Fund Stewardship Report

Job Aid

The Fund Stewardship report supplies a summary of information available on the purpose record of a fund. It aggregates information specific to stewardship and award recipients for a set of funds defined by the user. As of late July 2019, this report will be available to all WFAA users with access to fund reporting.

Use this report when you need to…

- Share the status of award disbursement and stewardship activity for a fund with campus partners.
- Take internal action with stewardship recipients who are specific to a fund.

RELATED REPORTS AND LIMITATIONS:
- This report is distinctive from the Donor Acknowledgement report (DAR), as it is designed to steward recipients to a specific fund with impact reporting and award recipient information. The DAR is designed to acknowledge donors for an instance of a specific gift.
- This report contains three tabs to provide both a broad overview of fund information and specific details for contacting individual stewardship and award recipients. Because of the variation in use across campus units and the need to summarize multiple years' of information into the Fund Summary Information tab, some columns contain concatenated information separated by a pipe/bar.

WHAT IS INCLUDED IN THE FUND STEWARDSHIP REPORT

The Fund Stewardship report aggregates information specific to stewardship and award recipients for a set of funds defined by the user. To that end this report:

- Provides a summary of all information relevant to awards and stewardship specific to the chosen funds.
- Identifies living stewardship recipients to these funds, when they last received stewardship, the method of that stewardship, and appropriate contact information.
- Identifies award recipients (undergraduate students, graduate/professional students, and faculty), the years or terms of support, and appropriate contact information.
- Provides address and salutation information to enable letter and email merging to facilitate communication.

HOW TO GENERATE THE FUND STEWARDSHIP REPORT

1. Log in to the [Advancement Resources website](#)
2. Click on the Fund Reporting tab and choose Fund/List Information
3. Use the Fund List & Information feature in ARW to filter your funds appropriately.
4. Choose FUND STEWARDSHIP for the report menu.
5. You will see a user interface with report parameter options:
   a. Include Award Recipients (will output fund award recipients with award details and contact info)
   b. Include Stewardship Report Recipients (will output stewardship report recipients, spouse linked when appropriate with contact information)
   c. Scholarship Terms
      i. You may choose "all years" or a specific scholarship term. NOTE: If pulling for faculty awards you must select "all years"
6. After you select your parameters, select CREATE REPORT. Your report will be emailed to you.

REPORT GLOSSARY

TAB ONE: Fund Information Summary

Highlight indicates fields that may be repeated on subsequent tabs.

Element	Description
Fund Number	Fund Number with link to ABE CRM.
Fund Name	Fund Name.
Sort Name	Fund name, configured to sort alphabetically.
Start Date	The date the fund was created.
Unit	School/college unit the fund supports.
Department	Department within school/college unit the fund supports.
Division	Development director that oversees this fund.
Use	Fund use code.
Class	Fund class.

Element	Description
Description	Fund description. Expand the column width to see full text.
Fund Groups	If the fund belongs to a fund group, the group name is listed here. Use this information to identify funds that are matched by any current matching programs (i.e. Nicholas or Morgridge matches).
Impact Report Note	Impact report note from the Documentation tab on the purpose record, if populated.
Related Staff	WFAA or campus staff associated with the fund, or constituents who should be contacted for more information.
Most recent stewardship activity	For any given fund, the most recent stewardship activity recorded on the purpose record, with date. Concatenated in one column and separated by a comma.
Stewardship Recipients	All living stewardship recipients fund with no end date, as recorded on the fund purpose field in ABE. Contains ID and name, concatenated in one column, with each individual's data separated by a comma. Individual recipients separated by a pipe/bar.
Award Recipients	Award Recipients for terms chosen. Contains ID, name and award year. Each individual awardee's data separated by a comma. Individual awardees separated by a pipe/bar.

TAB TWO: Stewardship Report Recipients

This tab duplicates many of the fields available on Fund Summary tab, but is formatted as one line for each Stewardship Recipient. Each fund may have multiple lines to accommodate this. Please refer to data definitions highlighted above for duplicated fields.

Element	Description
Type

Method | Used to submit stewardship activity information to the WFAA. It provides a pull-down menu to select the type of stewardship activity completed. |
| Date (mm/dd/yyyy) | Used to submit stewardship activity information to the WFAA. Supply the date the stewardship was completed. |

Element	Description
Comments	Used to submit stewardship activity information to the WFAA. Supply a brief description of the impact.
Look Up ID	ABE Look up ID for constituent recorded on fund as a stewardship recipient with no end date.
First Name	First name of constituent recorded on fund as a stewardship recipient with no end date.
Last name	Last name of constituent recorded on fund as a stewardship recipient with no end date.
Spouse look Up ID	Spouse look up ID is included if spouse is also indicated as a stewardship recipient with no end date
Spouse First Name	Spouse first name if spouse is also indicated as a stewardship recipient with no end date.
Spouse Last Name	Spouse last name if spouse is also indicated as a stewardship recipient with no end date.
Addressee	Recipient addressee. First class format is provided. If spouse is also listed as a stewardship recipient with no end date, the joint addressee format will populate. If stewardship recipient is an organization constituent, constituent name will populate into this field.
Salutation	Recipient salutation. If spouse is also listed as a stewardship recipient with no end date, the joint salutation format will populate.
Address	First class mailing address provided.
Email address	Recipient email address. If there are solicit codes or other restrictions on email address, that information will populate.
Spouse email address	Will populate if spouse is also indicated on the fund record as stewardship recipient with no end date.
Stewardship Recipient Type	Indicates the type of stewardship constituent. Possible values include attorney, corporate contact, donor, executor, family member, financial advisory, foundation

Element	Description
	contact, honoree, and trustee. If blank, type is not indicated on the record in ABE. Update if applicable.
Recognition Preference	Indicates what type of recognition the donor would like to receive. Private recognition includes one-on-one acknowledgement to the donor; public recognition includes external or public-facing recognition.
Stewardship Activity	Lists all stewardship activity (sorted most-to-least recent) including method and date. Each activity is separated by a pipe/bar.
Gift Capacity Rating	Estimates a prospect's ability to gift of a certain size, payable over a 5 year time frame.
Total Giving To Fund	Based on the fund selected, excluding anonymous gifts

TAB THREE: Award Recipients

This tab duplicates many of the fields available in the Fund Summary tab, but is formatted as one line for each Award Recipient. Each fund may have multiple lines to accommodate this. Please refer to data definitions above for duplicated fields.

Element	Description
Most Recent Stewardship Activity	Most recent stewardship date and type for the fund. This is concatenated in one field and separated by a comma.
Look Up ID	ABE Look up ID for constituent
First Name	First name of constituent listed on fund as stewardship recipient with no end date.
Last name	Last name of constituent listed on fund as stewardship recipient with no end date.
Addressee	Award recipient addressee. First class format provided.
Salutation	Award recipient salutation.
Address	First class mailing address provided.

Element	Description
Email address	Recipient email address. If there are solicit codes or other restrictions on email address, that information will populate instead of the email.
Scholarship Term	For scholarship awards this is the range based on the academic year (2019-2020).
Award Start Date	Start date for a scholarship or faculty position.
Faculty Award End Date	End date for a faculty award. This field will only populate for Faculty Awards.
Comments	Any comments from the Award Recipient entry on the fund will appear here.