# Qualification Report

# Job Aid

## WHEN TO USE THE QUALIFICATION REPORT

The Qualification 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.

If you wish to view your assigned portfolio to assist prioritization and maintenance, use the Portfolio Report.

The report can be exported into Excel for easy sorting and filtering, and can be viewed in ABE CRM or as a PDF.

## WHAT IS INCLUDED IN THE QUALIFICATION REPORT

The Qualification 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:

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| **Guidance** | 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 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 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.<br><br>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.<br><br>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 |

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| | 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).<br><br>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" |
| **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. GCR** | 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 GCR** | 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. |

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| **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. |
| **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. |
| **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** | 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 QUALIFICATION REPORT

1. Log in to ABE CRM
2. On the navigation bar, click **WFAA Reports**
3. Click on **DEV – Prospect – Qualification 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 the **Fundraiser**
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**