REEHER PLATFORM
DATA REQUEST GUIDE
VERSION 2017.3

FREQUENTLY ASKED QUESTIONS

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Reeher LLC

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 naming of the file on a daily basis. If splitting a file into multiple files, name the files by adding a letter and short description (i.e. Entity_a_Persons, Entity_b_NonPersons, etc.).

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, if various participations are stored in other 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 (i.e. Entity_a_Persons, Entity_b_NonPersons, Participation_History_Events etc.).

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 for Reeher to make effective Reeher Predictive Scores?
Many of our customers are concerned about the completeness and accuracy of their data. Yet, Reeher has extensive experience in working with the data you have available and adapting our predictive models and the Platform 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 Reeher Platform?
Reeher 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. The Reeher Platform 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?
Reeher reviews your data files upon receiving them and provides feedback and guidance. 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 does Reeher monitor the files and ensure that Reeher processes 'good data' if there is an issue with my file generation?
Reeher monitors the file sizes and the row counts of each file and before the processing of any file checks that the size or record count has not changed significantly (usually if it decreases by more than 5%) compared to the previous day's files. Reeher also monitors when the file was sent and if the file is multiple days old, Reeher will not process the file. If a file does not pass any of these checks, Reeher will not process the new contents of the file and instead keep the data that is in the Reeher database at that time. If a file issue persists, Reeher Support will reach out to your system administrator to work to resolve the file monitoring issues.

I am an existing Reeher customer and looking at this most recent Reeher 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 Reeher now 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 Reeher's processing of your data. Please keep the names of your files the same as they currently are being sent as. 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 Reeher Support before making changes to the existing processing and files to ensure a consistent and correct transfer of your data.

Initial Reeher Implementation

What does my institution get from the Reeher Platform?
Custom Predictive Models – You will receive accurate data for decision making and setting priorities. Reeher custom predictive models allow you to focus on the prospect's most likely to deliver annual fund contributions or major gifts. Reeher's 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 Reeher Community Network – The Reeher 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.

Care and Support – Your executives and users of all levels will receive ongoing support through the lifecycle of your subscription. This support expedites your results, as well as provides training and guidance that promotes rapid payback on your investment. The subscription fee also covers all software enhancements and maintenance associated with your subscription type.

My institution just became a Reeher customer, now how do we implement the Reeher Platform?
The Reeher Implementation process can be broken down into four quick and easy phases:

1st phase Data Collection – The Reeher 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 proved process for translating and mapping your data to the Reeher Platform via a secure nightly file transfer. This phase is where 95% of the work is done by your institution (the other 5% involves testing the Platform during Pilot Testing). You will send us all of your data files as requested in the Reeher Data Request Guide. We'll work with you and send feedback on your data to make sure that it matches closely to what Reeher is requesting and what you would see in your donor database. At the end of data collection, Reeher will validate that the data and numbers that the Platform would report match your internal reporting in the form of dollars and donors and identify those constituents who will receive Reeher Predictive Scores.

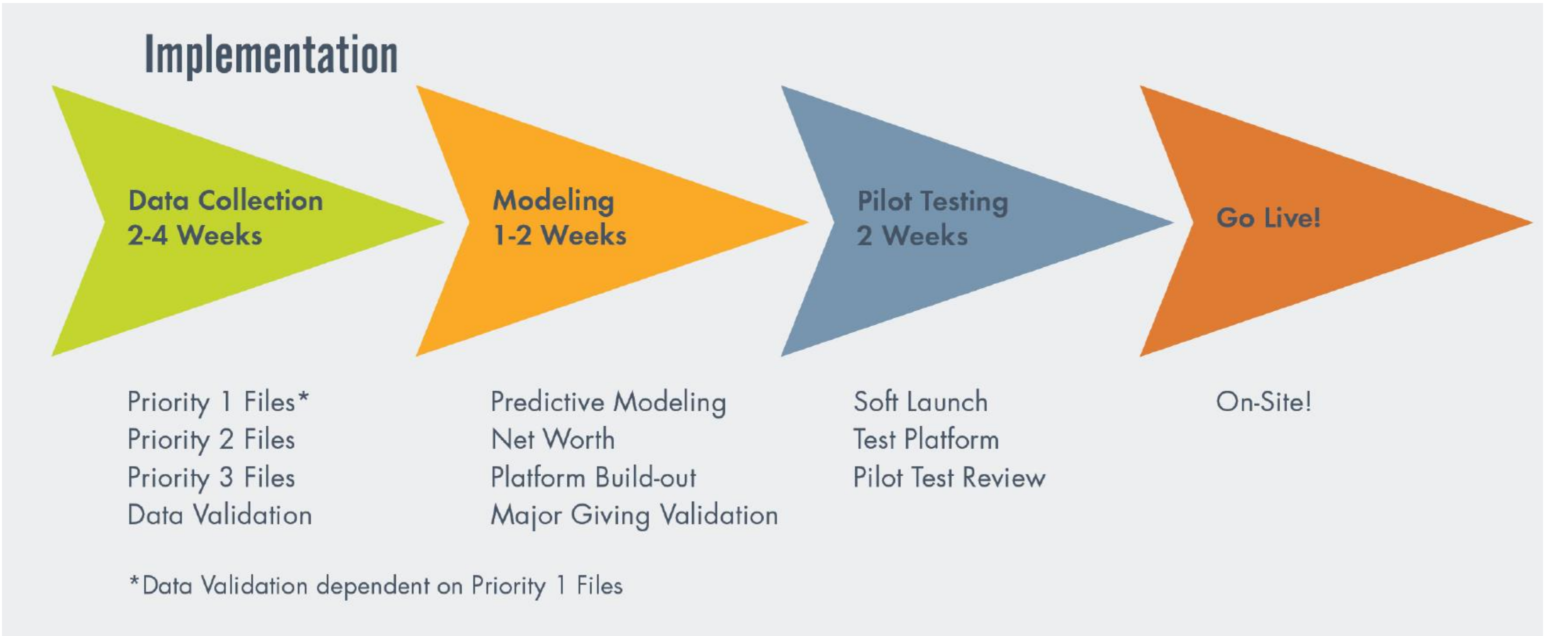
To best organize the work and timeline, the data files found in the Data Request Guide are broken down by priority groups. The priority 1 files will contain all of the information for the validation process. We can proceed to the next phase, while your group continues to complete the priority 2 and 3 files.

2nd phase Predictive Modeling and Platform Build – Reeher will get to work on mapping your data to the Reeher Platform. We append a net worth estimate, provided by Acxiom Corporation, 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 Reeher 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 Platform subscription. Reeher also performs 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. 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.

3rd phase Pilot Testing – This phase begins with a soft-launch meeting where we'll go over your Reeher Predictive Scores and introduce you to your Platform with your data incorporated. You will then have an opportunity to conduct live testing of the Platform with a small select group of key testers before Reeher comes onsite for the Go-Live.

4th phase Go-Live – Reeher will be on location at your institution to train your staff members on the Reeher Platform, grant access to your institution's users, meet with the executive team, and discuss strategies in order to maximize the value of the Reeher Platform for everyone focused on advancement.

What is the typical target timeline for a Reeher Implementation?
Most subscribing institutions – whether implementing the entire Reeher Platform, the Annual Fund, or the Major Giving Platform – are up-and-running on the Reeher Platform within eight weeks. The typical eight week timeline is outlined as follows:



Does implementing Reeher require a large-scale database conversion or special staffing?
The Reeher Platform 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 the Reeher Platform does not require a large-scale system replacement or database conversion. The Reeher 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. The Reeher Platform 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 Reeher Community.

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

How does Reeher ensure the models stay relevant to my institution?
During Reeher's nightly processing of your data, any new constituents added to the database 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 in the Reeher Platform?
The Reeher Platform 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 of the Reeher Platform, 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 Reeher with validating your dollars and donor count along with looking at all of your constituents and identifying those who will receive Reeher 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 3.1a: Activity History	File 1.2b: Email Addresses
File 2.1: Donor Transaction History	File 3.2: Staff Information	File 1.5b: Giving Societies
File 1.2a: Addresses	File 3.3: Prospect Entity	File 1.7: Athletics
File 1.3: Degrees	File 3.4: Prospect Status	File 1.8: Associated Entities
File 1.4: Relationship Type	File 3.5: Assignment History	File 2.2: Appeals
File 1.5a: Participation History	File 3.1b: Activity Details	File 2.3: Appeal Entity
File 1.6: Contact Restrictions		File 3.6: Proposal
File 4.1: Code Translation Table		File 3.7: Proposal Assignment
		File 4.2: Customer Specific Codes

File specific questions begin on next page

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 Reeher 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 will Reeher know 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 see that constituent as based on the determined hierarchy.

Where does this data show up in the Platform?
Most of this data in this file is biographical information that is displayed on the constituent’s Relationship Profile (see Appendix: Relationship Profile). The Primary Entity ID field is used for householding purposes and lets a user see a list of entities grouped as households with the entity with the Primary Entity ID specified as the primary entity in that spousal pair. 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 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.

Does Reeher prefer the Zip Code or Zip Code with the Zip+4 for an address?
Reeher prefers the Zip Code with the Zip+4, if it is available, for an entity’s address (i.e. 91234-8765), but Reeher will also accept standard Zip Codes (i.e. 90210).

I have additional phone numbers not associated with an address that I want to include, how should I send those numbers?
First, remember that in the Entity file, Reeher request the Mobile Phone number of the constituent so maybe those numbers are already included as that field. If you have other phone numbers that you want included, Reeher recommends sending the data as an additional line in the Addresses file in which the Entity ID, Phone, Address Type, Primary Home Indicator, Primary Business Indicator, and Preferred Indicator fields are all populated, but the others (City, etc.) are blank.

Where does this show up in the Platform?
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 1.3: 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

Example 2: Alumni with three degrees in different years.

Entity ID	School of Graduation	Degree Year	Degree of Graduation	Major
67890	AS	1989	BA	PHIL
67890	AS	1993	MA	PHIL
67890	AS	1997	PHD	PHIL

Where does this show up in the Platform?
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 the Platform?
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".

Where does this show up in the Platform?
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 the Platform?
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 the Platform?
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 the Platform?
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, 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 Reeher?
Yes, Reeher 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, and supply the constituent's Entity ID, the associated person's Associated 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 the Platform?
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 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 linking 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 2010.

Entity ID	Associated Entity ID	Associated Name	Associated Relationship Type	School of Graduation	Class Year
2222	1111	John Smith	Parent		
1111	2222	Mary Smith	Child	School of Business	2010

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 2006, Beth Jones graduated from the School of Medicine with the Class Year of 1999.

Entity ID	Associated Entity ID	Associated Name	Associated Relationship Type	School of Graduation	Class Year
4444	3333	Adam Jones	Brother	College of Arts and Sciences	2006
3333	4444	Beth Jones	Sister	School of Medicine	1999

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, Reeher 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 at the end of this section for more detail.

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 (i.e. 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 Smith 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 Smith	5000	5000	12/10/2012	Pledge	1	1	2014
Bob Smith	5000	5000	12/10/2012	Pledge	1	1	2015
Bob Smith	5000	5000	12/10/2012	Pledge	1	1	2016

Example 2: Sam Smith 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 Smith	100	100	5/20/2014	Gift	1	1	2013

Example 3: Adam Smith 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 Smith	300	300	5/23/2015	Gift	1	1	2015
Coca-Cola	300	300	8/15/2015	Matching Gift	1	1	2015
Adam Smith	0	300	8/15/2015	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 Reeher 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, etc.), you can specify using the donor indicator if that entity should or should not be counted as a donor for that transaction.

Where does this data show up in the Platform?

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.

*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, 2010. On December 31, 2010 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	7/12/2010	Pledge	1	0	1
Sally Smith	0	1000	7/12/2010	Pledge	1	0	1
John Smith	500	500	12/31/2010	Pledge Payment	1	1	0
Sally Smith	0	500	12/31/2010	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	8/19/2010	Gift	0	1	1
John Smith	0	5000	8/19/2010	Gift	0	1	1
Sally Smith	0	5000	8/19/2010	Gift	0	1	1

Example 3: Adam Smith 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 Smith	300	300	6/23/2010	Gift	1	1	1
Coca-Cola	300	300	6/23/2010	Matching Gift	1	1	1
Adam Smith	0	300	6/23/2010	Matching Gift	1	1	1

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 the Platform, so including even the appeal code will allow you to add the type, drop date, etc. in the Platform.

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: Direct Mail, Phone, Email, Web, Officer, and Other. 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 the Platform.

Where does this show up in the Platform?
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 the Platform somehow?
While Reeher 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 the Platform by uploading the list/spreadsheet via the Platform.

Where does this show up in the Platform?
This file allows you 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: Visit, Phone, Letter/Email, Event, Activity, and Other.

Where does this show up in the Platform?
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

Where does this show up in the Platform?
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

Where does this show up in the Platform?
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 the Platform, it must exist in this file. In addition, we have a tool in the Platform 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 the Platform?
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, and Stewardship.

Where does this show up in the Platform?
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.

File 3.5: Assignment History

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 the Platform?
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 3.6: 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 Reeher 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 the Platform?
While Reeher requests all of the amounts and dates that we do to populate the numerous reports for analyzing the proposals and officer's performance, Reeher understands that some institutions may not have every field and date tracked on a proposal. Please inform Reeher Support or your Reeher Implementation team to tell them which field(s) you may not be able to include and Reeher can consult on the impact and provide any potential solutions. To utilize the majority of the

proposal based information and metrics in the Platform, Reeher 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 if my database does not have the Proposal Stage field?
For the Proposal Stage field, Reeher 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.

Where does this show up in the Platform?
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 3.7: 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 the Platform?
We will only show proposals in the Platform 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 the Platform?
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 Reeher files as codes, how should I send the translations/definitions of those codes so that Reeher know what each code stands for?
We have a number of starred fields throughout the Reeher 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 Reeher. To identify for Reeher what file and what field each code corresponds to, Reeher 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.). Reeher 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	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	PH	Phone
Appeals	Appeal Type	EM	Email

Where does this show up in the Platform?
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 the Platform, 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

Where does this show up in the Platform?
This file allows you to send custom ratings, scores, codes, values or appends (either internal or third party) to be loaded into the Platform. 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.

Appendix A: Relationship Profile

Reeher Platform > Relationship Profile

James "Jim" Stockslager

Title: Project Manager
Employer: Best Buy
Preferred Email:
james.stockslager@reeh...

Entity ID: 25041
Primary Relationship Type: Alumni
Relationship Status: Active

Gender: M
Age: 64 (12/30/1951)
Marital Status: Married

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

Detail | Donor Analytics | Donor Discovery | Timeline | Activities (6) | Proposals (5) | Attachments (5)

Detail

Degrees and Affiliations:

Preferred Class Year:	1975
Degrees:	- School of Business - Business: Bachelor 1975
Relationship Type(s):	Alumni
Athletics:	N/A
Participations:	Alumni Affairs Committee Alumni Network Volunteer View Details (2)

Contact Information: See All Addresses (4)

Preferred Mailing Name:	James Stockslager
Home Address: (preferred)	901 PO BOX Marion, FL 34421 Map Zillow
Business Address:	Best Buy 328 Sunflower Pkwy Hollywood FL, 33021 Map
Home Phone:	(123)-456-7890
Work Phone:	(123)-456-7890
Mobile Phone:	(123)-456-7890
Contact Restrictions:	N/A

Prospect Information:

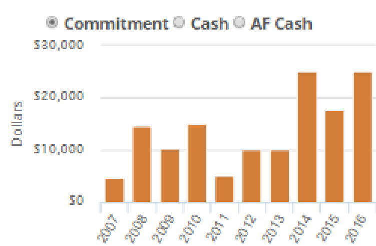
Major Giving EVI:	**99**
Annual Giving EVI:	**99**
Annual Giving EV:	**$7,176.63**
Annual Fund PDI:	**89**
Net Worth:	**Greater than $2,999,999**
Prospect Rating:	Top Campaign 1000 Group
Prospect Classification:	prospect
Prospect Stage:	Identification
Related Prospects:	Mary Stockslager
Assigned Officer(s):	**Richard Thiem**
Assigned Volunteer(s):	N/A
Affinity Cluster:	Apathetic Wealth

Donor Analytics

Donation History

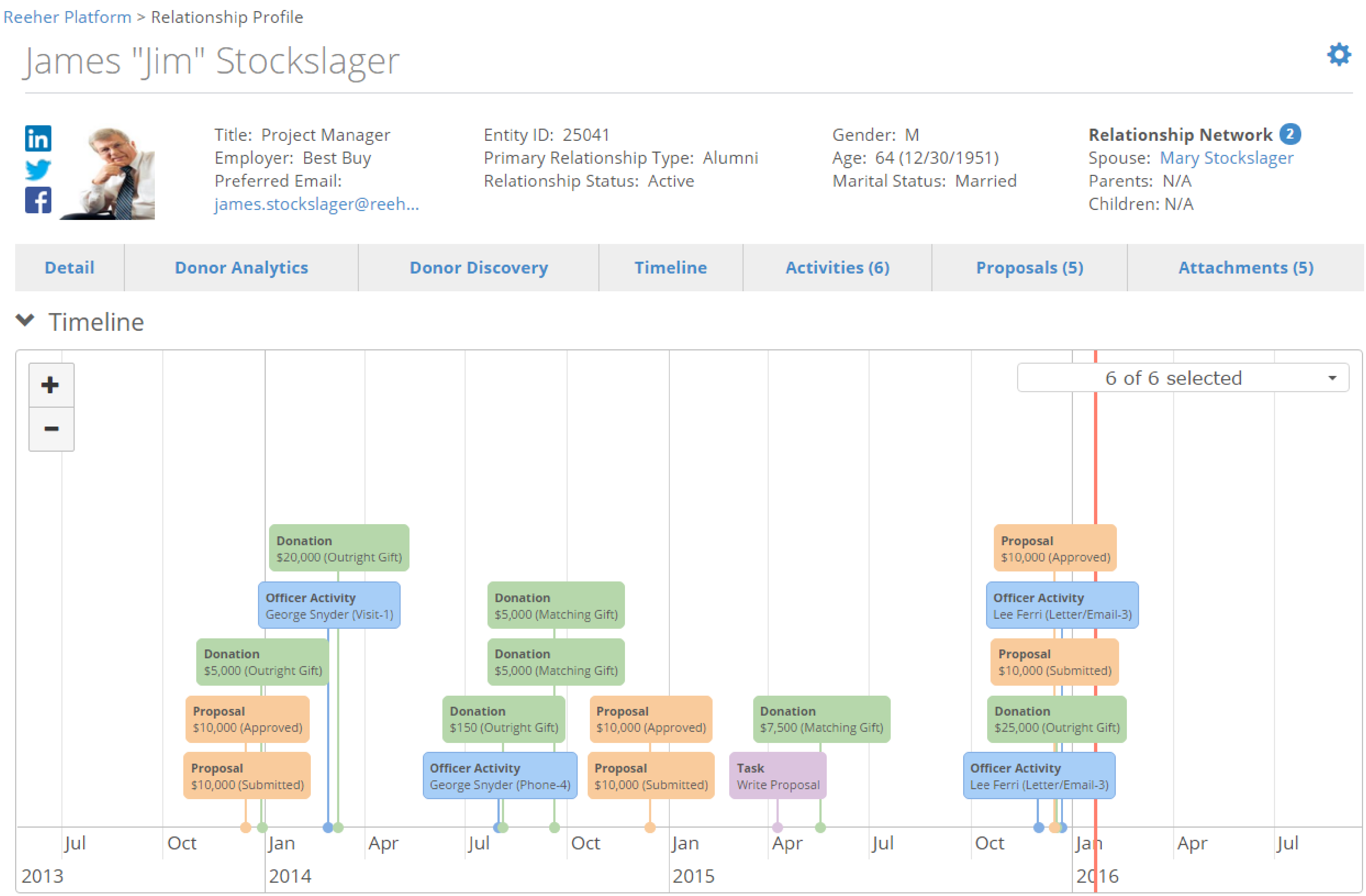
Total Commitments:	$169,751.25 view details
Total Cash Giving:	$169,751.25 view details
Total AF Cash Giving:	$114,751.25 view details
Fiscal Years of Giving:	33
Consecutive Years of Giving:	23
First Year of Donation:	1981
Last Cash Gift:	$25,000.00 , 12/17/2015 , Phil and Ted's Undergraduate Research 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 Memory	School of Arts and Sciences	$16,500.00
	Total	$169,751.25


Reeher Platform > Relationship Profile
James "Jim" Stockslager
Title: Project Manager
Employer: Best Buy
Preferred Email:
james.stockslager@reeh...
Entity ID: 25041
Primary Relationship Type: Alumni
Relationship Status: Active
Gender: M
Age: 64 (12/30/1951)
Marital Status: Married
Relationship Network 2
Spouse: Mary Stockslager
Parents: N/A
Children: N/A
Detail
Donor Analytics
Donor Discovery
Timeline
Activities (6)
Proposals (5)
Attachments (5)
Timeline
6 of 6 selected
Donation $20,000 (Outright Gift)
Officer Activity George Snyder (Visit-1)
Donation $5,000 (Outright Gift)
Proposal $10,000 (Approved)
Proposal $10,000 (Submitted)
Donation $5,000 (Matching Gift)
Donation $5,000 (Matching Gift)
Donation $150 (Outright Gift)
Officer Activity George Snyder (Phone-4)
Proposal $10,000 (Approved)
Proposal $10,000 (Submitted)
Donation $7,500 (Matching Gift)
Task Write Proposal
Proposal $10,000 (Approved)
Officer Activity Lee Ferri (Letter/Email-3)
Proposal $10,000 (Submitted)
Donation $25,000 (Outright Gift)
Officer Activity Lee Ferri (Letter/Email-3)
Jul
Oct
Jan
Apr
Jul
Oct
Jan
Apr
Jul
Oct
Jan
Apr
Jul
2013
2014
2015
2016

Appendix A: Relationship Profile

Reeher Platform > Relationship Profile

James "Jim" Stockslager

Title: Project Manager
Employer: Best Buy
Preferred Email:
james.stockslager@reeh...

Entity ID: 25041
Primary Relationship Type: Alumni
Relationship Status: Active

Gender: M
Age: 64 (12/30/1951)
Marital Status: Married

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

Detail | Donor Analytics | Donor Discovery | Timeline | Activities (6) | Proposals (5) | Attachments (5)

Activities (6)

Activity ID, Officer(s)

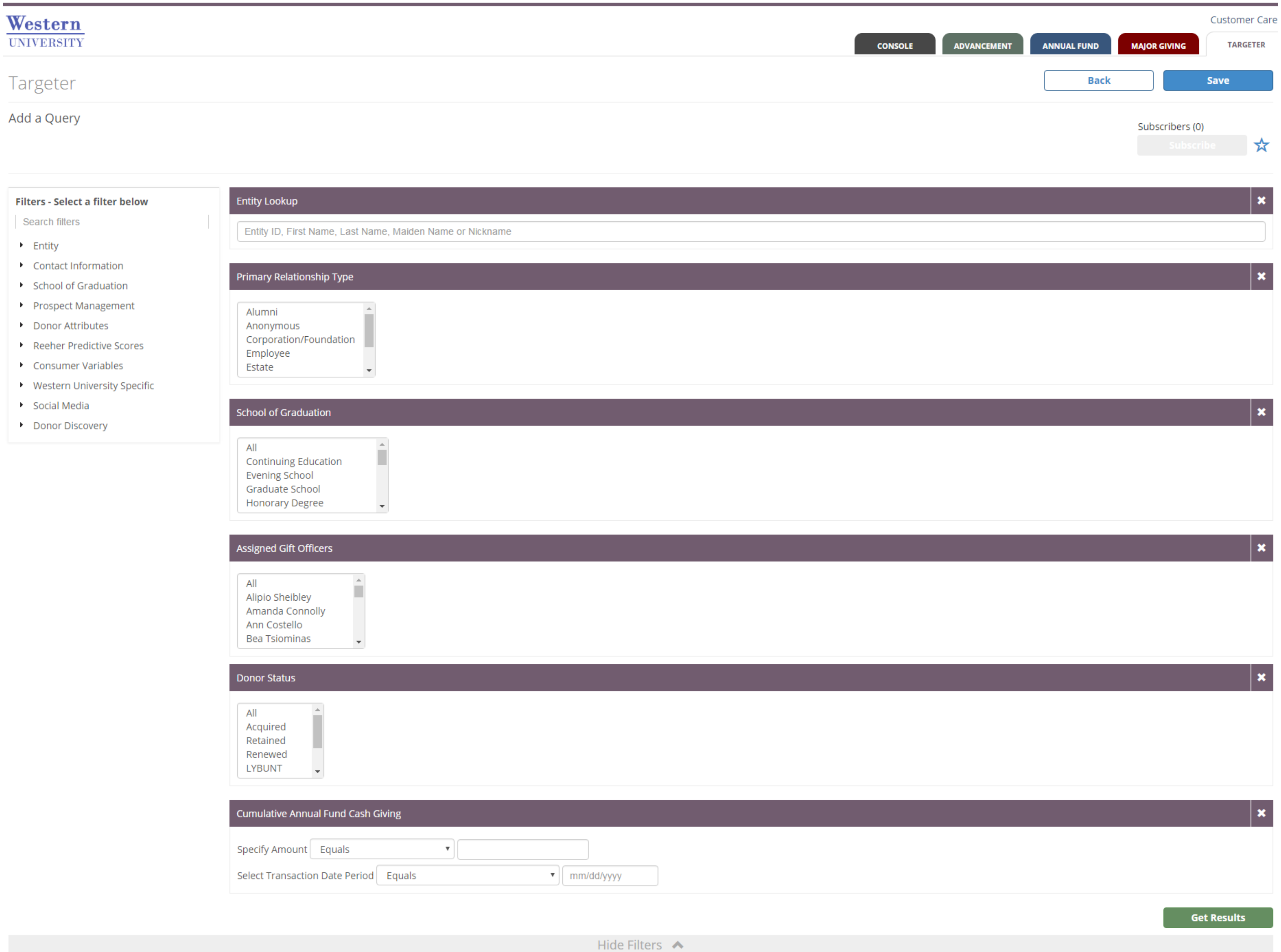
Activity ID	Subject	Staff	Type	Date	Purpose	Measured	Status
92335	Check in with James and Mary	Lee Ferri	Letter/Email-3	12/22/2015	Information	Unmeasured	Completed
91783	Check in with Mary and James	Lee Ferri	Letter/Email-3	12/01/2015	Cultivation	Unmeasured	Completed
73885	Call with James	George Snyder	Phone-4	07/31/2014	Stewardship	Unmeasured	Completed
68721	Visit with James and Mary	George Snyder	Visit-1	02/27/2014	Solicitation	Unmeasured	Completed
54003	Check in with James	Lee Ferri	Letter/Email-3	01/06/2013	Stewardship	Unmeasured	Completed
42040	Check in with James	Sandra Byrd	Letter/Email-3	02/02/2012	Cultivation	Unmeasured	Completed
T00000711	Write Proposal	Sean O'Malley Western	Task	04/09/2015	N/A	N/A	Planned

Proposals (5)

Proposal ID, Proposal Name

Proposal ID	Proposal Name	Entity Name(s)	Officers	Proposal Type	Proposal Status	Target Amount	Target Date	Ask A
331-16	Capital	Mary Stockslager, James Stockslager	**Lee Ferri**	Program Support	Closed	$10,000	12/15/2015	
331-15	Capital	Mary Stockslager, James Stockslager	**Lee Ferri**	Program Support	Closed	$10,000	12/15/2014	
331-14	Capital	Mary Stockslager, James Stockslager	**Lee Ferri**	Program Support	Closed	$10,000	12/15/2013	
331-13	Capital	James Stockslager, Mary Stockslager	**Lee Ferri**	Program Support	Closed	$10,000	12/15/2012	

Appendix B: Targeter



Appendix B: Targeter

Western UNIVERSITY

Targeter Results: List View

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

Targeter

Back | Save

Add a Query

Subscribers (0)

Subscribe

Show Filters

Results

9,695 | 7,701 | View:

Export | Add Columns

Entity ID	First Name	Last Name	Home State	Home Zip Code	Primary Relationship Type	MG EVI	Prospect Classification	Cumulative Cash Giving	AF Cash Giving - Current FY	Days Since Last Contact	Primary Assigned Gift Officer(s)
100015	Judith	Powell	MN	56319	Alumni	98		$7,335	$500	1,090	No Primary Assigned
100020	Donald	Gay	FL	32963	Alumni	94		$1,240	$250	Not Contacted	No Primary Assigned
100109	Robert	Maier	TX	78779	Alumni	98	prospect	$7,630	$300	Not Contacted	Paul Cash
100133	Nancy	Lane	MN	55588	Alumni	96		$1,010	$240	Not Contacted	No Primary Assigned
100147	Robert	Porter	MN	55450	Alumni	98	suspect	$9,315	$1,041	657	No Primary Assigned
100168	Edwin	Brady	MN	55374	Alumni	80		$3,620	$160	586	No Primary Assigned
100182	Nell	Greene	MN	56631	Alumni	99	prospect	$5,335	$300	413	David Cartuyrelles

Western UNIVERSITY

Targeter Results: Cross Tab View

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

Targeter

Back | Save

Add a Query

Subscribers (0)

Subscribe

Show Filters

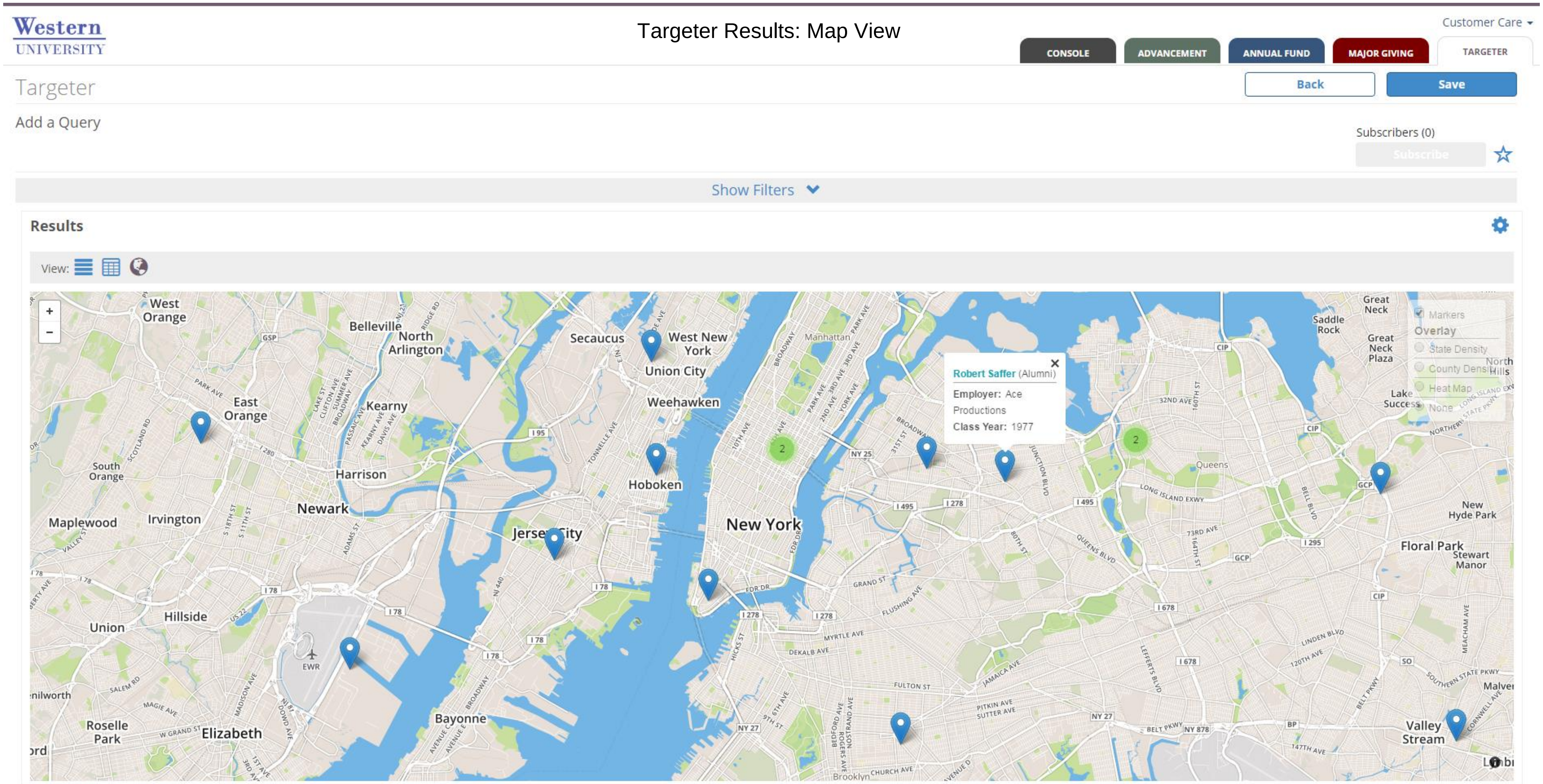
View:

Export

Current Prospect Stage | Primary Relationship Type | Apply

Current Prospect Stage	Alumni	Employee	Other	Parent	Student	Overall
Cultivation (Cultivation)	495	25	161	17	0	698
Identification (Identification)	425	23	177	10	0	635
Qualification (Qualification)	440	19	140	18	0	617
Solicitation (Solicitation)	488	27	200	19	0	734
Stewardship (Stewardship)	443	25	184	20	0	672
N/A	4,077	261	1,577	291	9	6,215
Overall	**6,410**	**397**	**2,499**	**380**	**9**	**9,695**

Appendix B: Targeter



Appendix C: Advancement Layer

Western UNIVERSITY

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

Executive Summary

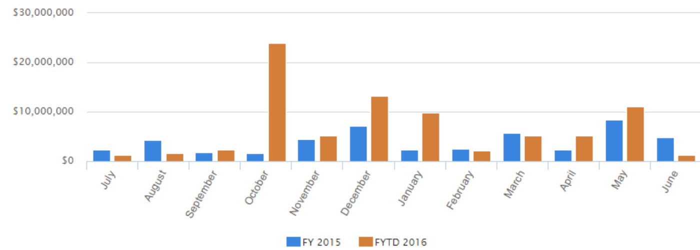
Operating Reports

Fiscal Year: FY2016

+ VIEWPORTS

Monthly Comparison

Cash Dollars



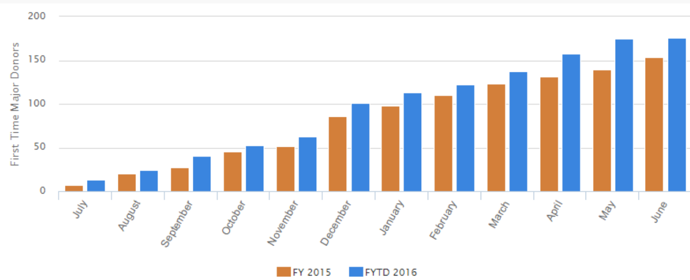
Visit Comparison by Officer

Visits | Entities Visited

Permitted Officers	Total	New Relationships	Developing Relationships	Existing Relationships
Mary Matson	151	34	36	83
Paulette Sonnega	142	81	64	2
Bea Tsiominas	119	48	35	38
Jeffrey Caluwert	103	41	32	34
Susan Zheng	101	69	27	10
Opal McClain	100	40	25	35
Nick Weller	95	34	42	19
Overall	**2,140**	**1,002**	**766**	**491**

First Time Major Donors by Month (cumulative)

$10,000



School/Unit Designation Comparison

Cash Dollars

School/Unit Designation	FYTD 2015	FYTD 2016	% Change
Continuing Education	$1,988,397	$308,887	-84.5%
School of Applied Sciences	$3,659,623	$2,395,917	-34.5%
School of Art and Design	$4,954,889	$5,092,777	2.8%
School of Arts and Sciences	$3,275,616	$6,838,321	108.8%
School of Business	$1,895,868	$3,444,058	81.7%
School of Education	$334,106	$4,366,030	1,206.8%
School of Engineering	$2,624,275	$1,661,747	-36.7%
School of Health Sciences	$4,445,733	$3,343,894	-24.8%
Overall	**$46,440,810**	**$81,975,122**	**76.5%**

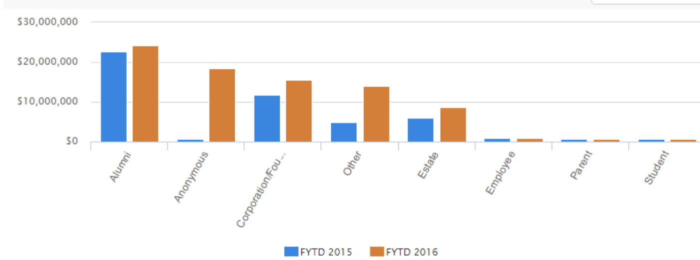
Gift Band Comparison

Cash Donors

Gift Band	FYTD 2015	FYTD 2016	% Change
Less than $100	12,164	13,038	7.2%
$100 to $499	7,791	9,254	18.8%
$500 to $999	1,184	1,322	11.7%
$1,000 to $4,999	3,199	3,118	-2.5%
$5,000 to $9,999	375	349	-6.9%
$10,000 to $24,999	375	363	-3.2%
$25,000 to $49,999	130	134	3.1%
$50,000 to $99,999	72	83	15.3%
Total	**25,385**	**27,793**	**9.5%**

Primary Relationship Type Comparison

Cash Dollars



Western UNIVERSITY

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

Executive Summary

Operating Reports

Period: Fiscal Year to Date | Measurement: Cash | School/Unit: 17 of 17 selected | Primary Relationship Type(s): 9 of 9 selected

+ VIEWPORTS

Overall Performance Summary

Key Measurement	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Total Donors	24,320	25,417	25,263	25,385	27,793	2,408	9.5%
Total Giving	$34,423,020	$41,508,585	$38,941,955	$46,440,810	$81,975,122	$35,534,312	76.5%
Average Giving	$1,415	$1,633	$1,541	$1,829	$2,949	$1,120	61.2%
Median Giving	$100	$77	$100	$100	$100	$0	0.0%
Maximum Contribution	$3,395,333	$6,500,000	$5,050,000	$6,526,953	$18,434,781	$11,907,829	182.4%
Retained Donors	13,536	14,386	15,081	14,977	15,533	556	3.7%
Retention Rate	60.3%	57.4%	57.7%	57.9%	59.9%	2.0%	3.5%

Donor Type Summary

Dollar Performance

Donor Type	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Acquired	$4,901,308	$10,482,238	$2,163,439	$5,250,472	$36,544,501	$31,294,030	596.0%
Retained	$24,232,148	$28,297,993	$34,607,780	$34,130,990	$40,051,236	$5,920,246	17.3%
Renewed	$5,289,564	$2,728,354	$2,170,736	$7,059,349	$5,379,385	($1,679,964)	-23.8%
Total	**$34,423,020**	**$41,508,585**	**$38,941,955**	**$46,440,810**	**$81,975,122**	**$35,534,312**	**76.5%**

Donor Performance

Donor Type	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Acquired	5,212	5,152	4,727	4,210	5,682	1,472	35.0%
Retained	13,536	14,386	15,081	14,977	15,533	556	3.7%
Renewed	5,572	5,879	5,455	6,198	6,578	380	6.1%
Total	**24,320**	**25,417**	**25,263**	**25,385**	**27,793**	**2,408**	**9.5%**

Primary Relationship Type Summary

Dollar Performance

Primary Relationship Type	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Alumni	$9,784,097	$15,569,667	$14,092,461	$22,702,772	$24,238,299	$1,535,527	6.8%
Anonymous	$96,000	$96,000	$96,000	$128,000	$18,434,781	$18,306,781	14,302.2%
Corporation/Foundation	$15,045,499	$12,308,911	$12,479,223	$11,712,452	$15,453,130	$3,740,678	31.9%
Other	$3,915,773	$2,892,695	$3,707,461	$4,866,014	$14,054,812	$9,188,798	188.8%
Estate	$4,607,654	$9,280,057	$5,860,687	$5,990,383	$8,575,637	$2,585,254	43.2%
Employee	$750,050	$626,922	$983,507	$813,726	$950,288	$136,562	16.8%
Parent	$223,536	$732,477	$1,721,668	$226,539	$254,422	$27,883	12.3%
Student	$410	$1,855	$949	$925	$13,753	$12,828	1,386.5%
Total	**$34,423,020**	**$41,508,585**	**$38,941,955**	**$46,440,810**	**$81,975,122**	**$35,534,312**	**76.5%**

Donor Performance

Primary Relationship Type	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Alumni	14,923	15,858	15,435	16,558	17,715	1,157	7.0%
Other	5,803	5,904	6,093	5,044	5,918	874	17.3%
Parent	1,691	1,697	1,742	1,838	1,999	161	8.8%
Corporation/Foundation	1,384	1,350	1,367	1,279	1,320	41	3.2%
Employee	477	544	573	615	711	96	15.6%
Student	11	29	15	20	94	74	370.0%
Estate	30	34	37	30	35	5	16.7%
Anonymous	1	1	1	1	1	0	0.0%
Total	**24,320**	**25,417**	**25,263**	**25,385**	**27,793**	**2,408**	**9.5%**

Appendix D: Annual Fund Layer

Western UNIVERSITY

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

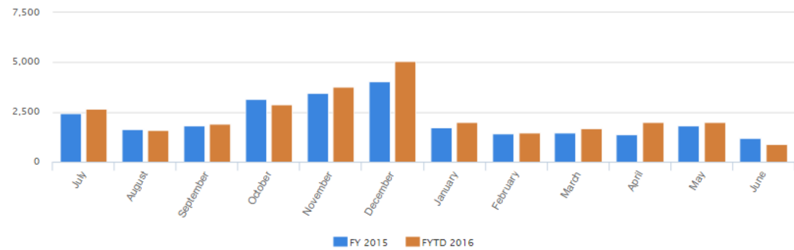
- Donors
- Dollars
- Appeals
- Operating Reports

Fiscal Year: FY2016

+ VIEWPORTS

Monthly Comparison

Cash Donors



AF Performance FYTD

AF Metrics	FYTD 2015	FYTD 2016	% Change
Commitment Dollars	$9,014,555	$9,958,579	10.5%
Cash Dollars	$8,695,910	$9,005,166	3.6%
Cash Donors	25,241	27,859	10.4%
Average Cash Giving	$345	$323	-6.2%
Median Cash Giving	$100	$100	0.0%
Maximum Cash Giving	$151,071	$180,171	19.3%
Retained Cash Donors	14,775	15,357	3.9%
Retention Rate	57.85%	60.01%	3.7%

Gift Band Migration

FYTD 2016

Cash Donors

Gift Band FY 2015	$0	<$100	$100 - $249	$250 - $499	$500 - $999	$1K - $2.49K	$2.5K - $4.99K	$5K - $9.99K
<$100	5,990	5,214	999	101	36	36	11	2
$100 - $249	2,376	744	2,486	465	106	65	9	4
$250 - $499	605	57	314	540	193	57	5	7
$500 - $999	388	21	92	148	340	164	37	8
$1K - $2.49K	576	32	65	48	168	1,242	193	45
$2.5K - $4.99K	175	17	41	17	66	250	414	60
$5K - $9.99K	102	4	12	7	16	37	79	116

AF PDI Performance

AF PDI Groups	# of Records	Non-donors	Donors	Participation
90-100	509	53	456	89.6%
80-89	5,919	995	4,924	83.2%
70-79	4,375	1,195	3,180	72.7%
60-69	2,960	1,070	1,890	63.9%
50-59	2,928	1,372	1,556	53.1%
40-49	3,297	1,743	1,554	47.1%
30-39	3,935	2,561	1,374	34.9%
20-29	7,342	5,373	1,969	26.8%
Total	366,537	338,678	27,859	

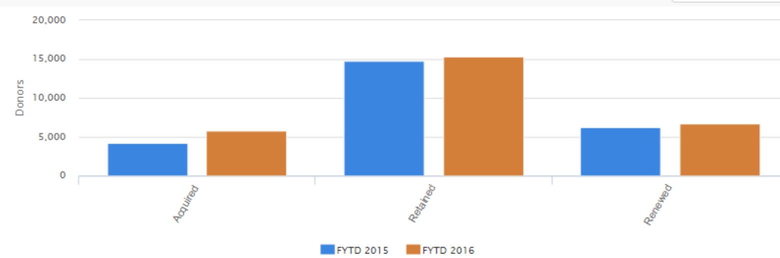
Gift Band Comparison

Cash Donors

Gift Band	FYTD 2015	FYTD 2016	% Change
Less than $25	1,402	1,805	28.7%
$25 to $49	4,924	5,258	6.8%
$50 to $99	5,914	6,121	3.5%
$100 to $249	6,175	7,376	19.4%
$250 to $499	1,725	2,111	22.4%
$500 to $999	1,216	1,384	13.8%
$1,000 to $2,499	2,341	2,400	2.5%
$2,500 to $4,999	1,029	901	-12.4%
Total	25,241	27,859	10.4%

Donor Type Comparison

Cash Donors



Appendix D: Annual Fund Layer

Western UNIVERSITY

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

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Fiscal Year: FY2016

+ VIEWPORTS

FY2016 Appeals

Appeal type missing on **0 out of 373**

<< < > >> 1 to 5 of 373 Appeals

Search Appeals

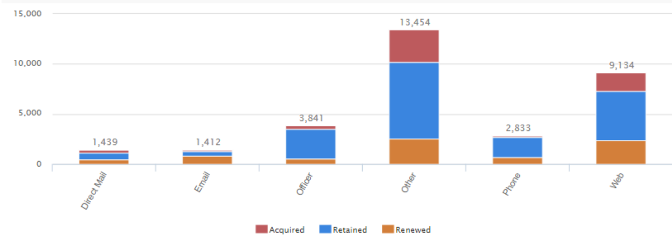
Appeal Code	Description	Type	Initiated FY	Solicited	Cost	Cash In FY	Donors In FY	Total Cash	Total Donors	Avg. Gift	Participation Rate
SL08	Endowed Scholarship Recipient Financial Aid Appeal	Other	2015	24,358	$150,000	$3,235,019	7,547	$3,248,444	7,932	$409	32.56%
CAT08	Alumni Career Brochure Appeal	Other	2010	4,057	$15,000	$1,495,099	2,944	$1,499,299	2,946	$508	72.61%
CAT07	CYE Calender- suspects/prospects	Officer	2010	3,560	$1,500,000	$1,206,039	1,692	$2,857,324	3,255	$877	91.43%
MEM08	Alumni Leadership Dinner	Other	2016	4,174	$15,000	$175,834	1,910	$175,834	1,910	$92	45.75%
SL07	Senior Gift Grand Mailing	Direct Mail	2010	7,424	$800,000	$175,021	517	$3,323,817	6,834	$486	92.05%

FYTD2016 Channel Performance

Type	Cash	% Cash	Donors	% Donors	Avg. Cash Gift
Direct Mail	$260,621	2.9%	1,439	5.2%	$181
Phone	$413,740	4.6%	2,833	10.2%	$146
Email	$127,925	1.4%	1,412	5.1%	$91
Web	$1,041,415	11.6%	9,134	32.8%	$114
Officer	$1,448,299	16.1%	3,841	13.8%	$377
Volunteer	$0	0.0%	0	0.0%	$0
Other	$5,713,166	63.4%	13,454	48.3%	$425
Overall	**$9,005,166**	**100%**	**27,859**	**100%**	**$323**

FYTD2016 Donor Type Performance by Channel

Donors | Dollars



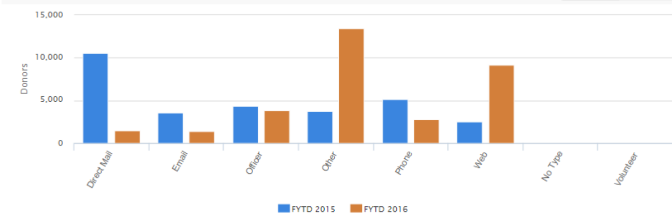
Channel Migration

FYTD 2016

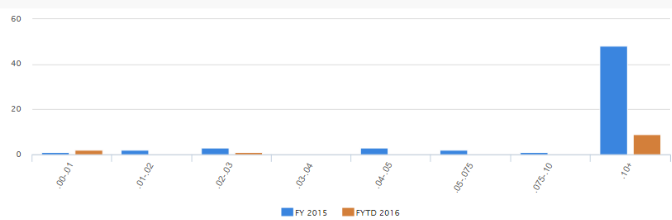
Type FY 2015	LYBUNT	Direct Mail	Phone	Email	Web	Officer	Volunteer	Other	No Type
Direct Mail	4,695	500	653	96	1,514	556	0	4,087	
Phone	1,676	87	512	45	1,096	1,112	0	1,908	
Email	1,383	40	396	231	742	782	0	605	
Web	1,030	26	216	53	724	560	0	381	
Officer	987	59	177	66	1,083	1,081	0	2,159	
Volunteer	0	0	0	0	0	0	0	0	

FYTD2016 Channel Performance Comparison

Donors | Dollars

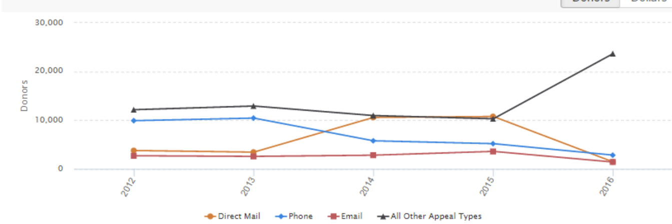


FYTD2016 Direct Marketing Response Rate



Channel Performance Trending

Donors | Dollars



Appendix D: Annual Fund Layer

Western UNIVERSITY

Customer Care

CONSOLE | ADVANCEMENT | ANNUAL FUND | MAJOR GIVING | TARGETER

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Period: Fiscal Year to Date | Measurement: Cash | School/Unit: 17 of 17 selected | Primary Relationship Type(s): 9 of 9 selected

+ VIEWPORTS

Overall Performance Summary

Key Measurement	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Total Donors	24,288	25,304	25,120	25,241	27,859	2,618	10.4%
Total Giving	$7,841,842	$8,085,775	$8,611,950	$8,695,910	$9,005,166	$309,256	3.6%
Average Giving	$323	$320	$343	$345	$323	($21)	-6.2%
Median Giving	$100	$75	$80	$100	$100	$0	0.0%
Maximum Contribution	$126,060	$165,542	$167,643	$151,071	$180,171	$29,100	19.3%
Retained Donors	13,391	14,221	14,853	14,775	15,357	582	3.9%
Retention Rate	60.4%	57.5%	57.6%	57.8%	60.0%	2.2%	3.7%

Donor Type Summary

Dollar Performance

Donor Type	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Acquired	$693,917	$556,908	$617,946	$683,051	$840,208	$157,158	23.0%
Retained	$6,054,568	$6,374,929	$6,865,649	$6,756,561	$6,710,042	($46,518)	-0.7%
Renewed	$1,093,357	$1,153,938	$1,128,355	$1,256,298	$1,454,915	$198,617	15.8%
Total	**$7,841,842**	**$8,085,775**	**$8,611,950**	**$8,695,910**	**$9,005,166**	**$309,256**	**3.6%**

Donor Performance

Donor Type	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Acquired	5,244	5,153	4,752	4,232	5,797	1,565	37.0%
Retained	13,391	14,221	14,853	14,775	15,357	582	3.9%
Renewed	5,653	5,930	5,515	6,234	6,705	471	7.6%
Total	**24,288**	**25,304**	**25,120**	**25,241**	**27,859**	**2,618**	**10.4%**

Channel Summary

Dollar Performance

Channel	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Direct Mail	$1,140,936	$275,153	$3,494,647	$3,562,637	$260,621	($3,302,016)	-92.7%
Phone	$3,145,749	$3,298,955	$2,032,994	$1,658,658	$413,740	($1,244,918)	-75.1%
Email	$234,358	$339,829	$275,104	$393,240	$127,925	($265,315)	-67.5%
Web	$144,805	$434,357	$320,979	$414,676	$1,041,415	$626,739	151.1%
Officer	$566,988	$302,942	$219,339	$1,814,070	$1,448,299	($365,771)	-20.2%
Other	$2,609,006	$3,434,540	$2,268,888	$852,629	$5,713,166	$4,860,538	570.1%
Total	**$7,841,842**	**$8,085,775**	**$8,611,950**	**$8,695,910**	**$9,005,166**	**$309,256**	**3.6%**

Donor Performance

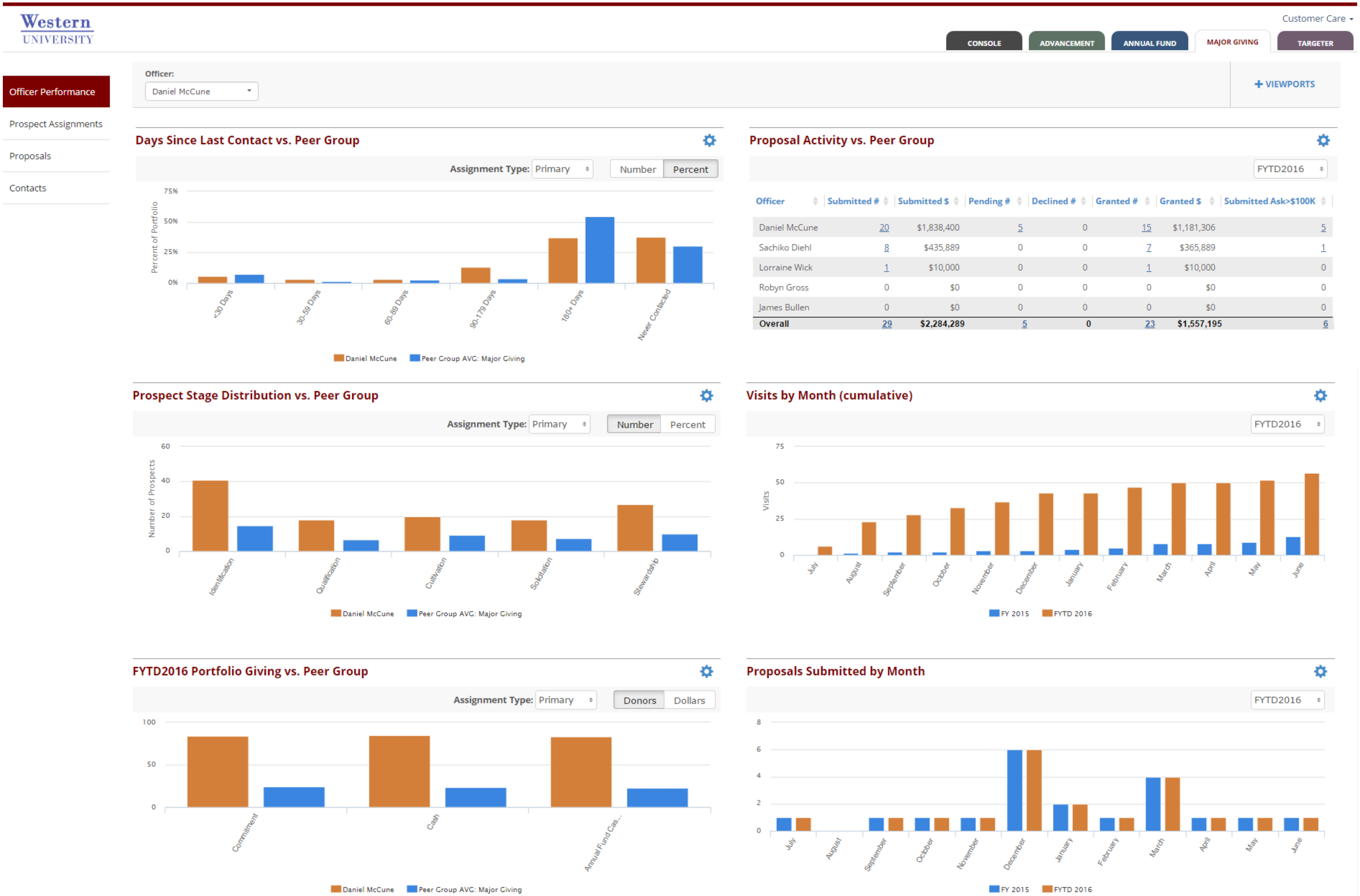
Channel	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Direct Mail	3,696	3,380	10,377	10,552	1,439	-9,113	-86.4%
Phone	9,743	10,250	5,567	5,157	2,833	-2,324	-45.1%
Email	2,675	2,534	2,788	3,564	1,412	-2,152	-60.4%
Web	1,278	3,735	2,698	2,561	9,134	6,573	256.7%
Officer	4,731	3,779	3,166	4,387	3,841	-546	-12.4%
Other	6,275	6,061	5,662	3,759	13,454	9,695	257.9%
Overall	**24,288**	**25,304**	**25,120**	**25,241**	**27,859**	**2,618**	**10.4%**

Retained Donor Migration Summary

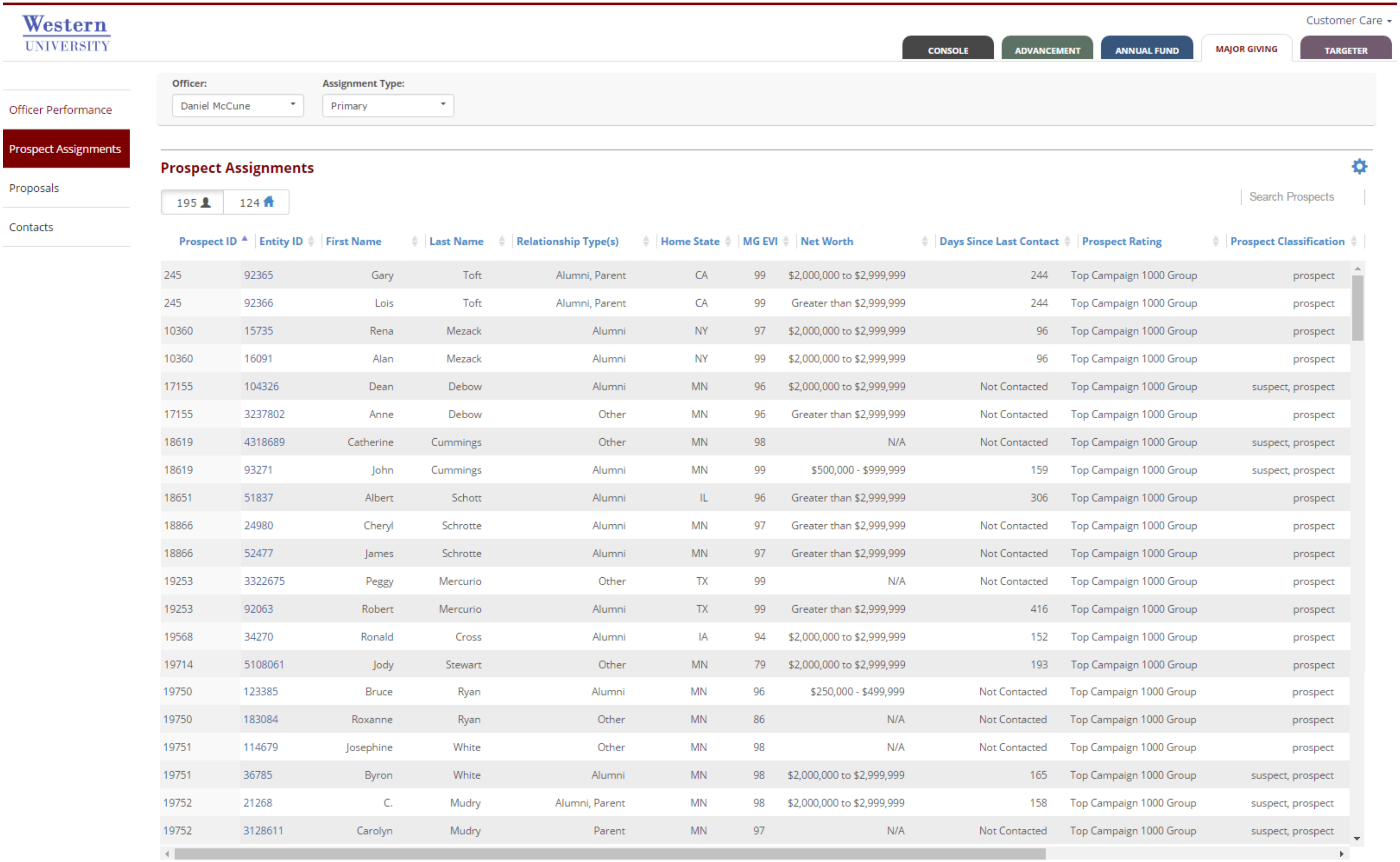
Dollar Performance

Migration	FYTD 2012	FYTD 2013	FYTD 2014	FYTD 2015	FYTD 2016	Unit Change	% Change
Upgrades	$3,317,145	$3,926,732	$3,893,736	$3,377,919	$4,037,518	$659,599	19.5%
Downgrades	$1,955,951	$1,611,514	$1,705,012	$1,996,395	$1,771,033	($225,362)	-11.3%
Same Amount	$781,472	$836,683	$1,266,902	$1,382,247	$901,491	($480,755)	-34.8%
Total	**$6,054,568**	**$6,374,929**	**$6,865,649**	**$6,756,561**	**$6,710,042**	**($46,518)**	**-0.7%**

Appendix E: Major Giving Layer

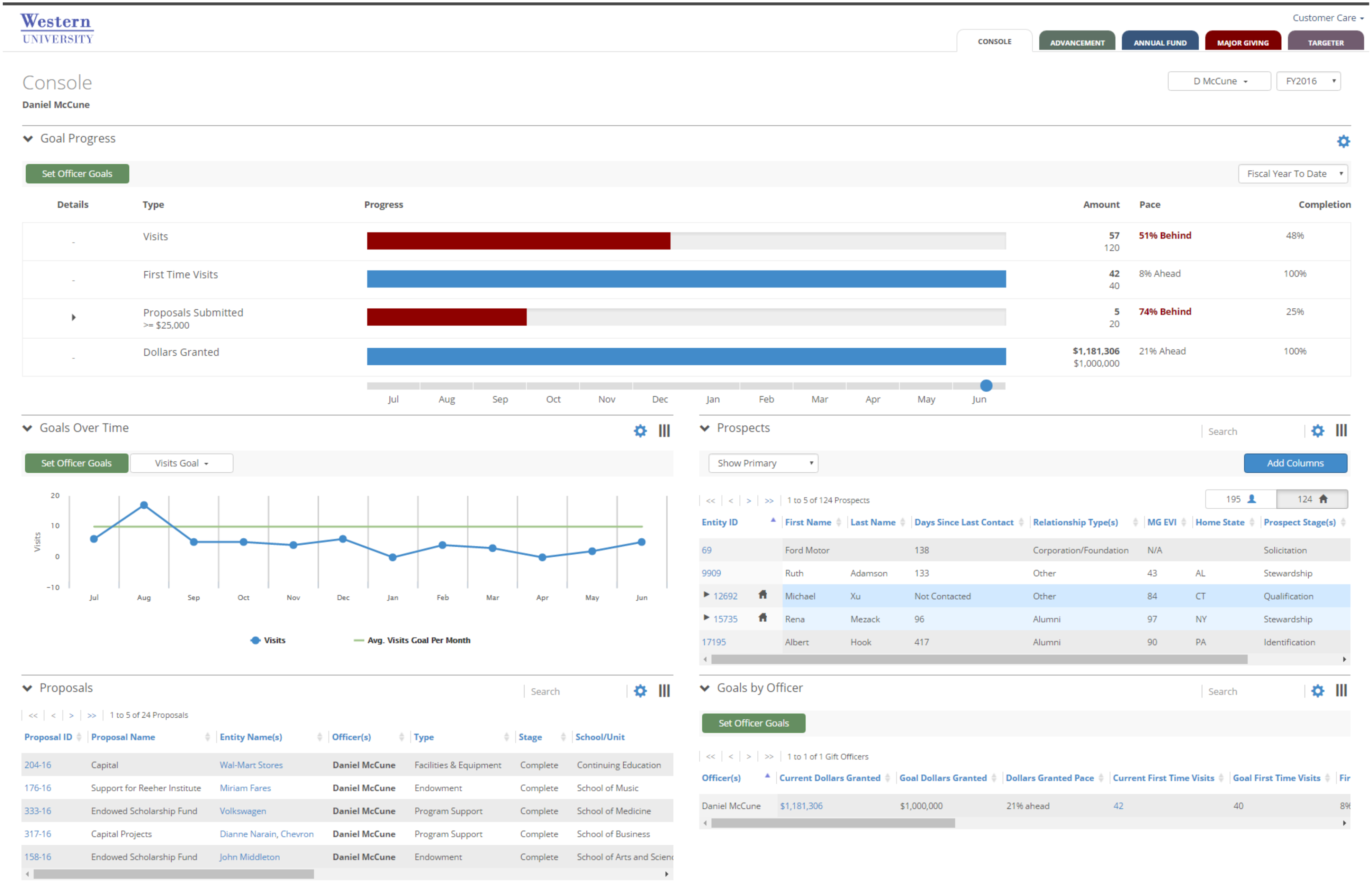


Appendix E: Major Giving Layer

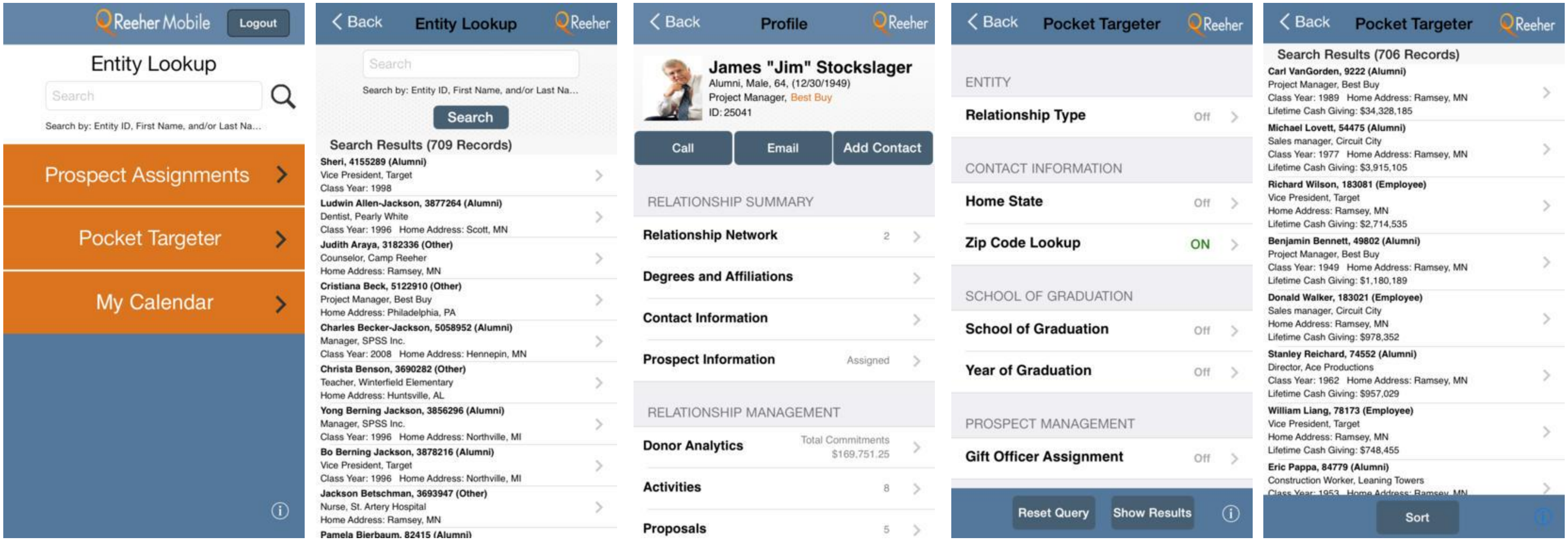


Prospect ID	Entity ID	First Name	Last Name	Relationship Type(s)	Home State	MG EVI	Net Worth	Days Since Last Contact	Prospect Rating	Prospect Classification
245	92365	Gary	Toft	Alumni, Parent	CA	99	$2,000,000 to $2,999,999	244	Top Campaign 1000 Group	prospect
245	92366	Lois	Toft	Alumni, Parent	CA	99	Greater than $2,999,999	244	Top Campaign 1000 Group	prospect
10360	15735	Rena	Mezack	Alumni	NY	97	$2,000,000 to $2,999,999	96	Top Campaign 1000 Group	prospect
10360	16091	Alan	Mezack	Alumni	NY	99	$2,000,000 to $2,999,999	96	Top Campaign 1000 Group	prospect
17155	104326	Dean	Debow	Alumni	MN	96	$2,000,000 to $2,999,999	Not Contacted	Top Campaign 1000 Group	suspect, prospect
17155	3237802	Anne	Debow	Other	MN	96	Greater than $2,999,999	Not Contacted	Top Campaign 1000 Group	prospect
18619	4318689	Catherine	Cummings	Other	MN	98	N/A	Not Contacted	Top Campaign 1000 Group	suspect, prospect
18619	93271	John	Cummings	Alumni	MN	99	$500,000 - $999,999	159	Top Campaign 1000 Group	suspect, prospect
18651	51837	Albert	Schott	Alumni	IL	96	Greater than $2,999,999	306	Top Campaign 1000 Group	prospect
18866	24980	Cheryl	Schrotte	Alumni	MN	97	Greater than $2,999,999	Not Contacted	Top Campaign 1000 Group	prospect
18866	52477	James	Schrotte	Alumni	MN	97	Greater than $2,999,999	Not Contacted	Top Campaign 1000 Group	prospect
19253	3322675	Peggy	Mercurio	Other	TX	99	N/A	Not Contacted	Top Campaign 1000 Group	prospect
19253	92063	Robert	Mercurio	Alumni	TX	99	Greater than $2,999,999	416	Top Campaign 1000 Group	prospect
19568	34270	Ronald	Cross	Alumni	IA	94	$2,000,000 to $2,999,999	152	Top Campaign 1000 Group	prospect
19714	5108061	Jody	Stewart	Other	MN	79	$2,000,000 to $2,999,999	193	Top Campaign 1000 Group	prospect
19750	123385	Bruce	Ryan	Alumni	MN	96	$250,000 - $499,999	Not Contacted	Top Campaign 1000 Group	prospect
19750	183084	Roxanne	Ryan	Other	MN	86	N/A	Not Contacted	Top Campaign 1000 Group	prospect
19751	114679	Josephine	White	Other	MN	98	N/A	Not Contacted	Top Campaign 1000 Group	prospect
19751	36785	Byron	White	Alumni	MN	98	$2,000,000 to $2,999,999	165	Top Campaign 1000 Group	suspect, prospect
19752	21268	C.	Mudry	Alumni, Parent	MN	98	$2,000,000 to $2,999,999	158	Top Campaign 1000 Group	suspect, prospect
19752	3128611	Carolyn	Mudry	Parent	MN	97	N/A	Not Contacted	Top Campaign 1000 Group	suspect, prospect

Appendix F: Console Layer



Appendix G: Reeher Mobile



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