Portfolio Report

WHEN TO USE THE PORTFOLIO REPORT?

The Portfolio 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.

WHAT IS INCLUDED IN THE PORTFOLIO REPORT?

The Portfolio 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.
Disqualified for Site	Outputs the site for which the Research and/or Development Disqualification note is applied and is still active (not end-dated in the past). The site of WFA - Wisconsin Foundation and Alumni Association encompasses all UW sites and indicates a prospect has been disqualified for the entire organization. If several disqualifications have been made for a constituent, these sites will be listed in alphabetical order. See the Disqualification area on Connect for more details about how to apply a Disqualification to a constituent.
Plan Name	This is the name of your plan; the hyperlink directs you to the plan itself in ABE. Plan names follow a standard organizational syntax: [SITE] [DOD/QUAL/BLANK] [Plan Type]. Examples include: LET KATIER Major Gift or EGR BRADG/RUSSA Gift Planning or MED GILLIANF Major Gift. See Research & Prospect Management's Plan Names overview for more information.
Plan Group	While uncommon, the plan group feature allows DoDs to view plans that have specific attributes associated with a WFAA initiative – i.e.: "Legacy Project" or "LET A-RATED Project." Selecting "All Plans" will allow you to see your active unassigned plans that fall under the parameters you choose. Checking only a specific Plan Group will limit the output to only plans that contain the selected attribute.

Planned Gift/Interest	A "Y" will populate under the "Planned Gift" column, if the constituent has a planned gift on record. If that field is blank, it indicates that the constituent *does not* have a planned gift on record. A "Y" in the "Planned Gift Interest" column indicates that the constituent has responded positively to a planned giving survey question.
Prospect Status	Indicates whether a constituent is a VIP-Level prospect or has been marked as "Not a Prospect"
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	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.
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	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	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.

HOW TO GENERATE THE PORTFOLIO REPORT

How to access the report

1. Log in to ABE CRM
2. On the navigation bar, click **WFAA Reports**
3. Click on **DEV – Prospect – Portfolio Report**
4. If necessary, select the applicable **Plan Group –** To see all plans, select "**All Plans**" (most plans do not have a Plan Group associated with them)
5. Select **Plan Manager**
6. Select whether or not to **Include Preferential Seating Gifts** (only affects data pertaining to "Recent Gift to UW" columns)
7. Select applicable **Unit** (only affects data pertaining to "Recent Gift to Site" columns)
8. Select applicable **Department** (only affects most recent giving to Site columns)
9. Select applicable **Prospect Status**
10. Select **Excel Ready Formatting**
11. Click **View Report**