

BOV MEMBER INFORMATION REPORT

Job Aid

WHAT IS A BOV MEMBER INFORMATION REPORT

The BoV Member Information Report is a tool for WFAA staff to produce lists of Board of Visitor Committee Members. This tool enables users to review the members in specified committees, or to contact them as needed. If the report is used to contact BoV members, please submit the list of contacted BoV members to the BI-Reporting group so that the communication can be recorded in ABE CRM. You must coordinate with Caty Ahrens if you wish to communicate to WFAA Board Members.

HOW TO ACCESS THE BOV MEMBER INFORMATION REPORT

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Click on **CST – Constituent - BoV Member Information**.
4. Select **Site**.
5. Select **Affiliation Names**. Multiple selections are permitted.
6. Select **Member Status** – “Current” returns only those members who are listed as currently active with the committee. “All” will include both current and former members.
7. Select **Spouse Link** – “Yes” will combine spouses into one row in the resulting list.
8. Select **Include Spouse even if they do not qualify** – “Yes” will includes spouses even if they are not a member of the selected Affiliation.
9. Select **Unit** to determine the giving that will output in the report.
10. Select **Department** to determine the giving that will output in the report.
11. Select **Excel Ready Formatting**.
12. Click **View Report**.

HOW TO INTERPRET A BOV MEMBER INFORMATION REPORT

This report displays contact and giving information for the selected BoV Committee members. Solicit codes (based upon the site selected) are applied which may result in some contact info being blank. The “Mail Indicator,” “Email Indicator,” and “Phone Indicator” columns display solicit codes or other restrictions. If a value is present in these Indicator columns, the corresponding contact information is suppressed. Deceased constituents are always excluded from the report results.

What is included in the report fields?

Affiliation Names	Lists the committee(s) with which the constituent is affiliated, and their status (current or past).
Household Giving to Site Current Year	Total new gifts and pledges made by the household for the selected unit and department during the current calendar year.
Total Household Giving to Site	Total household giving (new gifts and pledges) for the selected unit and department.
Address, Phone and Email	Outputs the primary for each type of contact information. The address is the in-season address (if someone has a seasonal address).
Mail Indicator, Phone Indicator, Email Indicator	Displays if this type of contact information is unavailable, due to solicit code restrictions, missing data, bounced email, etc.