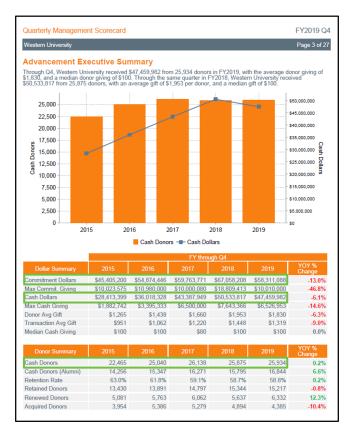
Data Quality Check for QMS

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.bl ackbaud.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.

	ince Management	Advancement	- Anni		• I•iajoi	r Giving 🔻	Target		rol Panel 🔻
Filted Year to Date Report Library Type(a) 17 of 17 selected 9 of 9 selected 17 of 17 selected 9 of 9 selected Overall Performance Summary Key Measurement FYTD 2016 FYTD 2015 FYTD 2017 FYTD 2018 FYTD 2020 Unit Change % Change Total Donors 3.442 3.422 3.536 3.2244 3.442 184 5.7% Total Giving 52.745.064 54.245.148 52.525.258 53.006.159 52.133.063 (\$873.096) -29.0% Average Giving Prist for to Date Commitment 12.448 5.649 42.45.148 52.525.558 53.006.159 52.133.065 (\$20.01 32.648 Madimum Contribue Filed Terris Date Commitment 12.448 54.649 42.45.148 52.525.558 53.055.04 140.78 54.649 <td< th=""><th></th><th>Operating Re</th><th>ports</th><th></th><th></th><th></th><th></th><th></th><th></th></td<>		Operating Re	ports						
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Median Giving Madinum Contribution Median Giving Nameworksetienskink Typeloi 9 of 9 steams Masserement Cash Schwitzburg 12 July 2005 Masserement 12 July 2005 Masserement 22 July 2005 Masserement 23 J	Total Donors	<u>3.442</u>	<u>3.427</u>		<u>i36</u>	3.244	<u>3.428</u>		4 5.79
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Total Downs 16,229 17,292 17,224 19,165 20,228 15,563 15,673 12,784 Total Gwing 523,384,418 529,892,443 523,553,56 544,552,152 556,100.100 533,557,448 136,776 Average Gwing 51,394 51,306 51,425 51,208 52,000 51,922 118,86 Madam Gwing 580 56,776 51,000,000 51,976 51,000,000 51,976 51,000,000 51,976 52,020,000 51,976 52,252 33,98 Mazimum Combination 51,395,333 56,470,472 53,000,000 51,976 51,976 52,976 52,776 Retained Downs 59,282 10,253 11,169 12,249 12,279 660 5,776	Total Giving Average Giving Median Giving Maximum Contribut	\$2,745,064 \$700 Period Fiscal Year to Date Primary Relationship Typ	\$4,245,148 \$4,245,148 Measure (Cash re(s) Cash re(s) Cash re(s)	2 3.5 \$2,525,2 arement	158 \$3,00	06,159 \$2 \$027 tool/Unit	2,133,063	184 (\$873,096) -29.09
Tetar Giving \$33,385,418 \$194,892,443 \$125,256,516 \$24,552,122 \$58,106,100 \$33,357,048 \$136,76 Average Giving \$13,394 \$15,400 \$11,425 \$12,130 \$31,300 \$13,357,1048 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$13,857,1048 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$14,859,1049 \$15,859,1049 \$12,859,1049	Total Giving Average Giving Median Giving Maximum Contribut Retained Donors	\$2,745,064 \$2,700 Period Fiscal Year to Date Primary Relationship Typ 9 of 9 selected	\$4,245,148 \$4,245,148 * Casi * Casi * Corr * Corr	s2,525,2 s2,525,2 reement h h	158 \$3,00	06,159 \$2 \$027 tool/Unit	2,133,063	184 (\$873,096) -29.09) 22.09 WPORTS 9
Average Gwing \$1,304 \$1,680 \$1,425 \$1,281 \$2,600 \$1,522 118,36 Mediana Gwing \$10 \$175 \$100 \$75 \$100 \$253 \$334 Maximum Contribution \$33,363,33 \$64,370,472 \$35,060,000 \$19,493,51 \$14,454,258 \$22,46 Retained Donors \$2,892 \$10,723 \$11,164 \$12,260 \$12,723 \$64,000,471	Total Giving Average Giving Median Giving Maximum Contribut Retained Donors	\$2,745,064 \$700 Period Riscal Year to Date Primary Relationship Typ 9 of 9 selected Overall Performant	\$4,245,148 \$4,245,148 \$1,226 (cast re(s) Cor nce Sum Plet	s \$2,525,2 s \$2,525,2 s s s s s s s s s s s s s s s s s s s	258 \$3,00	06,159 \$2 \$037 teo//Unit 7.044	2,133,063 5612	184 (\$873,096 (\$204) -29.09 WPORTS
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Maximum Contribution \$3,395,333 \$6,470,472 \$3,5050,000 \$1,986,519 \$18,434,781 \$16,436,263 \$22,48 Retained Donors \$5,552 \$10,735 \$11,146 \$12,049 \$22,720 690 \$7,76	Total Giving Average Giving Median Giving Maximum Contribut Retained Donors	52,745,064 Frid Facil Year to Date Primary Relationship Typ 9 of 9 selected Overall Performan Key Measurement Total Donors	\$4,245,148 \$4,245	2 2.525,2	158 \$3,00	06,159 \$2 0077 1000/Unit 7,041 Ares 1000 FYTD 2018 19,165	2,133,063 \$600 • • •	184 (\$873.096 (\$204 a vie Unis Change 1.563) -29.09 22.09 WPORTS 9 4 5 6 6 6 8.2%
Retained Donors 9.962 10.758 11.146 12.040 12.730 690 5.7%	Total Giving Average Giving Median Giving Maximum Contribut Retained Donors	S2,745,064 S2,745,064 Final Year to Date Primary Relationship Type Second Overall Performant Key Measurement Total Donors Total Gwing	\$4,245,148 \$4,245,148 \$1 200 Cast re(s) Cor nce Sum Plet Prytp 2015 16,729 \$23,385,418	2 3.6 52,525,7 wrement h.h h pytp 2016 12,792 529,892,443	158 \$3,00 144 5ch FYTD 2017 127,724 \$25,736,536	06,159 \$2 00,159 \$2 00,170 00,170 00,159 FYTD 2018 19,165 \$24,552,132	EYTD 2019 20,728 20,728 20,728 20,728 20,728	184 (\$873,096 (\$20,4 (\$20,4 (\$20,4)(\$20,4)(\$20) -29.09 WPORTS 9 % Change 8.2% 136.7%
	Total Giving Average Giving Median Giving Maximum Contribut Retained Donors	S2,75,064 From Period Period Period Performant Primary Relationship Typ 9 of 9 seleccel Overall Performant Key Messurement Total Donors Total Donors Total Donors Merage Giung Median Giung	\$4,245,148 \$4,128 \$5,1384 \$4,138 \$4,139 \$4,139 \$4,139 \$4,139	2 3.2 3 \$2,525,2 rement h h PYTD 2016 17,792 529,992,443 \$1,680 \$75	158 \$3,00 144 FYTD 2017 12,724 525,258,386 \$1,425 \$200	06,159 \$2 \$0077 \$2 \$0077 \$2 \$0077 \$2 \$0077 \$2 \$0077 \$2 \$10010 \$2 \$12018 \$2 \$12018 \$2 \$12018 \$2 \$12018 \$2 \$12018 \$2 \$12018 \$2	PYTD 2019 20.723 20.723 558,100,180 52,803 \$100	18/ (\$873,096 /************************************) -29.09 27.09 WPORTS P % Change 8.2% 136.7% 118.8% 23.3%
	Total Giving Average Giving Median Giving Maximum Contribut Retained Donors	S2.755.064 Evide Ford Evide Prival Restanchis typ 9 of 9 stocad Overall Performant Key Messurement Total Donos: Total Conog Average Gring Masimum Contribution	S4.245.148 S4.245.148 C + 300 C	2 3.2 3 \$2,525,2 rement h h FYTD 2016 127.292 \$28,992,443 \$73 \$6,470,472	58 \$3,00 54 54 54 54 54 54 54 54 54 54 55 55,050,000	06,159 \$2 50,77 1000/Unit FYTD 2018 19,155 \$24,552,132 \$1,281 \$73 \$1,988,319	PYTD 2019 23.283 25.830 20.223 23.843 20.223 23.8434,781	184 (\$873,096 (\$204 (\$204 (\$204 (\$204 (\$204)) (\$204)(\$204)(\$204)(\$204)(\$	 -29.0% -29.0%

xecutive Summary	Monthly G	Giving Summ	ary					\$
perating Reports				Giving Per	formance			
ampaign Reporting	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)	-4.45
eport Library	August	\$3,504,439	\$3,448,439	\$1,135,242	\$5,523,788	\$3,725,729	(\$1.798.058)	-32.69
	September	\$2,756,858	\$3,491,870	\$21,557,841	\$953,276	\$5,000,471	\$4,047,194	424.69
	October	\$53,379	\$37,947	\$111,653	\$691,342	\$92,164	(\$599,178)	-86.79
	Total	\$8,510,793	\$9,473,937	\$25,215,211	\$10,825,807	\$12,316,485	\$1,490,677	13.8
				Donor Per	formance			
	Month	FYTD 2016	FYTD 2017	FYTD 2018	FYTD 2019	FYTD 2020	Init Change	% Change
	July	1.455	1.359	1.449	1.334	1.319	-15	-1.19
	August	1.230	1.710	1.413	1.718	1.707	-11	-0.69
	September	1.687	2.007	2.323	2.409	2.583	174	7.29
	October	214	<u>360</u>	<u>453</u>	712	<u>320</u>	-392	-55.19

Portfolio Analysis:

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.

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

Confirm that each Peer Group has the correct officers included.

Quarterly Management Scorecard	FY2018 Q4
Western University	Page 4 of 27
Portfolio Analysis	

The following table(s) compare the composition and hygiene of officer portfolios based on MG EVI relative to their peer group using the range, average, and median MG EVI of their primary assigned prospects. Portfolio Size: Reeher recommends churn of discovery prospects while maintaining portfolios of 120-150 households.

Portiolio size, reener recomments crum or uscovery prospects while maintaining portions or 120-150 notaerious. Portfolio Composition: Reeher recommends an average MG EVI score of 95 or greater and a median MG EVI of 97 or greater in officer portfolios.

Peer Group: College & Unit

Officer	# Primary Household Assignments	# With MG EVI	Min MG EVI	Max MG EVI	Average MG EVI	Median MG EVI
Bea Tsiominas	126	99	80	99	95	97
Brandon Hesse	102	100	80	99	96	98
Daniel Thompson	38	29	89	99	97	99
David Cartuyrelles	107	98	80	99	96	98
Donald Lehr	59	59	83	99	96	97
James Webb	1	1	84	84	84	84
Joseph Daley	114	99	81	99	97	99
Kevin Fogelson	136	7	85	99	94	94
Larry Reardon	34	28	86	99	97	98
Linda Clenney	132	122	80	99	96	98
Nancy Engle	197	195	21	99	95	98
Opal McClain	125	108	80	99	97	99
Paulette Sonnega	168	168	80	99	95	97
Richard Kroeger	107	77	80	99	95	98
Robert Henderson	103	94	85	99	98	99
Robin Hodell	90	49	81	99	95	96
Rohit Powell	49	41	87	99	96	98
Sarah Olds	9	9	91	99	96	97
Shawn Vranesic	100	85	91	99	98	98
William Froehlich	73	51	17	99	93	99
Overall	1,682	1,519	17	99	96	98

≡ Fundraiser Perl	ormance Manageme	nt Console	Advancement 👻	Annual Giving 🔻	Major Giving 👻	Targeter	Volunteer Network Fundraisin
Major Giving					Officer Performa	ince	
Officer Performance	Officer: Brandon Hesse	Assignr • Prime	nent Type:		Prospect Assign	ments	
Prospect Assignments					Proposals		
Proposals	Prospect Assi	gnments			Contacts		
Contacts	144 💄 104	ff.					
Officer Benchmarks	Entity ID	A First Name	0 Last Name	0 MG EVI 0	Days Since Last Visit by	Anyone	Prospect Rating(s)
	112297	Eugene	Trine	99	Not Visited		Top Campaign 1000 Group
	122255	Anne	Breving	99	Not Visited		Top Campaign 1000 Group
	► 140084 🛛 🕌	Shirley	Mirbach	99	277		Top Campaign 1000 Group
	140433	Edwin	Bruno	99	Not Visited		Top Campaign 1000 Group
	► 144003	Kathy	Yackee	93	Not Visited		Top Campaign 1000 Group
	► 148265 🛃	Jeffrey	Evans	94	Not Visited		Top Campaign 1000 Group
	151647	Jeanne	Rentos	99	Not Visited		Top Campaign 1000 Group

Manage Users		Contract (1997)
User Preferences	Peer Groups Search	Add New Peer Group
Manage Users	Officer Vist Last Email	0 Active 0 Peer Group
Groups	Not Classified	6 Officer(ii)
Profiles	De Not Display Display: No	2 Officer(s) Edit
Seats	De Not Map Display: No	1 Officer(s) Edit
Users	Executive Leadership Display: Yes	13 Officer(s) bdi
Manage Platform	Leadership Annual Giving Display: Ves	8 Officer(s) Edi
Donor Discovery	Boyd	Yes Leadership Annual Gving •
Settings	5044272 Sandra Byrd	Yes Leadership Annual diving *
Volunteer Network Fundraising Settings	3107756 Jayne Harrison	Yes Leadership Annual Giving *
	5090842 J. Knight	Yes Leadership Annual Guing •
Manage Customers	5085316 James Nesbitt	Yes Leadership Annual Giving
	5102339 Alipio Shebley brian,gindorff@reeher.com	Ves Leadership Annual Giving
	3025396 Dalores Slater	Yes Leadership Annual Giving
	4274970 James Wills	Yes Leadership Annual Giving
	Major Giving Display, Yes	8 Officer(s) Ed
	No Shew Officers Display: No	1 Officer(s) Ed
	Planned Giving	4 Officer(s) Edit

Officer Visits:

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.

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

Page 10 of 27

FY2018 Q4

Western University 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 FV2017 through Q4 officers made 1,611 visits with 55.8% entities being visited for the first time.

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

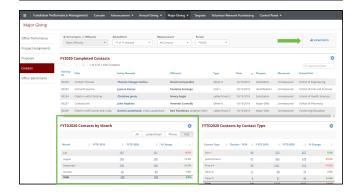
Overall Institution

	FY2	2018 through	Q4	FY2	017 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

				2018 through	Q4	FY2	017 through	Q4
Officer	FY2018 Visit Goal	FY2018 First Time Goal	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 Cartuyrelles	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 Hodell	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 Compariso	n by Offic	er		\$
			Visits Enti	ties Visited
Permitted Officers	Total≑ Ne Re	ew 🔶 🕴 Developing lationships		ips 🔶
Mary Matson	<u>45</u>	11	<u>9</u>	26
Bea Tsiominas	<u>43</u>	<u>17</u>	<u>12</u>	15
Paulette Sonnega	<u>38</u>	22	<u>18</u>	0
Lee Ferri	<u>30</u>	11	<u>12</u>	9
Nick Weller	<u>30</u>	<u>14</u>	<u>12</u>	4
Daniel McCune	<u>29</u>	<u>21</u>	9	1
Opal McClain	<u>29</u>	<u>13</u>	<u>6</u>	<u>10</u>
Robert Henderson Overall	23 <u>555</u>	15 <u>259</u>	6 <u>193</u>	2 ×



Proposals Submitted/Granted:

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.

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*.

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!*

Part Part Part Part Part Part Part Part	Wieslem University								Page 17 of 27	Western Liniuersity								Page 18 of 2
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increase of which whi																		
Nome N	Alestern University	officers sub	mitted 672 prop	osals dur	ing FY2018 thro	aph Q4 for	a total ask amor	int of \$1	51,642,545.	Peer Group: Dire	ctors of De	relopment						
												FY2018 the	ouch G4			FY2017 the	wah G4	
Nome Nom Nome Nome Nome		esearch, hig al dollars on	hest performing inled.	officers :	vabriet at least 21	proposale	at \$25,000 or g	reater w	rth at least	College .	• 1			3				
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Proposal Comparis	on by Officer					3	¢
					Count	Amount	t
Permitted Officers	Submitted	\$	Granted	🔶 🗌 Subm	itted Ask >= \$25K	¢	
Susan Slattery	1	5		3		<u>13</u>	-
Gary Boyd	1	2		<u>5</u>		<u>9</u>	1
David Cartuyrelles	1	0		4		<u>8</u>	
Robert Henderson	1	0		<u>5</u>		<u>8</u>	
Shawn Vranesic		9		<u>4</u>		<u>9</u>	
Millicent Klayman		<u>8</u>		4		<u>8</u>	
Nick Weller		8		<u>5</u>		Z	
Amanda Connolly Overall	<u>11</u>	7 5		4 67		<u>93</u> 6	*

er Derformance	8 AL D	oposala 🔆 Officer(s)	School/Unit	Project of I	nterest	Period			
	Select	Officer(s)	17 of 17 selected	* Zal7sek	ected •	Pr2020 *			A VIEWPORTS
oect Assignments									
osals	FY2020	Proposals							
ets.		> >> 1 to 5 of 1.312 P	roposals), Search Proposals
r Benchmarks	Proposal ID	Proposal Name	Errity Name(s)		Officers		Турне	Status	School/Unit
	205-20	Capital Projects	James Bowen, Nancy Cole	inan .	james Gollen, james Z	Jeleniewski	Program Support	Closed	School of Health
	204-20	Capital	Wal-Mart Stores		Joann Jevidoy, Shawn 1	Wanesic, Jeffrey Caluwert, Daniel Mo	Cure Facilities & Equipment	Closed	Continuing Edu
	203-20	Endowed Scholarship Fund	Joseph Donnelly, Mary Do	crosily	Jeffrey Caluwert, Arna	nda Connolly. David Cartuyrelles	Facilities & Equipment	In Negotiation	School of Social
	201-20	Western Scholarships	Kim Gardner, Gary Gardr	er	Susan Slattery		Program Support	in Negotiation	School of Nursh
	20-20	Endowment	Sinoper, James Campbell	Barbara Campbel	Mitchel Johnson, Rich	ard Thiem	Special Fund	Closed	School of Applie
	4								
	FYTD20	20 Submitted and Gr	anted Proposals by	Month	0	Granted Proposal Pipe	line		
								P	/ 2020 PY 202
	Neeth		Submitted	Granted		\$15,000,000			
	July			<u>47</u>	22	\$10,000,000	-		
	August			22	12	Arrow			
	Septemb	Jer .		-52	22	4 55,000,000			
	October			12	10	30			

Annual Giving Executive Summary:

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

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

Toggle to Amount and confirm the dollars Granted 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.

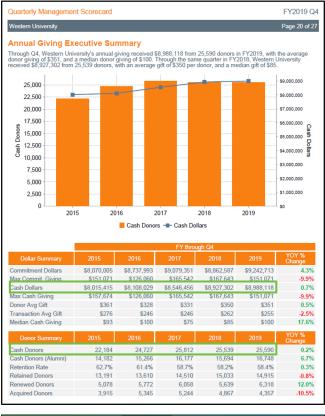
You are also able to view and adjust your institution's definition of Submitted and Granted Proposals at Control Panel > Manage Platform > Code Mapping > Proposal Status.

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.

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



nance Management Advancement 🔻		Annual	Giving 🔻	Major Giving		ter Control	Panel 🔻	
		Opera	ting Reports					
Period	Measure	ement						
Fiscal Year to Date	Fiscal Year to Date Cash					alt VIE		
School/Unit Primary Relationship Type(s)								
17 of 17 selected								
Overall Perform			FYTD 2018	FYTD 2019	FYTD 2020	Unit Change	🔅 % Change	
Total Donors	3.388	<u>3.359</u>	<u>3.463</u>	<u>3.182</u>	<u>3,344</u>	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.