 5,1	\$3,014,140 Donor Performance FYTD 2020 2,152 3,652 4,155 9,987 Giving Performance 219 519,177 \$107,866 \$177,766 \$417,643 \$224,356	\$3,410,474 PYTD 2021 2,574 3,551 4,544 11,359 PYTD 2021 516,967 5120,591 5212,935 5459,263 5259,263 5259,263 5258,551	\$3,899,043 Unit Change 2.783 4.853 4.353 11.899 Unit Chang 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,369 519,55 510 510 525,65 510 510 510 510 510 510 510 510 510 51	\$188,569 % Charg 1.99 1.302 -581 830 830 \$10 \$1.50 \$15,2451 \$15,2456 \$152,2676 \$152,2676 \$153,2676	iange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Giving Level Less than \$25 \$25 to \$49 \$50 to \$249 \$50 to \$249 \$50 to \$249 \$50 to \$249		\$2,767,417 FYTD 2017 2,252 2,472 4,072 8,81 5,12	FYTD 2018	\$3,065,666 PYTD 2019 2,131 3,557 3,8274 9,577 9,577 9,577 9,577 118,331 5,191,930 5,411,289 5,256,778 5,233,347	\$3,014,140 Donor Performance FYTD 2020 2,1123 3,652 3,562 3,582 Giving Performance S19,177 5107,86 5197,70 5197,70 5197,7 510,7 5197,7 510,7 5	\$3,410,474 PYTD 2021 2,574 3,551 4,584 11,159 PYTD 2021 516,967 \$120,691 \$212,598 \$120,691 \$212,598 \$122,598 \$122,598 \$228,551 \$228,552	\$3,899,643 Unit Change 2,783 4,853 4,853 4,853 11,999 11,999 5110,333 519,869 5110,333 5229,683 5111,940 5110,333 5229,683 5111,940 5111,940 5125,655 5326,718	\$188,569 % Charg 109 1.302 -581 830 \$200 (\$10,258) \$16,745 \$155,676 \$155,676 \$155,676	iange
Mgration Upgrades Downgrades Same Amount Total Gift Band Summ Giving Level Less than \$25 525 to \$49 550 to 599 5100 to \$249 5500 to \$399 5500 to \$399 5500 to \$399 5500 to \$399		\$2,767,417 PYTD 2017 2,252 2,472 9,81	PYTD 2018	\$3,065,666 PYTD 2019 2.131 3.572 3.872 9.379 8 PYTD 20 8 PYTD 20 9.372 9.373 9.375 5.113,331 5.191,930 5.4115,679 5.113,831 5.191,930 5.4115,678 5.223,347 5.1,077,096	\$3,014,140 Donor Performance PYTD 2020 2,193 3,629 4,165 9,987 Glving Performance 959 \$19,177 \$107,866 \$177,766 \$417,643 \$266,054 \$1,082,487	\$3,410,474 PYTD 2021 2.674 3.551 4.944 11.159 PYTD 2021 510,997 5120,591 5212,996 5459,263 5228,952 528,952 \$1,025,930	\$3,899,643 Unit Change 2.783 4.853 4.853 11.989 519.369 519.369 519.369 519.369 519.369 519.369 519.365 5325,718 5325,718 5326,718	\$188,669 % Charg 109 1.302 	ange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Gift Band Summ Silving Level Less than \$25 525 to 549 550 to 5499 550 to 52499 5500 to 52499 51000 to 52499		\$2,767,417 FYTD 2017 FYTD 2017 FYTD 2017 S12 S12 S16 S40 S21 S25 S1.02 S57	FYTD 2018	\$3,065,666 PYTD 2019 2,131 3,573 3,573 3,573 3,579 8 8 PYTD 20 9,579 8 8 PYTD 20 9,579	\$3,014,140 Donor Performance PTD 2020 2,153 3,6523 4,155 9,9897 Giving Performance 219 \$19,177 \$107,286 \$117,776 \$1224,356 \$224,356 \$226,054 \$1,082,467 \$456,689	\$3,410,474 FYTD 2021 2.674 3.551 4.594 11.159 FYTD 2021 516,967 \$120,891 \$212,936 \$459,263 \$459,263 \$228,952 \$1,025,930 \$512,037	\$3,899,643 Unit Change 2.253 4.353 4.353 11.399 Unit Change \$110,333 \$11,349 \$110,333 \$222,633 \$511,540 \$310,333 \$222,633 \$511,540 \$322,718 \$10,91,374 \$695,560	\$188,669 % Chan 109 1,302 -61 830 830 	ange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Gift Band Summ Soliton 525 525 to 549 550 to 559 5100 to 5249 550 to 5499 5500 to 599 51000 to 52499 51000 to 52499 51000 to 5499		\$2,767,417 FYTD 2017 2,257 4,07 8,01 5,02 5,02 5,10	FYTD 2018	\$3,065,666 PYTD 2019 2,131 3,574 3,574 3,577 3,577 4,577 5,118,331 5,191,920 5,517,557 5,118,331 5,191,920 5,518,331 5,191,920 5,518,331 5,526,778 5,528,347 5,526,534 5,536,534 5,536,534	\$3,014,140 Donor Performance [FYTD 2020 2,123 3,629 4,155 9,387 Giving Performance 519 \$19,177 \$107,266 \$197,766 \$197,766 \$2417,643 \$256,054 \$100,2467 \$150,689 \$925,492	\$3,410,474 FYTD 2021 2.674 3.551 4.524 11.169 FYTD 2021 516.567 5120.691 5212.396 5459.263 5459.263 5268.651 5288.552 5368.553 5288.552 5362.5580 5312.037 5974.052	\$3,899,043 Unit Change 2,203 4,853 4,853 4,353 11,979 Unit Change 519,369 5110,333 5229,683 5611,940 5326,578 5325,578 5425,5785,5785,5785,5785,5785,5785,5785,57	\$188,569 % Chang 109 1.302 -581 830 \$30 \$30 \$30 \$15,245 \$152,676 \$32,833 \$37,765 \$152,676 \$393,833 \$37,765 \$555,444 \$157,543 \$157,543 \$157,543	kange
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Gifving Level Less than \$25 525 to 549 550 to 599 5100 to 5249 550 to 599 5500 to 599 5500 to 599 5500 to 599 5500 to 599 51000 to 52499 52.500 to 54.999 55.000 to 54.999		\$2,767,417 FYTD 2017 FYTD 2017 FYTD 2017 FYTD 2017 S12 S16 S40 S21 S16 S40 S21 S55 S57 S56 S57 S56 S27 S76 S27 S76 S27 S27 S26 S26 S26 S27 S26	FYTD 2018	\$3,065,666 FYTD 2019 2,131 2,574 2,574 2,573 2,579 2,579 2,579 3,517,557 5,17,557 5,17,557 5,17,557 5,17,557 5,17,557 5,17,557 5,233,347 5,534,534 2,536,534 2,536,534 2,536,534 2,536,535 2,528,555 2,528,555 2,528,555 2,528,555 2,528,555 2,528,555	\$3,014,140 Donor Performance FYTD 2020 2,153 3,653 4,155 9,387 Giving Performance 219 \$107,86 \$107,766 \$177,776 \$107,863 \$224,356 \$224,356 \$256,054 \$1,856,659 \$295,492 \$295,492	\$3,410,474 PYTD 2021 2,574 3,551 4,554 11,159 PYTD 2021 516,567 510,269 5212,596 5459,263 4268,651 5228,552 51,025,593 4552,633 4268,651 5288,552 51,025,593 521,037 5974,052 5423,837	\$3,899,043 Unit Change 2,728 4,853 4,253 4,253 11,879 Unit Change 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,369 5119,374 5568,580 5508,061	\$188,569 % Chang 109 1.302 -581 830 (\$1,302 (\$1,302 (\$1,025) (\$1,02	
Migration Upgrades Downgrades Same Amount Total Gift Band Summ Gift Band Summ Soliton 525 525 to 549 550 to 559 5100 to 5529 5100 to 5529 5100 to 5249 5500 to 599 51,000 to 52499 55,000 to 5499		\$2,767,417 FYTD 2017 FYTD 2017 FYTD 2017 FYTD 2017 511 512 540 540 540 541 542 540 541 542 540 541 542 540 541 542 540 541 542 540 541 542 540 541 542 540 541 542 540 541 542 55 540 541 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 540 55 55 55 55 55 55 55 55 55 55 55 55 55	FYTD 2018	\$3,065,666 PYTD 2019 2,131 3,574 3,574 3,577 3,577 4,577 5,118,331 5,191,920 5,517,557 5,118,331 5,191,920 5,518,331 5,191,920 5,518,331 5,526,778 5,528,347 5,526,534 5,536,534 5,536,534	\$3,014,140 Donor Performance [FYTD 2020 2,123 3,629 4,155 9,387 Giving Performance 519 \$19,177 \$107,266 \$197,766 \$197,766 \$2417,643 \$256,054 \$100,2667 \$100,2667 \$100,2667 \$100,2667 \$100,2667 \$100,2679 \$105,689 \$925,492	\$3,410,474 FYTD 2021 2.674 3.551 4.524 11.169 FYTD 2021 516.567 5120.691 5212.396 5459.263 5459.263 5268.651 5288.552 5368.553 5288.552 5362.5580 5312.037 5974.052	\$3,899,043 Unit Change 2,203 4,853 4,853 4,353 11,979 Unit Change 519,369 5110,333 5229,683 5611,940 5326,578 5325,578 5425,5785,5785,5785,5785,5785,5785,5785,57	\$188,569 % Chang 109 1.302 -581 830 \$30 \$30 \$30 \$15,245 \$152,676 \$32,833 \$37,765 \$152,676 \$393,833 \$37,765 \$555,444 \$157,543 \$157,543 \$157,543	iange

Appendix E: Major Giving Layer

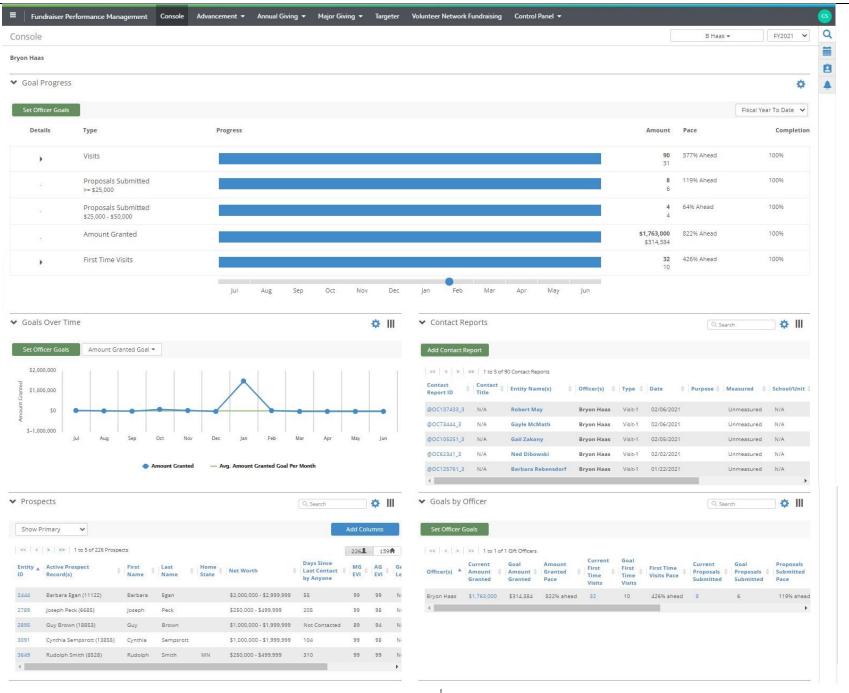


Appendix E: Major Giving Layer

Giving													
formance	Officer:	Assign artuyrelles * Prim	ment Type:										
signments													
	Prospect	Assignments											
	127	115 🛖											
													Q Search Prosp
chmarks	Entity II	Prospect ID(s)	÷ First Name	‡ Last Name	Relationship Type(s)	Home State	Contact & Solicitation Restriction Exclusions	Days Since Last Contact by Anyone	Days Since Last Visit by Anyone	MG	Cumulative Cash Giving	Number of Fiscal Years Giving	Prospect Stage(s)
	100182	15726	Nell	Greene	Alumni	MN		284	1,815	99	\$5.335	15	Identification
	10162	195	Lorrence	Liette	Parent	MN	No Mail, No Solicit	545	545	99	\$31,415	25	Solicitation
	103968	20912	Mark	Johns	Alumni	MA		529	529	97	\$2,842	26	Qualification
	104100	20910	Charles	Siebert	Alumni	NC		289	289	99	\$23,791	25	Solicitation
	107021	19439, 13380	Carl	Miller	Alumni	CA		430	430	99	\$24,760	24	Stewardship, Qualification
	10841	21036, 10520	Paul	Chamberlain	Other	MN	No Solicit	458	458	97	\$3,203	28	Identification, Stewardship
	109589	20567	Daniel	Field	Alumni	NY		Not Contacted	Not Visited	95	\$750	5	Identification
	109646	20570	Charles	Fowler	Alumni	NY	No Phone	119	119	35	\$0	0	Identification
	111151	20568	Bruce	Molloy	Alumni	NY	No Phone	258	258	86	\$75	2	Qualification
	112787	16074	Robert	Ruark	Alumni	MN		283	283	97	\$3,022	14	Identification
	114619	10499	Mary	Gervers	Other	MN		265	265	99	\$30,550	29	Qualification
	115381	18633	N. A.	Beard	Alumni	MA		233	989	97	\$3,685	24	Identification
	115741	18593	Deborah	Warm	Alumni	MN	No Phone	413	413	93	\$1,735	5	Qualification
	117850	20568	Susan	Molloy	Alumni	NY		271	271	87	\$0	0	Qualification
	117998	8658, 18593	Paul	Warm	Alumni	MN		110	Not Visited	99	\$8,000	14	Cultivation, Qualification

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Appendix F: Console Layer



CONFIDENTIAL

Appendix G: Fundraiser Performance Management Mobile

2:02		•11 LTE	
Blac	kbaud Fundraiser Performa	rce Management"	
	Welcome	e to	
Blackbaud F	undraiser Perfo	rmance Manage	men
	Lookup an E	ntity	
Q. Search: I	Entity ID, First Na	me/Last Name	0
	Create a Contac	t Report	
	Access Pocket 7 Prospect Assig and Activity Cent	nments,	
	L		
Q Entity Search) Targeter Prosp	M E	1 ndar

2:03		••II LTE	•• I LTE 💽		
<	Relationshi	p Profile	•••		
	Myrna Aronoff (Alumni, Female, 62, (01/3: Dentist, Pearly White ID: 19966 (Active)				
Call	Email	+ Contact + Tas	k		
Relationsh	nip Summary				
Relationship	p Network	3	>		
Degrees an	d Affiliations		>		
Contact Infe	ormation		>		
Prospect In	formation	Assigned	>		
Relationsh	nip Management				
Donor Anal	ytics	Total Commitments \$32,554.00	>		
Activities		9	>		
Proposals		6	>		
Attachment	s	2	>		
Donor Dis Last Screenin	COVERY g: 02/19/2016 06:27 PM				
Donor Disc	overy Summary		>		
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