

CAMPAIGN UNIT BREAKOUT JOB AID

WHAT IS A CAMPAIGN UNIT BREAKOUT REPORT?

The Campaign Unit Breakout report shows a breakout of campaign progress by different UW-Madison unit groups, units, constituent type, and commitment type. This includes campaign commitments from the start of the campaign (7/1/2013) to the current date, based on revenue that has been entered in ABE CRM as of the date the report is run.

This report is only available as a PDF.

HOW TO ACCESS A CAMPAIGN UNIT BREAKOUT REPORT

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Click **Campaign Unit Breakout Report**.
4. Show Individual Units:
 - a. Select **Yes** to see distinct school/college and other units.
 - b. Select **No** to see a summary by key UW unit groups.
5. Show each constituent type separately:
 - a. Select **Yes** to see a breakout by Individuals, Organizations, and Foundations.
 - b. Select **No** to see a summary by commitment type only (Pledge/Payment/Deferred).
6. Click **View Report**.

HOW TO INTERPRET A CAMPAIGN UNIT BREAKOUT REPORT

What is included in the Campaign Unit Breakout 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 Unit Groups constructed?

Unit Groups are a way to view units at a summarized level.

University of Wisconsin Foundation	Includes commitments made to UW Foundation and estate gifts.
UW – Administrative Units	Includes central campus offices and services.
UW – Schools/Colleges	Includes academic school and college units.
UW – Units/Divisions	Includes centers, programs, and UW affiliates.

How are the totals by commitment type summarized?

Pledges	Includes the unpaid balance of any pledges made since the start of the campaign.
Payment	Includes outright gifts and pledge payments received since the start of the campaign.
Deferred	Includes the unpaid balance of deferred pledges made since the start of the campaign.

How are the totals by constituent type summarized?

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).
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How is Match Campaign revenue counted?

This report includes the full amount of the Match Campaign pledge when it is made, but it may show in a holding fund in the UW Foundation unit. Unit level totals do not include the matching donor commitment until their 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.