

Outreach Management Tool Dashboard and Filter Definitions

Personal Dashboard Description

Fundraising Selected Prospects

Number of fundraising prospects a volunteer selects

Fundraising Contacted Prospects

Number of fundraising prospects with at least one contact report submitted by the volunteer

Donors

Number of fundraising prospects in the 'Donated' stage. (Prospect has given to at least one of the funds, specified in the campaign settings, this fiscal year.)

Dollars Raised

Total dollars raised from selected fundraising prospects. (Counts money given to the funds, specified in the campaign settings, this fiscal year. It is not reunion gift credit dollars or connected to contact reports.)

Dollars Pledged

Total dollars pledged from selected fundraising prospects. (Counts pledge dollars for the funds, specified in the campaign settings, this fiscal year. It is not reunion gift credit pledge dollars or connected to contact reports.)

Reunion Dollars Pledged

Is the sum of the reunion gift credit pledge dollars.

Fundraising Filters

Annual Giving Loyalty Circle LYBUNT – an annual giving loyalty circle prospect who donated last year but unfortunately not this year; if they give this year, will remain in the annual giving loyalty circle.

Annual Giving Loyalty Circle Prospect – a prospect who has donated the last two years and if they donate this year, will fall into the annual giving loyalty circle (must be 3 consecutive years of giving)

Annual Giving Leadership Circle LYBUNT – an annual giving leadership circle prospect who donated last year but unfortunately not this year; if they give this year, will remain in the annual giving leadership circle.

Annual Giving Leadership Circle Prospect – a prospect who has a leadership level target ask but has not yet made a leadership level gift in the current fiscal year. If the prospect donates at the leadership level or greater they will fall into the annual giving leadership circle.

Leadership Levels:

- \$250 or more for alumni 1–4 years since graduation
- \$500 or more for alumni 5–9 years since graduation
- \$1,000 or more for alumni 10–14 years since graduation
- \$2,500 or more for alumni 15+ years since graduation