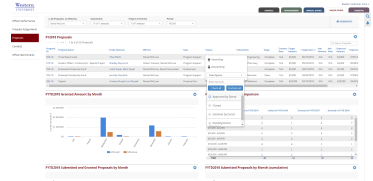


Proposals Tab

The **Proposals Tab**, located in the Major Giving Layer, is focused on providing reporting on your institution's proposal activity and performance. The reporting found in the Proposal tab can help you analyze the number of proposals and proposal values over previous years, proposal yield, proposal pipeline, proposal ask amounts, and a host of other invaluable reports. These reports can help you to visualize where the success is in your organization and where you are behind from historical levels.



There are two sections of reporting within the Proposals tab. At the top of the page is the **Proposals Table**, which displays key information related to each proposal record. The section below the table contains a variety of proposal-related **Viewports**, similar to other reporting tabs Fundraiser Performance Management.

The scope of what is included in the Proposals Table and the Proposals Tab viewports is controlled by the fiscal year drop down and officer drop down located on the top bar of the page. By default, the reporting in the Proposals tab will show proposals that have an ask date, granted date, or target date in the selected fiscal year. You have the ability to analyze up to five years of proposal information. If available, you may also choose *All Proposals* which will include all proposals in the selected time period regardless of officer assignment.

You can select a previous year from the **Period** drop down to limit the information in the Proposals Table and the viewports to that selected fiscal year period. You can also select an individual officer, multiple officers, entire peer groups, or all officers from the **Officer** drop down to limit the Proposals Table and viewports to only the selected officers' proposal history. Additionally, for users whose institutions track the data, you can select to view the dashboard by which **School/Unit** the proposals are associated with (i.e. School of Business, Library, Athletics, etc.).

Proposals Table

The **Proposals Table** is a list of all the selected officer's (or officers') currently open proposals or any proposal that has been closed in the selected fiscal year. In the Platform, open proposals are any proposals with a status mapped in the [Code Mapping](#) tool to either "In Development" or "Submitted/Pending." The data displayed in the Proposals Table is provided from your institution in the nightly file that is received by Fundraiser Performance Management. On the top right of the Proposals Table, you will see the gear icon that allows you to interact with the table. There is also an **Export** option in the gear icon that allows you to export all proposals into an Excel file. In addition, you will see the Proposal Search that allows you to search for proposals within the selected fiscal year (and for a specified officer if you've made that selection) by Proposal ID, Entity Name(s), or Proposal Name. This search will filter the results in the Proposal Table, but will not impact any of the viewports. On the top of the Proposals Table, you will see **Navigation** that allows you to click through the different pages of proposals.

You can **sort** the content of the Proposals Table by the different available columns. Just click on the column header and select to sort. One click will sort a-z, two clicks will sort z-a.

The columns of information in the Proposals Table include the following:

- **Proposal ID:** The unique identifier on the proposal record that is provided by your institution. Click this to open the Proposal Detail window.
- **Proposal Name:** The name given to the proposal.
- **Entity Name(s):** These are the constituent records associated with the proposal.
- **Officers:** All officers related to the proposal record.
- **Type:** The type of proposal associated with the proposal (i.e. Program Support, Scholarships, Unrestricted, Endowment, etc.).
- **Status:** The current status of the proposal (i.e. In Development, Pending, Approved, Declined).
- **Stage:** Current stage that the proposal is in within the proposal development cycle (typically found in Advance databases only).
- **School/Unit:** The school/unit associated with the proposal, if applicable to your institution (i.e. School of Business, Library, Athletics, etc.).
- **Target Amount:** The expected dollar amount the officer(s) will ask for.
- **Target Date:** The expected date the officer(s) plans to make the ask.
- **Ask Amount:** The actual amount the officer(s) asked for.
- **Ask Date:** The date the ask occurred.
- **Expected Amount:** The amount of the proposal that is expected to be granted/committed.
- **Expected Date:** The date that the proposal is expected to close.
- **Granted Amount:** The dollar amount the donor granted against the proposal.
- **Granted Date:** The date the proposal was granted by the donor.
- **Last ask amount / date:** Looks for the most recent ask date that's < today for an active proposal record and populate the date and amount value with what shows in the corresponding ask amount / date fields from that proposal. These should not be mapped for values where proposal status is "in development".
- **Last granted amount / date:** Looks for the most recent granted date that's < today for an active proposal record and populate the date and amount value with what shows in the corresponding granted amount / date fields from that proposal. These should only be

mapped for values where proposal status = "approved".

- **Next expected amount / date:** Looks for first upcoming expected date that is in the future for an active proposal, and populate the date and amount value with what shows in the corresponding expected date / amount fields from that proposal. These should only be mapped for values where proposal status is in "in development" or "submitted/pending".
- **Next target amount / date:** Looks for the first upcoming target date that is in the future for an active proposal, and populate the date and amount value with what shows in the corresponding target date / amount fields from that proposal. These should only be mapped for values where the proposal status is in "in development."