



Kelley's Homegrown Dashboard (Part 1)

Jen Gray's FY2011 Goals

| | Total Points | Goal | Actual | Points Earned |
|---|--------------|-----------------------|-------------------|---------------|
| Dollars [i] | 40 | 4,500,000 | 386,059.45 | 4.8 |
| • Overall Annual Fund | (10) | (2,700,000) | (127,572.92) | (0.5) |
| • The Shareholder Fund | (30) | (1,800,000) | (258,486.53) | (4.3) |
| Contacts [ii] | 25 | 150 | 0 | 0.0 |
| • Personal | (10) | (75) | (0) | (0.0) |
| • Phone | (15) | (75) | (0) | (0.0) |
| Dean's Associates "Associate"/"Director" level's increase [iv] | 30 | 7,774 | 399 | 0.6 |
| • Director | (15) | (400) | (4) | (0.1) |
| • Associate | (10) | (1237) | (22) | (0.2) |
| • Contributor | (5) | (6,137) | (373) | (0.3) |
| Budget management [iv] | 5 | <= 6,500.00 | Bal. 6,500 | 5.0 |
| "Non-Credit" [vi] | 0 | | | |
| TOTAL | 100 | | | 10.4 |

| | | |
|------------------------|-------------------------------|---------------------------------|
| | View Contacts | Approve Appeals |
| Contacts Detail | Not Approved | Approved |
| Personal | 0 | 0 |
| Phone | 0 | 0 |
| TOTAL | 0 | 0 |

ⁱ Collectively shared goals, both the overall Annual Fund and Shareholder Fund includes dollars raised through direct mail, telemarketing and personal visits from any and all members(s) of the Development/Alumni Relations staff.

ⁱⁱ Contacts are defined as substantive (as determined by the Assistant Dean) personal visits, proactive (KSB-initiated) or phone calls.

^{iv} The goal is defined as increasing the "Director", "Associate" and "Contributor" level populations of Kelley donors by 5% each from the end of FY10.

^v The FY11 T&E budget for this position will be \$6,500.

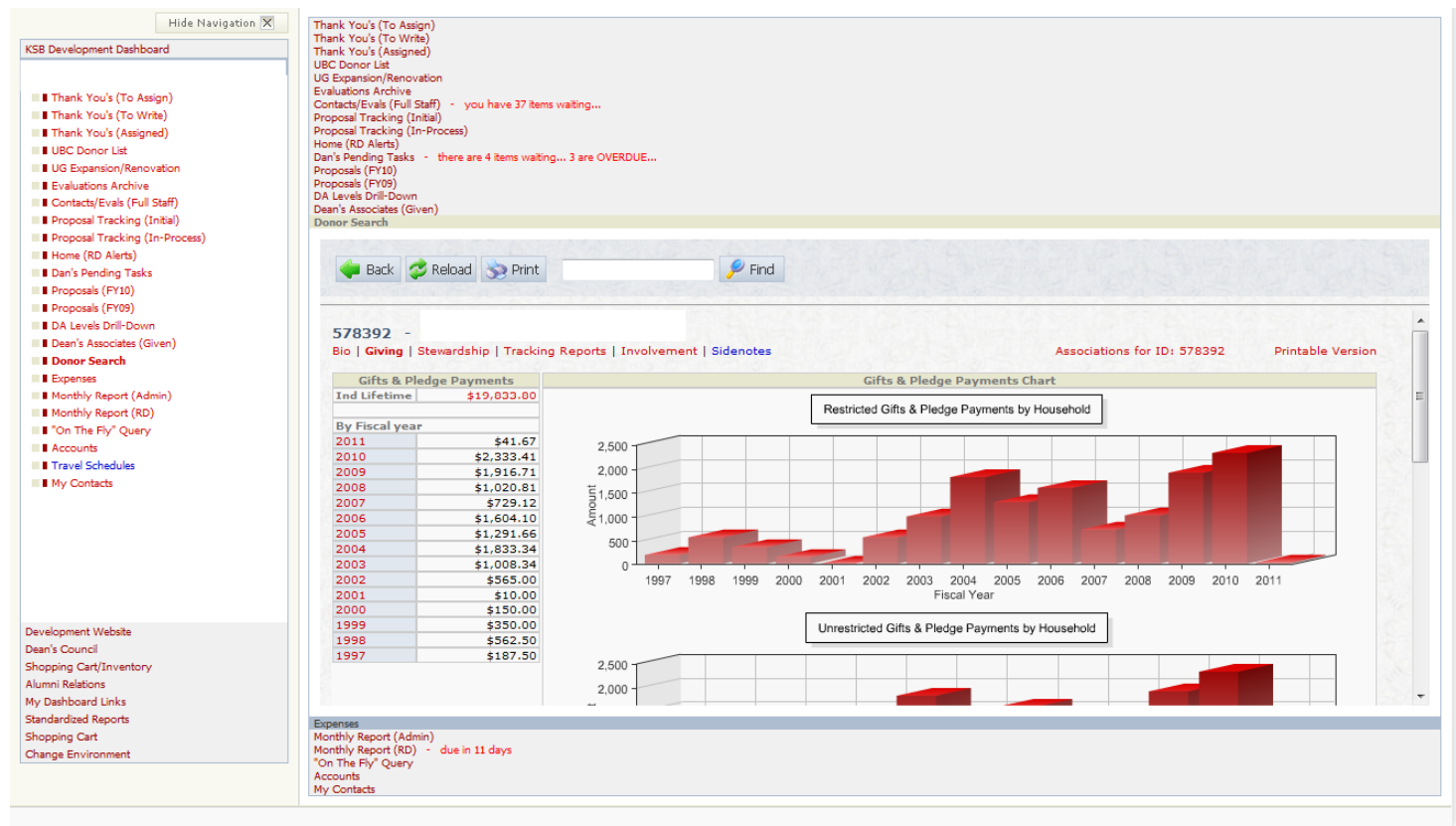
^{vi} All Annual Fund officers are encouraged to personally log their acts/efforts of collegial support and assistance throughout the fiscal year, particularly when associated with other development officers both in and out of the Kelley program.

Measuring and Evaluating Your ANNUAL GIVING STAFF



Kelley

Kelley's Homegrown Dashboard (Part 2)





Kelley's Homegrown Dashboard (Part 3)

Welcome to ROVER... Rick Dupree

You have 9 alerts to address...

| Module | Details |
|------------------------------|------------------|
| Progress Blurbs | OVERDUE |
| Thank Yous (To Assign) | 6 items waiting |
| Thank Yous (To Write) | 1 item waiting |
| Contacts Summary/Evaluations | 33 items waiting |
| Vignettes In-Play | 7 items waiting |
| Campaign: UGB Major Donors | 45 items waiting |
| Proposals In Play | 2 items waiting |
| CFR (Do Not Thank List) | 7 items waiting |
| Monthly Report | OVERDUE |

Remember: A module must be copied from the "All Modules" tree to your own module tree to receive alerts for that module.