

Figure 1. Campaign Gift Table in Tableau: Overview


Gift Table Overall Gift Table with Details Unmanaged/Undiscovered Drilldown - Unmanaged/Undis...									
Gift Table: Overview 									
Unit Filter	Unit Name ▼								
Campaign Goal		Cumulative Giving			Remaining Balance			% to Goal	
\$45,000,000		\$31,305,857			\$13,694,143			69.6%	
Proposed Gift Table during Campaign				FY12 to Current			Current to FY21		
Cumulative Giving Level	Donors Needed	Prospects Needed	Campaign Target Gifts	Donors To Date	Cumulative Gifts to Date	% to Goal	Remaining balance	Donors Still Required	Prospects Still Required
\$5,000,000 Plus	2	6	\$10,000,000	1	\$13,650,000	136.5%	(\$3,650,000)	0	0
\$2,500,000	2	6	\$5,000,000	0	\$0	0.0%	\$5,000,000	2	6
\$1,000,000	8	24	\$8,000,000	5	\$6,632,541	82.9%	\$1,367,459	2	6
\$500,000	14	42	\$7,000,000	3	\$2,065,436	29.5%	\$4,934,564	10	30
\$250,000	14	42	\$3,500,000	9	\$2,803,216	80.1%	\$696,784	3	9
\$100,000	33	99	\$3,300,000	23	\$3,242,261	98.3%	\$57,739	1	3
\$50,000	42	126	\$2,100,000	14	\$916,944	43.7%	\$1,183,056	24	72
\$25,000	40	120	\$1,000,000	17	\$488,517	48.9%	\$511,483	21	63
\$10,000	110	330	\$1,100,000	35	\$487,818	44.3%	\$612,182	62	186
Less than \$10,000			\$4,000,000	2,600	\$1,019,122	25.5%	\$2,980,878		
Total	265	795	\$45,000,000	2,707	\$31,305,857	69.6%	\$13,694,143	125	375

Figure 2. Campaign Gift Table in Tableau: Current Prospects and Progress


Gift Table Overall		Gift Table with Details		Unmanaged/Undiscovered		Drilldown - Unmanaged/Undis...					
Gift Table: Current Prospects and Progress											
Unit Filter		Unit Name									
Campaign Goal			Cumulative Giving			Remaining Balance			% to Goal		
\$45,000,000			\$31,305,857			\$13,694,143			69.6%		
ID Prospect Master <input type="text"/>				<input type="checkbox"/> < 50% of Required Prospects <input type="checkbox"/> >= 50% of Required Prospects <input type="checkbox"/> Enough Prospects		Solicitation Enter % Below 50% 40%		Unit Potential Enter % Below 25% 10%		Estimated Capacity Enter % Below 5% 1%	
Cumulative Giving Level	Campaign Target Gifts	Cumulative Gifts to Date	Remaining balance	Donors Still Required	Prospects Still Required	Solicitation Delivered	Solicitation Planned	Late Cultivation	Early Cultivation	Discovery	Unmanaged/Undiscovered
\$5,000,000 Plus	\$10,000,000	\$13,650,000	(\$3,650,000)	0	0	0	0	0	3	10	15
\$2,500,000	\$5,000,000	\$0	\$5,000,000	2	6	0	0	0	0	2	10
\$1,000,000	\$8,000,000	\$6,632,541	\$1,367,459	2	6	2	1	0	3	8	20
\$500,000	\$7,000,000	\$2,065,436	\$4,934,564	10	30	0	0	0	3	17	99
\$250,000	\$3,500,000	\$2,803,216	\$696,784	3	9	0	0	0	2	4	19
\$100,000	\$3,300,000	\$3,242,261	\$57,739	1	3	3	3	4	21	17	57
\$50,000	\$2,100,000	\$916,944	\$1,183,056	24	72	8	3	5	44	21	375
\$25,000	\$1,000,000	\$488,517	\$511,483	21	63	4	1	1	23	32	1,486
\$10,000	\$1,100,000	\$487,818	\$612,182	62	186	0	1	1	10	57	5,868
Less than \$10,000	\$4,000,000	\$1,019,122	\$2,980,878			12	9	2	63	26	4,304
Total	\$45.0M	\$31.3M	\$13.7M	125	375	\$1.5M	\$1.0M	\$0.3M	\$12.9M	\$21.0M	\$8.4M
 Click on Prospects/Discovery Above to Create a List											

Figure 3. Campaign Gift Table in Tableau: Current Prospects and Progress

Gift Table Overall												Gift Table with Details												Unmanaged/Undiscovered												Drilldown - Unmanaged/Undis...											
Gift Table: Current Prospects and Progress																																															
Unit Filter		Unit Name																																													
Campaign Goal				Cumulative Giving				Remaining Balance				% to Goal																																			
\$18,000,000				\$11,321,188				\$6,678,812				62.9%																																			
ID Prospect Master				<input type="checkbox"/> < 50% of Required Prospects <input type="checkbox"/> >= 50% of Required Prospects <input type="checkbox"/> Enough Prospects				Solicitation <i>Enter % Below</i>		Unit Potential <i>Enter % Below</i>		Estimated Capacity <i>Enter % Below</i>																																			
								50%	40%	25%	10%	5%	1%																																		
Cumulative Giving Level	Campaign Target Gifts	Cumulative Gifts to Date	Remaining balance	Donors Still Required	Prospects Still Required	Solicitation Delivered	Solicitation Planned	Late Cultivation	Early Cultivation	Discovery	Unmanaged/Undiscovered																																				
\$2,500,000 Plus	\$2,500,000	\$0	\$2,500,000	1	3	0	0	0	1	3	90																																				
\$1,000,000	\$4,000,000	\$1,544,148	\$2,455,852	3	9	0	1	3	0	2	78																																				
\$500,000	\$3,500,000	\$3,231,948	\$268,052	1	3	0	1	0	0	9	164																																				
\$250,000	\$3,000,000	\$0	\$3,000,000	12	36	0	0	2	4	1	59																																				
\$100,000	\$1,500,000	\$2,892,938	(\$1,392,938)	0	0	1	2	2	1	6	141																																				
\$50,000	\$750,000	\$810,553	(\$60,553)	0	0	0	0	4	3	22	509																																				
\$25,000	\$400,000	\$711,292	(\$311,292)	0	0	0	3	6	5	33	1,598																																				
\$10,000	\$350,000	\$642,425	(\$292,425)	0	0	4	3	7	7	20	4,539																																				
Less than \$10,000	\$2,000,000	\$1,487,885	\$512,115			1	2	7	8	11	4,059																																				
Total	\$18.0M	\$11.3M	\$6.7M	17	51	\$0.1M	\$1.1M	\$1.8M	\$7.7M	\$1.3M	\$20.7M																																				

Click on Prospects/Discovery Above to Create a List

Id Prospect Master	Name	Unit Manager	Primary Mgr	Code Unit	Capacity	Unit Filter Potential	Stage	Solicitation Planned/Delivered	Custom Expected Amount	Unit Filter Alumni	University Alumni	Unit Filter Giving	Unit Filter Last Gift	Sub Contact Unit Filter	Unit Filter RFM
100037466	John Doe	Mgr. Name 1	Mgr. Name2	Unit	\$10M - \$25M	\$250K - \$500K	Early Cultivation	Null	\$37,500	No	Yes	Over \$1M	3/24/17	7/18/18	13
140023277	Jack Smith	Mgr. Name 2	Mgr. Name1	Unit	\$1M - \$2.5M	\$250K - \$500K	Early Cultivation	Null	\$37,500	No	No	\$1K - \$5K	6/19/18	6/21/18	13
300422950	David Lane	Mgr. Name 1	Mgr. Name2	Unit	\$250K - \$500K	\$250K - \$500K	Early Cultivation	Null	\$37,500	No	Yes	Non-donor	Null	9/1/17	0
400131195	Jen Reid	Mgr. Name 1	Mgr. Name2	Unit	\$25K - \$50K	\$250K - \$500K	Early Cultivation	Null	\$37,500	No	Yes	Non-donor	Null	8/30/17	0

Figure 4. Campaign Gift Table in Tableau: Unmanaged & Undiscovered Constituents

Gift Table Overall | Gift Table with Details | Unmanaged/Undiscovered | Drilldown - Unmanaged/Undis...

◀

Gift Table: Unmanaged & Undiscovered Constituents

Click on Any Element(s) of this Dashboard to Create a List

Click Here to Reset Filters to "All"

Unit Filter	Sub-Unit	Current Watchlist	Capacity	University Alumni	Unit Alumni	Unit Filter RFM	RDO Region
Unit Name	Sub-Unit Name	(All)	(All)	(All)	(All)	(All)	(All)
Constituent Type	Last Unit Sub. Contact	Previous Managed/Discovery	University Giving	Last University Gift	Unit Filter Giving	Last Unit Filter Gift	Lifetime Engagement
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)

Constituents

7,944

Constituent Type

Individual	7,815
Organization	129

Capacity by Giving to Selected Unit (UNIT)

Highlighted individuals are a priority

Capacity	UNIT LTD Giving										
	\$1M+	\$500K - \$1M	\$250K - \$500K	\$100K - \$250K	\$50K - \$100K	\$25K - \$50K	\$10K - \$25K	\$5K - \$10K	\$1K - \$5K	Below \$1K	Non-donor
\$100M+									1	1	
\$50M - \$100M								2			
\$10M - \$25M		2								2	
\$5M - \$10M								5		1	1
\$2.5M - \$5M						1		2	3	4	
\$1M - \$2.5M							4		1	10	5
\$500K - \$1M		1		7			2	1	13	41	34
\$250K - \$500K					2		2	1	5	8	2
\$100K - \$250K	1		2			3	4	3	7	29	7
\$50K - \$100K				1	1		12	4	31	209	116
\$25K - \$50K					1	2		19	72	693	692
\$10K - \$25K					1	1	4	11	205	2,070	3,574

Last Unit Gift Date by % of Giving to Selected Unit (UNIT)

Highlighted individuals are a priority

Months Since Last NUR Gift	% of Total Philanthropy Given to NUR				Non-donor
	75% - 100%	50% - 75%	25% - 50%	Below 25%	
0-3 Months	46	9	7	10	
3-6 Months	68	6	8	15	
6 - 12 Months	134	26	24	21	
1-3 Years	204	38	48	53	
3-5 Years	182	32	35	64	
5 Years +	1,354	217	246	666	
Non-donor					4,431

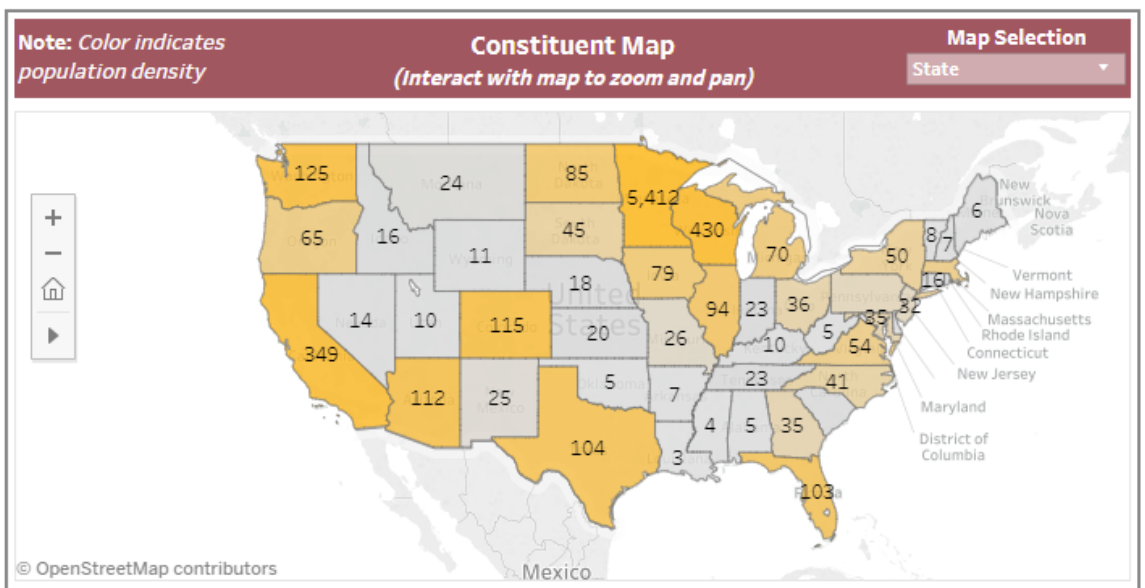


Figure 5. Campaign Gift Table in Tableau: Unmanaged & Undiscovered Constituents

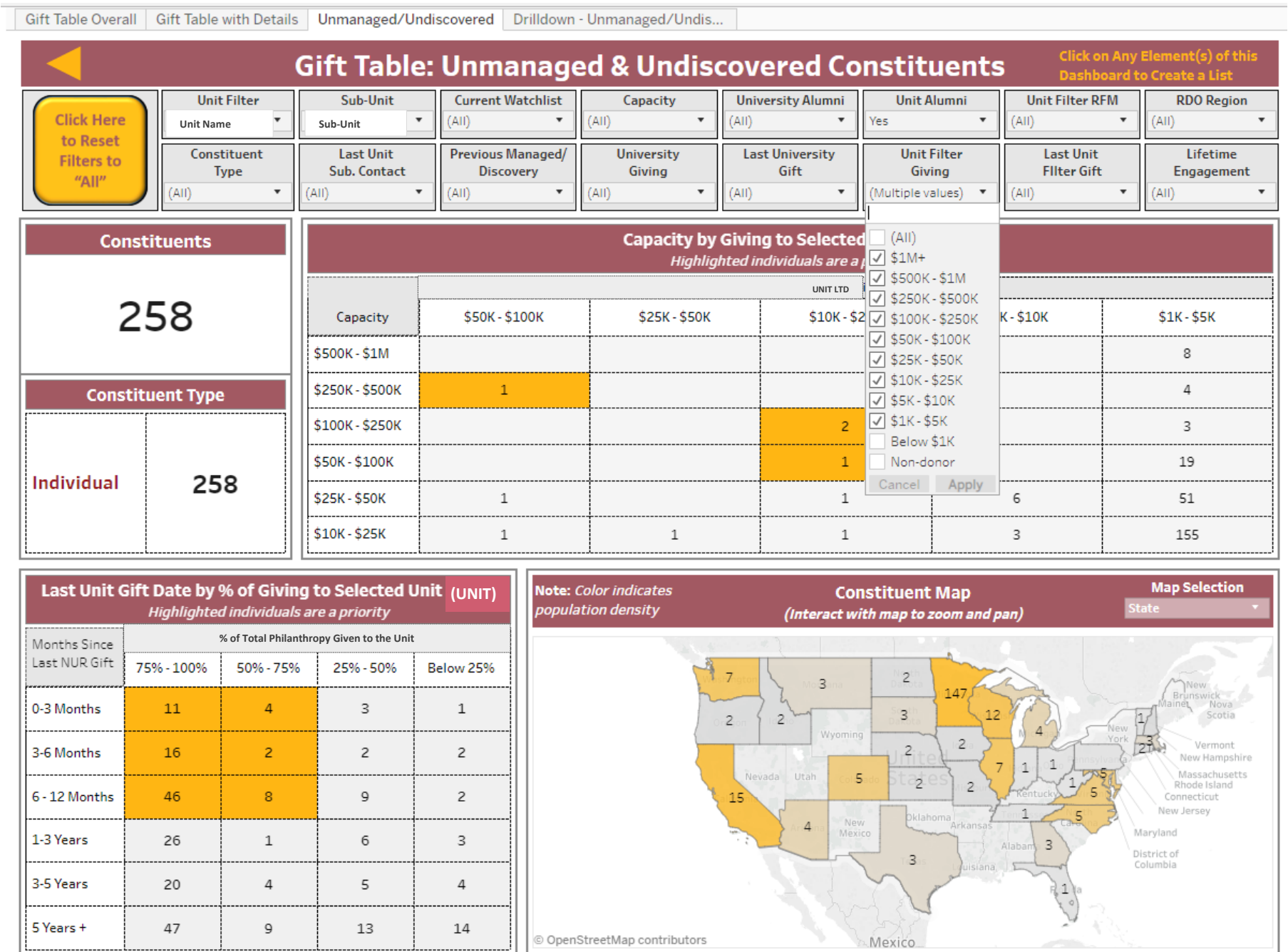


Figure 6. Campaign Gift Table in Tableau: Unmanaged & Undiscovered Constituents with \$1m+ Capacity

Gift Table Overall | Gift Table with Details | Unmanaged/Undiscovered | Drilldown - Unmanaged/Undis...

Gift Table: Unmanaged & Undiscovered Constituents

Click on Any Element(s) of this Dashboard to Create a List

Click Here to Reset Filters to "All"

Unit Filter

Unit Name ▼

Sub-Unit

Sub-Unit ▼

Current Watchlist

(All) ▼

Capacity

(Multiple values) ▼

- (All)
- \$100M+
- \$50M - \$100M
- \$25M - \$50M
- \$10M - \$25M
- \$5M - \$10M
- \$2.5M - \$5M
- \$1M - \$2.5M
- \$500K - \$1M
- \$250K - \$500K
- \$100K - \$250K
- \$50K - \$100K
- \$25K - \$50K
- \$10K - \$25K

Cancel Apply

University Alumni

(All) ▼

Unit Alumni

(All) ▼

Unit Filter RFM

(All) ▼

RDO Region

(All) ▼

Constituent Type

(All) ▼

Last Unit Sub. Contact

(All) ▼

Previous Managed/Discovery

(All) ▼

Last University Gift

(All) ▼

Unit Filter Giving

(All) ▼

Last Unit Filter Gift

(All) ▼

Lifetime Engagement

(All) ▼

Constituents

45

Constituent Type

Individual	21
Organization	24

Giving to Selected Unit (UNIT)			Filtered individuals are a priority				
UNIT LTD GIVING							
Capacity	\$500K - \$1M	\$2.5M - \$5M	\$100K - \$250K	\$25K - \$50K	\$10K - \$25K	Below \$1K	Non-donor
\$100M+							
\$50M - \$100M							
\$10M - \$25M	2						
\$5M - \$10M							
\$2.5M - \$5M		1					
\$1M - \$2.5M			4				

UNIT LTD GIVING				
\$25K	\$5K - \$10K	\$1K - \$5K	Below \$1K	Non-donor
		1	1	
	2			
	5		2	
	2	3	4	1
		1	10	5

Figure 7. Campaign Gift Table in Tableau: a) Unmanaged & Undiscovered Constituents with \$50k+ Capacity, given to the unit within the past three years, and have never been previously managed b) Drilldown List

Gift Table Overall | Gift Table with Details | Unmanaged/Undiscovered | Drilldown - Unmanaged/Undis...

Gift Table: Unmanaged & Undiscovered Constituents

Click on Any Element(s) of this Dashboard to Create a List

Click Here to Reset Filters to "All"

Unit Filter Unit Name	Sub-Unit Sub-Unit	Current Watchlist (All)	Capacity (Multiple values)	University Alumni (All)	Unit Alumni (All)	Unit Filter RFM (All)	RDO Region (All)
Constituent Type (All)	Last Unit Sub. Contact Never	Previous Managed/Discovery Neither	University Giving (All)	Last University Gift (Multiple values)	Unit Filter Giving (All)	Last Unit Filter Gift (All)	Lifetime Engagement (All)

Constituents 155	Capacity by (UNIT)				
	Capacity	\$1M+	\$500K - \$1M	\$250K - \$500K	\$100K - \$250K
	\$100M+				
	\$50M - \$100M				
	\$10M - \$25M		1		

Unit Filter (UNIT)					
Priority	\$10K - \$25K	\$5K - \$10K	\$1K - \$5K	Below \$1K	Non-donor
			1	1	
		2			
				2	

Gift Table Overall | Gift Table with Details | Unmanaged/Undiscovered | Drilldown - Unmanaged/Undis...

Unmanaged/Undiscovered Drilldown List

of Constituents Selected: 155

Id	Demo Master	Name	Code Unit	Include Reason	Capacity	University Alumni	Unit Filter Alumni	Unit Filter Giving Range	Unit Filter Last Gift Date	% of Unit Filter Giving	Unit Filter RFM	Curr Watch	Previous Managed/Discovery	RDO Region
100039715		John Smith	Unit	Alum & Donor	\$100K - \$250K	Yes	Yes	Below \$1K	6/4/17	7%	9	No	Neither	MN/WI
100051043		Jane Brown	Unit	Alum & Donor	\$50K - \$100K	Yes	Yes	Below \$1K	11/26/08	3%	4	No	Neither	Metro TC
100068080		Mike Scott	Unit	Alum Only	\$50K - \$100K	Yes	Yes	Non-donor	Null	Null	0	No	Neither	Metro TC
100161501		David Anderson	Unit	Alum Only	\$50K - \$100K	Yes	Yes	Non-donor	Null	Null	0	No	Neither	Metro TC
100173949		John Bell	Unit	Alum & Donor	\$50K - \$100K	Yes	Yes	Below \$1K	4/28/15	0%	7	No	Neither	Metro TC
100177330		Jessica Cooper	Unit	Donor Only	\$50K - \$100K	No	No	Below \$1K	10/2/87	0%	0	No	Neither	Metro TC
100211958		Pete Benson	Unit	Donor Only	\$100K - \$250K	No	No	Below \$1K	12/31/12	0%	6	No	Neither	Metro TC
100258542		Kaitlin Campbell	Unit	Donor Only	\$500K - \$1M	No	No	\$1K - \$5K	11/25/97	4%	0	No	Neither	Metro TC

Figure 1. Campaign Gift Table in Excel: Overview



Unit Gift Table Overview

Unit Goal	\$45 M
Gifts to Date	\$26 M
Remaining Goal Amount	\$19 M

58% of goal amount

Giving Level	Proposed Gift Table during Campaign			FY12 to Current			Current to FY21			
	Donors Needed	Prospects Needed	Campaign Target Gifts	Donors to Date	Cumulative Gifts to Date	% to Goal	Remaining Balance	Donors Still Required	Prospects Still Required	Known and Unknown Prospects
\$ 5,000,000	2	6	\$10.00 M	1	\$13.65 M	137%				27
\$ 2,500,000	2	6	\$5.00 M	0	\$0.00 M	0%	\$5.00 M	2	6	13
\$ 1,000,000	6	18	\$6.00 M	4	\$5.35 M	89%	\$0.65 M	1	3	38
\$ 500,000	10	30	\$5.00 M	1	\$0.74 M	15%	\$4.26 M	9	27	99
\$ 250,000	14	42	\$3.50 M	4	\$1.27 M	36%	\$2.23 M	9	27	30
\$ 100,000	34	102	\$3.40 M	17	\$2.60 M	76%	\$0.80 M	9	27	92
\$ 50,000	42	126	\$2.10 M	11	\$0.74 M	35%	\$1.36 M	28	84	588
\$ 10,000	210	630	\$2.10 M	39	\$0.74 M	35%	\$1.36 M	136	408	6,018
< \$10,000			\$7.90 M	2,276	\$0.79 M	10%	\$7.11 M			5,400
Total	320	960	\$45.00 M	2,353	\$25.88 M	58%	\$19.12 M	194	582	12,305

Data as of July 29, 2016

Figure 2. Campaign Gift Table in Excel: Current Prospects and Progress



Unit Campaign Pyramid, Current Prospects and Progress

Unit Goal	\$45 M
Gifts to Date	\$26 M
Remaining Goal Amount	\$19 M

58% of goal amount

Number of Prospects Required by Target Pool and Goal Amount					
Known Prospects				Unknown Prospects	
Solicitation		Unit Potential		Estimated Capacities	
50%	40%	25%	10%	5%	5%
Delivered	Planned	Late Cultivation	Early Cultivation	Discovery	Unmanaged Undiscovered
0	0	0	2	3	22
0	0	0	0	2	11
0	0	0	3	7	28
0	1	0	2	17	79
0	6	2	1	3	18
1	8	4	10	14	55
4	11	1	34	18	520
4	8	8	24	54	5,920
9	14	1	6	6	5,364
Total	\$0.21 M	\$1.46 M	\$0.45 M	\$12.48 M	\$11.84 M
Cumulative Total	\$0.21 M	\$1.67 M	\$2.13 M	\$14.60 M	

Giving Level	Campaign Gift Dollars	Cumulative Gifts to Date	Remaining Balance	Donors Still Required	Prospects Still Required
\$ 5,000,000	\$10.00 M	\$13.65 M		0	0
\$ 2,500,000	\$5.00 M	\$0.00 M	\$5.00 M	2	6
\$ 1,000,000	\$6.00 M	\$5.35 M	\$0.65 M	1	3
\$ 500,000	\$5.00 M	\$0.74 M	\$4.26 M	9	27
\$ 250,000	\$3.50 M	\$1.27 M	\$2.23 M	9	27
\$ 100,000	\$3.40 M	\$2.60 M	\$0.80 M	9	27
\$ 50,000	\$2.10 M	\$0.74 M	\$1.36 M	28	84
\$ 10,000	\$2.10 M	\$0.74 M	\$1.36 M	136	408
< \$10,000	\$7.90 M	\$0.79 M	\$7.11 M		
Total	\$45.00 M	\$25.88 M	\$19.12 M	194	582
Cumulative Total					

Data as of July 29, 2016

Unit Production FY12-Current

Giving Level	Donors Solicited for the Unit	Solicited for the Unit	Campaign Cumulative Gifts to Date			
			FY12-FY14	FY12-FY15	FY12-FY16	FY12-FY17
\$ 5,000,000	0	\$0.00 M	\$13.65 M	\$13.65 M	\$13.65 M	\$13.65 M
\$ 2,500,000	0	\$0.00 M	\$0.00 M	\$0.00 M	\$0.00 M	\$0.00 M
\$ 1,000,000	5	\$6.65 M	\$2.00 M	\$3.35 M	\$5.35 M	\$5.35 M
\$ 500,000	1	\$0.60 M	\$0.00 M	\$0.00 M	\$0.74 M	\$0.74 M
\$ 250,000	2	\$0.55 M	\$1.18 M	\$1.18 M	\$1.27 M	\$1.27 M
\$ 100,000	4	\$0.49 M	\$1.44 M	\$2.07 M	\$2.60 M	\$2.60 M
\$ 50,000	12	\$0.66 M	\$0.79 M	\$0.65 M	\$0.74 M	\$0.74 M
\$ 10,000	26	\$0.60 M	\$0.37 M	\$0.64 M	\$0.74 M	\$0.74 M
< \$10,000	68	\$0.08 M	\$0.53 M	\$0.66 M	\$0.79 M	\$0.79 M
Total	118	\$9.62 M	\$19.96 M	\$22.20 M	\$25.87 M	\$25.88 M
		FY gifts		\$2.24 M	\$3.67 M	\$0.01 M

Enough prospects
 50% of prospects required
 > 50% of prospects required

Figure 3. Campaign Gift Table in Excel: Unmanaged Undiscovered Constituents

Unit Campaign Pyramid, Current Prospects and Progress

Unmanaged Undiscovered Constituents

Unmanaged Undiscovered by Type

Giving Level	Individual	Organization	Total
\$ 5,000,000	2	20	22
\$ 2,500,000	4	7	11
\$ 1,000,000	16	12	28
\$ 500,000	69	10	79
\$ 250,000	8	10	18
\$ 100,000	42	13	55
\$ 50,000	503	17	520
\$ 10,000	5,891	29	5,920
< \$10,000	5,266	98	5,364
Total	11,801	216	12,017

Unmanaged Undiscovered Constituents

Giving Level	Previously in Discovery	Current Watchlist	Added to DO Restrictions	Previously Managed	Unmanaged Only
\$ 5,000,000	0	0	0	2	20
\$ 2,500,000	3	0	0	3	8
\$ 1,000,000	6	3	0	9	19
\$ 500,000	15	6	3	22	56
\$ 250,000	2	3	4	6	12
\$ 100,000	12	7	5	25	29
\$ 50,000	9	40	11	60	438
\$ 10,000	40	177	27	187	5,612
< \$10,000	6	56	2	51	5,274
Total	93	292	52	365	11,468

Prospects in Cultivation

Late and Early Cultivation Prospects' Unit Potential vs. Capacity

Giving Level	Unit Potential	Capacity	%
\$ 5,000,000	\$112.5 M	\$.1 M	202210%
\$ 2,500,000	0	\$.0 M	
\$ 1,000,000	\$5.3 M	\$581.5 M	1%
\$ 500,000	\$1.5 M	\$2.4 M	62%
\$ 250,000	\$1.1 M	\$13.5 M	8%
\$ 100,000	\$2.5 M	\$2721.0 M	0%
\$ 50,000	\$2.6 M	\$89.3 M	3%
\$ 10,000	\$1.1 M	\$2726.6 M	0%
< \$10,000	\$23 K	\$663.5 M	0%
Total	\$126.6 M	\$6,797.9 M	\$.0 M