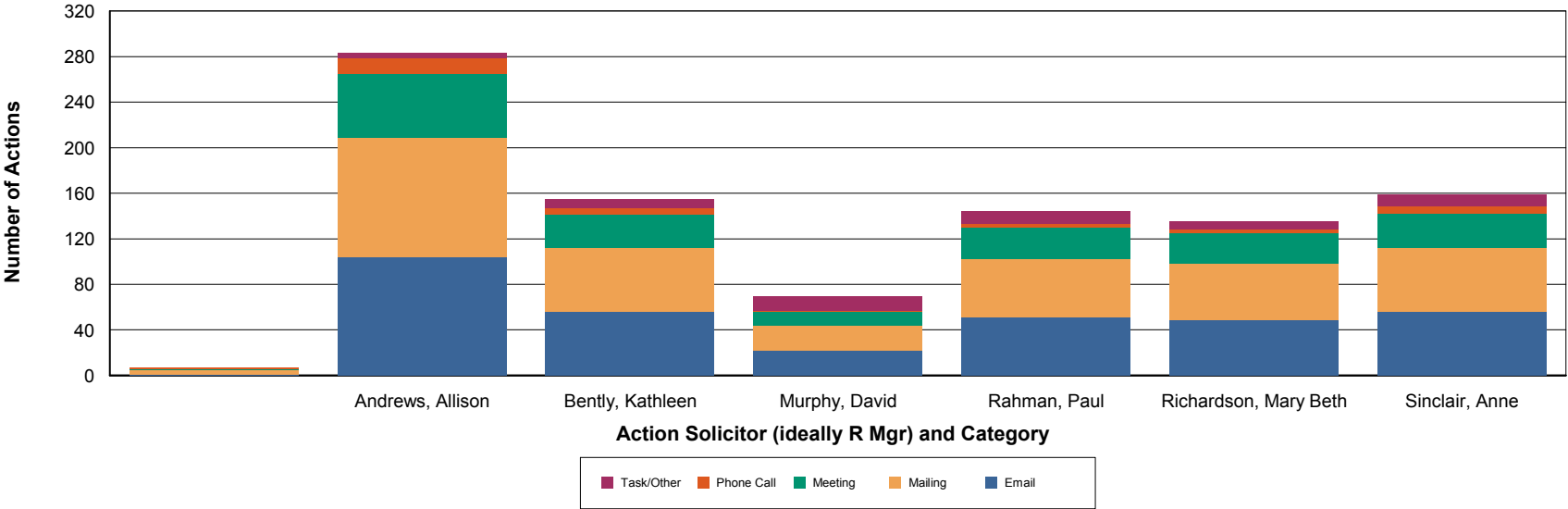
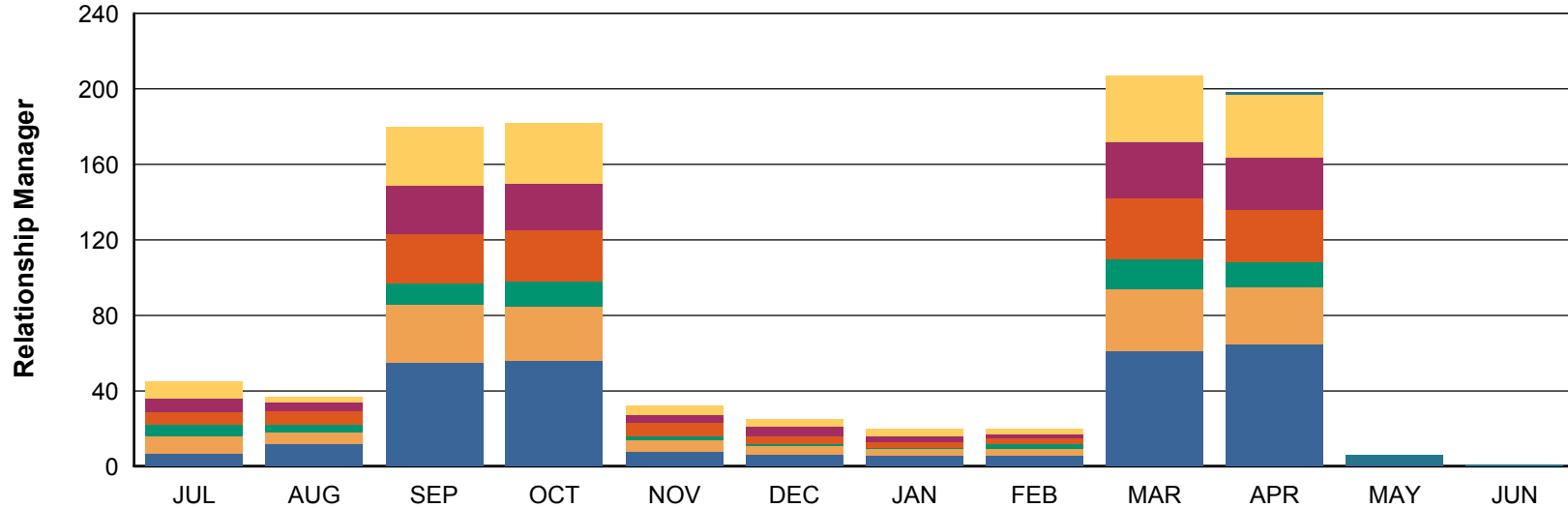


SAMPLE - FY 14 Summary of Actions by Relationship Manager



	Email	Mailing	Meeting	Phone Call	Task/Other	Total
	1	4	1	1	0	7
Andrews, Allison	104	105	56	14	4	283
Bently, Kathleen	56	56	29	6	8	155
Murphy, David	22	22	12	1	13	70
Rahman, Paul	51	51	28	3	11	144
Richardson, Mary Beth	49	49	27	3	7	135
Sinclair, Anne	56	56	30	7	10	159
Total	339	343	183	35	53	953

SAMPLE - Actions (#) by Relationship Manager



FY14 Action Summary by Relationship Manager and Month



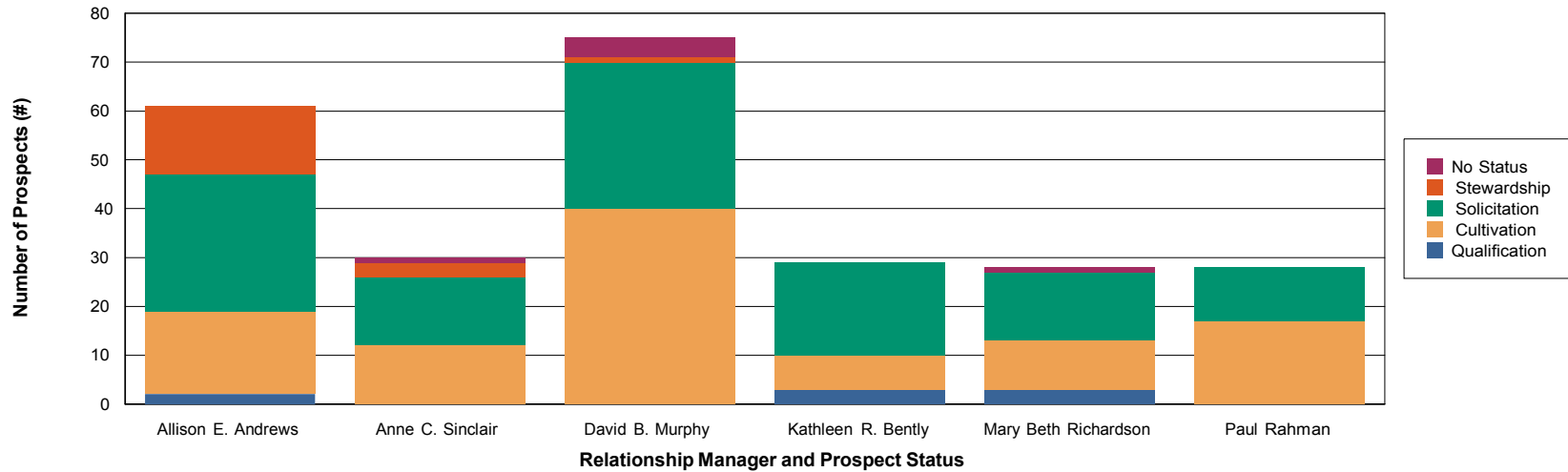
		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Total
	Email	0	0	0	0	0	0	0	0	0	0	1	0	1
	Mailing	0	0	0	0	0	0	0	0	0	1	3	0	4
	Meeting	0	0	0	0	0	0	0	0	0	0	0	1	1
	Phone Call	0	0	0	0	0	0	0	0	0	0	1	0	1
	Total	0	0	0	0	0	0	0	0	0	0	1	5	1
Andrews, Allison	Email	0	0	48	0	0	0	0	0	56	0	0	0	104
	Mailing	0	0	0	48	0	0	0	0	0	57	0	0	105
	Meeting	5	7	6	6	6	4	5	5	5	7	0	0	56

		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Total
Andrews, Allison	Phone Call	1	4	1	2	1	2	1	0	0	1	1	0	14
	Task/Other	1	1	0	0	1	0	0	1	0	0	0	0	4
	Total	7	12	55	56	8	6	6	6	61	65	1	0	283
Bently, Kathleen	Email	0	0	27	0	0	0	0	0	29	0	0	0	56
	Mailing	0	0	0	27	0	0	0	0	0	29	0	0	56
	Meeting	7	5	2	2	3	3	2	2	3	0	0	0	29
	Phone Call	2	0	1	0	2	1	0	0	0	0	0	0	6
	Task/Other	0	1	1	0	1	1	1	1	1	1	1	0	8
	Total	9	6	31	29	6	5	3	3	33	30	0	0	155
Murphy, David	Email	0	0	10	0	0	0	0	0	12	0	0	0	22
	Mailing	0	0	0	10	0	0	0	0	0	12	0	0	22
	Meeting	2	2	1	1	1	1	1	1	1	1	0	0	12
	Phone Call	0	0	0	1	0	0	0	0	0	0	0	0	1
	Task/Other	4	2	0	1	1	0	0	2	3	0	0	0	13
	Total	6	4	11	13	2	1	1	3	16	13	0	0	70
Rahman, Paul	Email	0	0	23	0	0	0	0	0	28	0	0	0	51
	Mailing	0	0	0	23	0	0	0	0	0	28	0	0	51
	Meeting	6	5	2	2	3	3	2	2	3	0	0	0	28
	Phone Call	0	0	0	1	2	0	0	0	0	0	0	0	3
	Task/Other	1	2	1	1	2	1	1	1	1	0	0	0	11
	Total	7	7	26	27	7	4	3	3	32	28	0	0	144
Richardson, Mary Beth	Email	0	0	22	0	0	0	0	0	27	0	0	0	49
	Mailing	0	0	0	22	0	0	0	0	0	27	0	0	49
	Meeting	5	5	2	2	3	3	2	2	3	0	0	0	27

		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Total
Richardson, Mary Beth	Phone Call	1	0	1	0	0	1	0	0	0	0	0	0	3
	Task/Other	1	0	1	1	1	1	1	0	0	1	0	0	7
	Total	7	5	26	25	4	5	3	2	30	28	0	0	135
Sinclair, Anne	Email	0	0	26	0	0	0	0	0	30	0	0	0	56
	Mailing	0	0	0	26	0	0	0	0	0	30	0	0	56
	Meeting	3	3	3	3	3	3	3	3	3	3	0	0	30
	Phone Call	3	0	1	1	1	1	0	0	0	0	0	0	7
	Task/Other	3	0	1	2	1	0	1	0	2	0	0	0	10
	Total	9	3	31	32	5	4	4	3	35	33	0	0	159
Total	45	37	180	182	32	25	20	20	207	198	6	1	953	

*This is a SAMPLE report, all data has been created for demonstration purposes.

Sample - Prospects by Relationship Manager and Prospect Status



Prospects by Relationship Manager and Prospect Status Number of Amount of Asked, Expected, and Funded Solicitations

		Qualification	Cultivation	Solicitation	Stewardship	No Status	Total
ANDREWS, ALLISON EVE	Asked (\$)		\$25,000	\$1,372,000	\$1,459,000	\$0	\$2,856,000
	Expected (\$)		\$25,000	\$1,329,000	\$1,369,000	\$0	\$2,723,000
	Funded (\$)		\$1,350	\$80,000	\$560,500	\$0	\$641,850
	Asked (#)	0	1	6	6	0	13
	Expected (#)	0	1	7	8	0	16
	Funded (#)	0	1	4	4	0	9
	Prospects (#)	2	17	28	14	0	61
BENTLY, KATHLEEN ROSE	Asked (\$)	\$510,000	\$0		\$0	\$0	\$510,000
	Expected (\$)	\$10,000	\$0		\$0	\$0	\$10,000
	Funded (\$)	\$10,000	\$0		\$0	\$0	\$10,000
	Asked (#)	2	0	0	0	0	2
	Expected (#)	1	0	0	0	0	1
	Funded (#)	1	0	0	0	0	1
	Prospects (#)	3	7	19	0	0	29

		Qualification	Cultivation	Solicitation	Stewardship	No Status	Total
MURPHY, DAVID BENSON	Asked (\$)	\$0		\$515,000	\$200,000		\$715,000
	Expected (\$)	\$0		\$515,000	\$150,000		\$665,000
	Funded (\$)	\$0		\$15,000	\$150,000		\$165,000
	Asked (#)	0	0	3	1	0	4
	Expected (#)	0	0	3	1	0	4
	Funded (#)	0	0	2	1	0	3
	Prospects (#)	0	40	30	1	4	75
RAHMAN, PAUL	Asked (\$)	\$0	\$10,000	\$2,550,000	\$0	\$0	\$2,560,000
	Expected (\$)	\$0	\$0	\$1,050,000	\$0	\$0	\$1,050,000
	Funded (\$)	\$0	\$0	\$2,050,000	\$0	\$0	\$2,050,000
	Asked (#)	0	1	2	0	0	3
	Expected (#)	0	0	2	0	0	2
	Funded (#)	0	0	2	0	0	2
	Prospects (#)	0	17	11	0	0	28
RICHARDSON, MARY BETH	Asked (\$)	\$40,000	\$1,002,000	\$5,000	\$0		\$1,047,000
	Expected (\$)	\$40,000	\$2,000	\$5,000	\$0		\$47,000
	Funded (\$)	\$36,100	\$2,000	\$2,500	\$0		\$40,600
	Asked (#)	1	2	1	0	0	4
	Expected (#)	1	1	1	0	0	3
	Funded (#)	1	1	1	0	0	3
	Prospects (#)	3	10	14	0	1	28
SINCLAIR, ANNE CLARICE	Asked (\$)	\$0	\$145,000	\$200,000	\$115,000		\$460,000
	Expected (\$)	\$0	\$135,000	\$140,000	\$110,000		\$385,000
	Funded (\$)	\$0	\$135,000	\$150,000	\$160,000		\$445,000
	Asked (#)	0	4	1	2	0	7
	Expected (#)	0	2	1	2	0	5
	Funded (#)	0	3	1	2	0	6
	Prospects (#)	0	12	14	3	1	30
Total	Asked (\$)	\$550,000	\$1,182,000	\$4,642,000	\$1,774,000		\$8,148,000
	Expected (\$)	\$50,000	\$162,000	\$3,039,000	\$1,629,000		\$4,880,000
	Funded (\$)	\$46,100	\$138,350	\$2,297,500	\$870,500		\$3,352,450
	Asked (#)	3	8	13	9	0	33
	Expected (#)	2	4	14	11	0	31
	Funded (#)	2	5	10	7	0	24
	Prospects (#)	8	103	116	18	6	251

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Relationship Management Pipeline Report

Name (ID) Const Code, Degree and Year (if applicable) Spouse Const Code, Degree and Year (if applicable)	Last Gift Amount, Date Largest Gift Amount, Date Total Gift Amount, #	Proposal Name Purpose Status Solicitor(s)	Asked Amount, Date Expected Amount, Date Funded Amount, Date	Last Action Date, Type and Description Next Action Date, Type and Description
ANDREWS, ALLISON EVE				
Stewardship				
Clara M. Daniels (194) Friend BS 1942	\$100 4/14 \$1,000,000			5/21/14 Email Dialogue Had an email dialouge with Clara and she asked me to
Jesse E. Daniels	\$1,214,850 13			10/1/14 One-Way Email Follow up on email dialouge from May
Travis D. Inman (35) Volunteer MBA 1960	\$50 1/06 \$200,000			4/28/14 Letter
Augustine Inman	\$253,550 4			
Ira M. Rosenberg (69) Volunteer	\$250,000 4/13 \$250,000	Green Proposal Major Gift	\$0	5/20/14 Phone Call Spoke with Ira to schedule a
Ginger Rosenberg Friend BS 1983	\$302,300 5	Strategy Development Andrews, Allison	\$100,000 \$0	visit in July 7/30/14 Scheduled Visit
Michelle Taylor (122) Supporter BA 1965	\$25,000 2/08 \$50,000			4/28/14 Letter
Max G. Taylor Grandparent BS 1961	\$120,125 7			
Cynthia B. Urban (83) Supporter BA 1982	\$2,000 6/13 \$5,000 \$12,000 3	Green Proposal Major Gift Strategy Development Andrews, Allison	\$0 \$0 \$25,000 12/14 \$0	4/28/14 Letter 6/25/14 Visit Meeting with Cynthia to determine interest in Green
Subtotal: Stewardship	Asked (#,\$): 11, \$1,459,000.00; Expected (#,\$):11\$1,369,000.00; Funded (#,\$):11, \$560,500.00			

*This is a SAMPLE report, all data has been created for demonstration purposes.

Relationship Management Pipeline Report

Name (ID) Const Code, Degree and Year (if applicable) Spouse Const Code, Degree and Year (if applicable)	Last Gift Amount, Date Largest Gift Amount, Date Total Gift Amount, #	Proposal Name Purpose Status Solicitor(s)	Asked Amount, Date Expected Amount, Date Funded Amount, Date	Last Action Date, Type and Description Next Action Date, Type and Description
ANDREWS, ALLISON EVE				
Solicitation				
George D. Finley (21) Trustee	\$600 3/14 \$5,000 \$10,075 9			5/5/14 Thank You
Dale Green (159) Friend BS 1982	\$100 5/13 \$15,000 \$16,170 5	Green Proposal Major Gift Strategy Development Andrews, Allison	\$0 \$2,000 12/14 \$0	4/28/14 Letter
Lisa Haas (32) Development Staff BA 1975	\$75 12/09 \$10,000 \$18,500 5			4/28/14 Letter
Dean P. Isley (33) Supporter BA 1992	\$20,000 11/08 \$800,000 \$1,060,875 9			4/28/14 Letter
Kimberly J. Luton (8832) Alumna/us BS 2004	\$25 3/09 \$2,000 \$3,150 4			4/28/14 Letter

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Relationship Management Pipeline Report

Name (ID) Const Code, Degree and Year (if applicable) Spouse Const Code, Degree and Year (if applicable)	Last Gift Amount, Date Largest Gift Amount, Date Total Gift Amount, #	Proposal Name Purpose Status Solicitor(s)	Asked Amount, Date Expected Amount, Date Funded Amount, Date	Last Action Date, Type and Description Next Action Date, Type and Description
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ANDREWS, ALLISON EVE

Solicitation

Winston R. Tate (79) Supporter BA 1984	\$2,100 3/14 \$15,000 \$19,200 6			4/28/14 Letter
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Michelle E. Wagner (87) Supporter BA 1981	\$2,500 3/14 \$3,000 \$6,915 5			4/28/14 Letter
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Kate A. Williams (89) Friend	\$75 12/09 \$500,000 \$512,195 9			4/28/14 Letter
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Subtotal: Solicitation **Asked (#,\$): 8, \$1,372,000.00; Expected (#,\$):8\$1,329,000.00; Funded (#,\$):8, \$80,000.00**

Cultivation

Dustin S. Andrews (180) Current Parent	\$15,000 4/14 \$15,000			5/29/14 Thank You
Allison E. Andrews Alumna/us BA 1982	\$16,200 4			

*This is a SAMPLE report, all data has been created for demonstration purposes.

Relationship Management Pipeline Report

Name (ID) Const Code, Degree and Year (if applicable) Spouse Const Code, Degree and Year (if applicable)	Last Gift Amount, Date Largest Gift Amount, Date Total Gift Amount, #	Proposal Name Purpose Status Solicitor(s)	Asked Amount, Date Expected Amount, Date Funded Amount, Date	Last Action Date, Type and Description Next Action Date, Type and Description
ANDREWS, ALLISON EVE				
Cultivation				
Renee A. Wilson (129) Friend	\$25 4/07 \$100			4/28/14 Letter
Lajuan Wilson Supporter BA 1969	\$200 3			
Subtotal: Cultivation		Asked (#,\$): 1, \$25,000.00; Expected (#,\$):1\$25,000.00; Funded (#,\$):1, \$1,350.00		
Qualification				
Aron Cohen (234) BA 2004				4/28/14 Letter
	\$0 0			
David M. Korbin (41) Volunteer MD 1975	\$1,000 6/10 \$3,500 \$5,625 6			4/28/14 Letter
Subtotal: Qualification		Asked (#,\$): 0, ; Expected (#,\$):0; Funded (#,\$):0,		
Subtotal: ANDREWS, ALLISON EVE		Asked (#,\$): 20, \$2,856,000.00; Expected (#,\$):20\$2,723,000.00; Funded (#,\$):20, \$641,850.00		

*This is a SAMPLE report, all data has been created for demonstration purposes.