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:

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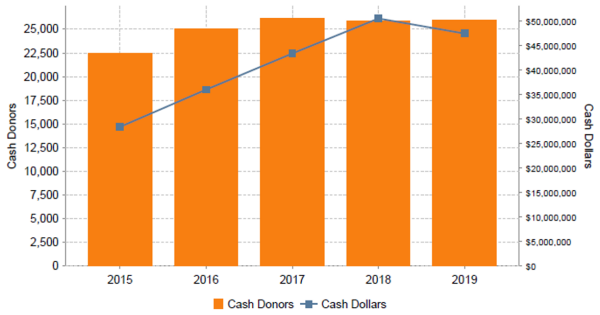
Advancement Executive Summary

Through Q4, Western University received $47,459,982 from 25,934 donors in FY2019, with the average donor giving of $1,830, and a median donor giving of $100. Through the same quarter in FY2018, Western University received $50,533,817 from 25,875 donors, with an average gift of $1,953 per donor, and a median gift of $100.



	FY through Q4					
Dollar Summary	2015	2016	2017	2018	2019	YOY % Change
Commitment Dollars	$45,405,200	$54,874,446	$59,763,771	$67,058,208	$58,311,088	-13.0%
Max Commit. Giving	$10,023,575	$10,980,000	$10,000,080	$18,809,413	$10,010,000	-46.8%
Cash Dollars	$28,413,399	$36,018,328	$43,387,949	$50,533,817	$47,459,982	-6.1%
Max Cash Giving	$1,882,742	$3,395,333	$6,500,000	$7,643,366	$6,526,953	-14.6%
Donor Avg Gift	$1,265	$1,438	$1,660	$1,953	$1,830	-6.3%
Transaction Avg Gift	$951	$1,062	$1,220	$1,448	$1,319	-9.0%
Median Cash Giving	$100	$100	$80	$100	$100	0.0%

Donor Summary	2015	2016	2017	2018	2019	YOY % Change
Cash Donors	22,465	25,040	26,138	25,875	25,934	0.2%
Cash Donors (Alumni)	14,256	15,347	16,271	15,795	16,844	6.6%
Retention Rate	63.0%	61.8%	59.1%	58.7%	58.8%	0.2%
Retained Donors	13,430	13,891	14,797	15,344	15,217	-0.8%
Renewed Donors	5,081	5,763	6,062	5,637	6,332	12.3%
Acquired Donors	3,954	5,386	5,279	4,894	4,385	-10.4%

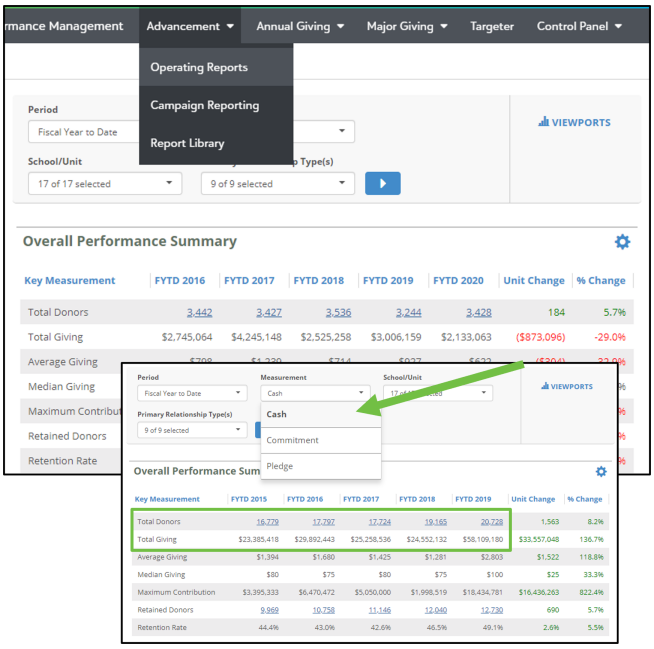
Validate the overall donors and dollars raised by your institution during the period of your upcoming scorecard.

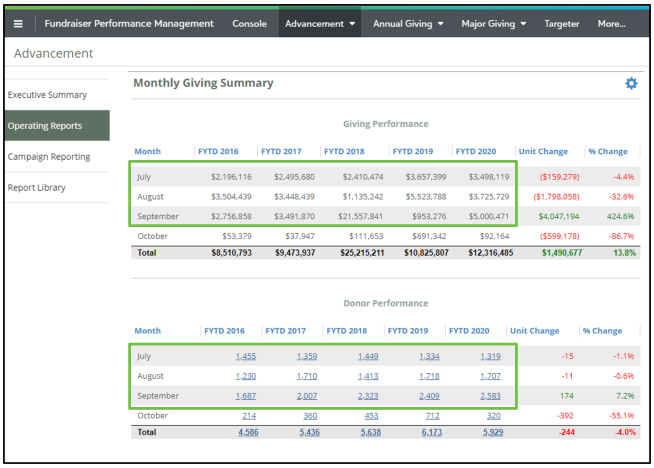
Confirm the overall Commitment Dollars, Cash Dollars, and Cash Donors match what you would expect to see for the current fiscal year and each of the previous four fiscal years.

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.





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

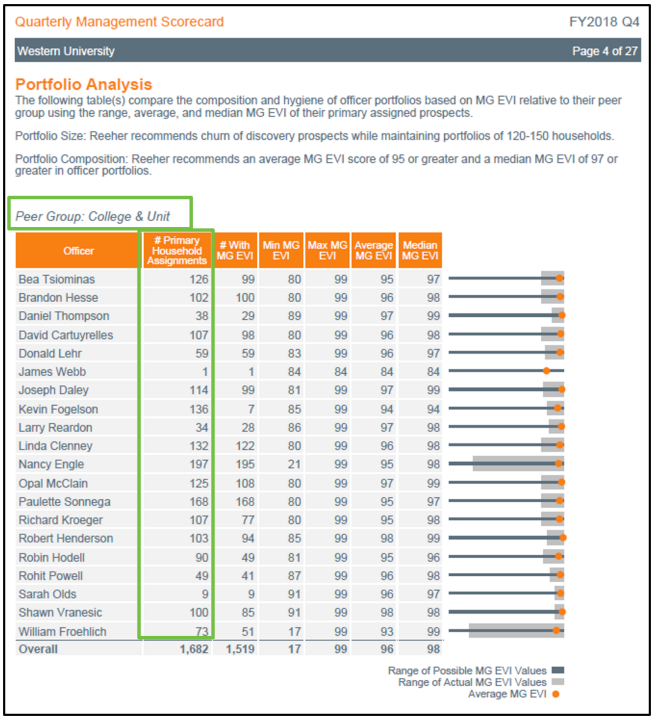
Confirm that Giving and Donors in each month reflect what you would expect to see in internal reports.

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.

Portfolio Analysis:

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

Confirm that each Peer Group has the correct officers included.



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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.

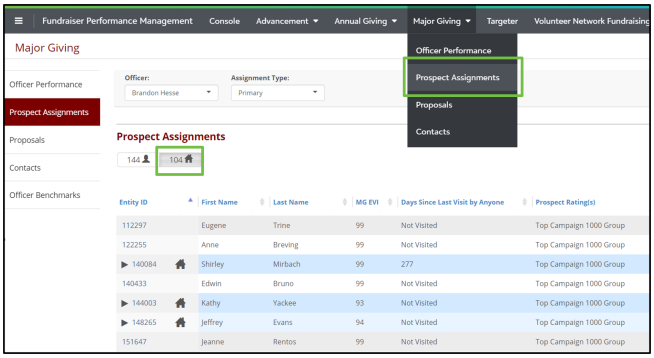
Portfolio Size: Reeher recommends churn of discovery prospects while maintaining portfolios of 120-150 households.

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**

Range of Possible MG EVI Values
Range of Actual MG EVI Values
Average MG EVI

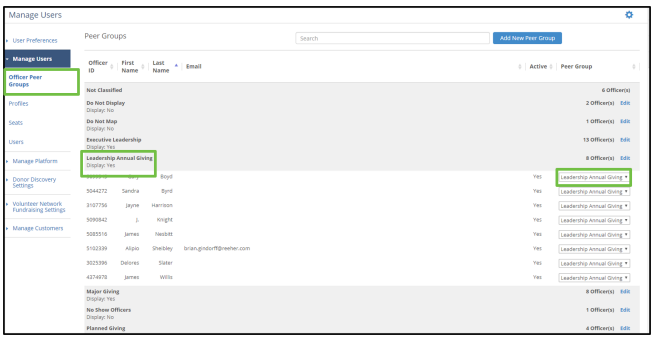


Navigate to Major Giving > Prospect Assignments.

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!*

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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 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

	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

			FY2018 through Q4			FY2017 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%

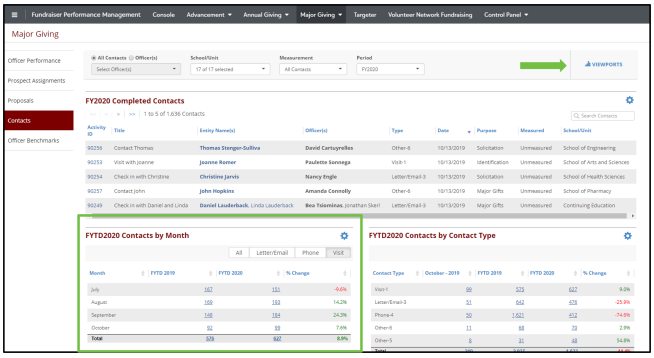
Visit Comparison by Officer

Visits | Entities Visited

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.



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

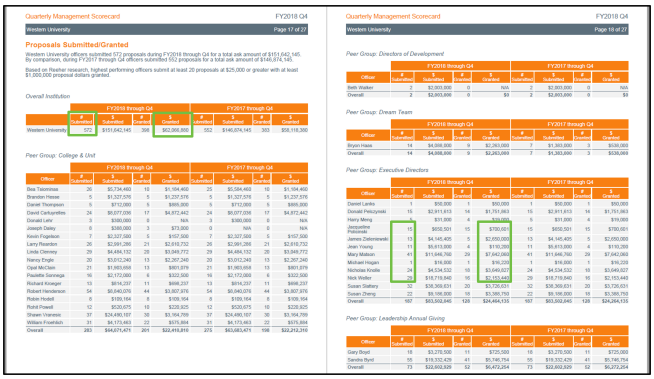
You are also able to view and adjust your institution's definition of Visits at Control Panel > Manage Platform > Code Mapping > Contact Type. All contact reports with a Contact Type mapped to Visit will be included in your Visit totals.

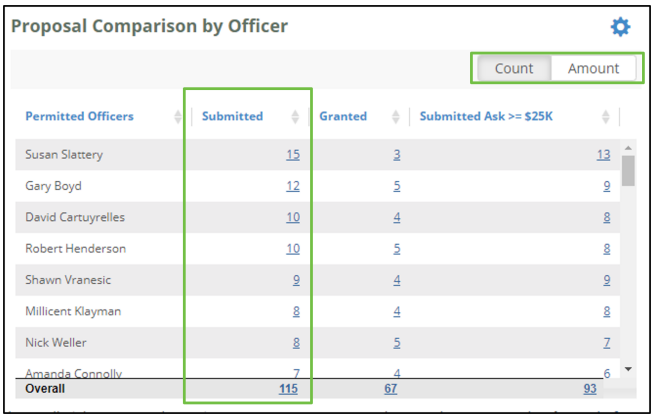
For organizations *not* using Activity Center and looking for additional validation, please see the linked Data Request Guide here to view the guidelines for data is coming over into FPM. For this specific section please refer to your organizations *3.1a Activity History.*

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!*



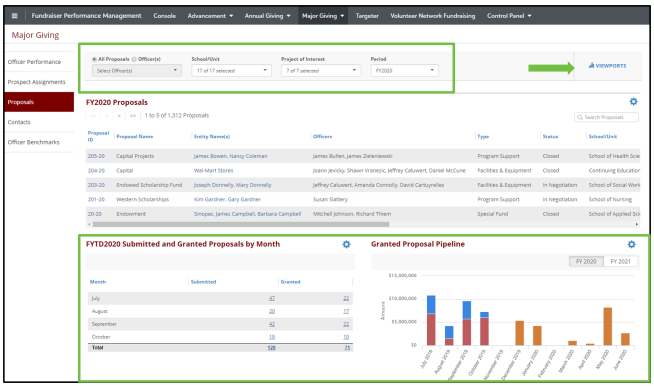


Navigate to Advancement > Executive Summary > Proposal Comparison by Officer.

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.*

Annual Giving Executive Summary:

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

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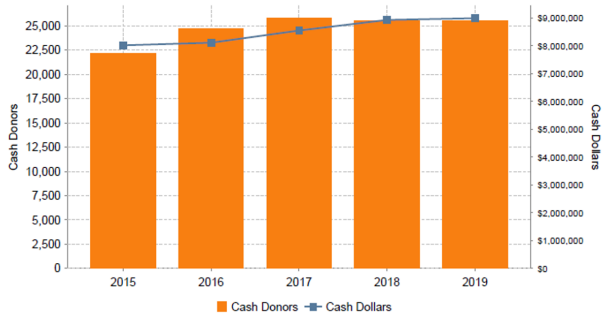
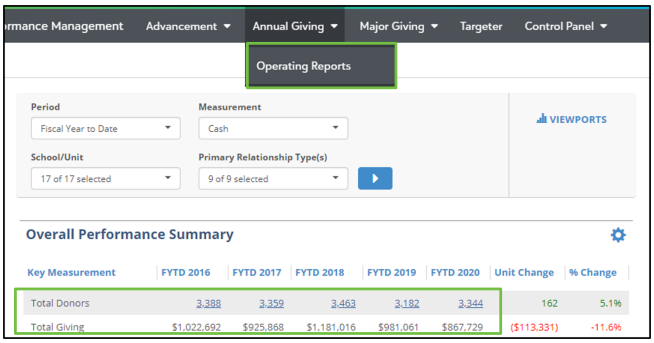
Annual Giving Executive Summary

Through Q4, Western University's annual giving received $8,988,118 from 25,590 donors in FY2019, with the average donor giving of $351, and a median donor giving of $100. Through the same quarter in FY2018, Western University received $8,927,302 from 25,539 donors, with an average gift of $350 per donor, and a median gift of $85.



	FY through Q4					
Dollar Summary	2015	2016	2017	2018	2019	YOY % Change
Commitment Dollars	$8,070,005	$8,737,993	$9,079,351	$8,862,587	$9,242,713	4.3%
Max Commit. Giving	$151,071	$126,060	$165,542	$167,643	$151,071	-9.9%
Cash Dollars	$8,015,415	$8,108,029	$8,546,456	$8,927,302	$8,988,118	0.7%
Max Cash Giving	$157,674	$126,060	$165,542	$167,643	$151,071	-9.9%
Donor Avg Gift	$361	$328	$331	$350	$351	0.5%
Transaction Avg Gift	$276	$246	$246	$262	$255	-2.5%
Median Cash Giving	$93	$100	$75	$85	$100	17.6%

Donor Summary	2015	2016	2017	2018	2019	YOY % Change
Cash Donors	22,184	24,727	25,812	25,539	25,590	0.2%
Cash Donors (Alumni)	14,182	15,266	16,177	15,694	16,748	6.7%
Retention Rate	62.7%	61.4%	58.7%	58.2%	58.4%	0.3%
Retained Donors	13,191	13,610	14,510	15,033	14,915	-0.8%
Renewed Donors	5,078	5,772	6,058	5,639	6,318	12.0%
Acquired Donors	3,915	5,345	5,244	4,867	4,357	-10.5%



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.