

QUALIFICATION ACTIVITY REPORT

Job Aid

WHAT IS A QUALIFICATION ACTIVITY REPORT?

The Qualification Activity Report is a tool that helps Development output and maintain their qualification portfolio. The report returns any unassigned plan on which the selected development officer owns a past or future step.

DoDs and development support can also use this report to prioritize unassigned prospects for future qualification and cultivation.

HOW TO ACCESS A QUALIFICATION ACTIVITY REPORT

1. Log in to [ABE CRM](#)
2. On the navigation bar, click **WFAA Reports**
3. Click the **DEV – Prospect – Plan Activity** report
4. Select **Plan Manager**
5. Select whether or not to **Include Preferential Seating Gifts** (only affects data pertaining to “Recent Gift to UW” columns)
6. Select applicable **Unit** (only affects data pertaining to “Recent Gift to Site” columns)
7. Select applicable **Department** (only affects most recent giving to Site columns)
8. Select **Excel Ready Formatting**
9. Click **View Report**

HOW TO INTERPRET A QUALIFICATION ACTIVITY REPORT

What is included in the Qualification Activity report?

The Qualification Activity report outputs all unassigned plans on which a specified development officer owns a future (or past) step, including but not limited to the following fields:

Conversation	Designed to help guide conversations about qualification activity. Possible outputs include: 1) Deceased – Mark Plan Historical, 2) Potential DoD Assignment, 3) Include “QUAL” in Plan Name, 4) Overdue Pending Step, 5) No Pending Step, and 6) QUAL Plan.
Lookup ID	This is the unique ID used in the ABE CRM system.

Deceased Flag	Outputs a Y/N indicator. Unless outstanding actions must still be taken, plans on deceased prospects should be made historical.
Region	The geographic region as defined by their address and the ABE regional definition. See the Region area on Connect for more details.
Plan Name	<p>This is the name of the plan; for convenience, it is hyperlinked to the plan itself in ABE.</p> <p>All active QUAL plans (i.e. unassigned with a pending step) follow the same organizational syntax: [SITE] [QUAL] [Plan Type]. The insertion of 'QUAL', rather than the DoD name, indicates that a DoD is not yet formally assigned to the plan, because the relationship is still in the qualification stage—interest and capacity haven't been confirmed yet. For example, a plan named "EDU QUAL Leadership Annual Gift" indicates that a DoD is actively qualifying a prospect for a LAG gift to Education. Once a DoD completes qualification, though, 'QUAL' is either replaced by the DoD's name (to move forward with cultivation) or taken out completely (if putting back in the unassigned pool).</p> <p>See Research & Prospect Management's Plan Names overview for more information.</p>
Plan Type	The Plan Type—such as Major Gift, Leadership Annual Gift, or Gift Planning—indicates the intended and current type of development activity with the prospect. See Research & Prospect Management's Plan Type overview for more information.
Plan Stage	Indicates where the plan falls on the Advancement Continuum, based on most recent contact report associated with the plan.
Plan Site	Returns the WFAA site to which the plan is attached.
Ind. Gift Capacity Rating	Returns the Individual Gift Capacity Rating, which is based on an estimate of a prospect's ability to give a gift of a certain size, payable over a five-year time frame. See Research & Prospect Management's Capacity overview for more detail.
HH Gift Capacity Rating	Returns the Household Gift Capacity Rating, which is based on an estimate of a household's ability to give a gift of a certain size, payable over a five-year time frame. See Research & Prospect Management's Capacity overview for more detail.

Recent Gift to UW (Amount, Date, Site)	Returns details related to the most recent gift to WFAA.
Recent Gift to Site (Amount, Date, Site)	Returns details related to the most recent gift to the unit selected in the report parameters.
Likelihood MG Rating	Returns the predictive model rating bucket (e.g. 1 Top 0.1%, 2 Top 0.25%, etc.) that indicates a prospect's likelihood to make a \$25,000+ gift. See Research & Prospect Management's Likelihood overview for more detail.
Likelihood LAG Rating	Returns the predictive model rating bucket (e.g. 1 Top 0.1%, 2 Top 0.25%, etc.) that indicates a prospect's likelihood to make a \$1000-\$24,999 gift. See Research & Prospect Management's Likelihood overview for more detail.
Likelihood PG Rating	Returns the predictive model rating bucket (e.g. 1 Top 0.1%, 2 Top 0.25%, etc.) that indicates a prospect's likelihood to make a planned gift. See Research & Prospect Management's Likelihood overview for more detail.
Composite Priority Score	A combination of likelihood and individual gift capacity intended to help a user prioritize a prospect among a group of prospects. Higher Composite Priority Scores should be prioritized first.
Last Step Fields (Date, Owner, Category, Subcategory, Type, Objective)	Displays details related to the last completed step on a plan. If no step has been completed on the plan, the fields will be blank. Only contact reports will be returned by these fields.
Next Step Fields (Date, Owner, Category, Subcategory, Type, Objective)	Displays details related to the next step on a plan. All step types (including staff tasks) will display in these fields. If these fields are blank, then no future step exists on the plan.