

Fiscal Year End

At the end of the fiscal year, system administrators will receive an email from Blackbaud on some next steps regarding Fundraiser Performance Management. This will include details on the following information. For organization-specific questions, please reach out to your Principal Business Consultant, or Business Consultant Senior.

Predictive Models

At the conclusion of your fiscal year, the Blackbaud Fundraiser Performance Management team will be re-scoring your constituent population to provide predictive scores for the upcoming fiscal year and subsequently posting the updated scores to the Platform

As a part of this process, the team reviews the performance for each of your models and makes adjustments if necessary. Any questions or points of clarification regarding the models should be brought to our attention ahead of the rescore. Examples of changes that should be brought to our attention include:

- A change to when your financial books are closed
- Changes to business rules for classifying donations as annual fund
- Changes in the classification of relationship types or relationship statuses for constituents
- Significant changes in the factors used in your model (e.g. significant change in coverage of marital status, age, contact information, or changes in the way you track participation data)

If you would like to request changes, or receive a reminder of the factors used in your model, please contact [Support](#)

Annual Reports

The rescore information above will also help us accurately generate your organization's fiscal year end reports, including the Annual Performance Scorecard. A few action items:

- Please confirm the current peer groups of your organization. Confirming these groups will ensure that comparisons displayed in the scorecard are accurate.
- Please confirm your data code mapping is up-to-date and accurate. This can be managed in the [Platform](#) by navigating to the *Control Panel Manage Platform Code Mapping*.

Please contact [Support](#) with any changes or questions you have.

Console Goals

Console goals will need to be updated to reflect your current fiscal year. To "rollover" and apply the same goals from the previous fiscal year, those with access to edit goals, can accept the "rollerover goals" message (seen below) at any time. Adjustments can be made on the individual or peer group level.

