

COMMUNICATION PLANNER - DONORS TO UNIT/DEPT/FUND

Job Aid

WHEN TO USE COMMUNICATION PLANNER – DONORS TO UNIT/DEPT/FUND

The Communication Planner – Donors to Unit/Dept/Fund Report is a tool WFAA staff may use to communicate to a specific set of donors at the unit, department or fund level. Typically, this is used for impact reporting, stewardship communications, or solicitations to donors. The report includes contact information, so it may be used to produce lists for mailings, emails, or phone calls with the proper solicit codes applied. This report is not intended to replace the Stewardship “Prep” report that may be requested from BI.

If you choose to use this list to communicate to a group of constituents, you must also submit the final list via the [List & Report Request](#) Form. This will allow BI to tag the constituent records in ABE to show they received the communication. This step is crucial for tracking which communications a constituent receives, and helps us continue to refine our marketing and communications strategy.

If you use this to create a solicitation mailing, **please work with Gift Processing in advance to create an appeal.** This will streamline gift processing and allow you to track the results of your appeal.

HOW TO GENERATE COMMUNICATION PLANNER – DONORS TO UNIT/DEPT/FUND

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Click the **CST – Constituent - Communication Planner – Donors to Unit/Dept/Fund**
4. Select **Donors to** parameter. **Unit/Department/Fund** allows you to select funds at the unit/department/or fund level. **Fund Groups** allows you to select some or all funds in a fund group.
5. **Fund Filter.** Type a word or number into this field, and the **Fund** parameter will be limited to funds that contain this in their name.
6. Select **Fund**. You can only select one unit and one department OR one fund group, but you can select multiple funds.
7. **Start Date/End Date.** Limits the results based on the transaction dates of the gifts. Use date format MM/DD/YYYY.

8. **Giving Total Type.** Select “Cash” for cash-in-the-door (outright gifts, plus payments on pledges, planned gifts, recurring gifts and matching gift claims). Select “Commitments” for new gifts and pledges (outright gifts, pledge initiations, planned gifts, matching gift claims).
9. **Exclude Organizations.** Select “Yes” if you only want individual donors in your output.
10. **Exclude Tributes.** Select “Yes” if you do not want tribute gifts included in your output.
11. **Exclude Matching Gift Payments.** Select “Yes” if you do not want Matching Gift Payments included in your output.
12. **Who is Communication from?** Applies appropriate solicit codes based on the “brand” on the communication. For cross-branded communications, you may select multiple options.
13. **Intent of Communication.** Applies additional solicit codes based on special types of communications (invitations, solicitations, magazine/newsletter).
14. **Other Solicit codes.** Provides additional solicit codes to select if applicable. For example, some schools and colleges have multiple magazines/newsletters.
15. **SpouseLink.** Select “yes” if you want spouses merged together on one row. If “no,” is selected, the spouses will be listed individually on the list.
16. **List this School/College Alum first when Spouse-linked:** Use this feature to indicate your preference if you want the alumnus from your unit listed as Constituent.
17. **Include Spouse even if they do not qualify?** If “yes,” the spouse of the main constituent will be included even if s/he is not a donor to the unit/department/fund selected. Select “yes” to get an exact count of total number of people who would be invited to an event, for example.
18. **Excel-Ready Formatting.** If you intend to refine the file in Excel, select “Yes.” Once the list is exported, you can refine the list by region, county, city, state, giving history, etc.
19. Click **View Report**.

When exported to Excel, the report returns two tabs – one for domestic addresses and one for international addresses.

This report allows you to apply ABE Solicit Codes based on the source of the communication. This feature ensures that there will be no contact information surfaced if the constituent does not wish to receive a certain type of communication or communications from specific areas on campus or WFAA. This feature will not exclude anyone who meets the criteria selected in the parameters, but it will suppress the relevant contact information.

WHAT IS INCLUDED IN COMMUNICATION PLANNER – DONORS TO UNIT/DEPT/FUND

What is included in the report fields?

Honor Roll Name	Lists the standard WFAA format for outputting honor roll names. Does not necessarily reflect donor preferences.
First Class Formal Addressee	The name used in the address of first class postal correspondence. Lists the titles, first names and last names with punctuation.

Bulk Mail Formal Addressee	The name used in the address of bulk mail postal correspondence. Lists the titles, first names and last names excluding punctuation, per USPS bulk mail standards.
Standard Addressee	The name used in the address of postal correspondence. Excludes title.
Formal Salutation/Standard Salutation	The name used when addressing the constituent within postal correspondence. Formal includes title and last name, Standard included first name.
Region, County, Address, Phone and Email	Outputs the primary for each type of contact information. The address is the in-season address, if a seasonal address is available.
Full International Address	Listed only on the second tab in Excel file, denoted with "Intl." Returns the full international address block in this field.
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.
Lifetime Household Giving to UW	WFAA standard definition for Household Giving, excluding anonymous gifts. This calculation is based on recognition credit and includes gifts, pledges, deferred gifts, and informational gifts. It includes gifts that may have come from companies, foundations, and donor-advised funds that are soft credited to an individual in the household. "Household" is defined by the current spousal relationship.
Household Giving to UW	Based on the date range and giving total type selected, excluding anonymous gifts.
Household Giving to Unit	Based on the date range, unit, and giving total type selected, excluding anonymous gifts.
Household Giving to Department	Based on the date range, department, and giving total type selected, excluding anonymous gifts.
Household Giving to Funds	Based on the date range, funds, and giving total type selected, excluding anonymous gifts.

Constituent Education/Spouse Education	Lists the degrees the constituent and spouse received from UW-Madison.
Employer/Spouse Employer	Lists the current employer for the constituent and spouse.
Job Title/Spouse Job Title	Lists the current job title for the constituent and spouse.
Employer Notes/Spouse Employer Notes	Lists any related employer notes for the constituent and spouse.