



*Last Updated: July 2008*

## **III.5 Annual Recognition Spreadsheet Explanation**

This document describes the columns provided in the annual recognition spreadsheet. This spreadsheet can be obtained by running the annual recognition script following the procedure detailed in XX.X Running Annual Recognition.

### **Columns A thru M – Bio Information**

- **Key Indicator:** Denotes whether an individual or an organization
- **Records ID:** System record ID (used only for bug checking)
- **Constituent ID:** RE Constituent ID
- **Last Name:** Person's Last Name
- **First Name:** Person's First Name
- **Org Name:** Organization Name
- **Spouse ID:** Constituent ID of the persons spouse (if applicable)
- **Spouse Last Name:** Spouses Last Name (if applicable)
- **Spouse First Name:** Spouses First Name (if applicable)
- **Deceased:** If the person is deceased, then a 'Y' appears in this column
- **Spouse Recog Sep:** Denotes whether the spouses request to be recognized separately. This is denoted in a constituent record under the attribute "Recognition", "Spouse Recognized Separately"
- **Remove this Spouse:** Denotes which spouse is determined (by the script) to be removed. If it needs to be flipped to the other, please delete the value in this column, and move it to the appropriate record.
- **Anonymous:** Denotes whether the person is anonymous for all giving or not

### **Columns N and O – Recognition Name**

- **Recognition Name:** Recognition name as the system has it stored
- **Recognition Name Changes:** If changes to the recognition name are necessary, put the change in this column. Foundation staff will take care of updating the appropriate places in RE. **JEN:** we need to discuss whether or not we still want to do this or not.

### **Columns P thru Z – Annual Recognition**



- **DO NOT MODIFY ANYTHING in columns P thru W, Use columns X and Y for any changes**
- **Total UAA Annual Giving:** Total Amount given to UAA
- **Total UAF Annual Giving:** Total Amount given to UAF, excluding the amount given to KUAC and the Museum
- **Total KUAC Annual Giving:** Total Amount given to KUAC
- **Total Museum Annual Giving:** Total Amount given to Museum
- **Total UAS Annual Giving:** Total Amount given to UAS
- **Total SW Annual Giving:** Total Amount given to SW
- **Total Annual Giving:** Total amount given to UA
- **Annual Recognition Level:** Annual recognition level determined by the Total Annual Giving
- **Dollar Amount Change:** If for any reason the dollar amount is off, put the amount that it is off in this column.
- **Reason:** Reason for the different amount (used if something very strange is going on, or to find bugs in the code. Will be double checked against the final list)
- **New Recognition Level:** This will automatically change based on the number entered in **Dollar Amount Change (X)**

### Columns AA thru AK – Cumulative Recognition

- **DO NOT MODIFY ANYTHING in columns AA thru AH, Use columns AI and AJ for any changes**
- **Total UAA Cumulative Giving:** Total Amount given to UAA
- **Total UAF Cumulative Giving:** Total Amount given to UAF, excluding the amount given to KUAC and the Museum
- **Total KUAC Cumulative Giving:** Total Amount given to KUAC
- **Total Museum Cumulative Giving:** Total Amount given to Museum
- **Total UAS Cumulative Giving:** Total Amount given to UAS
- **Total SW Cumulative Giving:** Total Amount given to SW
- **Total Cumulative Giving:** Total amount given to UA
- **Cumulative Recognition Level:** Annual recognition level determined by the Total Annual Giving
- **Dollar Amount Change:** If for any reason the dollar amount is off, put the amount that it is off in this column.
- **Reason:** Reason for the different amount (used if something very strange is going on, or to find bugs in the code. Will be double checked against the final list)
- **New Recognition Level:** This will automatically change based on the number entered in **Dollar Amount Change (AI)**



## Columns AL thru AN – Legacy Society

- **Legacy Society:** Denotes if the person is a member of the legacy society
- **Legacy Society Recog Name:** Recognition name for the legacy society (Legacy Society is recognized for each spouse separately, so they have a separate recognition name in RE for this)
- **Missing or Fixes for Legacy:** If someone that is legacy society is missing or needs their recognition name fixed, note it here.

## Columns AO thru DT – Recognition Backup

- These columns hold the backup for the totals presented at the beginning of the spreadsheet
- AO thru AU
  - Annual pledges
- AV thru BB
  - Annual pledge payments
- BC thru BI
  - Difference between Annual Pledges and Annual Pledge Payments
- BJ thru BP
  - Annual regular giving (including pledges)
- BQ thru BW
  - Total annual giving
- BX thru CD
  - Soft credit annual pledges
- CE thru CK
  - Soft credit annual pledge payments
- CL thru CR
  - Soft credit difference between soft credit annual pledges and soft credit annual pledge payments
- CS thru CY
  - Soft Credit regular giving (including soft credit pledges)
- CZ thru DF
  - Soft credit total giving
- DG thru DM
  - Total cumulative giving
- DN thru DT
  - Total soft credit cumulative giving

## Columns DU thru EA – Address Information