Blackbaud Fundraiser Performance Management™

DATA REQUEST GUIDE

Frequently Asked Questions for Non-Profits

Version 2021.1

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 board or committee 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, contact restrictions, 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 organization 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 organization, 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 organizations 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 organization 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 organization (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.

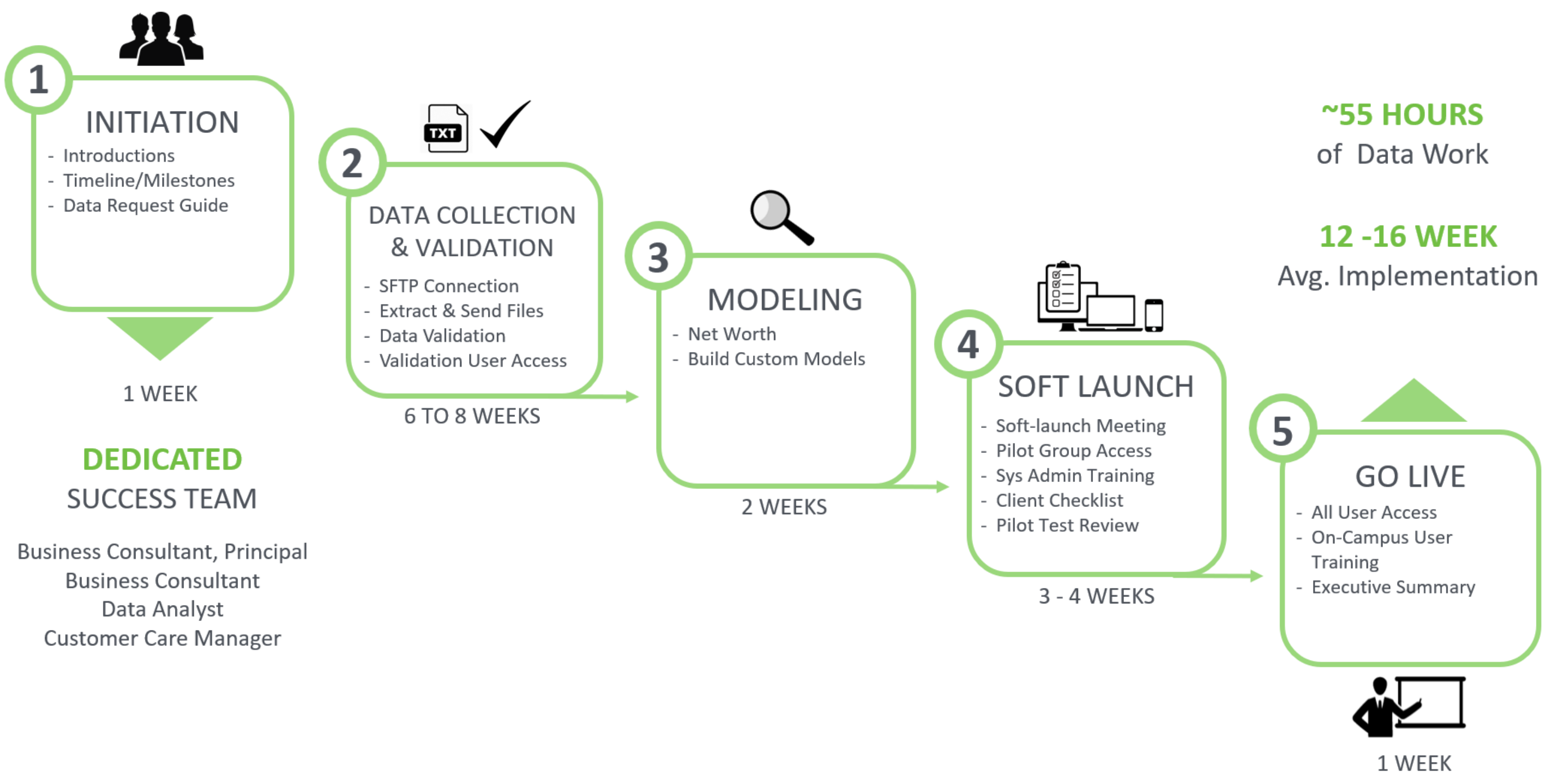
3rd phase Predictive Modeling and Fundraiser Performance Management Build – We will get to work on mapping your data to Fundraiser Performance Management. We append a net worth estimate on the individuals within your identified constituent pool that is a consumer marketing data variable based on a proprietary 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 organization 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 organization'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 organizations are up-and-running on Fundraiser Performance Management within sixteen weeks. The typical sixteen week timeline is outlined as follows:



1 INITIATION
- Introductions
- Timeline/Milestones
- Data Request Guide

1 WEEK

2 DATA COLLECTION & VALIDATION
- SFTP Connection
- Extract & Send Files
- Data Validation
- Validation User Access

6 TO 8 WEEKS

3 MODELING
- Net Worth
- Build Custom Models

2 WEEKS

4 SOFT LAUNCH
- Soft-launch Meeting
- Pilot Group Access
- Sys Admin Training
- Client Checklist
- Pilot Test Review

3 - 4 WEEKS

5 GO LIVE
- All User Access
- On-Campus User Training
- Executive Summary

1 WEEK

DEDICATED
SUCCESS TEAM

Business Consultant, Principal
Business Consultant
Data Analyst
Customer Care Manager

~55 HOURS
of Data Work

12 -16 WEEK
Avg. Implementation

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 organization's primary tasks are to establish the nightly feed to supply up-to-date fundraising information from your organization'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 organization?

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 organization is reviewed and shared with you. Adjustments are made, if necessary, to fine-tune performance. We assign scores to individuals, members, volunteers, 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 organization'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 1.8: Associated Entities
File 1.2c: Phones	File 3.1b: Activity Details	File 4.2: Customer Specific Codes
File 1.4: Relationship Type	File 3.2: Staff Information	File 4.3: Social Media Links
File 1.5a: Participation History	File 3.3: Prospect Entity	File 4.4: Web Addresses
File 1.6: Contact Restrictions	File 3.4: Prospect Status	
File 4.1: Code Translation Table	File 3.4b: Prospect Stage History	
	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 a Board Member, a Volunteer, and a Friend, 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 organization 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 organization 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 1.4: 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 a Board Member, a Volunteer, and a Friend, 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 committees, events, volunteering, traveling, run, walk, ride participation, 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".

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 1.8: 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, employers, 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, and Associated Relationship Type. 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.

Entity ID	Associated Entity ID	Associated Entity Name	Associated Relationship Type
2222	1111	John Smith	Parent
1111	2222	Mary Smith	Child

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.

Entity ID	Associated Entity ID	Associated Entity Name	Associated Relationship Type
4444	3333	Adam Jones	Brother
3333	4444	Beth Jones	Sister

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 organizations 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 organization (e.g., gifts and pledge payments). Essentially includes everything except pledges. Since many organizations 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 organization 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 organizations 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 organizations, 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 organization 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 organization 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 organization 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 organization 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 organization. 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 organization 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 unit giving designations, gift bands, donor type, and primary relationship type to provide analysis of dollar and donor performance for your organization. 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 Unit, you can evaluate how much of your officers' effort is being allocated to each 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, presidents, vice presidents, etc.

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

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
258	Current	President	0	0	1
987	Former	GiftOfficer	1	0	0
654	Former	Volunteer*	0	1	0
321	Former	Staff*	1	0	0
852	Former	President*	0	0	0

*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 organization 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 organizations 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 organization does not have an Advance database, it is acceptable for your organization 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 organization, 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, Contact Restrictions, Activity History, etc.) and the Field Name (Marital Status, Restriction Code, 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.

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

File Name	Field Name	Customer Code	Customer Definition
Entity	Marital Status	M	Married
Entity	Marital Status	S	Single
Entity	Marital Status	D	Divorced
Entity	Marital Status	W	Widowed
Entity	Primary Relationship Type	MEMB	Member
Entity	Primary Relationship Type	CF	Corporation/Foundation
Entity	Primary Relationship Type	FR	Friend
Entity	Primary Relationship Type	PA	Parent
Contact Restrictions	Restriction Code	DNM	Do Not Mail
Contact Restrictions	Restriction Code	DNP	Do Not Phone
Contact Restrictions	Restriction Code	DNS	Do Not Solicit
Appeals	Appeal Type	DM	Direct Mail
Appeals	Appeal Type	PH	Phone
Appeals	Appeal Type	EM	Email

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_Affinity” and wealth screening would be included in “CustomerSpecificCodes_Wealth”.

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.

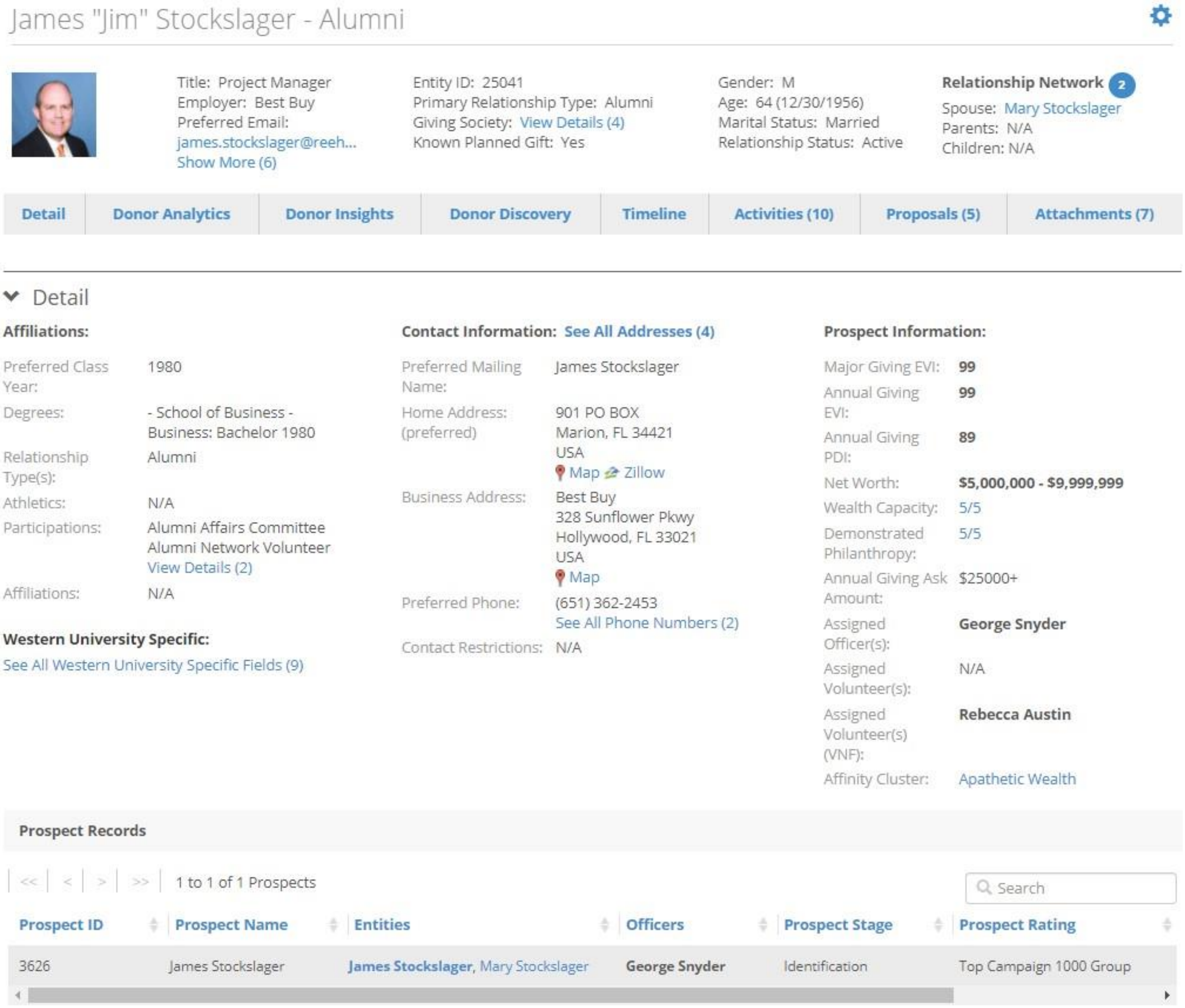
Where does this show up in Fundraiser Performance Management?
This file allows you to send links to social media sites (Facebook, Twitter, LinkedIn) for your constituents to be loaded into Fundraiser Performance Management. Social media links are displayed in each constituent's Relationship Profile. 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.

Appendix A: Relationship Profile



James "Jim" Stockslager - Alumni

Title: Project Manager
Employer: Best Buy
Preferred Email:
james.stockslager@reeh...
Show More (6)

Entity ID: 25041
Primary Relationship Type: Alumni
Giving Society: View Details (4)
Known Planned Gift: Yes

Gender: M
Age: 64 (12/30/1956)
Marital Status: Married
Relationship Status: Active

Relationship Network 2
Spouse: Mary Stockslager
Parents: N/A
Children: N/A

Detail

Affiliations:

Preferred Class Year:	1980
Degrees:	- School of Business - Business: Bachelor 1980
Relationship Type(s):	Alumni
Athletics:	N/A
Participations:	Alumni Affairs Committee Alumni Network Volunteer View Details (2)
Affiliations:	N/A

Western University Specific:
See All Western University Specific Fields (9)

Contact Information: **See All Addresses (4)**

Preferred Mailing Name:	James Stockslager
Home Address: (preferred)	901 PO BOX Marion, FL 34421 USA Map Zillow
Business Address:	Best Buy 328 Sunflower Pkwy Hollywood, FL 33021 USA Map
Preferred Phone:	(651) 362-2453 See All Phone Numbers (2)
Contact Restrictions:	N/A

Prospect Information:

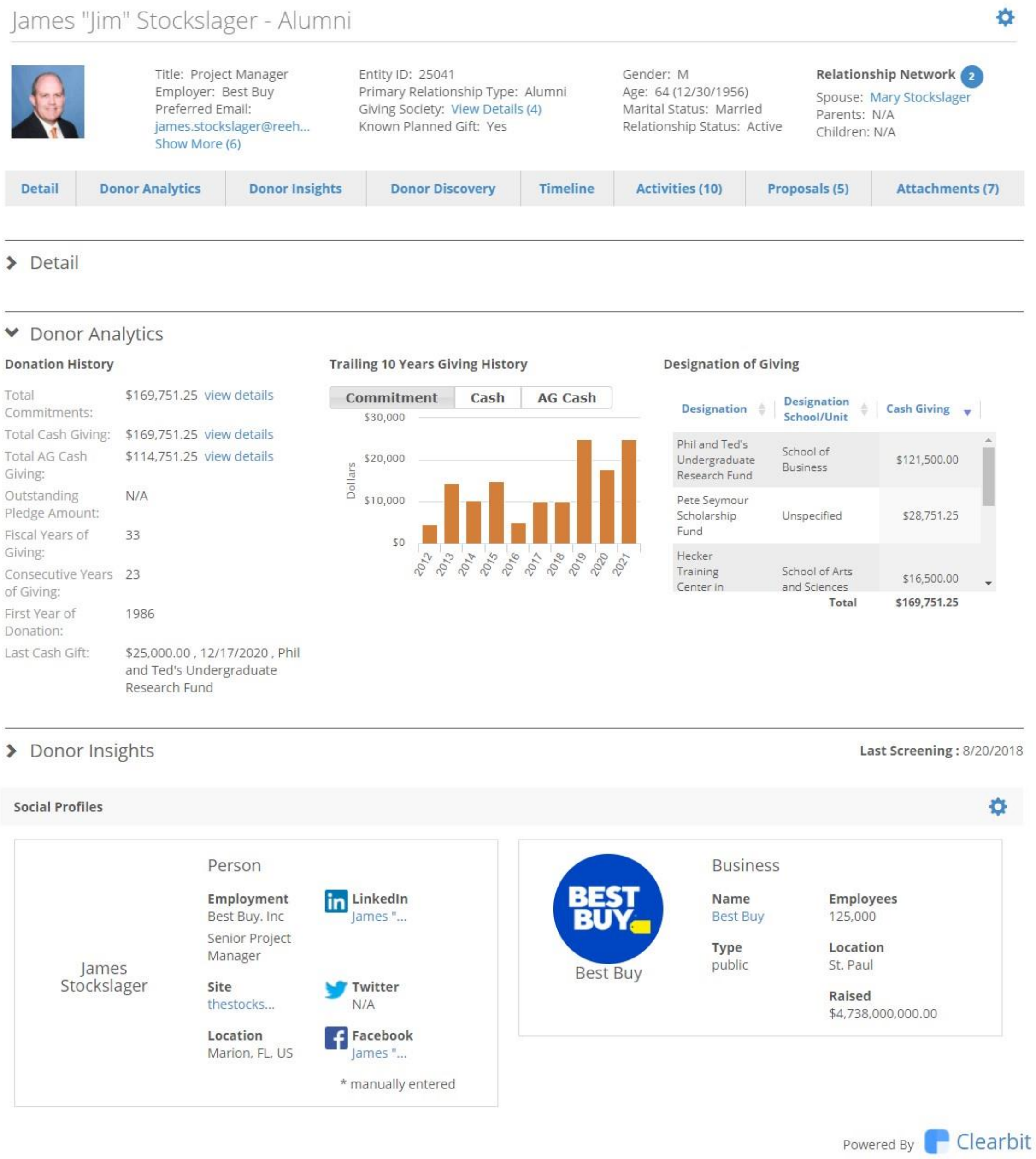
Major Giving EVI:	**99**
Annual Giving EVI:	**99**
Annual Giving PDI:	**89**
Net Worth:	**$5,000,000 - $9,999,999**
Wealth Capacity:	5/5
Demonstrated Philanthropy:	5/5
Annual Giving Ask Amount:	$25000+
Assigned Officer(s):	**George Snyder**
Assigned Volunteer(s):	N/A
Assigned Volunteer(s) (VNF):	**Rebecca Austin**
Affinity Cluster:	Apathetic Wealth

Prospect Records

1 to 1 of 1 Prospects

Prospect ID	Prospect Name	Entities	Officers	Prospect Stage	Prospect Rating
3626	James Stockslager	**James Stockslager**, Mary Stockslager	**George Snyder**	Identification	Top Campaign 1000 Group

Appendix A: Relationship Profile



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Employer: Best Buy
Preferred Email:
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Marital Status: Married
Relationship Status: Active

Relationship Network 2
Spouse: Mary Stockslager
Parents: N/A
Children: N/A

Detail

Donor Analytics

Donation History

Total Commitments:	$169,751.25 view details
Total Cash Giving:	$169,751.25 view details
Total AG Cash Giving:	$114,751.25 view details
Outstanding Pledge Amount:	N/A
Fiscal Years of Giving:	33
Consecutive Years of Giving:	23
First Year of Donation:	1986
Last Cash Gift:	$25,000.00 , 12/17/2020 , Phil and Ted's Undergraduate Research Fund

Trailing 10 Years Giving History

Designation of Giving

Designation	Designation School/Unit	Cash Giving
Phil and Ted's Undergraduate Research Fund	School of Business	$121,500.00
Pete Seymour Scholarship Fund	Unspecified	$28,751.25
Hecker Training Center in	School of Arts and Sciences	$16,500.00
	Total	$169,751.25

Donor Insights

Last Screening : 8/20/2018

Social Profiles

Person

James Stockslager

Employment
Best Buy, Inc
Senior Project Manager

Site
thestocks...

Location
Marion, FL, US

LinkedIn
James "...

Twitter
N/A

Facebook
James "...

* manually entered

Business

Best Buy

Name
Best Buy

Type
public

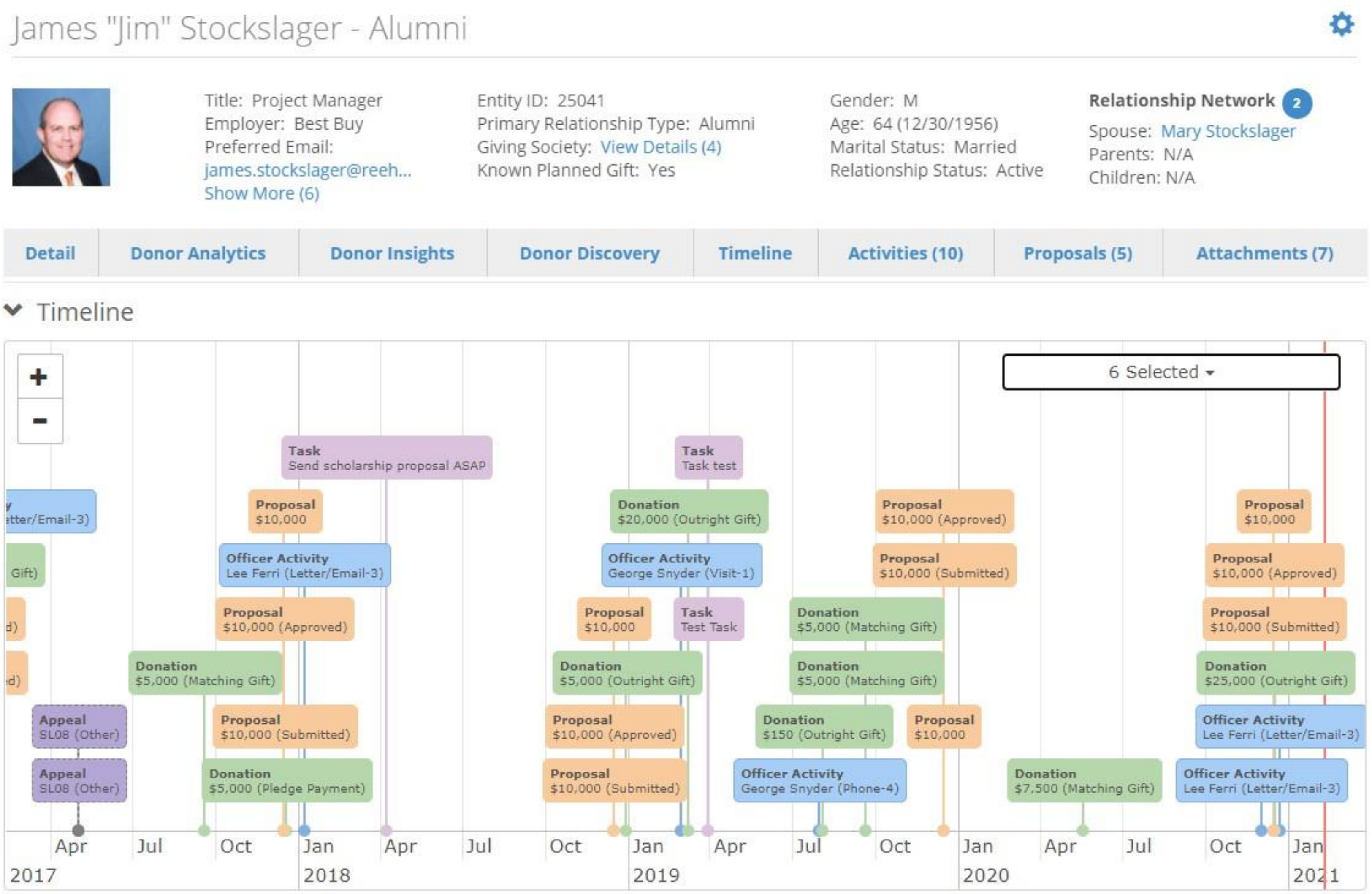
Employees
125,000

Location
St. Paul

Raised
$4,738,000,000.00

Powered By Clearbit

Appendix A: Relationship Profile



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Children: N/A

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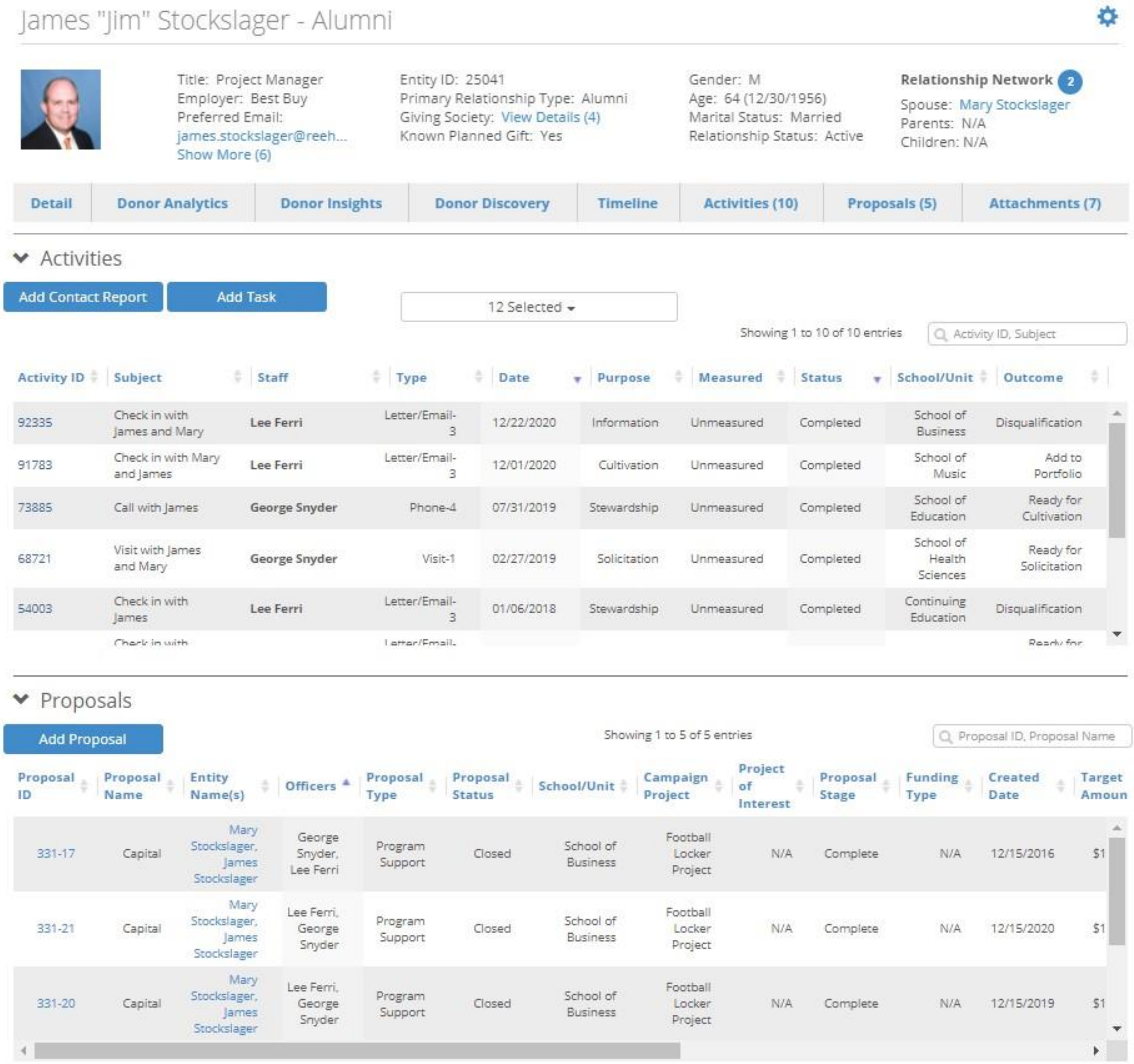

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Relationship Status: Active

Relationship Network 2
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Parents: N/A
Children: N/A

Activities

Showing 1 to 10 of 10 entries

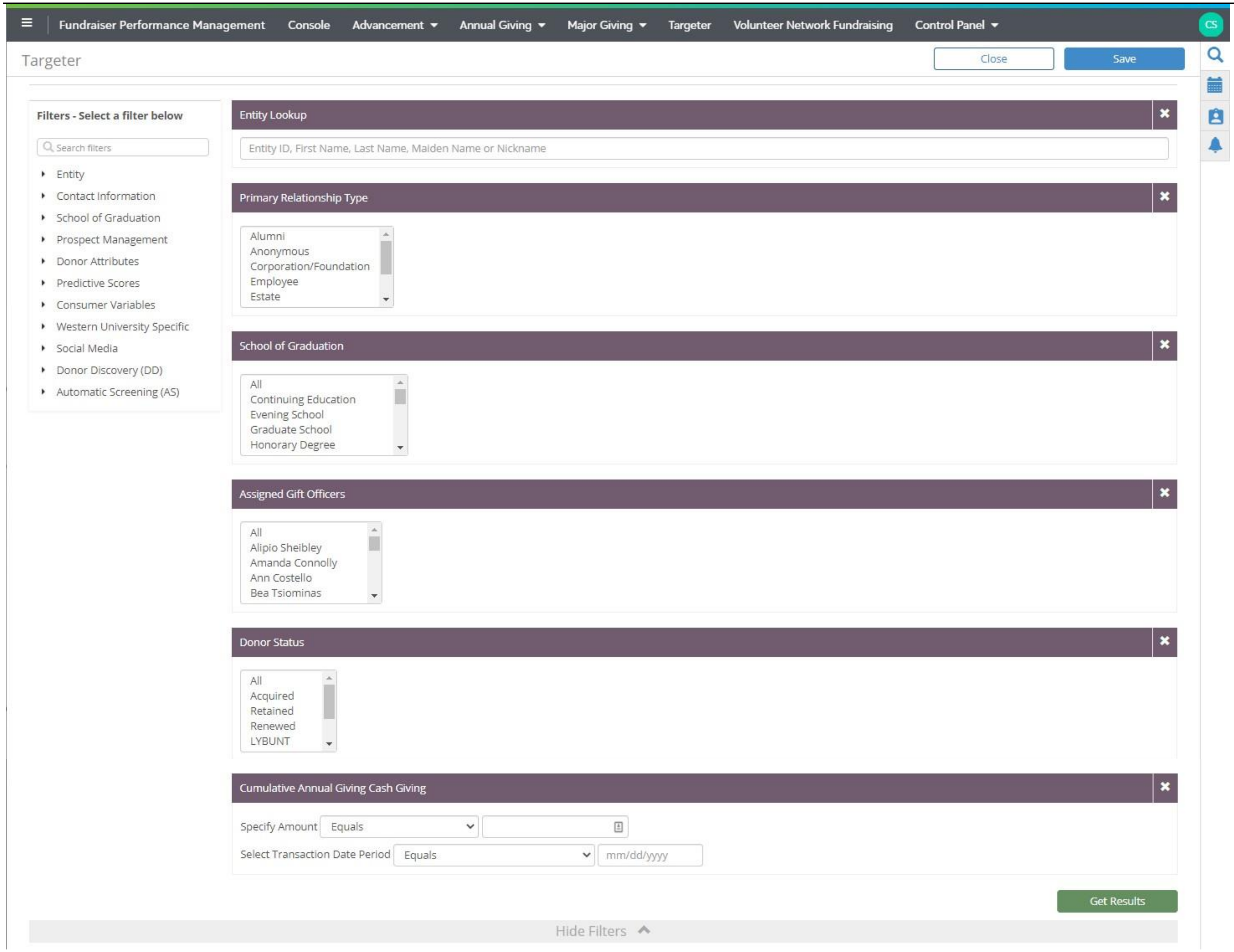
Activity ID	Subject	Staff	Type	Date	Purpose	Measured	Status	School/Unit	Outcome
92335	Check in with James and Mary	**Lee Ferri**	Letter/Email-3	12/22/2020	Information	Unmeasured	Completed	School of Business	Disqualification
91783	Check in with Mary and James	**Lee Ferri**	Letter/Email-3	12/01/2020	Cultivation	Unmeasured	Completed	School of Music	Add to Portfolio
73885	Call with James	**George Snyder**	Phone-4	07/31/2019	Stewardship	Unmeasured	Completed	School of Education	Ready for Cultivation
68721	Visit with James and Mary	**George Snyder**	Visit-1	02/27/2019	Solicitation	Unmeasured	Completed	School of Health Sciences	Ready for Solicitation
54003	Check in with James	**Lee Ferri**	Letter/Email-3	01/06/2018	Stewardship	Unmeasured	Completed	Continuing Education	Disqualification
	Check in with		Letter/Email-						Ready for

Proposals

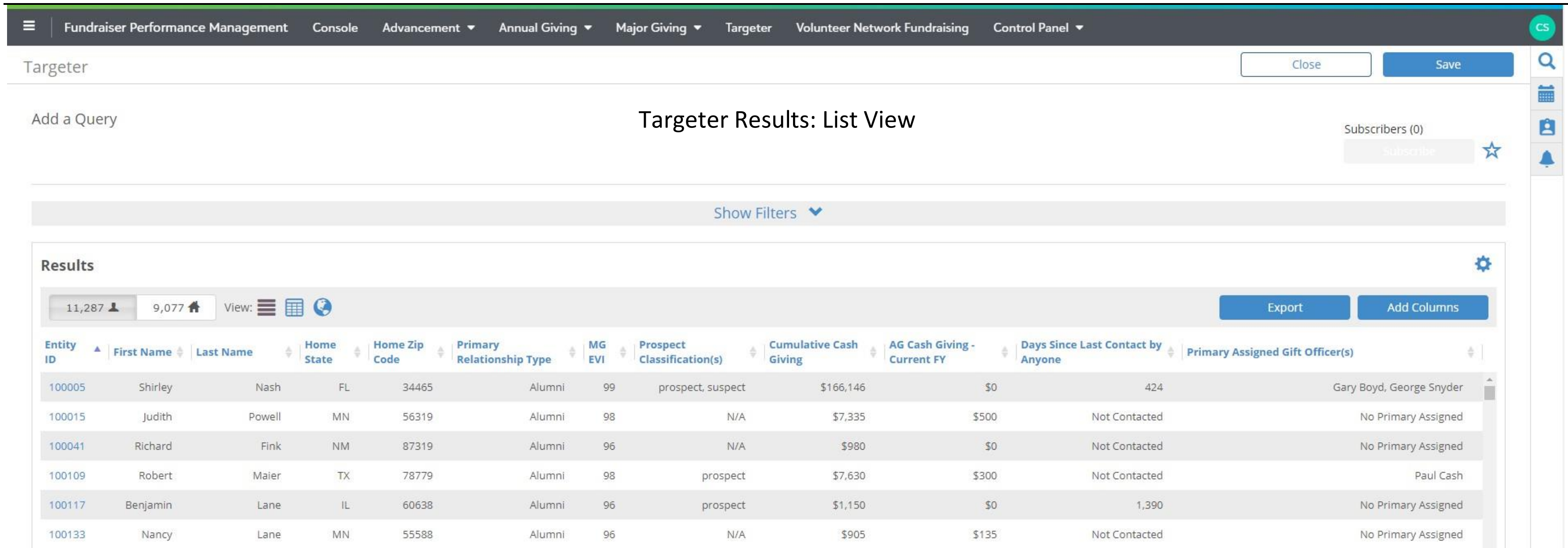
Showing 1 to 5 of 5 entries

Proposal ID	Proposal Name	Entity Name(s)	Officers	Proposal Type	Proposal Status	School/Unit	Campaign Project	Project of Interest	Proposal Stage	Funding Type	Created Date	Target Amoun
331-17	Capital	Mary Stockslager, James Stockslager	George Snyder, Lee Ferri	Program Support	Closed	School of Business	Football Locker Project	N/A	Complete	N/A	12/15/2016	$1
331-21	Capital	Mary Stockslager, James Stockslager	Lee Ferri, George Snyder	Program Support	Closed	School of Business	Football Locker Project	N/A	Complete	N/A	12/15/2020	$1
331-20	Capital	Mary Stockslager, James Stockslager	Lee Ferri, George Snyder	Program Support	Closed	School of Business	Football Locker Project	N/A	Complete	N/A	12/15/2019	$1

Appendix B: Targeter

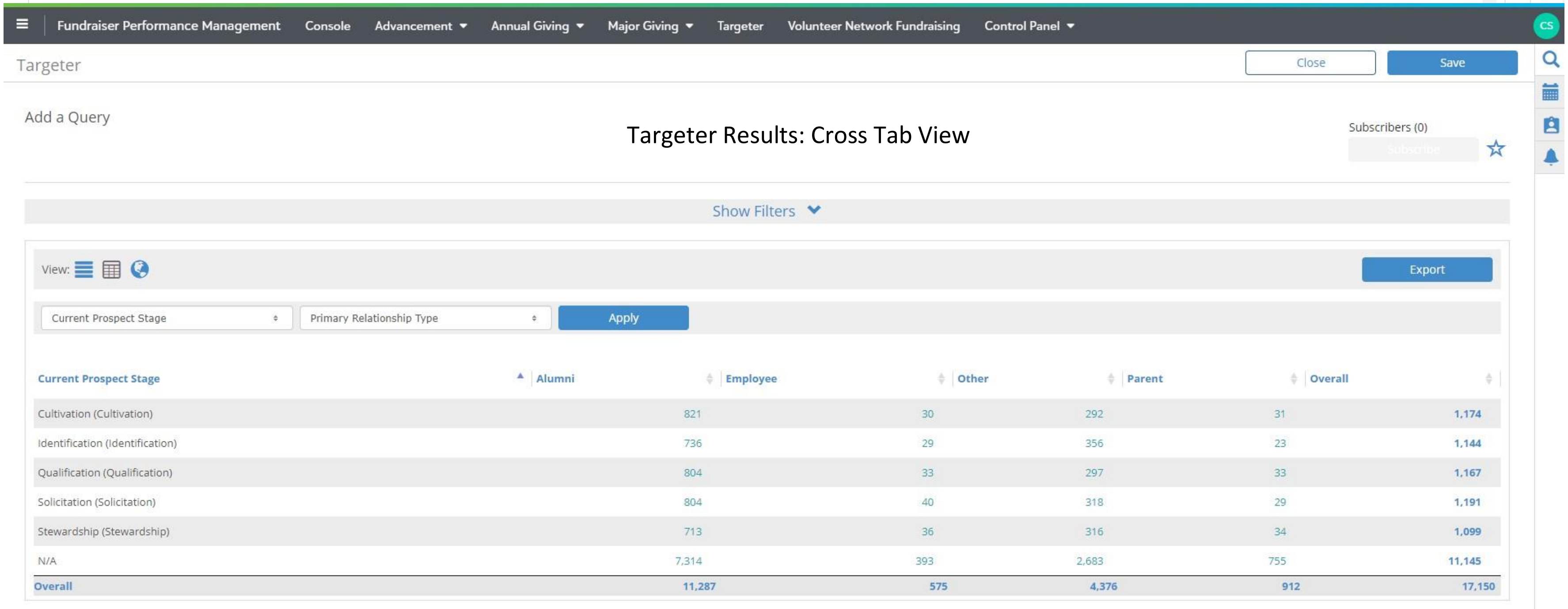


Appendix B: Targeter



Targeter Results: List View

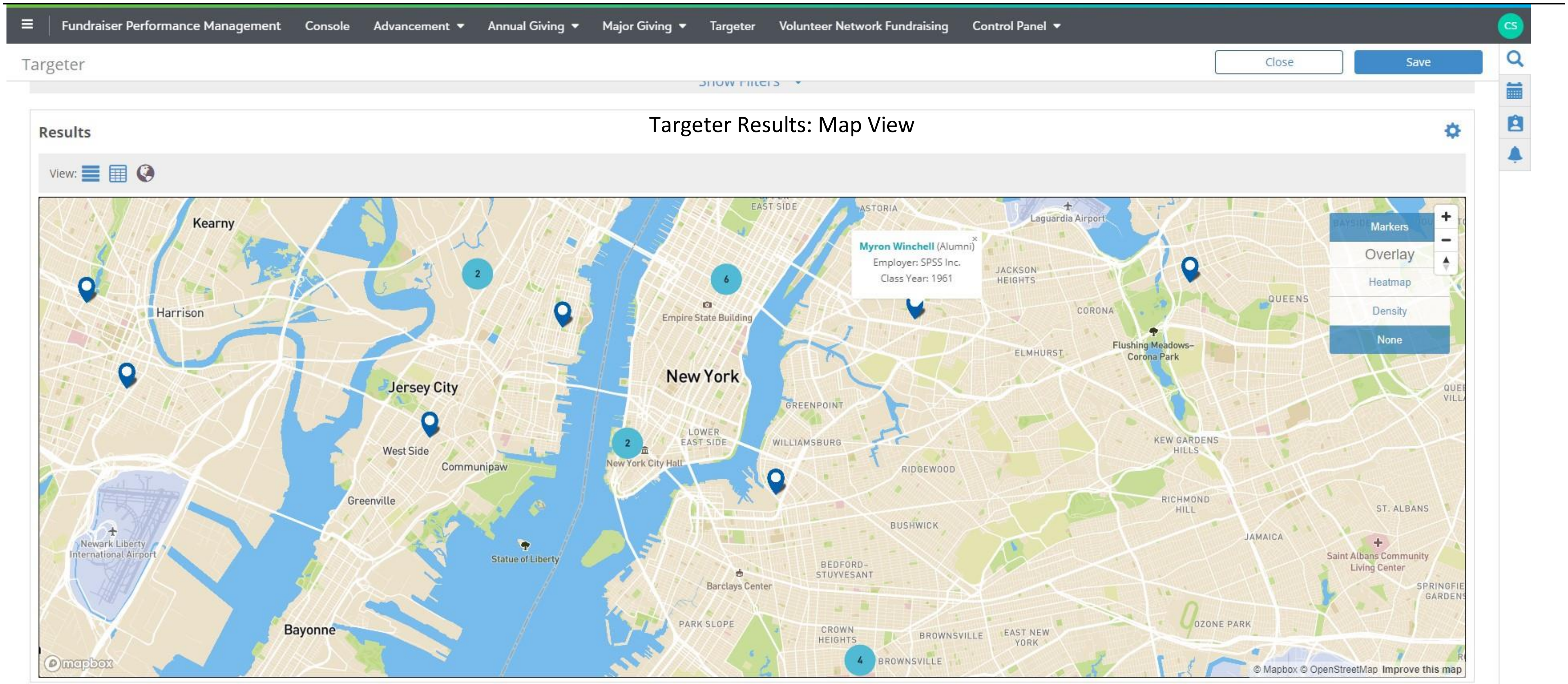
Entity ID	First Name	Last Name	Home State	Home Zip Code	Primary Relationship Type	MG EVI	Prospect Classification(s)	Cumulative Cash Giving	AG Cash Giving - Current FY	Days Since Last Contact by Anyone	Primary Assigned Gift Officer(s)
100005	Shirley	Nash	FL	34465	Alumni	99	prospect, suspect	$166,146	$0	424	Gary Boyd, George Snyder
100015	Judith	Powell	MN	56319	Alumni	98	N/A	$7,335	$500	Not Contacted	No Primary Assigned
100041	Richard	Fink	NM	87319	Alumni	96	N/A	$980	$0	Not Contacted	No Primary Assigned
100109	Robert	Maier	TX	78779	Alumni	98	prospect	$7,630	$300	Not Contacted	Paul Cash
100117	Benjamin	Lane	IL	60638	Alumni	96	prospect	$1,150	$0	1,390	No Primary Assigned
100133	Nancy	Lane	MN	55588	Alumni	96	N/A	$905	$135	Not Contacted	No Primary Assigned



Targeter Results: Cross Tab View

Current Prospect Stage	Alumni	Employee	Other	Parent	Overall
Cultivation (Cultivation)	821	30	292	31	1,174
Identification (Identification)	736	29	356	23	1,144
Qualification (Qualification)	804	33	297	33	1,167
Solicitation (Solicitation)	804	40	318	29	1,191
Stewardship (Stewardship)	713	36	316	34	1,099
N/A	7,314	393	2,683	755	11,145
Overall	**11,287**	**575**	**4,376**	**912**	**17,150**

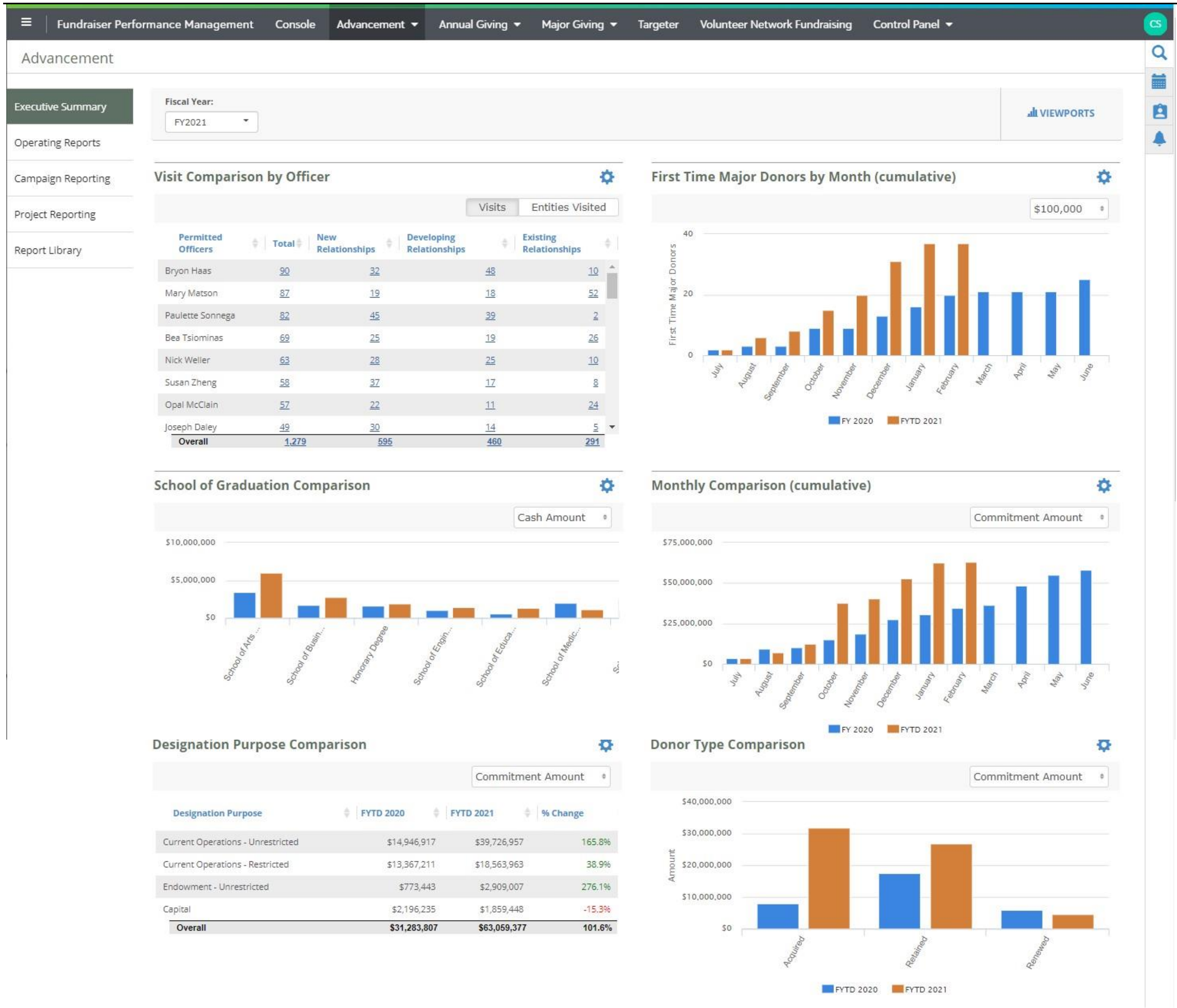
Appendix B: Targeter



Targeter Results: Map View

Myron Winchell (Alumni)
Employer: SPSS Inc.
Class Year: 1961

Appendix C: Advancement Layer



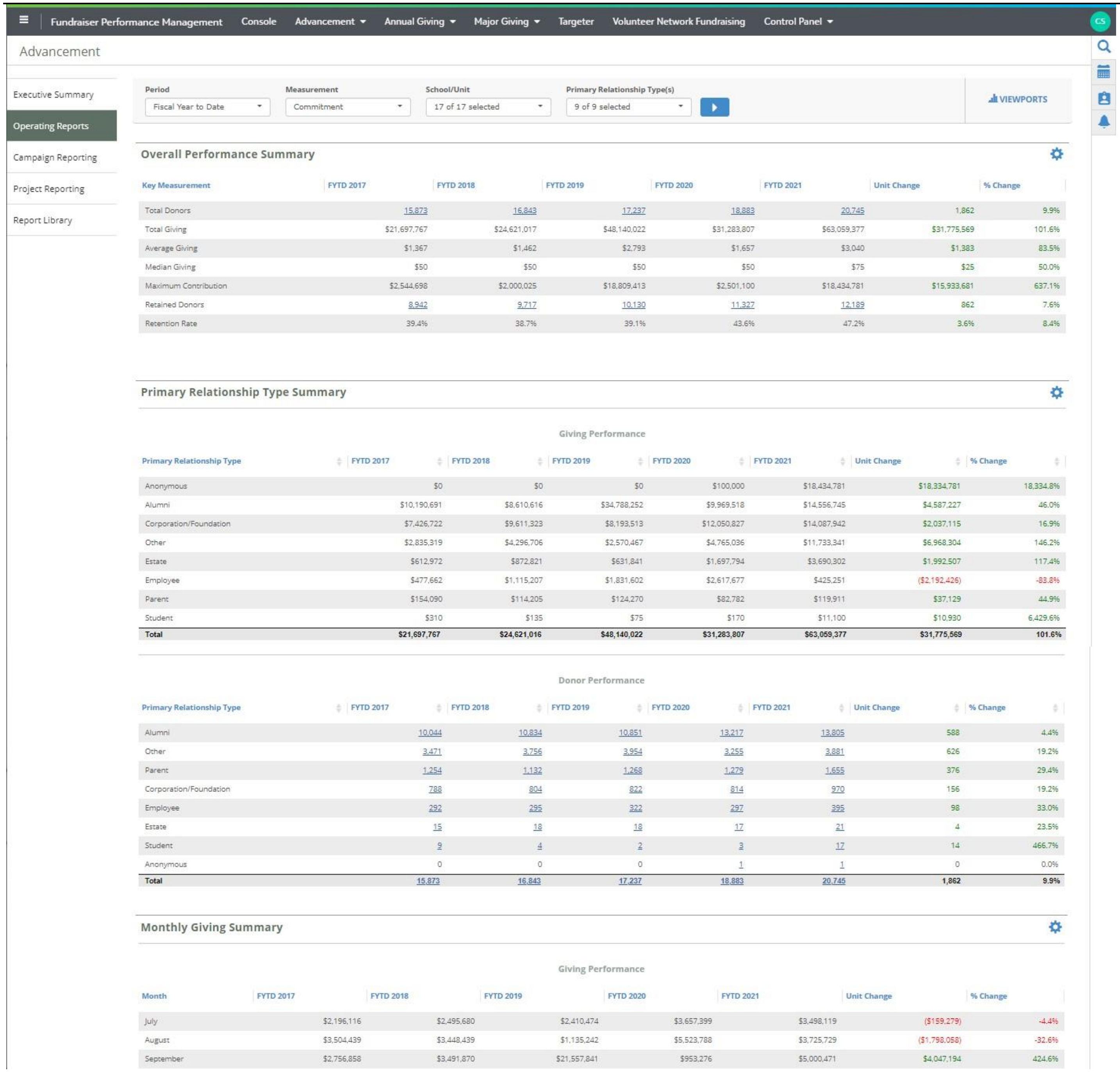
Visit Comparison by Officer

Permitted Officers	Total	New Relationships	Developing Relationships	Existing Relationships
Bryon Haas	90	32	48	10
Mary Matson	87	19	18	52
Paulette Sonnega	82	45	39	2
Bea Tsiominas	69	25	19	26
Nick Weller	63	28	25	10
Susan Zheng	58	37	17	8
Opal McClain	57	22	11	24
Joseph Daley	49	30	14	5
Overall	1,279	595	460	291

Designation Purpose Comparison

Designation Purpose	FYTD 2020	FYTD 2021	% Change
Current Operations - Unrestricted	$14,946,917	$39,726,957	165.8%
Current Operations - Restricted	$13,367,211	$18,563,963	38.9%
Endowment - Unrestricted	$773,443	$2,909,007	276.1%
Capital	$2,196,235	$1,859,448	-15.3%
Overall	**$31,283,807**	**$63,059,377**	**101.6%**

Appendix C: Advancement Layer



Period: Fiscal Year to Date

Measurement: Commitment

School/Unit: 17 of 17 selected

Primary Relationship Type(s): 9 of 9 selected

Overall Performance Summary

Key Measurement	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Total Donors	15,873	16,843	17,237	18,883	20,745	1,862	9.9%
Total Giving	$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	8,942	9,717	10,130	11,327	12,189	862	7.6%
Retention Rate	39.4%	38.7%	39.1%	43.6%	47.2%	3.6%	8.4%

Primary Relationship Type Summary

Giving Performance

Primary Relationship Type	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Anonymous	$0	$0	$0	$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

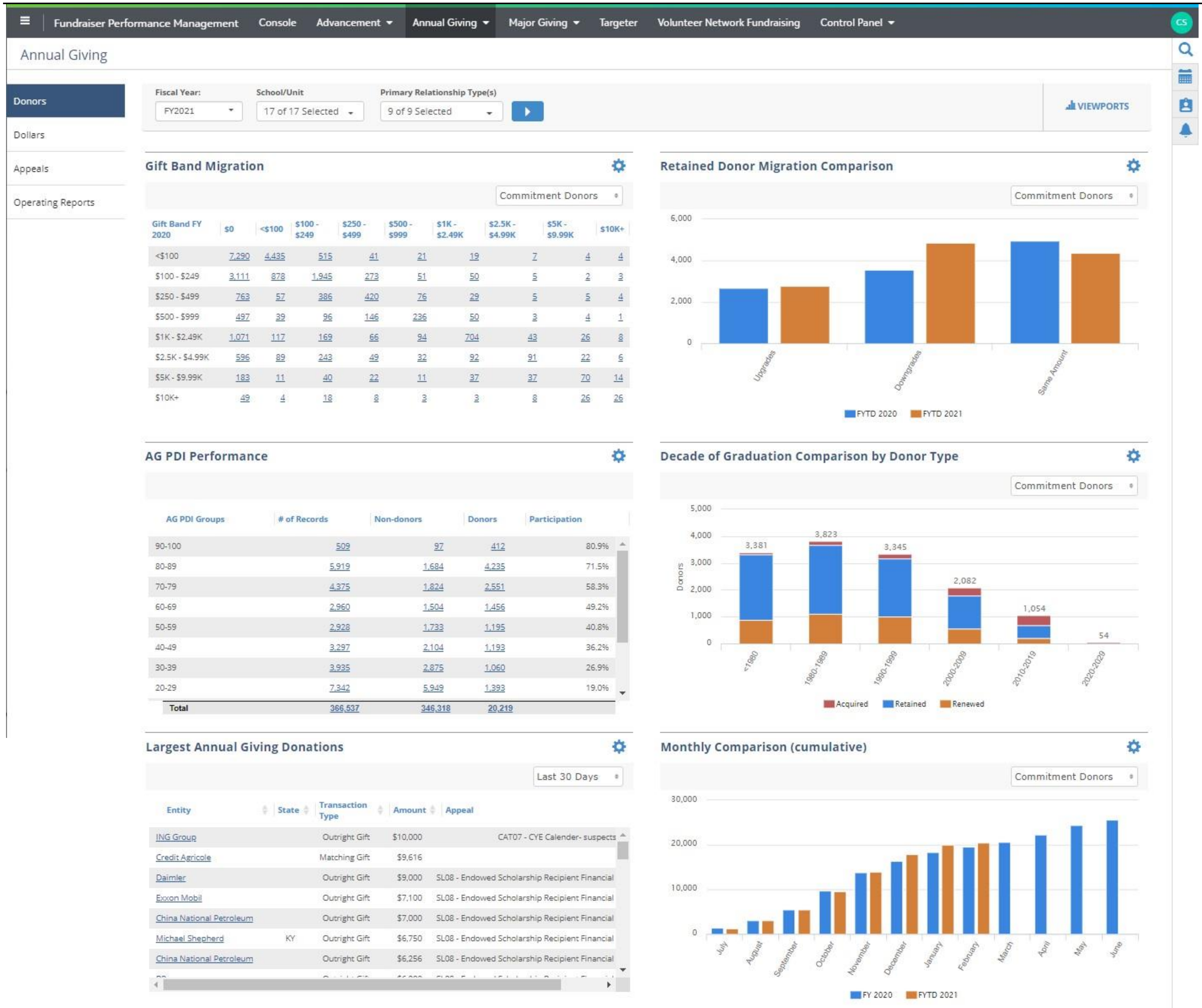
Primary Relationship Type	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Alumni	10,044	10,834	10,851	13,217	13,805	588	4.4%
Other	3,471	3,756	3,954	3,255	3,881	626	19.2%
Parent	1,254	1,132	1,268	1,279	1,655	376	29.4%
Corporation/Foundation	788	804	822	814	970	156	19.2%
Employee	292	295	322	297	395	98	33.0%
Estate	15	18	18	17	21	4	23.5%
Student	9	4	2	3	17	14	466.7%
Anonymous	0	0	0	1	1	0	0.0%
Total	**15,873**	**16,843**	**17,237**	**18,883**	**20,745**	**1,862**	**9.9%**

Monthly Giving Summary

Giving Performance

Month	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
July	$2,196,116	$2,495,680	$2,410,474	$3,657,399	$3,498,119	($159,279)	-4.4%
August	$3,504,439	$3,448,439	$1,135,242	$5,523,788	$3,725,729	($1,798,058)	-32.6%
September	$2,756,858	$3,491,870	$21,557,841	$953,276	$5,000,471	$4,047,194	424.6%

Appendix D: Annual Fund Layer



Fiscal Year: FY2021

School/Unit: 17 of 17 Selected

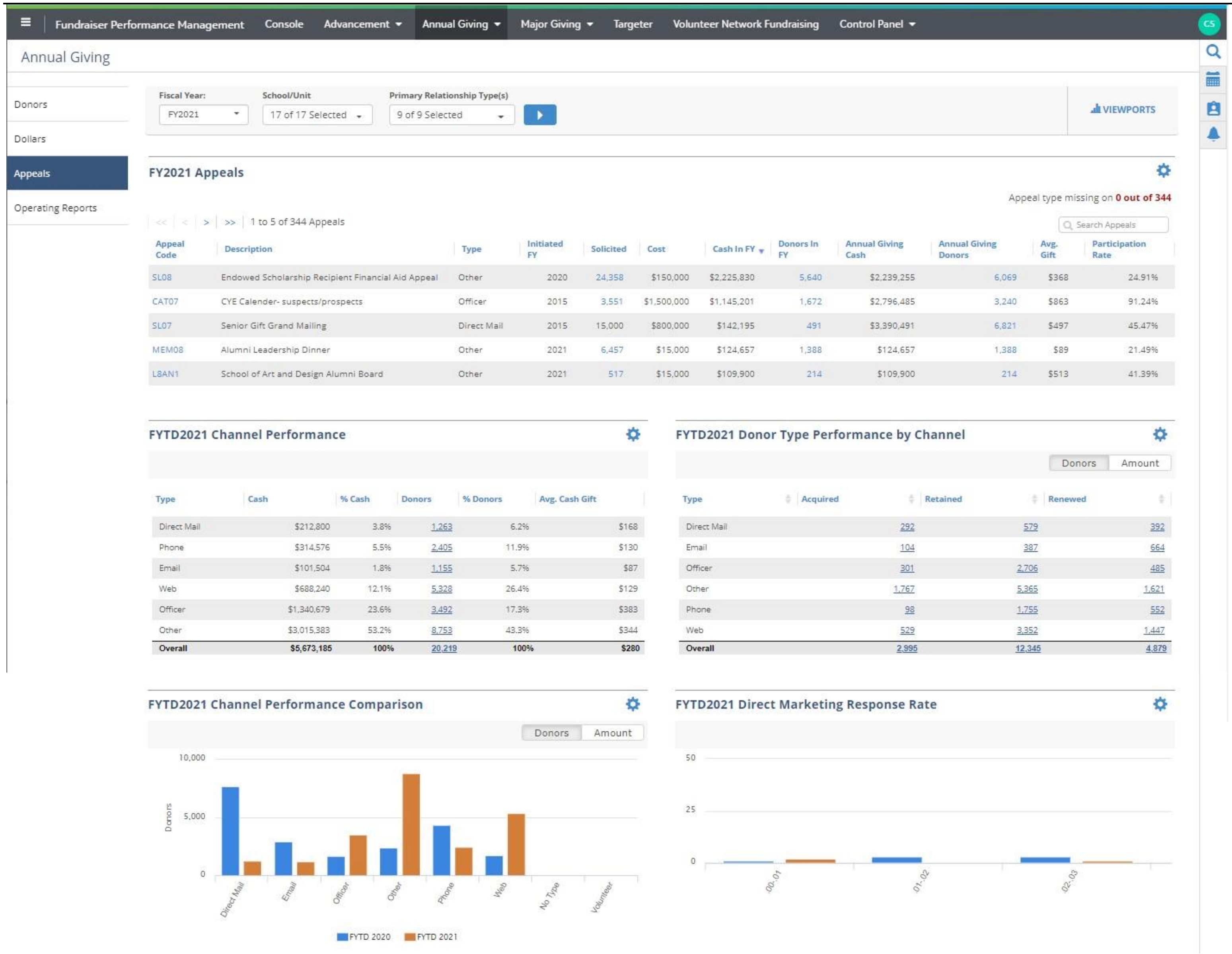
Primary Relationship Type(s): 9 of 9 Selected

Gift Band FY 2020	$0	<$100	$100 - $249	$250 - $499	$500 - $999	$1K - $2.49K	$2.5K - $4.99K	$5K - $9.99K	$10K+
<$100	7,290	4,435	515	41	21	19	7	4	4
$100 - $249	3,111	878	1,945	273	51	50	5	2	3
$250 - $499	763	57	386	420	76	29	5	5	4
$500 - $999	497	39	96	146	236	50	3	4	1
$1K - $2.49K	1,071	117	169	66	94	704	43	26	8
$2.5K - $4.99K	596	89	243	49	32	92	91	22	6
$5K - $9.99K	183	11	40	22	11	37	37	70	14
$10K+	49	4	18	8	3	3	8	26	26

AG PDI Groups	# of Records	Non-donors	Donors	Participation
90-100	509	97	412	80.9%
80-89	5,919	1,684	4,235	71.5%
70-79	4,375	1,824	2,551	58.3%
60-69	2,960	1,504	1,456	49.2%
50-59	2,928	1,733	1,195	40.8%
40-49	3,297	2,104	1,193	36.2%
30-39	3,935	2,875	1,060	26.9%
20-29	7,342	5,949	1,393	19.0%
Total	366,537	346,318	20,219	

Entity	State	Transaction Type	Amount	Appeal
ING Group		Outright Gift	$10,000	CAT07 - CYE Calender- suspects
Credit Agricole		Matching Gift	$9,616	
Daimler		Outright Gift	$9,000	SL08 - Endowed Scholarship Recipient Financial
Exxon Mobil		Outright Gift	$7,100	SL08 - Endowed Scholarship Recipient Financial
China National Petroleum		Outright Gift	$7,000	SL08 - Endowed Scholarship Recipient Financial
Michael Shepherd	KY	Outright Gift	$6,750	SL08 - Endowed Scholarship Recipient Financial
China National Petroleum		Outright Gift	$6,256	SL08 - Endowed Scholarship Recipient Financial

Appendix D: Annual Fund Layer



Annual Giving

Fiscal Year: FY2021

School/Unit: 17 of 17 Selected

Primary Relationship Type(s): 9 of 9 Selected

FY2021 Appeals

Appeal type missing on **0 out of 344**

1 to 5 of 344 Appeals

Appeal Code	Description	Type	Initiated FY	Solicited	Cost	Cash In FY	Donors In FY	Annual Giving Cash	Annual Giving Donors	Avg. Gift	Participation Rate
SL08	Endowed Scholarship Recipient Financial Aid Appeal	Other	2020	24,358	$150,000	$2,225,830	5,640	$2,239,255	6,069	$368	24.91%
CAT07	CYE Calender- suspects/prospects	Officer	2015	3,551	$1,500,000	$1,145,201	1,672	$2,796,485	3,240	$863	91.24%
SL07	Senior Gift Grand Mailing	Direct Mail	2015	15,000	$800,000	$142,195	491	$3,390,491	6,821	$497	45.47%
MEM08	Alumni Leadership Dinner	Other	2021	6,457	$15,000	$124,657	1,388	$124,657	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%

FYTD2021 Channel Performance

Type	Cash	% Cash	Donors	% Donors	Avg. Cash Gift
Direct Mail	$212,800	3.8%	1,263	6.2%	$168
Phone	$314,576	5.5%	2,405	11.9%	$130
Email	$101,504	1.8%	1,155	5.7%	$87
Web	$688,240	12.1%	5,328	26.4%	$129
Officer	$1,340,679	23.6%	3,492	17.3%	$383
Other	$3,015,383	53.2%	8,753	43.3%	$344
Overall	**$5,673,185**	**100%**	**20,219**	**100%**	**$280**

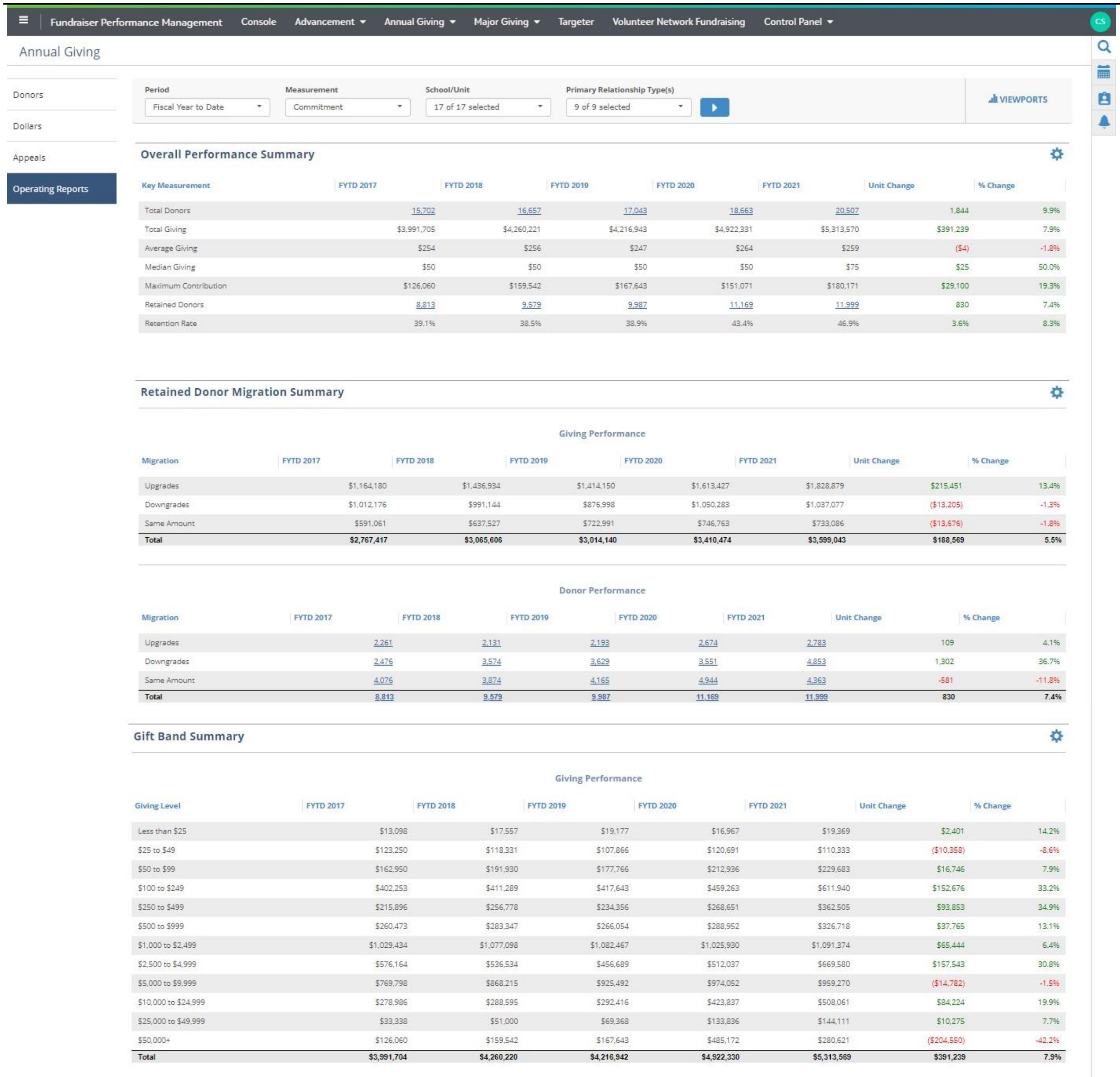
FYTD2021 Donor Type Performance by Channel

Type	Acquired	Retained	Renewed
Direct Mail	292	579	392
Email	104	387	664
Officer	301	2,706	485
Other	1,767	5,365	1,621
Phone	98	1,755	552
Web	529	3,352	1,447
Overall	2,995	12,345	4,879

FYTD2021 Channel Performance Comparison

FYTD2021 Direct Marketing Response Rate

Appendix D: Annual Fund Layer



Period: Fiscal Year to Date

Measurement: Commitment

School/Unit: 17 of 17 selected

Primary Relationship Type(s): 9 of 9 selected

Overall Performance Summary

Key Measurement	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Total Donors	15,702	16,657	17,043	18,663	20,507	1,844	9.9%
Total Giving	$3,991,705	$4,260,221	$4,216,943	$4,922,331	$5,313,570	$391,239	7.9%
Average Giving	$254	$256	$247	$264	$259	($4)	-1.8%
Median Giving	$50	$50	$50	$50	$75	$25	50.0%
Maximum Contribution	$126,060	$159,542	$167,643	$151,071	$180,171	$29,100	19.3%
Retained Donors	8,813	9,579	9,987	11,169	11,999	830	7.4%
Retention Rate	39.1%	38.5%	38.9%	43.4%	46.9%	3.6%	8.3%

Retained Donor Migration Summary

Giving Performance

Migration	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Upgrades	$1,164,180	$1,436,934	$1,414,150	$1,613,427	$1,828,879	$215,451	13.4%
Downgrades	$1,012,176	$991,144	$876,998	$1,050,283	$1,037,077	($13,205)	-1.3%
Same Amount	$591,061	$637,527	$722,991	$746,763	$733,086	($13,676)	-1.8%
Total	**$2,767,417**	**$3,065,606**	**$3,014,140**	**$3,410,474**	**$3,599,043**	**$188,569**	**5.5%**

Donor Performance

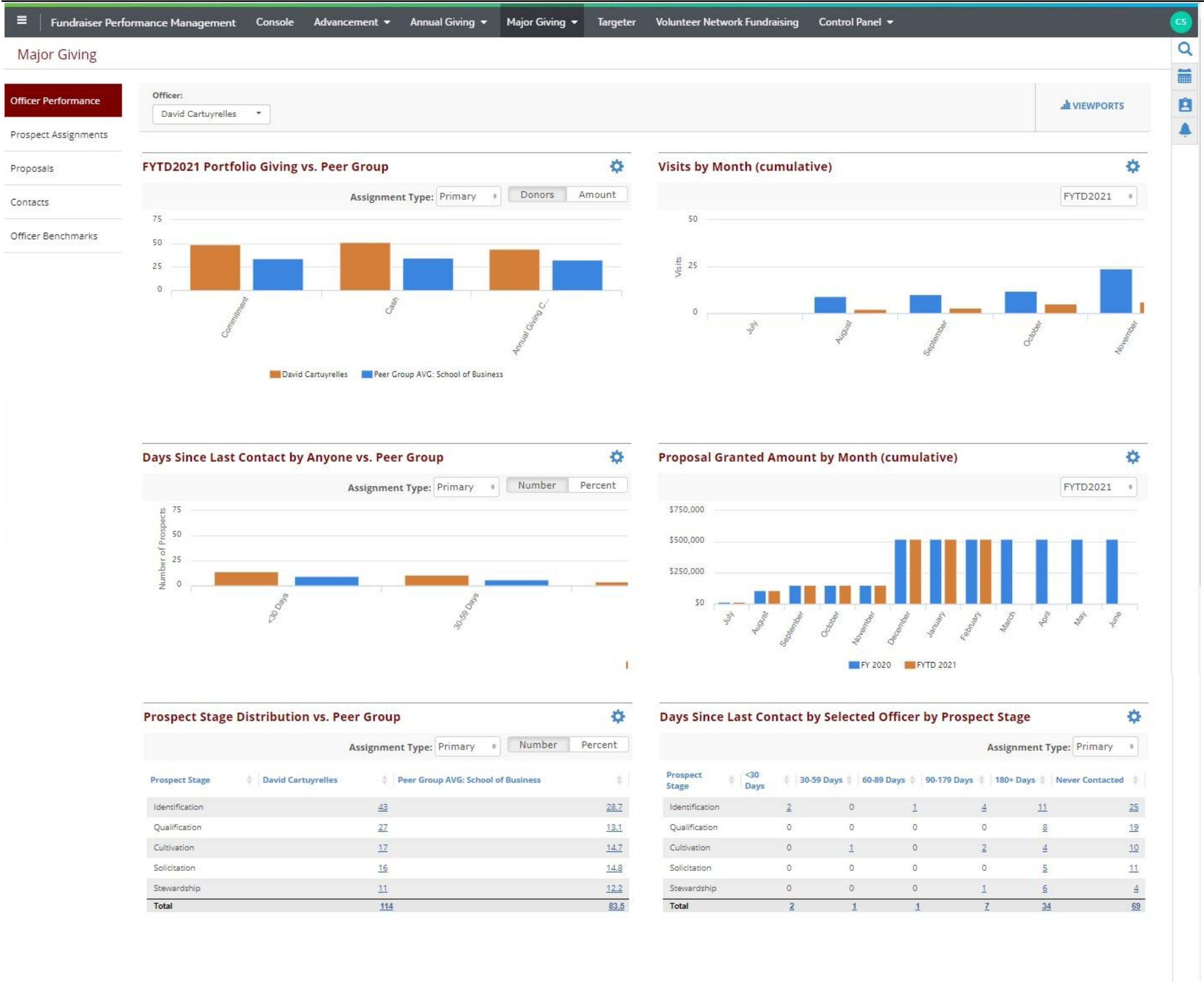
Migration	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Upgrades	2,261	2,131	2,193	2,674	2,783	109	4.1%
Downgrades	2,476	3,574	3,629	3,551	4,853	1,302	36.7%
Same Amount	4,076	3,874	4,165	4,944	4,363	-581	-11.8%
Total	**8,813**	**9,579**	**9,987**	**11,169**	**11,999**	**830**	**7.4%**

Gift Band Summary

Giving Performance

Giving Level	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	FYTD 2021	Unit Change	% Change
Less than $25	$13,098	$17,557	$19,177	$16,967	$19,369	$2,401	14.2%
$25 to $49	$123,250	$118,331	$107,866	$120,691	$110,333	($10,358)	-8.6%
$50 to $99	$162,950	$191,930	$177,766	$212,936	$229,683	$16,746	7.9%
$100 to $249	$402,253	$411,289	$417,643	$459,263	$611,940	$152,676	33.2%
$250 to $499	$215,896	$256,778	$234,356	$268,651	$362,505	$93,853	34.9%
$500 to $999	$260,473	$283,347	$266,054	$288,952	$326,718	$37,765	13.1%
$1,000 to $2,499	$1,029,434	$1,077,098	$1,082,467	$1,025,930	$1,091,374	$65,444	6.4%
$2,500 to $4,999	$576,164	$536,534	$456,689	$512,037	$669,580	$157,543	30.8%
$5,000 to $9,999	$769,798	$868,215	$925,492	$974,052	$959,270	($14,782)	-1.5%
$10,000 to $24,999	$278,986	$288,595	$292,416	$423,837	$508,061	$84,224	19.9%
$25,000 to $49,999	$33,338	$51,000	$69,368	$133,836	$144,111	$10,275	7.7%
$50,000+	$126,060	$159,542	$167,643	$485,172	$280,621	($204,550)	-42.2%
Total	**$3,991,704**	**$4,260,220**	**$4,216,942**	**$4,922,330**	**$5,313,569**	**$391,239**	**7.9%**

Appendix E: Major Giving Layer



Officer: David Cartuyrelles

FYTD2021 Portfolio Giving vs. Peer Group

Assignment Type: Primary

Visits by Month (cumulative)

FYTD2021

Days Since Last Contact by Anyone vs. Peer Group

Assignment Type: Primary

Proposal Granted Amount by Month (cumulative)

FYTD2021

Prospect Stage Distribution vs. Peer Group

Assignment Type: Primary

Number | Percent

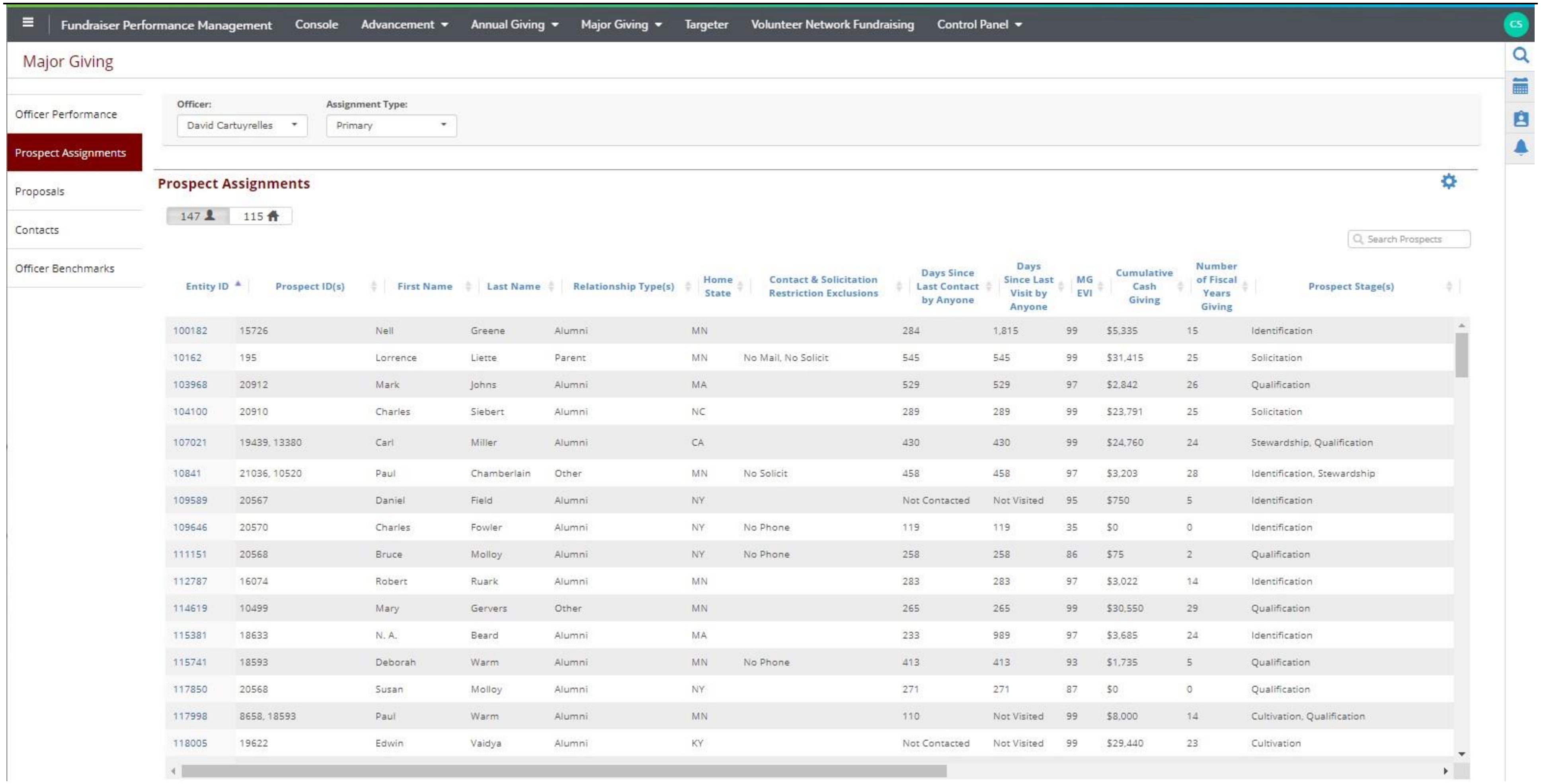
Prospect Stage	David Cartuyrelles	Peer Group AVG: School of Business
Identification	43	28.7
Qualification	27	13.1
Cultivation	17	14.7
Solicitation	16	14.8
Stewardship	11	12.2
Total	114	83.5

Days Since Last Contact by Selected Officer by Prospect Stage

Assignment Type: Primary

Prospect Stage	<30 Days	30-59 Days	60-89 Days	90-179 Days	180+ Days	Never Contacted
Identification	2	0	1	4	11	25
Qualification	0	0	0	0	8	19
Cultivation	0	1	0	2	4	10
Solicitation	0	0	0	0	5	11
Stewardship	0	0	0	1	6	4
Total	2	1	1	7	34	69

Appendix E: Major Giving Layer



Officer: David Cartuyrelles

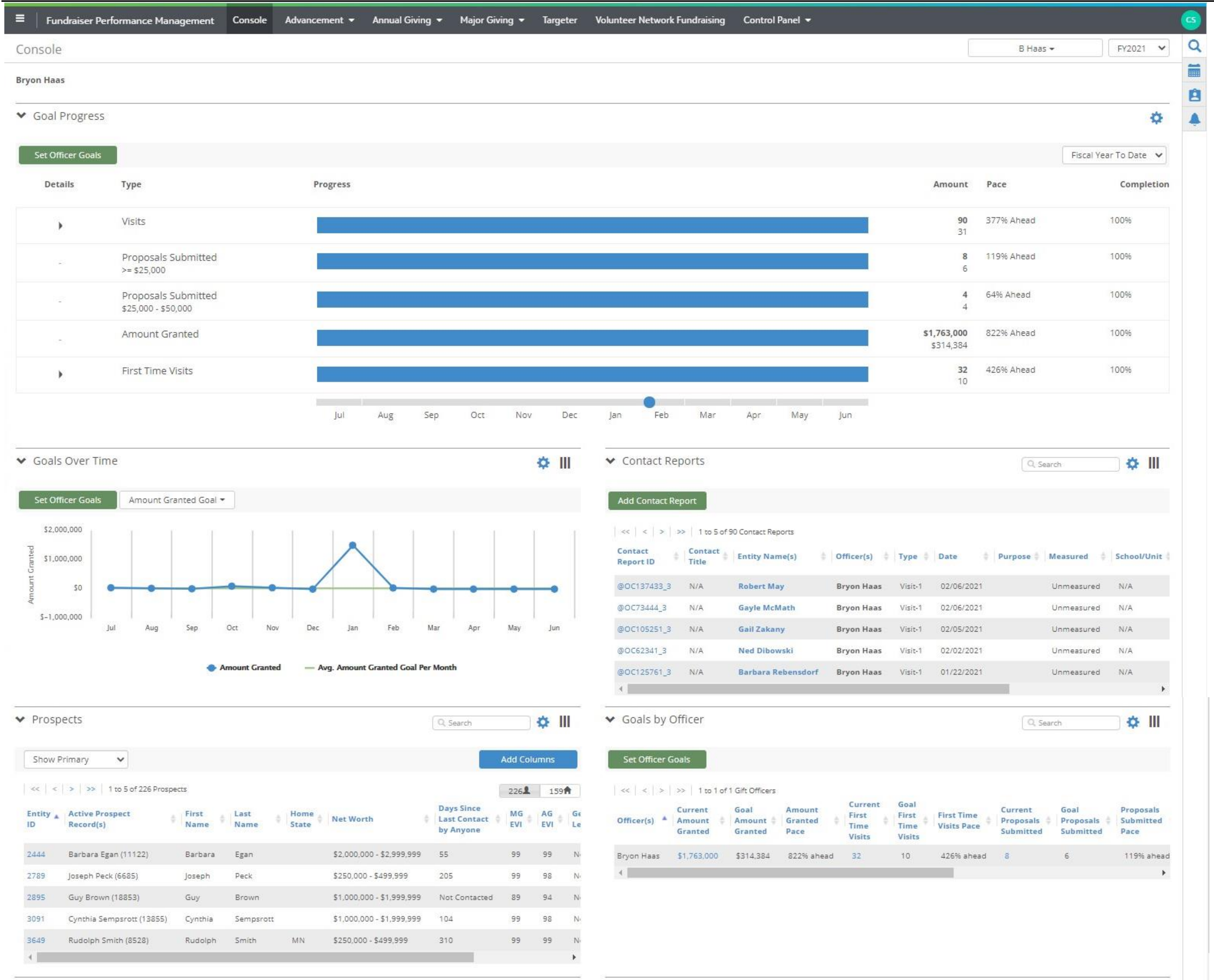
Assignment Type: Primary

Prospect Assignments

147 👤 115 🏠

Entity ID	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 EVI	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
118005	19622	Edwin	Vaidya	Alumni	KY		Not Contacted	Not Visited	99	$29,440	23	Cultivation

Appendix F: Console Layer



Console

Bryon Haas

Goal Progress

Set Officer Goals

Fiscal Year To Date

Details	Type	Progress	Amount	Pace	Completion
▸	Visits		90 31	377% Ahead	100%
-	Proposals Submitted >= $25,000		8 6	119% Ahead	100%
-	Proposals Submitted $25,000 - $50,000		4 4	64% Ahead	100%
-	Amount Granted		$1,763,000 $314,384	822% Ahead	100%
▸	First Time Visits		32 10	426% Ahead	100%

Goals Over Time

Contact Reports

<< | < | > | >> | 1 to 5 of 90 Contact Reports

Contact Report ID	Contact Title	Entity Name(s)	Officer(s)	Type	Date	Purpose	Measured	School/Unit
@OC137433_3	N/A	Robert May	Bryon Haas	Visit-1	02/06/2021		Unmeasured	N/A
@OC73444_3	N/A	Gayle McMath	Bryon Haas	Visit-1	02/06/2021		Unmeasured	N/A
@OC105251_3	N/A	Gail Zakany	Bryon Haas	Visit-1	02/05/2021		Unmeasured	N/A
@OC62341_3	N/A	Ned Dibowski	Bryon Haas	Visit-1	02/02/2021		Unmeasured	N/A
@OC125761_3	N/A	Barbara Rebensdorf	Bryon Haas	Visit-1	01/22/2021		Unmeasured	N/A

Prospects

<< | < | > | >> | 1 to 5 of 226 Prospects

226 | 159

Entity ID	Active Prospect Record(s)	First Name	Last Name	Home State	Net Worth	Days Since Last Contact by Anyone	MG EVI	AG EVI	Ge Le
2444	Barbara Egan (11122)	Barbara	Egan		$2,000,000 - $2,999,999	55	99	99	N
2789	Joseph Peck (6685)	Joseph	Peck		$250,000 - $499,999	205	99	98	N
2895	Guy Brown (18853)	Guy	Brown		$1,000,000 - $1,999,999	Not Contacted	89	94	N
3091	Cynthia Sempsrott (13855)	Cynthia	Sempsrott		$1,000,000 - $1,999,999	104	99	98	N
3649	Rudolph Smith (8528)	Rudolph	Smith	MN	$250,000 - $499,999	310	99	99	N

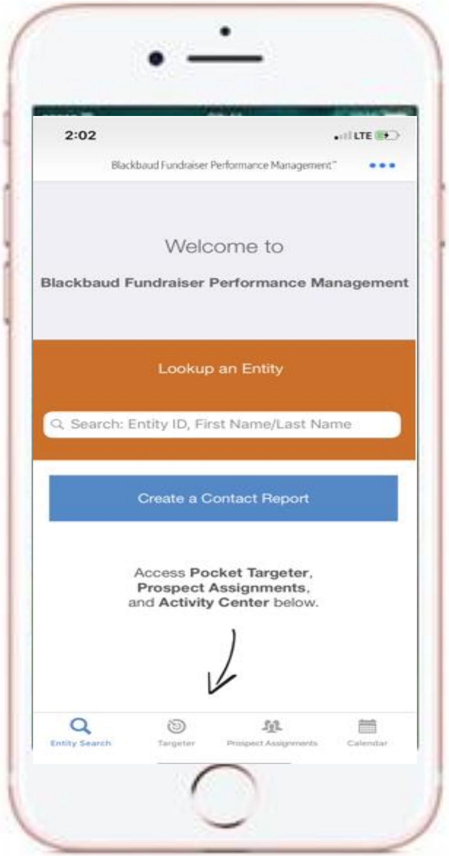
Goals by Officer

Set Officer Goals

<< | < | > | >> | 1 to 1 of 1 Gift Officers

Officer(s)	Current Amount Granted	Goal Amount Granted	Amount Granted Pace	Current First Time Visits	Goal First Time Visits	First Time Visits Pace	Current Proposals Submitted	Goal Proposals Submitted	Proposals Submitted Pace
Bryon Haas	$1,763,000	$314,384	822% ahead	32	10	426% ahead	8	6	119% ahead

Appendix G: Fundraiser Performance Management Mobile


2:02

Blackbaud Fundraiser Performance Management™

Welcome to

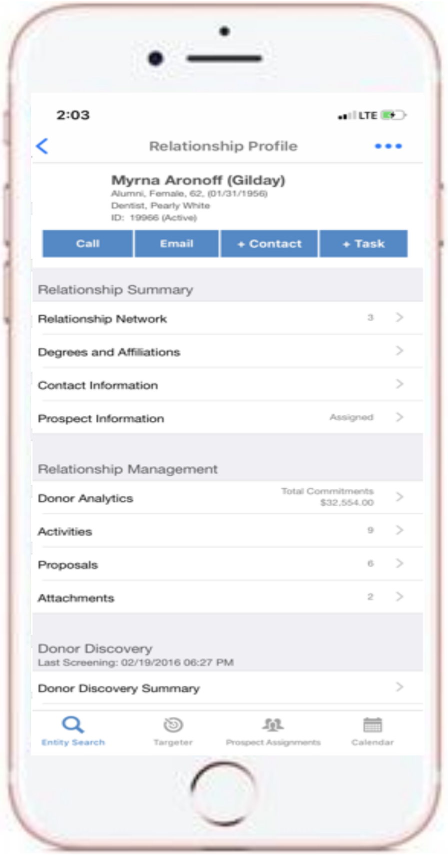
Blackbaud Fundraiser Performance Management

Lookup an Entity

Search: Entity ID, First Name/Last Name

Create a Contact Report

Access **Pocket Targeter**, **Prospect Assignments**, and **Activity Center** below.


2:03

Relationship Profile

Myrna Aronoff (Gilday)
Alumni, Female, 62, (01/31/1956)
Dentist, Pearly White
ID: 19966 (Active)

Relationship Summary

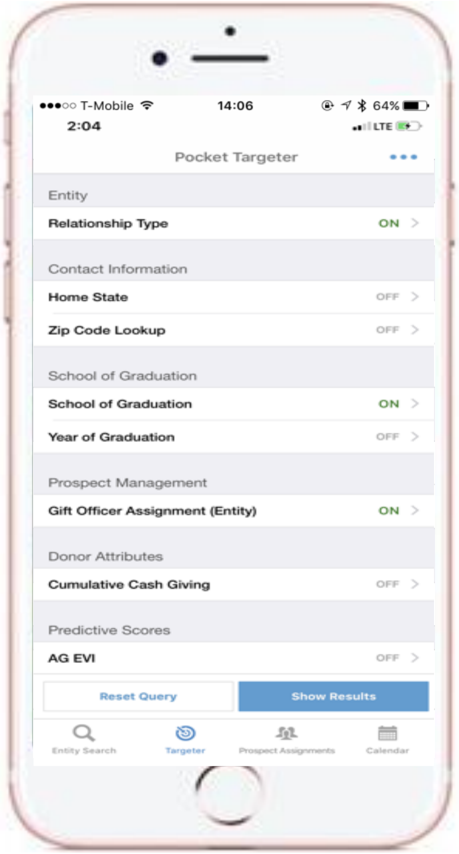
Relationship Network	3
Degrees and Affiliations	
Contact Information	
Prospect Information	Assigned

Relationship Management

Donor Analytics	Total Commitments $32,554.00
Activities	9
Proposals	6
Attachments	2

Donor Discovery
Last Screening: 02/19/2016 06:27 PM

Donor Discovery Summary


●●●○○ T-Mobile 14:06 64%
2:04

Pocket Targeter

Entity

Relationship Type	ON

Contact Information

Home State	OFF
Zip Code Lookup	OFF

School of Graduation

School of Graduation	ON
Year of Graduation	OFF

Prospect Management

Gift Officer Assignment (Entity)	ON

Donor Attributes

Cumulative Cash Giving	OFF

Predictive Scores

AG EVI	OFF

Available on the App Store

ANDROID APP ON Google play