PLAN ACTIVITY REPORT

Job Aid

WHAT IS A PLAN ACTIVITY REPORT?

The Plan Activity Report is a tool that helps development officers output and maintain their assigned portfolio. The report returns any plan on which the selected fund raiser holds a primary manager, secondary manager, or WFAA solicitor role.

Given the number of useful data points—such as capacity, likelihood, recent giving, opportunity information, and next/last interaction—DoDs and development support can use this report to conduct their own ad hoc portfolio maintenance and prioritization.

HOW TO ACCESS A PLAN 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 PLAN ACTIVITY REPORT

What is included in the Plan Activity report?

The Plan Activity Report outputs all plans to which a specified development officer is assigned as primary plan manager, secondary manager, or WFAA solicitor role, including but not limited to the following fields:

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	This is the name of the plan; it is hyperlinked to the plan itself in ABE. All plan names follow the standard organizational syntax: [SITE] [DOD/QUAL/BLANK] [Plan Type]. Examples include: LET KATIER Major Gift or EGR BRADG/RUSSSA Gift Planning or MED GILLIANF Major Gift. See Research & Prospect Management's Plan Names overview for more information.
Fund Raiser Role	Indicates the DoD's role assignment on the plan—e.g. Primary Plan Manager, Secondary Plan Manager or Secondary Solicitor.
Plan Type	This is the name of the 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~~, which is~~ intended to help a user prioritize a prospect among a group of prospects. ~~captures both the gift capacity as well as likelihood to give a gift to WFAA. It is designed to prioritize prospect lists DoD's use to qualify and cultivate gifts to WFAA. Higher~~Hi~~A hi~~gher Composite Priority Scores~~s should be prioritized~~~~is better than a lower one and therefore~~ should be prioritized first.~~.~~
Opportunity Status	If an Opportunity exists on the plan, the status of that Opportunity will be displayed here; otherwise the field will be blank. Possible values include: Qualified, Response Pending, Accepted, Rejected, Canceled. Filter by 'Qualified' status to look only at the projected future pipeline of solicitations; or by 'Response Pending' to view only those asks already made and awaiting a response; or by 'Accepted' to see if any plans can be made historical – and whether a new plan should be added for the next solicitation.
Opportunity Fields	The remaining opportunity-related fields are valuable for reviewing and maintaining the quality of a development officer's opportunity pipeline information. For instance, a DoD can review the projected pipeline—to ensure it reflects the most accurate forecast of upcoming asks—by focusing on the expected ask amounts and dates; similarly, a DoD can

	review actual ask amounts and dates ensure the solicitation pipeline reflects an accurate version of past development activity.
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.