CAMPAIGN DASHBOARD
Job Aid

WHAT IS A CAMPAIGN DASHBOARD?

The Campaign Dashboard is a visual representation of progress toward campaign goals, from the start of the campaign (7/1/2013) to the current date. This report may be produced for the entire campaign, a specific unit, or a specific department. It includes:

- Overall campaign total and goal for the selected area
- Totals by gift size
- Totals by fund purpose
- Totals by constituent type
- Donor totals
- Alumni participation statistics

This report is only available as a PDF.

HOW TO ACCESS A CAMPAIGN DASHBOARD REPORT

1. Log in to ABE CRM.
2. On the navigation bar, click **WFAA Reports**.
3. Click the **Campaign Dashboard Report**.
4. Select **All units** or a specific unit.
5. Select **All departments** or a specific department.
6. Click **View Report**.

HOW TO INTERPRET A CAMPAIGN DASHBOARD REPORT

What is included in the Campaign Dashboard Report?

- Gifts received since July 2013, including Gifts In Kind and Informational Gifts
- Pledge payments received since July 2013 that were not counted in the previous campaign
- Deferred pledges documented since July 2013
- Pledge commitments received since July 2013, excluding any payment amounts that have also been received since July 2013
- Estate gifts realized after July 2013 that were not counted in the previous campaign

- A small number of gifts received prior to July 2013 are included in campaign totals, at the discretion of the Chief Development Officer.
- Revenue totals are as of the date the report is run. Only gifts that have been entered in ABE CRM will show in this report.

How are the Gifts by Purpose summarized?

Faculty Support	Includes Faculty Support and Endowed Chairs/Professorships use codes.
Student Support	Includes Undergraduate Student Financial Support, Graduate Student Financial Support use codes.
Research and Programs	Includes Research, Programs, Research Equipment use codes.
Buildings and Grounds	Includes the Buildings and Grounds use code.
Discretionary	Includes the Discretionary use code.
Planned Gifts Undetermined	Includes planned gifts committed during the campaign and will be received by WFAA in the future. These have yet to be assigned to a specific fund purpose.

How is Revenue by Constituent Type calculated?

Individual	Includes campaign revenue that was credited to individual donors. For example, this includes gifts made through companies or family foundations when an individual receives recognition credit.
Organizations	Includes campaign revenue received from corporations and other outside institutions/partners.
Foundations	Includes campaign revenue received from private foundations and grant-making institutions (that are not also credited to an individual).

How are the donor counts and total revenue by gift range calculated?

The section that displays campaign total by gift range includes a count of donors and their total campaign giving that qualified for that gift range. Donor counts are based on households when applicable – for example, gifts from John and Jane Smith, as well as gifts from their family foundation that were credited to them, are summed together and count as one donor in this section.

How are donor and alumni counts calculated?

Total Donors	The total individuals and entities that made a gift, pledge or payment during the campaign. Each member of a household is counted, so one household of two donors = two donors in this section of the report.
Individual Donors	The total individuals who made a gift, pledge or payment during the campaign. Each member of a household is counted, so one household of two donors = two donors in this section of the report.
Alumni Donors	The total alumni who made a gift, pledge or payment during the campaign. Each member of a household is counted, so one household of two alumni donors = two donors in this section of the report.
Living Alumni	Total of all living alumni. This does NOT represent "contactable" alumni by considering the presence of current contact information or solicit codes.
% of Living Alumni Donated	This is calculated by dividing the total alumni donors by the total living alumni.

How is Match Campaign revenue counted?

The overall Campaign Dashboard includes the total dollars of the Match Campaign pledge when it is made. Unit and department level reports do not include the matching donor commitment until pledge payments are received and allocations are made to the corresponding unit/department. Allocations are made on a monthly basis, when there are matching donor payments available. You may see the amount encumbered for a unit/department based on Match Campaign pledges in the Campaign Match Supplement Report.