

# CST1017 Household/Organization Giving Report

## WHEN TO USE THE HOUSEHOLD/ORGANIZATION GIVING REPORT

The Household/Organization Giving report displays a constituent's cumulative giving totals in a printable format which can be shared with the respective donor.

Use this report when you need to...

- Provide a donor with a lifetime giving summary
- Assist a Development Director with gift conversations with prospective donors
- Determine cumulative household giving to the UW or a specific unit or department
- Provide a donor with a giving history through a particular year (for example, to see giving pre-campaign, year by year growth, etc.)

### RELATED REPORTS AND LIMITATIONS:

- This report shows a constituent's cumulative giving through the end of the specified year. It does not show giving for a single year. This will be addressed with a new yearly giving report (coming soon).

## WHAT IS INCLUDED IN THE HOUSEHOLD/ORGANIZATION GIVING REPORT

The Household/Organization Giving Report provides an overview of a constituent's cumulative giving through a specified year, along with other key data points (First Gift, Outstanding Pledge Balance, All Ways Forward Campaign totals, certain Recognition Society Memberships).

Gift amounts are based upon the Recognition Credit received by the constituent. A "Household" is defined by the current Spousal Relationship.

The report may be run to show constituent (household or organization) giving to UW-Madison overall, or to a specific School/College/Unit.

By default, the report does not include anonymous gifts in the totals, but an option is provided to include them. For all giving totals, if the option to include anonymous gifts is selected at run time, then the output will show the anonymous portion of the gift within parentheses, italicized.

The report displays a constituent's cumulative giving, summarized to various levels, including the following:

- Overall
- Totals by Unit
- Totals by Fund
- Totals by Gift Type

In-kind and Informational gifts are included in these totals.

The Glossary section at the end of this article lists the report output elements, and their corresponding report sections.

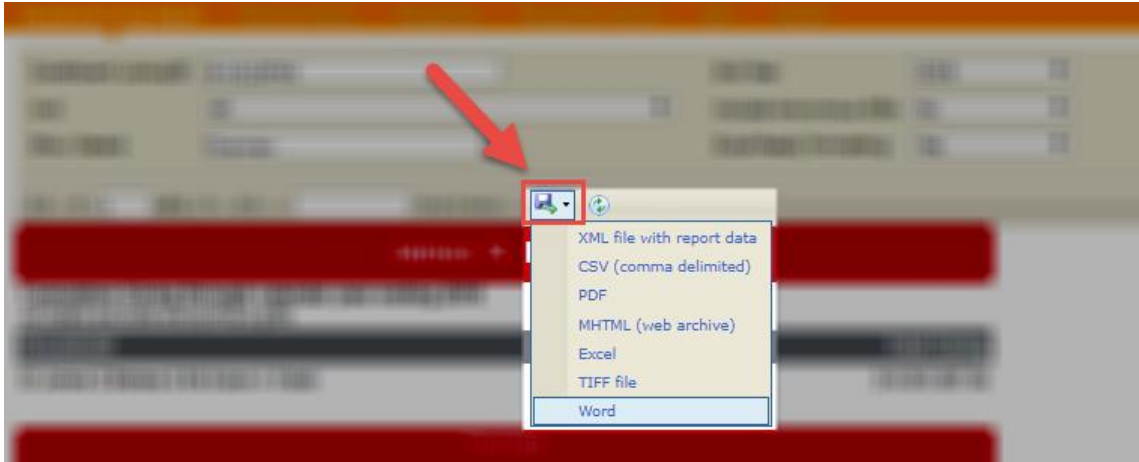
## HOW TO GENERATE THE HOUSEHOLD/ORGANIZATION GIVING REPORT

1. Log in to [ABE CRM](#).
2. Navigate to a specific constituent's record, and select the "Revenue" tab.
3. Click the sub-tab for "**Household Giving Report**" or "**Organization Giving Report**" (report name is dependent upon the type of constituent being viewed).
4. The report will automatically populate based upon the default values that have been set
5. Optionally change the report parameters listed below, and click **View Report** to update the results.

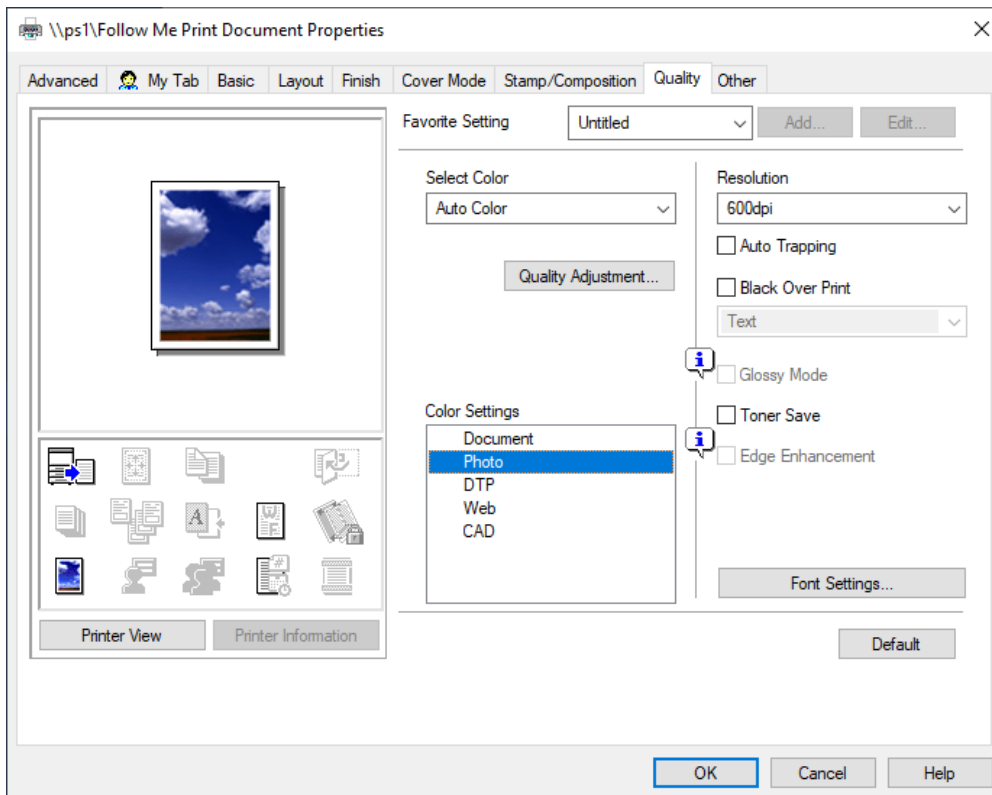
### Report Parameters:

- Select a value for **End Year**. The report defaults to the current year. Based on the value selected, the report results will show *cumulative* giving amounts through the end of the year specified (starting with the first gift, ever).
- Select a value for **Unit**. The report defaults to show amounts for all Units. To view giving totals to a single School/College/Unit, select a value other than "All" from the Unit drop down list.
- Select a value for **Include Anonymous Gifts**. The report defaults to "No", which excludes anonymous gifts. When a "Yes" value is specified, report output will show the anonymous portion of a respective total in parentheses, italicized.
- Select value(s) for **Show Details**. This parameter controls which sections will show in the report output. By default, all sections are shown. The "Header" section will always appear, and includes the Household or Organization name and corresponding Total Giving amount. The report user may choose to show or hide additional sections by checking (or unchecking) the following options:
  - Select All – shows all sections
  - Overview – shows key data points described in the Glossary section in this article
  - By Unit – shows cumulative gift amounts summarized to the department and unit levels
  - By Fund – shows cumulative gift amounts summarized to the fund and unit levels
  - By Gift Type – shows cumulative gift amounts summarized by type of gift
  - Campaign Giving – shows cumulative gift amounts that have occurred during the All Ways Forward Campaign (gifts from 7/1/2013 through the report date). This total is displayed in the "Overview" section, so the "Overview" section must also be selected for display.
- Select value for **Excel-Ready Formatting**. The report defaults to "No". When set to "Yes", this parameter will remove the standard WFAA logo and report title when downloaded to Excel, Word, or PDF. For this report, we recommend leaving the parameter value set to "No", since the report may be shared with a donor.

To produce a nicely formatted report suitable for sharing with a donor, run the report with the Excel-Ready Formatting parameter value set to "No". When the report results are displayed on screen, select the down-arrow next to the "Export" icon (see below), and choose either Word or PDF formats. The report results will be downloaded in the selected format within your browser, and can be opened in the respective application.



If printing at WFAA, the best results will be obtained by printing to the “Follow Me” printer (to print in color), and changing the printer “Quality” and “Color Settings” to “Photo” (leaving all other options at their default values):



## REPORT GLOSSARY

Report Section	Element	Description
Header	Constituent Name	Displays the name of the constituent for which the report is run.
Header	Household or Organization/Foundation	<p>If the report is run for an Individual, the name of the household for the corresponding constituent is shown. If the constituent has a spousal relationship captured in ABE, then both names are listed. The name of the constituent for which the report is run is listed first.</p> <p>If the report is run for an Organization or Foundation, the name of the Organization is listed.</p>
Header	Total Giving	<p>Displays the sum of the following, through the year specified at run time:</p> <ul style="list-style-type: none"> <li>• Outright Gifts</li> <li>• Pledge Initiations</li> <li>• Planned Gifts (Initiations and Payments)</li> <li>• Payments made on other people's pledges</li> <li>• Matching Gift Claims</li> </ul>
Overview	First Gift (1982 and later)	<p>Shows the date and corresponding amount for the constituent's first gift, in accordance with the following:</p> <ul style="list-style-type: none"> <li>• If the report was run for all UW giving and includes anonymous gifts, then the earliest gift is shown</li> <li>• If the report was run for all UW giving and excludes anonymous gifts, then the earliest non-anonymous gift is shown</li> <li>• If the report was run for a single School/College/Unit and includes anonymous gifts, then the earliest gift for that School/College/Unit is shown</li> </ul>

		<ul style="list-style-type: none"> <li>If the report was run for a single School/College/Unit and excludes anonymous gifts, then the earliest non-anonymous gift for that School/College/Unit is shown</li> </ul>
Overview	Giving - Top Units	<p>Shows giving totals for the top units, with a maximum of three units shown.</p> <p>If the report was run for a single School/College/Unit, this element does not appear</p>
Overview	Giving – Top Funds	<p>Shows giving totals for the top funds, with a maximum of three funds shown.</p> <p>If the report was run for a single School/College/Unit, only funds within the selected School/College/Unit are listed.</p>
Overview	Outstanding Pledge Balance	<p>Shows the <i>current</i> outstanding pledge balance, <i>as of the report run date</i>. This balance is irrespective of the year specified at run time. The corresponding report run date is also displayed.</p> <p>This is the same balance as shown in the Totals by Gift Type section of the report.</p>
Overview	All Ways Forward Campaign	Shows total giving toward the Campaign, occurring between 7/1/2013 and the corresponding report run date.
Overview	Recognition Society Memberships	<p>Lists the constituent’s membership in Lifetime Giving Recognition Societies</p> <p>If the constituent is not a member of any Recognition Society, this element does not appear.</p>
Totals by Unit	Unit Name	School/College/Unit associated with the fund to which gifts were given.
Totals by Unit	Department Name	Department associated with the fund to which gifts were given.

Totals by Unit	Total Giving	The sum of gifts (Outright Gifts, Pledge Initiations, Planned Gift Initiations, Matching Gifts, and Payments made on other people’s pledges) given to the corresponding Unit/Department.
Totals by Fund	Unit Name	School/College/Unit associated with the fund to which gifts were given.
Totals by Fund	Fund Name (Fund Number)	Name and number of the fund to which gifts were given, which may include closed funds.
Totals by Fund	Total Giving	The sum of gifts (Outright Gifts, Pledge Initiations, Planned Gift Initiations, Matching Gifts, and Payments made on other people’s pledges) given to the corresponding fund.
Totals by Gift Type - Gift	Gifts	<p>This total includes Outright Gift donations. These are gifts that are not associated with a prior commitment (such as pledge, planned gift, recurring gift, matching gift claim, etc.)</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Payment” AND the Application Description is “Donation”</li> </ul>
Totals by Gift Type - Gift	Recurring Gifts	<p>This total includes payments made on a Recurring Gift Type.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Payment” AND Application Description is “Recurring Gift”</li> </ul>
Totals by Gift Type - Gift	Gift-in-Kind / Informational Gifts	This total includes amounts associated with <a href="#">Gifts in Kind</a> and Informational Gifts (gifts received and processed via the relevant campus unit)

		<p>Not all Gifts In Kind are informational and not all informational are Gifts In Kind</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Any Transaction Type Description and Application Description included in Totals by Gift Type – Gift, AND any of the following is true: <ul style="list-style-type: none"> <li>○ Channel Description = ‘GIK / Property’</li> <li>○ OR Payment Method Description = ‘Gift-in-kind’</li> <li>○ OR Pledge Subtype Description = ‘In-Kind Pledge’</li> <li>○ OR (Revenue Attribute = ‘Pledge Characteristic’ and value = ‘In Kind’)</li> </ul> </li> </ul>
Totals by Gift Type - Gift	Other Gifts	<p>This total includes gifts that that are not explicitly covered by the preceding gift types. An example of this is a gift given as part of an Event Registration.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Payment”</li> <li>• AND Application Description is any of the following: <ul style="list-style-type: none"> <li>○ “Other”</li> <li>○ “Event Registration”</li> </ul> </li> </ul>
Totals by Gift Type – Pledge	Pledge Commitments	<p>This total reflects amounts associated with Pledges.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Pledge” AND the Application Description is “Donation”</li> </ul> <p>Any payments made on another constituent’s pledge are also included in this amount.</p>
Totals by Gift Type – Pledge	Gift-in-Kind / Informational Pledge Commitments	<p>This total reflects amounts associated with a pledge of non-monetary gifts, such as a promise to provide equipment.</p>

		<p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Pledge” OR Application Description is “Pledge”, AND any of the following is true: <ul style="list-style-type: none"> <li>○ Channel Description = “GIK / Property”</li> <li>○ OR Payment Method Description = “Gift-in-kind”</li> <li>○ OR Pledge Subtype Description = “In-Kind Pledge”</li> <li>○ OR (Revenue Attribute = “Pledge Characteristic” and value = “In Kind”)</li> </ul> </li> </ul>
Totals by Gift Type – Pledge	Pledge Payments	<p>This amount includes <i>all</i> payments made on a pledge, including payments that are made by others on the constituent’s pledge.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Payment” AND Application Description is “Pledge”</li> </ul>
Totals by Gift Type – Pledge	Outstanding Pledge Balance	<p>Shows the <i>current</i> outstanding pledge balance, <i>as of the report run date</i>. This balance is irrespective of the year specified at run time. The corresponding report run date is also displayed.</p> <p>This is the same balance as shown in the Overview section of the report.</p>
Totals by Gift Type – Matching Gift	Matching Gift Claims	<p>Some organizations match revenue that their employees or corporate partners give to nonprofit organizations.</p> <p>The amount reflected in this total represents:</p> <ul style="list-style-type: none"> <li>• Claims that were initiated by the constituent (typically an individual) and that another constituent (typically an organization) has agreed to pay</li> <li>• Claims the constituent has agreed to pay that were initiated by another constituent.</li> </ul>



		<p>This claim takes the form of a monetary claim.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Matching Gift Claim” OR the Application Description is “Matching Gift”.</li> </ul> <p>(Pre-ABE system matching gifts that were already paid were only converted as Transaction Type Description = “Matching Gift”, without a corresponding matching gift claim)</p>
<p>Totals by Gift Type – Matching Gift</p>	<p>Gift-in-Kind / Informational Matching Gift Claims</p>	<p>Some organizations match revenue that their employees or corporate partners give to nonprofit organizations.</p> <p>The amount reflected in this total represents:</p> <ul style="list-style-type: none"> <li>• Claims that were initiated by the constituent (typically an individual) and that another constituent (typically an organization) has agreed to pay</li> <li>• Claims the constituent has agreed to pay that were initiated by another constituent.</li> </ul> <p>This claim takes the form of a monetary claim.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Matching Gift Claim” OR the Application Description is “Matching Gift”, AND any of the following is true: <ul style="list-style-type: none"> <li>○ Channel Description = “GIK / Property”</li> <li>○ OR Payment Method Description = “Gift-in-kind”</li> <li>○ OR Pledge Subtype Description = “In-Kind Pledge”</li> <li>○ OR (Revenue Attribute = “Pledge Characteristic” and value = “In Kind”)</li> </ul> </li> </ul>

<p>Totals by Gift Type – Matching Gift</p>	<p>Matching Gift Payment</p>	<p>Some organizations match revenue that their employees or corporate partners give to nonprofit organizations.</p> <p>The amount reflected in this total represents:</p> <ul style="list-style-type: none"> <li>• Payments made on a matching gift claim (either <i>initiated</i> by that same constituent or by another constituent)</li> </ul> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Payment” AND Application Description is “Matching Gift”.</li> </ul>
<p>Totals by Gift Type – Deferred Gift</p>	<p>Revocable (ex. Bequest, Retirement Plan, etc.)</p>	<p>This amount reflects the total of Deferred Gifts for the constituent household or organization that have been recorded as “Revocable”.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Planned Gift” OR Application Description is “Planned Gift”, AND</li> <li>• Revocable indicator is set to Yes</li> </ul>
<p>Totals by Gift Type – Deferred Gift</p>	<p>Irrevocable (ex. Charitable Gift Annuity, Charitable Trust, etc.)</p>	<p>This amount reflects the total of Deferred Gifts for the constituent household or organization that have been recorded as “Irrevocable”.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Planned Gift” OR Application Description is “Planned Gift”, AND all of the following are true: <ul style="list-style-type: none"> <li>○ Revocable indicator is set to No</li> <li>○ Trust Held Outside indicator is set to No</li> <li>○ Fund Number starts with one of (“PG-22”, PG-42”, PG-62”)</li> </ul> </li> </ul>

<p>Totals by Gift Type – Deferred Gift</p>	<p>Gift-in-Kind / Informational Gift</p>	<p>This amount reflects the total of Deferred Gifts for the constituent household or organization that have been recorded as “Gift in Kind”.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Planned Gift” OR Application Description is “Planned Gift”, AND any of the following is true: <ul style="list-style-type: none"> <li>○ Channel Description = “GIK / Property”</li> <li>○ OR Payment Method Description = “Gift-in-kind”</li> <li>○ OR Pledge Subtype Description = “In-Kind Pledge”</li> <li>○ OR (Revenue Attribute = “Pledge Characteristic” and value = “In Kind”)</li> </ul> </li> </ul>
<p>Totals by Gift Type – Deferred Gift</p>	<p>Other (further detail can be provided by WFAA)</p>	<p>This amount reflects the total of Deferred Gifts for the constituent household or organization that are not covered by the above breakouts.</p> <p>In the system, these transactions have the following characteristics:</p> <ul style="list-style-type: none"> <li>• Transaction Type Description is “Planned Gift” OR Application Description is “Planned Gift”, AND</li> <li>• Not in the Revocable or Irrevocable classification</li> </ul>
<p>Totals by Gift Type</p>	<p>Total</p>	<p>The total amount shown in this section is the sum of the “left justified” elements, which are the following:</p> <ul style="list-style-type: none"> <li>• Gift – Gifts</li> <li>• Gift – Recurring Gifts</li> <li>• Gift – Gift-in-Kind / Informational Gifts</li> <li>• Gift – Other Gifts</li> <li>• Pledge – Pledge Commitments</li> <li>• Pledge – Gift-in-Kind / Informational Pledge Commitments</li> <li>• Matching Gift – Matching Gift Claims</li> <li>• Matching Gift – Gift-in-Kind / Informational Matching Gift Claims</li> </ul>

		<ul style="list-style-type: none"><li>• Deferred Gift – Revocable</li><li>• Deferred Gift – Irrevocable</li><li>• Deferred Gift – Gift-in-Kind / Informational</li><li>• Deferred Gift – Other</li></ul> <p>This total matches the totals in all other sections, including the “Total Giving” amount shown in the Header section.</p>
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