

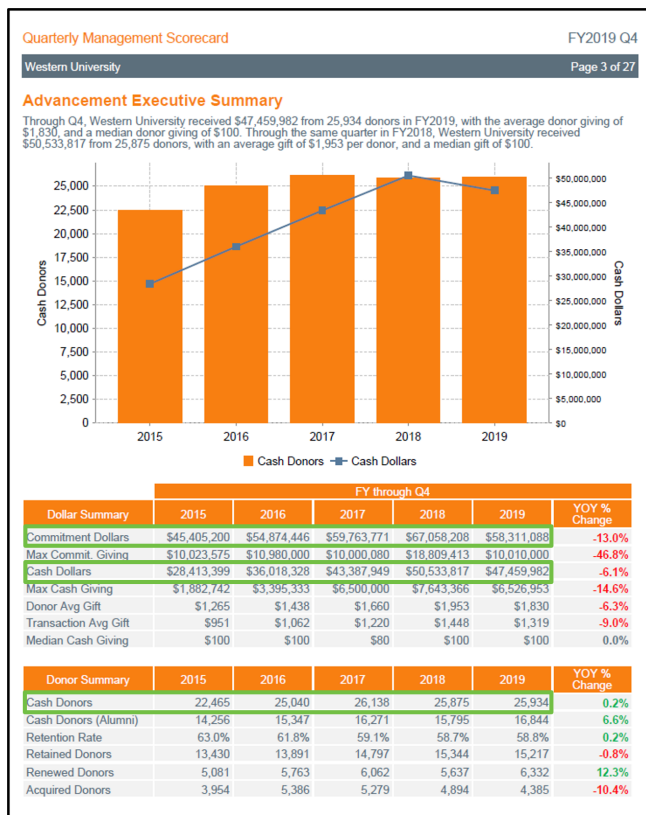
Data Quality Check for QMS

Each quarter some of the leadership at your organization and your Strategic Consultant, gather to review the performance progress and share community insights. Across the community, we are looking to ensure that these conversations are as productive as possible, focused around discussing the results of the Quarterly Management Scorecard, and community insights. The Quarterly Management Scorecard (QMS) is run on the 21st day (or next weekday if 21st falls on a weekend) of each month following quarter end.

Prior to this date, System Administrators should login to the Fundraiser Performance Management platform and validate all data that will populate in the QMS report. This document demonstrates where the data on each page of the QMS (screenshots of QMS sections for examples) can be validated in the FPM platform. Our hope is that by validating some of the data points outlined below, the Quarterly Review meeting time can be maximized for these purposes.

We are committed to resolving any data issues you identify in this process. Please contact Businessconsulting@blackbaud.com or Support.blackbaud.com with questions or concerns about the data in the FPM platform or the QMS report.

Advancement Executive Summary:



Validate the overall donors and dollars raised by your institution during the period of your upcoming scorecard.

Confirm the overall Commitment Dollars, Cash Dollars, and Cash Donors match what you would expect to see for the current fiscal year and each of the previous four fiscal years.

Log in to the platform, navigate to Advancement > Operating Reports, and set the Measurement to Cash.

Make sure all School/Units and Primary Relationship Types are selected.

In the Overall Performance Summary viewport, confirm that Total Donors and Total Giving reflect what you would expect to see in internal reports.

Performance Management

Advancement ▾ Annual Giving ▾ Major Giving ▾ Targeter Control Panel ▾

Operating Reports

Campaign Reporting

Report Library

Period: Fiscal Year to Date

School/Unit: 17 of 17 selected

Measurement Type(s): 9 of 9 selected

VIEWPORTS

Overall Performance Summary

Key Measurement	FYTD 2016	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	Unit Change	% Change
Total Donors	3,442	3,427	3,535	3,244	3,428	184	5.7%
Total Giving	\$2,745,064	\$4,245,148	\$2,525,258	\$3,006,159	\$2,133,063	(\$873,096)	-29.0%
Average Giving	\$797.43	\$1,238.56	\$743.44	\$926.65	\$622.57	(\$304.08)	-32.6%
Median Giving	\$80	\$75	\$80	\$75	\$100	\$25	33.3%
Maximum Contribution	\$3,395,333	\$6,470,472	\$5,050,000	\$1,998,519	\$18,434,781	\$16,436,263	822.4%
Retained Donors	9,889	10,738	11,146	12,040	12,730	690	5.7%
Retention Rate	44.4%	43.0%	42.6%	46.5%	49.1%	2.6%	5.5%

Period: Fiscal Year to Date

Measurement: Cash

School/Unit: 17 of 17 selected

VIEWPORTS

Overall Performance Summary

Key Measurement	FYTD 2015	FYTD 2016	FYTD 2017	FYTD 2018	FYTD 2019	Unit Change	% Change
Total Donors	16,729	17,287	17,724	19,165	20,728	1,563	8.2%
Total Giving	\$23,385,418	\$29,892,443	\$25,258,536	\$24,552,132	\$58,109,180	\$33,557,048	136.7%
Average Giving	\$1,394	\$1,680	\$1,425	\$1,281	\$2,803	\$1,522	118.8%
Median Giving	\$80	\$75	\$80	\$75	\$100	\$25	33.3%
Maximum Contribution	\$3,395,333	\$6,470,472	\$5,050,000	\$1,998,519	\$18,434,781	\$16,436,263	822.4%
Retained Donors	9,889	10,738	11,146	12,040	12,730	690	5.7%
Retention Rate	44.4%	43.0%	42.6%	46.5%	49.1%	2.6%	5.5%

For further validation, scroll down to the Monthly Giving Summary (still in Advancement > Operating Reports).

Confirm that Giving and Donors in each month reflect what you would expect to see in internal reports.

If additional validation is needed, please see the linked [Data Request Guide](#) [here](#) to view the guidelines for data coming over into FPM. For this specific section please refer to your organization's **2.1 Donor Transaction History file**, to check for any variability in the data you are expecting to see in FPM.

Fundraiser Performance Management Console

Advancement ▾ Annual Giving ▾ Major Giving ▾ Targeter More...

Advancement

Executive Summary

Operating Reports

Campaign Reporting

Report Library

Monthly Giving Summary

Giving Performance

Month	FYTD 2016	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	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%
October	\$53,379	\$37,947	\$111,653	\$691,342	\$92,164	(\$599,178)	-86.7%
Total	\$8,510,793	\$9,473,937	\$25,215,211	\$10,825,807	\$12,316,485	\$1,490,677	13.8%

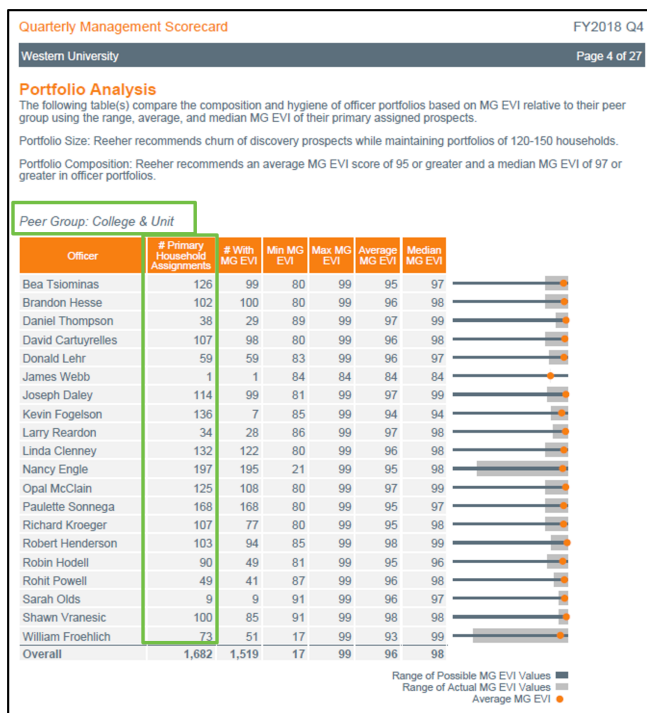
Donor Performance

Month	FYTD 2016	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	Unit Change	% Change
July	1,453	1,359	1,469	1,334	1,319	-15	-1.1%
August	1,230	1,710	1,413	1,718	1,707	-11	-0.6%
September	1,687	2,007	2,323	2,402	2,583	174	7.2%
October	214	360	453	712	320	-392	-55.1%
Total	4,586	5,436	5,658	6,173	5,929	-244	-4.0%

Portfolio Analysis:

Confirm that each portfolio has the correct number of Primary Household Assignments.

Confirm that each Peer Group has the correct officers included.

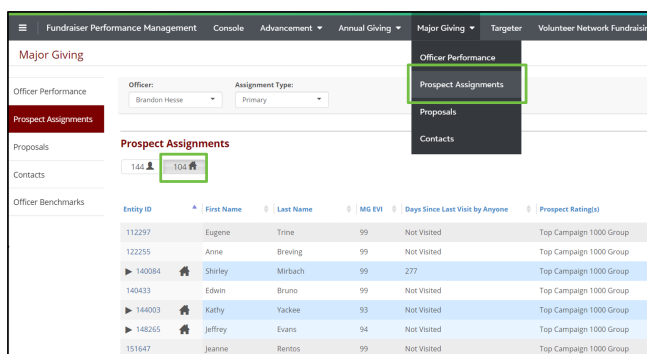


Navigate to Major Giving > Prospect Assignments.

Select an officer and their primary assignment type in the page level filters.

Confirm the number of household assignments.

If additional validation is needed, please see the linked Data Request Guide [here](#) to view the guidelines for data coming over into FPM. For this specific section please refer to your organizations 3.5 *Portfolio Assignment (previously Assignment History)* file, to check for any variability in the data you are expecting to see in FPM

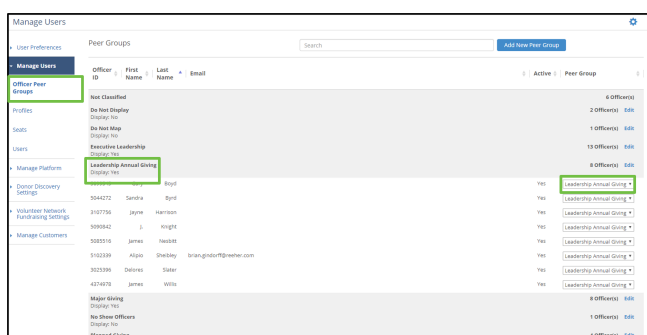


Navigate to Control Panel > Manage Users > Officer Peer Groups.

Confirm the correct officers are in each peer group by selecting the peer group.

Peer group adjustments can easily be made by selecting the dropdown in the right column.

Peer groups are a set of gift officers that have similar roles and should be evaluated as peers.



Officer Visits:

Validate the number of overall visits filed by your institution during the period of your upcoming scorecard.

Validate the number of visits filed by individual officers.

Officers should be required to enter all contact reports and proposals within 7 days following quarter end to allow for timely validation. *If it's not in the platform, it didn't happen!*

Quarterly Management Scorecard

FY2018 Q4

Western University

Page 10 of 27

Officer Visits

Officers at Western University made 1,883 visits to 1,535 unique individuals, with 55.8% of those entities being visited for the first time. By comparison, during FY2017 through Q4 officers made 1,611 visits with 55.8% entities being visited for the first time.

Based on Reeser research, highest performing officers record at least 120 visits annually including 40 first time visits to prospects with MG EVI of 95 or higher.

Overall Institution

	FY2018 through Q4			FY2017 through Q4		
	Total Visits	Entities Visited	% Visited First Time	Total Visits	Entities Visited	% Visited First Time
Western University	1,883	1,535	55.8%	1,611	1,290	55.8%

Peer Group: College & Unit

Officer	FY2018 Visit Goal	FY2018 First Time Goal	FY2018 through Q4			FY2017 through Q4		
			Total Visits	Entities Visited	% Visited First Time	Total Visits	Entities Visited	% Visited First Time
Bea Tsiominas	100	40	37	37	56.8%	0	0	N/A
Brandon Hesse	100	40	0	0	N/A	0	0	N/A
Daniel Thompson	100	40	31	31	61.3%	16	14	64.3%
David Cartuyvelles	100	40	42	42	47.6%	0	0	N/A
Donald Lehr	100	40	0	0	N/A	0	0	N/A
James Webb	100	40	0	0	N/A	0	0	N/A
Joseph Daley	100	40	0	0	N/A	0	0	N/A
Kevin Fogelson	100	40	0	0	N/A	0	0	N/A
Larry Reardon	100	40	5	4	25.0%	0	0	N/A
Linda Clenney	100	40	47	41	36.6%	33	30	46.7%
Nancy Engle	100	40	82	82	50.0%	17	17	47.1%
Opal McClain	100	40	81	60	48.3%	8	8	0.0%
Paulette Sonnega	100	40	117	101	55.4%	8	8	75.0%
Richard Kroeger	100	40	0	0	N/A	0	0	N/A
Robert Henderson	100	40	25	25	68.0%	12	8	87.5%
Robin Hodel	100	40	33	29	72.4%	0	0	N/A
Rohit Powell	100	40	0	0	N/A	0	0	N/A
Sarah Olds	100	40	0	0	N/A	0	0	N/A
Shawn Vranesic	100	40	52	41	65.9%	22	28	64.3%
William Froehlich	100	40	76	58	50.0%	3	3	33.3%
Overall			628	551	53.7%	119	116	54.3%

Visit Comparison by Officer				
Visits				
Permitted Officers	Total	New Relationships	Developing Relationships	Existing Relationships
Mary Matson	45	11	9	26
Bea Tsiominas	43	17	12	15
Paulette Sonnega	38	22	18	0
Lee Ferri	30	11	12	9
Nick Weller	30	14	12	4
Daniel McCune	29	21	9	1
Opal McClain	29	13	6	10
Robert Henderson	23	15	6	2
Overall	555	259	193	137

Navigate to Advancement > Executive Summary > Visit Comparison by Officer. (If this viewport is not on your dashboard, you may need to add it by selecting Viewports at the top right of the page.) Based on your organizations FPM subscription you may not have access to Executive Summary, if this is the case please navigate to Major Giving>Contacts> FYTD Visit Frequency viewport and use the officer page level filter at the top of the page to validate.

Confirm the total Visit numbers for individual officers and the overall institution.

Fundraising Performance Management									
Major Giving									
Officer Performance									
Proposals									
FY2020 Completed Contacts									
Activity ID	Type	Entity Name(s)	Officer(s)	Type	Date	Purpose	Measured	School/Dept	
92236	Contact Thomas	Thomas Stanger-Judith	David Cartuyvelles	Other-G	10/13/2019	Solicitation	Unmeasured	School of Engineering	
92238	Visit with James	James Koster	Paulette Sonnega	Visit-G	10/13/2019	Identification	Unmeasured	School of Arts and Sciences	
92234	Check in with Christine	Christine Jarvis	Nancy Engle	Letter/Email-G	10/13/2019	Solicitation	Unmeasured	School of Health Sciences	
92237	Contact John	John Hopkins	Amanda Connolly	Other-G	10/13/2019	Major Gifts	Unmeasured	School of Pharmacy	
92249	Check in with Daniel and Linda	Daniel Luederbach, Linda Luederbach	Bea Tsiominas, Jonathan Goss	Letter/Email-G	10/13/2019	Major Gifts	Unmeasured	Continuing Education	
FYTD2020 Contacts by Month									
Month	FYTD 2019	FYTD 2020	% Change	FYTD2020 Contacts by Contact Type					
July	182	151	-16.5%	Contact Type	October - 2019	FYTD 2019	FYTD 2020	% Change	
August	188	133	-14.2%	Visit-G	59	123	627	6.2%	
September	185	134	-24.3%	Letter/Email-G	51	852	435	-13.4%	
October	85	89	7.9%	Phone-G	50	1,622	512	-74.6%	
Year	555	567	1.8%	Other-G	11	88	18	-2.9%	
				Other-G	8	35	38	16.9%	

For additional validation, navigate to Major Giving > Contacts > Contacts by Month.

You are also able to view and adjust your institution's definition of Visits at Control Panel > Manage Platform > Code Mapping > Contact Type. All contact reports with a Contact Type mapped to Visit will be included in your Visit totals.

For organizations *not* using Activity Center and looking for additional validation, please see the linked Data Request Guide [here](#) to view the guidelines for data is coming over into FPM. For this specific section please refer to your organizations 3.1a Activity History.

Proposals Submitted/Granted:

Validate the number of Submitted proposals and number of dollars Granted by your institution and individual officers during the period of your upcoming scorecard.

Officers should be required to enter all contact reports and proposals within 7 days following quarter end to allow for timely validation. *If it's not in the platform, it didn't happen!*

Quality Management Dashboard		FY2019 Q4		Quality Management Dashboard		FY2019 Q4	
Session: University		Page 11 of 21		Session: University		Page 11 of 21	
Proposals Submitted/Granted							
Proposals submitted/awarded FY19 proposals during FY19 through Q4 for a total award amount of \$1,141,146. Of this amount, \$1,079,712 was awarded to the University and \$61,434 was awarded to other providers. For FY19, the University has received 10 proposals for a total award amount of \$1,141,146. The University has received 10 proposals for a total award amount of \$1,141,146. The University has received 10 proposals for a total award amount of \$1,141,146.							
Overall performing offers based on at least 20 proposals at \$25,000 or greater with at least \$1,000 per proposal offers.							
Overall history							
		FY2019 Proposal Q4		FY2019 Proposal Q4			
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count
University	10	\$1,141,146	10	University	10	\$1,141,146	10
University	10	\$1,141,146	10	University	10	\$1,141,146	10
FY2019 Proposal Q4							
Session	Offer	Amount	Count	Session	Offer	Amount	Count

[illegible]

Navigate to Advancement > Executive Summary > Proposal Comparison by Officer.

Confirm the number of proposals Submitted by individual officers and the overall institution.

Based on your organizations FPM subscription you may not have access to Executive Summary, if this is the case please navigate to Major Giving>Proposals> FYTD Proposal Type Performance viewport and use the officer page level filter at the top of the page to validate.

If additional validation is needed, navigate to Major Giving > Proposals. Make sure All Proposals, all School/Units, and all Projects of Interest are selected. Locate the Submitted and Granted Proposals by Month, Submitted Proposal Pipeline, and Granted Proposal Pipeline viewports and validate accordingly.

You are also able to view and adjust your institution's definition of Submitted and Granted Proposals at Control Panel > Manage Platform > Code Mapping > Proposal Status.

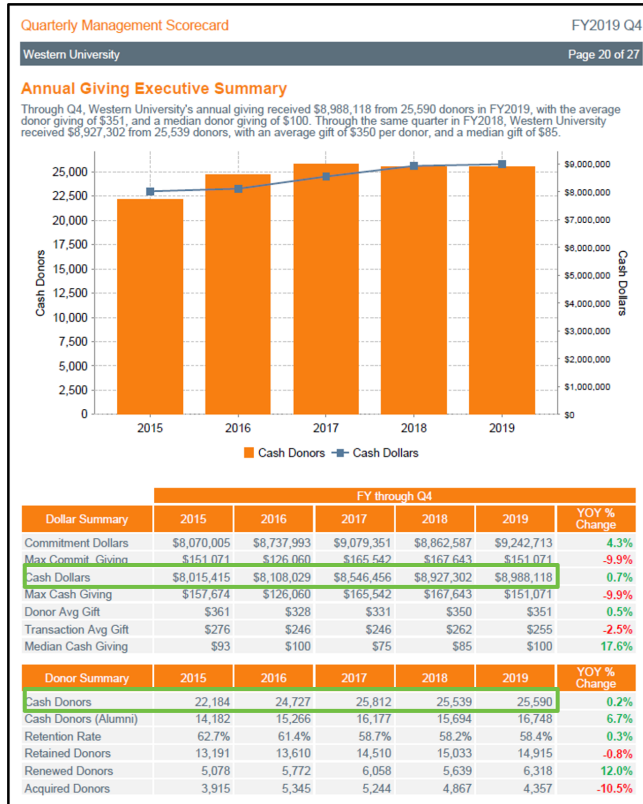
All proposals with a status mapped to Submitted/Pending, Approved or Declined will be counted in the Submitted totals.

All proposals with a status mapped to Approved will be counted in the Granted totals.

For organizations *not* using Activity Center and looking for additional validation, please see the linked Data Request Guide [here](#) to view the guidelines for data is coming over into FPM. For this specific section please refer to your organizations 3.6a proposals, and 3.7 proposal assignment file.

Annual Giving Executive Summary:

Validate the Annual Giving Cash Dollars and Cash Donors raised by your institution during the period of your upcoming scorecard.



Performance Management Advancement Annual Giving Major Giving Targeter Control Panel

Operating Reports

Period: Fiscal Year to Date Measurement: Cash VIEWPORTS

School/Unit: 17 of 17 selected Primary Relationship Type(s): 9 of 9 selected

Overall Performance Summary

Key Measurement	FYTD 2016	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	Unit Change	% Change
Total Donors	3,388	3,352	3,463	3,182	3,344	162	5.1%
Total Giving	\$1,022,692	\$925,868	\$1,181,016	\$981,061	\$867,729	(\$113,331)	-11.6%

Navigate to Annual Giving > Operating Reports, and set the Measurement to Cash.

Make sure all School/Units and Primary Relationship Types are selected.

In the Overall Performance Summary viewport, confirm that Total Donors and Total Giving reflect what you would expect to see in internal reports.

If additional validation is needed, please see the linked Data Request Guide [here](#) to view the guidelines for data coming over into FPM. For this specific section please refer to your organizations **2.1 Donor Transaction History** file, to check for any variability in the data you are expecting to see in FPM.