frontstream WORKPLACE PHILANTHROPY

ONLINE REPORTING SYSTEM: WHERE RAISED REPORTING

Local United Way & Administrative Views

Document Version 1.0
March 20, 2012
FrontStream

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What are Where Raised Reports?

Where Raised Reports provide Local United Way organizations with geographically defined donation information. Where Raised Reports show a Local United Way the money earned in their community during a fundraising initiative, helping the Local United Way determine the effectiveness of their fundraising efforts.

The Where Raised Report should not be confused with the pledge reports. Where Raised Reports show the amount of funds raised in the Local United Way's area. This includes money designated to other United Ways or non-profit agencies. The Pledge Report shows the amount that will be paid to a specific Local United Way or Agency.

Login Instruction

Local United Way View

1. Follow *Login Instruction* for Local United Way (LUW).
2. Click "**View Where Raised Report**."

   Note: The Where Raised Report screens are identical in both the LUW and Administrative view.

Administrative View

The Administrative View is used by FrontStream internal staff and support team.

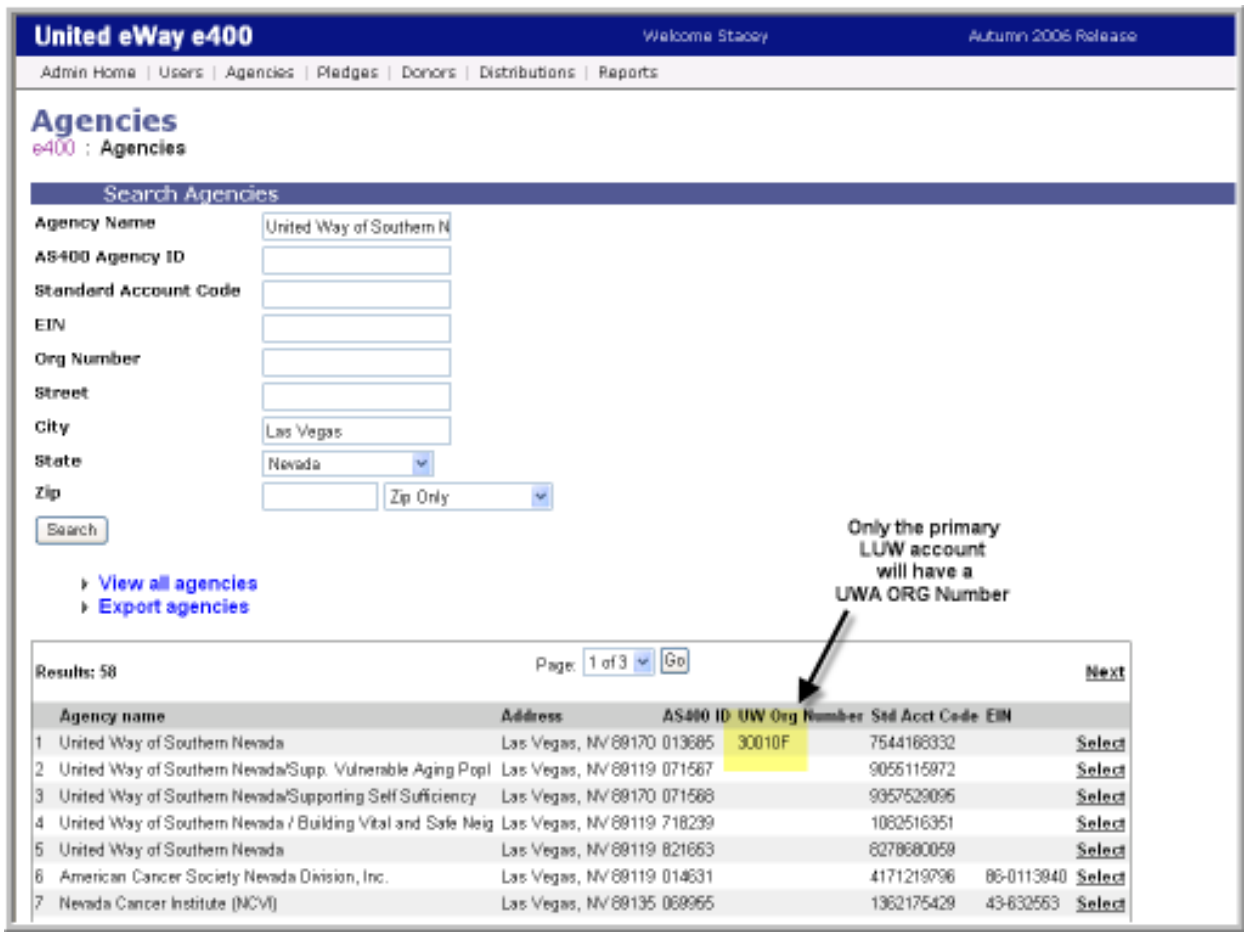
1. Follow Login Instruction for Administrative View.
2. Click "**Agencies**."
3. Search for the Local United Way (LUW).
4. Select the Primary LUW.

   - Only the primary LUW account will contain the Where Raised Information.
   - Only Primary LUW Accounts will have a UW Organization Number.

5. Click "**View Reports**."
6. Click the name of the LUW.
7. Click "**View Where Raised Reports**."
8. Click the name of the United Way's Report to view.
9. Select the type of data to see.

- **View Finalized Data Only** – This is what the LUW will see.
- **View All Data in Where Raised** – This is unofficial results for campaign that have yet to be finalized. These reports/totals should not be shared with LUW.

Note: The Where Raised Report screens are identical in both the LUW and Administrative View (For Finalized Data Only).



Selecting Campaign Year, Campaign, and Where Raised Details Type

1. Select a year from the **Campaign Year** dropdown menu.

    - 2006 is the first campaign year Where Raised information is available for on the Online Report System.

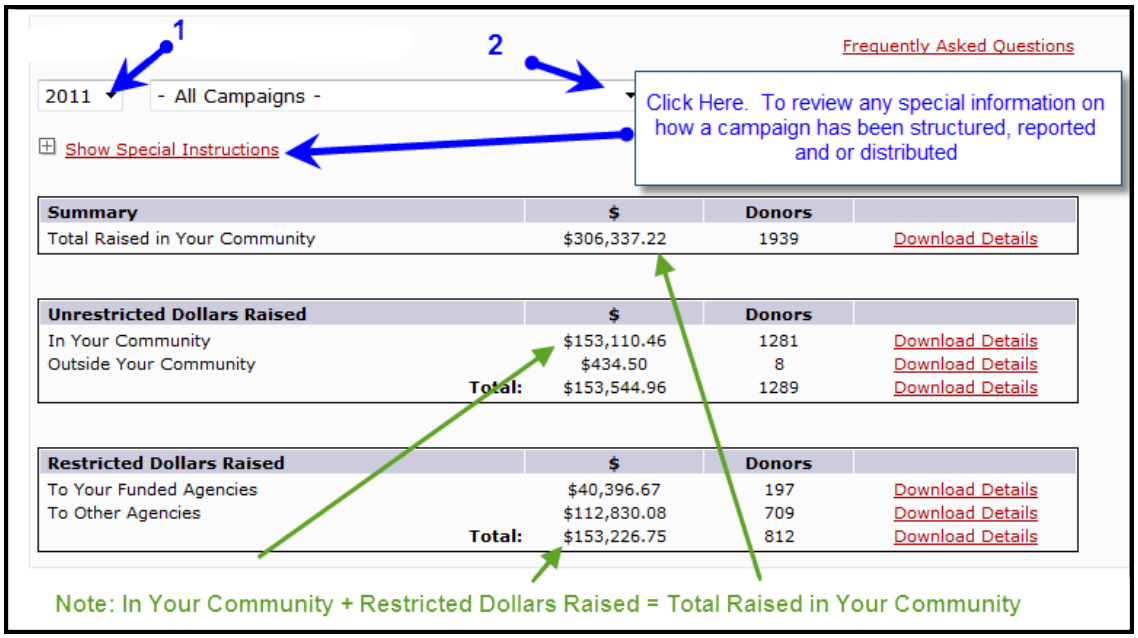
2. Select "**All Campaigns**" or a specific campaign from the ***Campaign*** dropdown menu.

    - Where Raised Reports are available only for campaigns managed by FrontStream and that use the FrontStream Campaign Management tool.

3. Select "**Download Details**" from the ***Where Raised Information Type*** dropdown menu.

    - Where Raised Information is divided into three types:

        a. Total Raised in your Community
        b. Unrestricted Dollars
        c. Restricted Dollars Raised

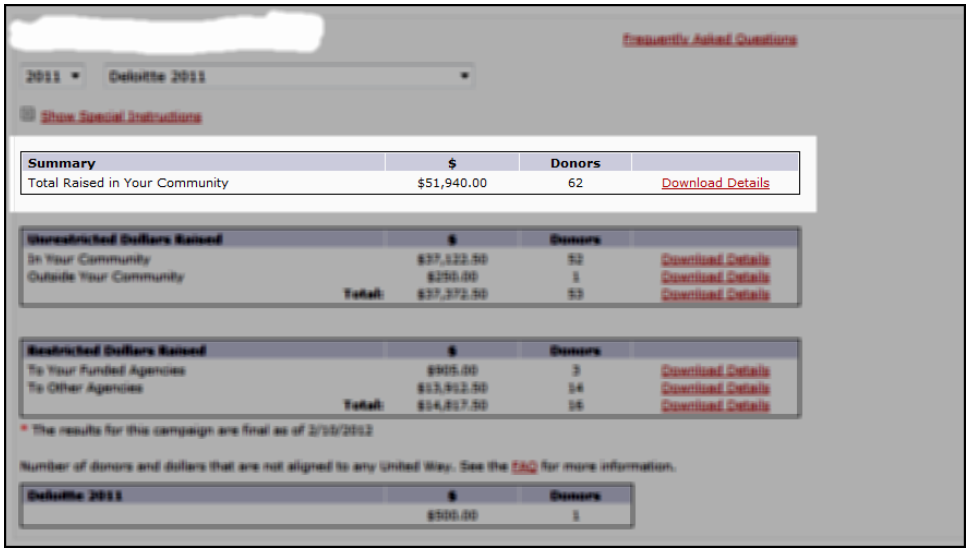


Why are Where Raised Reports Unavailable for some FrontStream Managed Campaigns?

FrontStream only releases Where Raised Reports with client approval. Some clients opt not to release the reports or release the information in an alternate method. Some GCL client companies release their information directly with United Way WorldWide. LUW can contact the GCL Help Desk at (877) 625-4630 or gclinfo@unitedway.org for information about Where Raised Reports for GCL clients not released by FrontStream.

Total Raised in your Community

1. The company running the campaign provides FrontStream with the Where Raised Zip Code. This can be either a donor's home or work zip code and is determined by the company running the campaign. In some cases the company may provide an alternate zip code.
2. The Where Raised Zip Code is compared to the GiftLink database to determine the LUW.
3. The dollar amount listed is the total amount the LUW will need to file their yearly filing form (Form DB2) with United Way Worldwide.
4. The dollar amount listed is the total amount pledged within their community; it is not the dollar the LUW will receive.



What is the Community?

The community is the area a LUW can operate and provide value to. Each LUW is aligned to a set of zip codes. The alignment of these zip codes is maintained in the GiftLink database. In some cases a zip code may be split between multiple Local United Ways; in this case, each LUW will be shown the portion of the donor's gift they can take credit for.

What is GiftLink?

GiftLink is a database of LUW and their assigned zip codes. GiftLink is maintained by United Way Worldwide. LUW may access a listing of their GiftLink zip codes at http://online.unitedway.org/zipcodes. Questions regarding zip code assignments should be directed to Jenny Palazio, Director of Membership Accountability at United Way Worldwide, at jenny.palazio@uww.unitedway.org or (800) 892-2757, ext. 511.

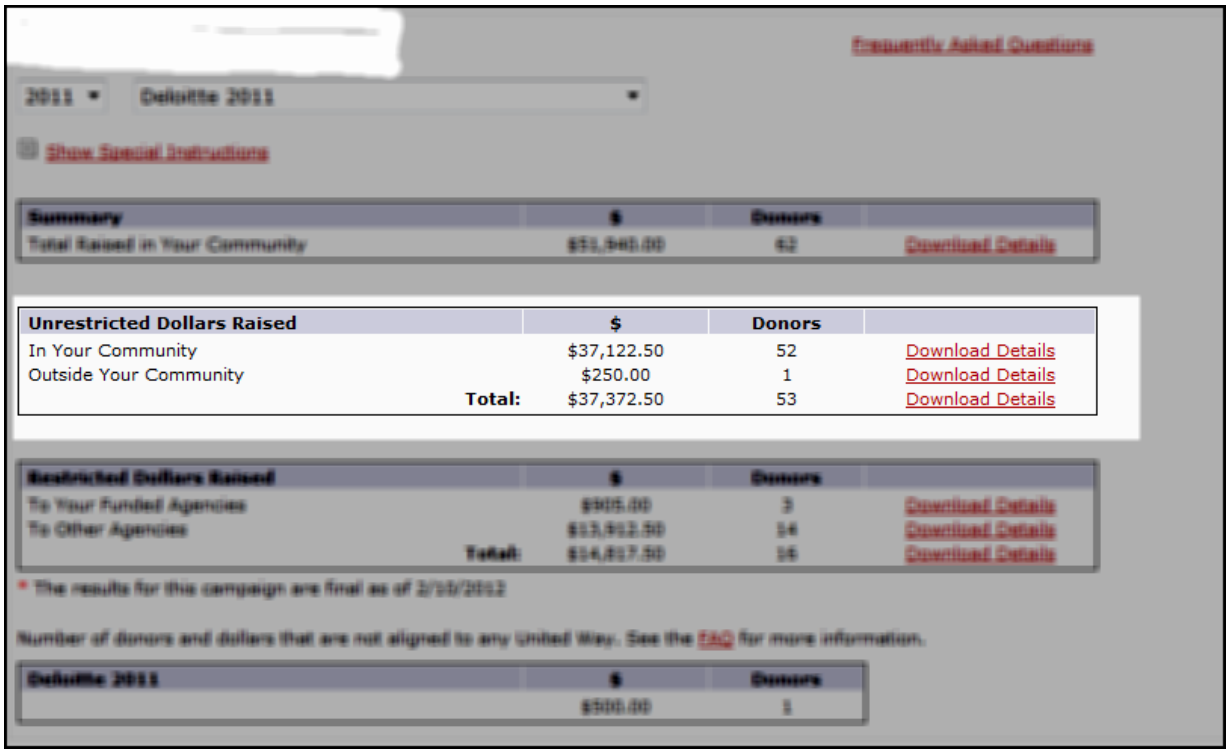
Unrestricted Dollars Raised

In your Community

- Dollars raised within the LUW community and designated to the same LUW and/or one of its Impact/Service Areas.
- This is the amount the LUW should expect to receive, minus any applicable service fees.

Outside your Community

- Dollars raised outside of the LUW community but designated to this LUW.
- This is the amount the LUW should expect to see, minus any applicable service fees.
- This is the amount that is not included in the ***Total Raised in your Community*** section.



Unrestricted Dollars Raised		$	Donors	
In Your Community		$37,122.50	52	Download Details
Outside Your Community		$250.00	1	Download Details
	Total:	$37,372.50	53	Download Details

What is the Difference between Funds Pledged to the LUW vs. an Impact/Service Area?

Funds pledged to the LUW can be used to fund any of the issues that the LUW is supporting. Funds pledged to an Impact/Service Area (also known as *Focus Area*) are targeted to support a specific issue within the LUW solicitation area. Each Impact/Service area is assigned a unique account number. Typically, Impact/Service Areas will contain the name of the LUW and the Impact/Service Area Name. Example of an Impact/Service Area: United Way of Southern Nevada/Supporting Self Sufficiency.

When will the Pledged Money be Paid?

FrontStream cannot begin to pay out funds until it is received and reconciled by the FrontStream Finance department. The date payouts begin depend on the type of donation the donor made, the first date a company forwards the funds to FrontStream, and the frequency the funds are forwarded to FrontStream. Information regarding approximate payout dates and frequency is available in the *FrontStream CRM* notes or the *Client Campaign Notes* document.

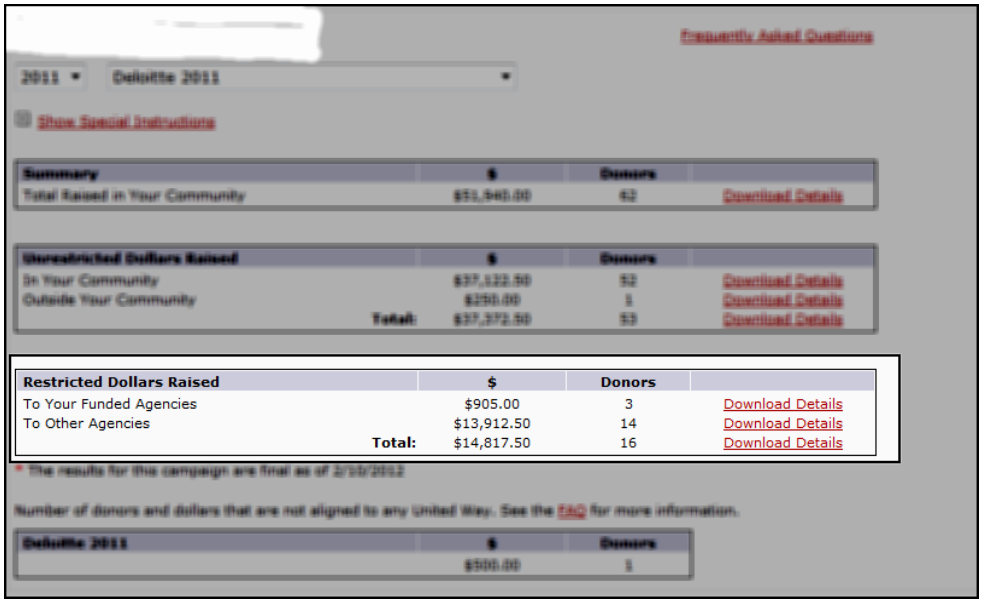
Restricted Dollars Raised

To your Funded Agencies

- Dollars raised within this LUW community and designated to this LUW's Funded Agencies.
- Funded Agencies are the partner agencies and other agencies that are being funded through the LUW Community Fund.

To Other Agencies

- Dollars raised within this LUW community and designated to non-funded agencies within this LUW community or any agency outside this LUW community.



Restricted Dollars Raised		$	Donors	
To Your Funded Agencies		$905.00	3	Download Details
To Other Agencies		$13,912.50	14	Download Details
	Total:	$14,817.50	16	Download Details

How are Funded Agencies Determined?

FrontStream uses the information contained in the Investment Guide (iGuide) to determine the funded agencies.

What is the Investment Guide (iGuide)?

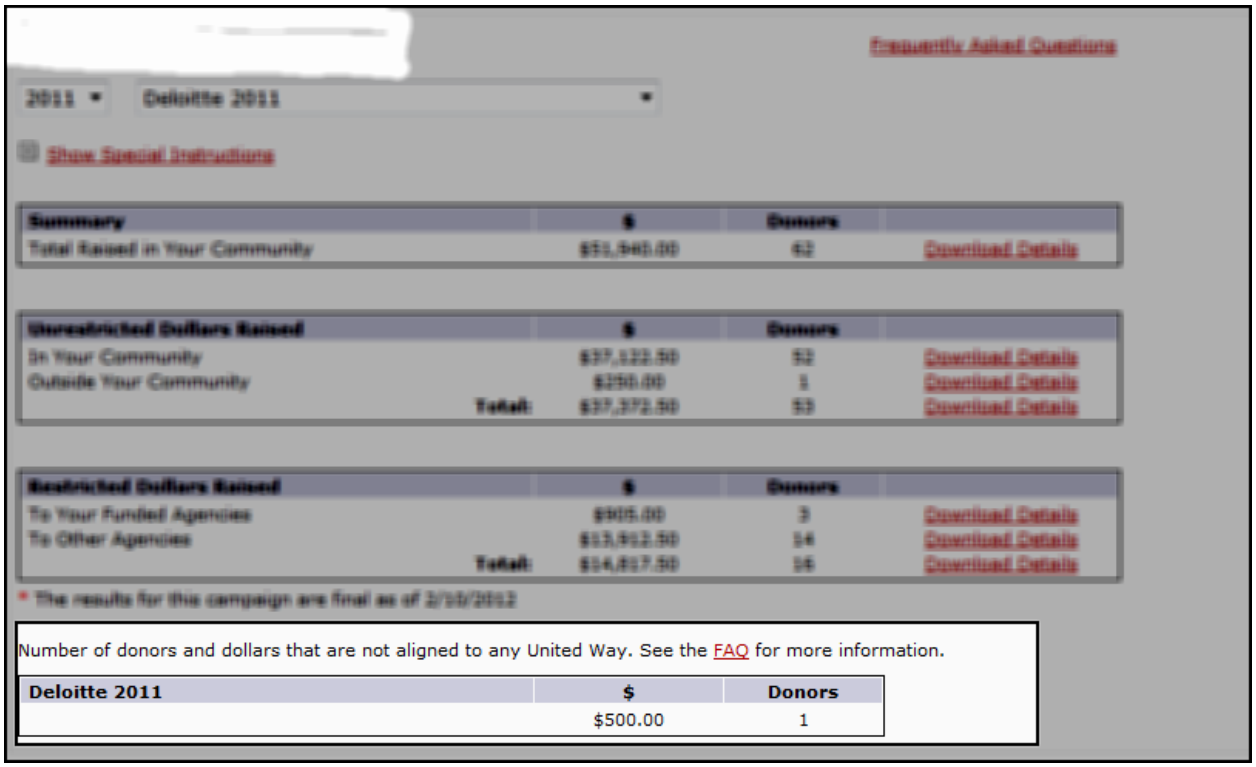
iGuide contains information about the LUW, including the LUW's Service/Impact Areas and their funded agencies. Local United Ways are responsible for maintaining the information contained in iGuide. LUW can access iGuide by going to http://iguide.FrontStream.com. For more information on access iGuide, please see further documentation, *Introduction to Investment Guide (iGuide)*, found on the FrontStream Support Site.

Who is Responsible for Paying Agencies?

The company running the campaign can select designation to be paid a ***Direct Payment*** or a ***Pay-Thru***. In Direct Pay designations, FrontStream pays designations directly to the recipient agency. In Thru-Pay designations, FrontStream pays the Where Raised United Way for any designations, and then the Where Raised United Way pays the recipient agency. The company's preference is listed in the FrontStream *CRM Funds Processing Program* and in the *Client Campaign Notes*. A LUW can opt out of being a Pay-Thru United Way by submitting a letter to FrontStream, requesting funds be paid directly to all agencies or non-funded agencies.

Unaligned Donors

Occasionally, it is not possible to align a donor to a specific United Way. There are various reasons why this may happen; such as the donor was located outside of the US or the client was unable to provide a valid US zip code. When this happens, FrontStream provides each United Way with a count of the number of donors not aligned and the dollar amount this represent. This LUW should not include this amount in their campaign totals. This is for reference only.



Number of donors and dollars that are not aligned to any United Way. See the FAQ for more information.

Deloitte 2011	$	Donors
	$500.00	1

Generating and Downloading the Where Raised Detailed Reports

There are three different types of Detail Level reports available for download:

- Agency Designation Detail
    - Contains ***Agency Information***, ***Total Number of Donors***, and ***Total Designation Amount***.
    - Available in ***Total Raised in your Community***, ***Unrestricted Dollars***, and ***Restricted Dollars***.
    - Not customizable
- Donor Information
    - Account Mangers have the ability to customize report name.
    - Client selects columns to be released, but report may contain ***Donor Information***, ***Total Pledge Amounts***, and ***Applied Pledge Amounts***.
- Donor Information including Designation
    - Account Manager has the ability to customize report name.
    - Client selects columns to be released but report may contain ***Donor Information***, ***Total Pledge Amounts***, ***Applied Pledge***, ***Amount***, ***Designation Amount***, and ***Agencies Information***.

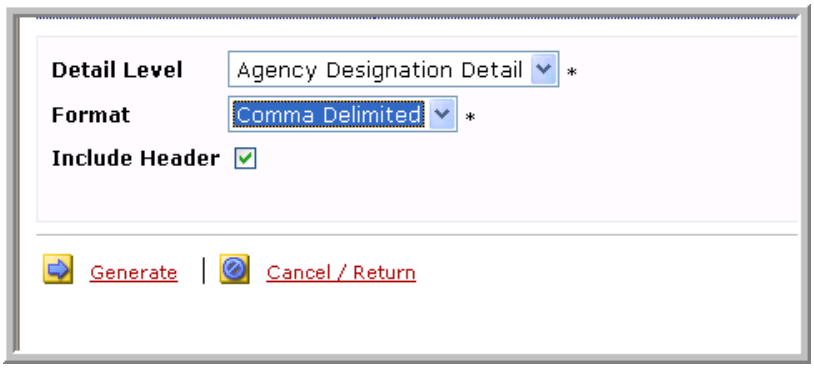
The information released on the ***Donor information*** and ***Donor Information***, including ***Designation*** is customizable by each client. FrontStream provides the client with a suggested list of columns to release (see Appendix A), but the client has the final decision of what will be available. Typically, for FrontStream managed online campaigns, the donor will be asked if they would like to release their personal information. The Where Raised Reporting will honor the donor's preference for release of their personal information.

Generating the Detail Level Report

1. Click "**Download Details**" for the Where Raised Report to be reviewed.
2. Select the ***Detail Level*** dropdown:
    - "**Agency Designation Detail**"
    - "**Donor Information**"
    - "**Donor Information Including Designation Detail**"
3. Select ***Format*** from the dropdown:

- "**Comma Delimited**" (Recommended)
- "**Tab Delimited**"
- "**Excel 2003+**"

4. Click the "**Generate Report**" link.



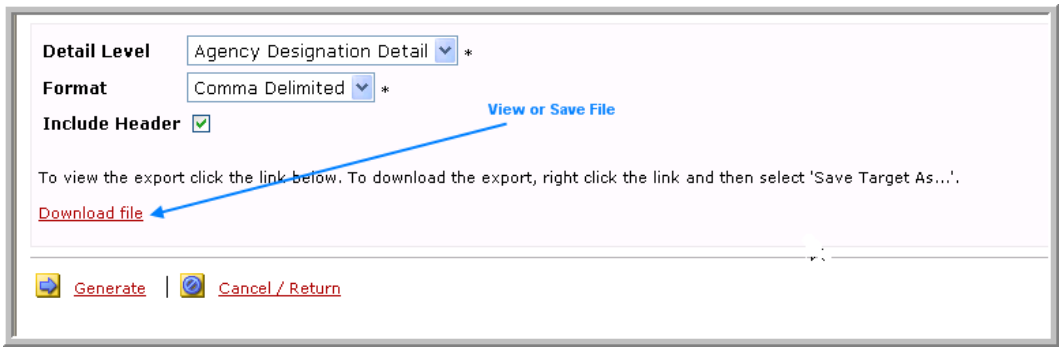
Viewing the Detail Level Report

1. Select either:

- "**Download File**"
  - File will open in an Excel Worksheet.

- "**Save Target as…**"

  1. Right click on download file
  2. Select "**Save Target as…**"
  3. A file ***Download*** box will display. During the download a ***Save as*** box will display. Select a location to save the file, enter a file name, and click "**Save**."
  4. Once the download is complete, a ***Download Complete*** box will appear. Select "**Open**" to view the file.

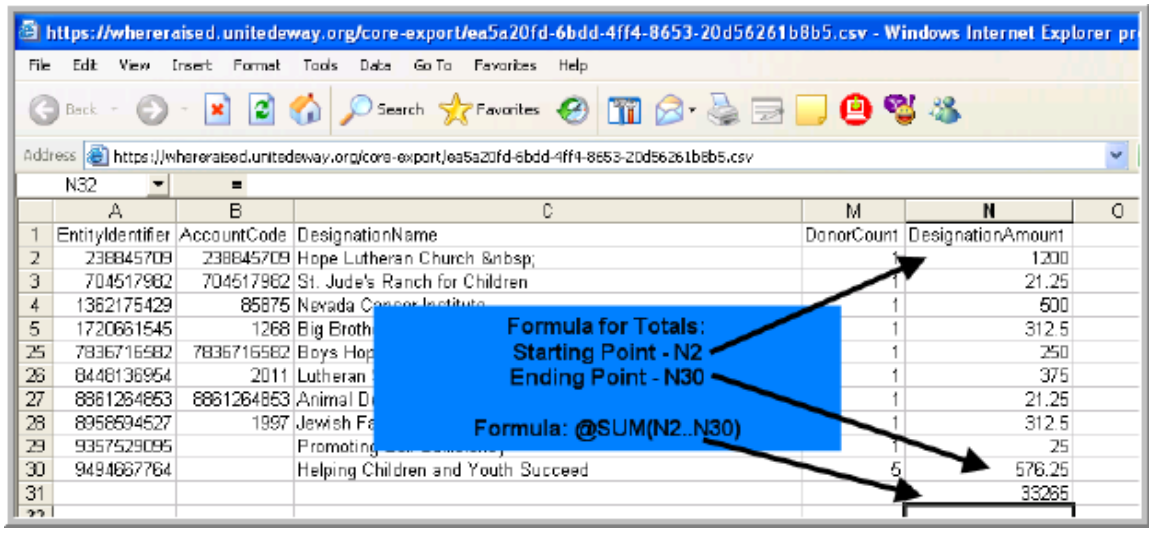


2. The downloaded file will open in Excel.

    - The file will display as a Comma Separated Value (CSV).
    - The column width will not be preformatted. In order to make the report easier to read, you will need to format the column width.

3. The report will not have any column totals. To add totals to a column, take the following steps:

    a. Note the range of cells you wish to add. (Example: Starting Point = N2 and Ending Point = N30.)
    b. Select a cell to enter the formula. (Example: Cell N31.)
    c. Enter the formula. (Example: @SUM(N2…N3) and Enter.)
    d. Total will show up in the selected cell.



4. The LUW can print a hard copy of the report or save a copy for later use. If the LUW does not save a copy, once the report is closed out, they will need to regenerate the report to review it again.
5. To return to the ***Where Raised Reporting*** page to process additional Detail Level Reports, click the "**Cancel/Return**" link and select "**Company and Detail Report**" as required.

Interpreting the Data in the Detail Level Reports

The data contained in the Detail Level Report depends on how much information the company provides, what information the company allows to be released, and what information the donor has allowed to be released.

Local United Way can download file specification and field description for each report:

1. From the main Where Raised Report screen, click "**Frequently Asked Questions**."
2. Click the link for "**Are Export File Specifications Available?**"
3. Click "**Details**."
4. Click the file specification report to be reviewed.
    - Agency Designation Export
    - Donor Designation Export
    - Donor Export

Copies of the file export specification are contained on the next several pages. The majority of the file export fields are self-explanatory but some do require additional information.

Agency Designation Export

- **Donor Count** – If an additional donor designated to more than one agency, the donor will be counted for each additional agency they have designated to.

Donor Export

- **Donor Address Preference** – Used to determine the address a donor prefers to use for Acknowledgment; 1 = HOME, 2 = WORK.
- **Donor Total Pledge Amount** – Total amount a donor donated to all agencies.
- **Donor Applied Pledge Amount** – Portion of the donation applied to the LUW if the donor's Where Raised Zip Code is split with another LUW.

Donor Designations

- **Donor Record Identifier and Donor Identifier** – This number is not unique to the individual donor. Another company can reissue the number.
- **Donor Address Preference** – Used to determine the address a donor prefers to use for Acknowledgement; 1 = HOME, 2 = WORK.
- **Donor Total Pledge Amount** – Total amount a donor designated to all agencies. If a donor designates to more than one agency the donor's total pledge amount will be listed for each agency the donor designated to. Example: Donor donates to $50.00 to two separate agencies; the total pledge amount is $100.00; each donor designation record will show the total pledge as $100.00 and the designation amount as $50.00.

- Donor Applied Pledge Amount – Portion of the donation applied to the LUW if the donor's Where Raised Zip Code is a split zip code with another LUW. If a donor designates to more than one agency the donor's total pledge amount will be listed for each agency the donor has designated to.

Data Export Format Specification

Agency Designation Export

Field #	Field Name	Data Type	Maximum Length	Format	Description
1	EntityIdentifier	Text	10		The unique entity code associated with a specific designateable entity.
2	AccountCode	Numeric	10		The unique code associated with a specific designateable entity.
3	DesignationName	Text	255		Designation Entity's name
4	EIN	Numeric	9		The unique code associated with a specific designation entity.
5	Address1	Text	100		Designation Entity's physical address line 1
6	Address2	Text	100		Designation Entity's physical address 2
7	City	Text	50		Designation Entity's physical address city
8	State	Text	2		Designation Entity's physical address state
9	ZipCode	Numeric	5		Designation Entity's physical address zip code
10	PhoneNumber	Numeric	15	(###) ###-####	Designation Entity's phone number
11	Contact	Text	100		Designation Entity Contact
12	DesignationEntityTypeCode[A]	Numeric	1		Defines the type of agency that is being designated to.
13	DonorCount	Numeric	10		Total number of donors designating to this entity.
14	DesignationAmount	Currency	18	#.00	Total value of the donations designated to this entity.

[A] Values for DesignateableEntityType* include:

1 – Catalog Organization
2 – Catalog Service Area
3 – Catalog Agency Group
4 – Catalog Agency
6 – Agency
7 - Write-In
8 - National IRS agency

Other Notes

- The comma delimited export (csv) uses the double quote (“) as the text qualifier and the comma character as a field delimiter.
- The tab delimited export (txt) uses the tab character as a field delimiter.
- Field names may be included as the first row of the file, the first row of the file is optional.

Where Raised Donor Designation Export

Field #	*Field Name*	*Data Type*	*Maximum Length*	*Format*	*Description*
1	CampaignName	Text	100		Campaign name
2	CampaignCode	Text	20		Campaign Code
3	CampaignYear	Numeric	4		Year of the campaign
4	ManagingOrganizationName	Text	50		Managing United Way name
5	ManagingOrganizationNumber	Text	15		Managing United Way number
6	DistributingOrganizationName	Text	50		Distributing United Way name
7	DistributingOrganizationNumber	Text	15		Distributing United Way number
8	CompanyName	Text	50		Company name
9	CompanyAccountNumber	Text	10		Company account number
10	DonorRecordIdentifier	Text	50		System defined Donor identifier
11	DonorIdentifier	Text	50		User defined Donor identifier
12	EmployeeNumber	Text	14		Donor's employee number
13	NamePrefix	Text	8		Donor's name prefix
14	FirstName	Text	50		Donor's first name
15	MiddleName	Text	50		Donor's middle name
16	LastName	Text	50		Donor's last name
17	NameSuffix	Text	4		Donor's name suffix
18	LeadershipRecognitionName	Text	65		Donor's preferred leadership recognition name

Field #	Field Name	Data Type	Maximum Length	Format	Description
19	SpouseName	Text	65		Donor's spouse name
20	SpouseEmployer	Text	65		Donor's spouse employer name
21	SpouseDonationAmount	Currency	18	#.00	Donor's spouse donation amount
22	DonorAddressPreference	Text	1		
23	DonorHomeEmailAddress	Text	80		Donor's home email address
24	DonorHomeAddress1	Text	100		Donor's home address line 1
25	DonorHomeAddress2	Text	100		Donor's home address line 2
26	DonorHomeCity	Text	50		Donor's home address city
27	DonorHomeState	Text	2		Donor's home address state
28	DonorHomeZipCode	Numeric	5		Donor's home address zip code
29	DonorHomeZipCodeExt	Numeric	4		Donor's home address zip code extension
30	Donor Home Country Code	Text	2		Donor's home address country
31	DonorHomePhoneNumber	Numeric	15		Donor's home phone number
32	WorkEmailAddress	Text	80		Donor's work email address
33	DonorWorkAddress1	Text	100		Donor's work address line 1
34	DonorWorkAddress2	Text	100		Donor's work address line 2
35	DonorWorkCity	Text	50		Donor's work address city
36	DonorWorkState	Text	2		Donor's work address state
37	DonorWorkZipCode	Numeric	5		Donor's work address zip code
38	DonorWorkZipCodeExt	Numeric	4		Donor's work address zip code extension
39	DonroWorkCountryCode	Text	2		Donor's work address country
40	DonorWorkPhoneNumber	Numeric	15		Donor's work phone number
41	DonorWhereRaisedZipCode	Text	10		Default zip code for donor
42	DonorTotalPledgeAmount	Currency	10		Total amount of the donation.

Field #	Field Name	Data Type	Maximum Length	Format	Description
43	DonorAppliedPledgeAmount	Currency	10		Amount of Donor's pledge that applies to this export.
44	AcknowledgementFlag [A]	Text	1		Answer provided for the "I would like to receive an acknowledgement from United Way confirming my contribution." question
45	ReleaseFlag [A]	Text	1		Answer provided for the "I would like to release my name to the agency(ies) receiving my contribution." question
46	CommunicateFlag [A]	Text	1		Answer provided for the "I would like to receive future emails from United Way." Question
47	DonationTransactionNumber	Numeric	25		Unique identifier associated with the donation
48	EntityIdentifier	Text	10		The unique entity code associated with a specific designateable entity.
47	AccountCode	Text	15		The profiles account number associated with the designation.
48	OrganizationCFCAccountCode				
49	DesignationName	Text	255		Agency's name
50	EIN	Numeric	9		The unique code associated with a specific designateable entity.
51	Address1	Text	100		Agency's physical address line 1
52	Address2	Text	100		Agency's physical address 2
53	City	Text	50		Agency's physical address city
54	State	Text	2		Agency's physical address state
55	ZipCode	Numeric	5		Agency's physical address zip code
56	CountryCode				
57	PhoneNumber	Numeric	15	(###) ###-	Agency's phone number

Field #	Field Name	Data Type	Maximum Length	Format	Description
				####	
58	Contact	Text	100		Agency Contact
59	DesignationAmount	Currency	18	#.00	Dollar value designated to DesignationName
60	DesignationEntityType[B]	Numeric	1		Defines the type of agency that is being designated to.
61	DonorCustomField1Description	Text	50		Description of data provided in DonorCustomField1
62	DonorCustomField1	Text	50		Donor specific data as described by DonorCustomField1Description
63	DonorCustomField2Description	Text	50		Description of data provided in DonorCustomField2
64	DonorCustomfield2	Text	50		Donor specific data as described by DonorCustomField2Description
65	DonorCustomField3Description	Text	50		Description of data provided in DonorCustomField3
66	DonorCustomfield3	Text	50		Donor specific data as described by DonorCustomField3Description
67	DonorCustomField4Description	Text	50		Description of data provided in DonorCustomField4
68	DonorCustomfield4	Text	50		Donor specific data as described by DonorCustomField4Description
69	DonorCustomField5Description	Text	50		Description of data provided in DonorCustomField5
70	DonorCustomfield5	Text	50		Donor specific data as described by DonorCustomField5Description
71	DonorCustomField6Description	Text	50		Description of data provided in DonorCustomField6
72	DonorCustomfield6	Text	50		Donor specific data as described by DonorCustomField6Description

Field #	Field Name	Data Type	Maximum Length	Format	Description
73	DonorCustomField7Description	Text	50		Description of data provided in DonorCustomField7
74	DonorCustomfield7	Text	50		Donor specific data as described by DonorCustomField7Description
75	DonorCustomField8Description	Text	50		Description of data provided in DonorCustomField8
76	DonorCustomfield8	Text	50		Donor specific data as described by DonorCustomField8Description
77	RegistrationCustomField1Description	Text	100		Description of data provided in RegistrationCustomField1
78	RegistrationCustomField1	Test	50		Donor specific data as described by RegistrationCustomField1Description
79	RegistrationCustomField2Description	Text	100		Description of data provided in RegistrationCustomField2
80	RegistrationCustomField2	Test	50		Donor specific data as described by RegistrationCustomField2Description
81	RegistrationCustomField3Description	Text	100		Description of data provided in RegistrationCustomField3
82	RegistrationCustomField3	Test	50		Donor specific data as described by RegistrationCustomField3Description
83	RegistrationCustomField4Description	Text	100		Description of data provided in RegistrationCustomField4
84	RegistrationCustomField4	Test	50		Donor specific data as described by RegistrationCustomField4Description
85	RegistrationCustomField5Description	Text	100		Description of data provided in RegistrationCustomField5
86	RegistrationCustomField5	Test	50		Donor specific data as described by RegistrationCustomField5Description

Field #	Field Name	Data Type	Maximum Length	Format	Description
87	RegistrationCustomField6Description	Text	100		Description of data provided in RegistrationCustomField6
88	RegistrationCustomField6	Test	50		Donor specific data as described by RegistrationCustomField6Description
89	RegistrationCustomField7Description	Text	100		Description of data provided in RegistrationCustomField7
90	RegistrationCustomField7	Test	50		Donor specific data as described by RegistrationCustomField7Description
91	RegistrationCustomField8Description	Text	100		Description of data provided in RegistrationCustomField8
92	RegistrationCustomField8	Test	50		Donor specific data as described by RegistrationCustomField8Description

[A] Values for IsAnonymous, Acknowledgement, Release, and CommunicateFlag are:
Y - Yes
N – No

[B] Values for DesignateableEntityTypeCode* include:
1 – Catalog Organization
2 – Catalog Service Area
3 – Catalog Agency Group
4 – Catalog Agency
6 – Agency
7 - Write-In
8 - National IRS agency

Other Notes

- The comma delimited export (csv) uses the double quote (“) as the text qualifier and the comma character as a field delimiter.
- The tab delimited export (txt) uses the tab character as a field delimiter.
- Field names may be included as the first row of the file; the first row is optional.

Where Raised Donor Export

Field #	Field Name	Data Type	Maximum Length	Format	Description
1	CampaignName	Text	100		Campaign name
2	CampaignCode	Text	20		Campaign Code
3	CampaignYear	Numeric	4		Year of the campaign
4	ManagingOrganizationName	Text	50		Managing United Way name
5	ManagingOrganizationNumber	Text	15		Managing United Way number
6	DistributingOrganizationName	Text	50		Distributing United Way name
7	DistributingOrganizationNumber	Text	15		Distributing United Way number
8	CompanyName	Text	50		Company name
9	CompanyAccountNumber	Text	10		Company account number
10	DonorRecordIdentifier	Text	50		System defined Donor identifier
11	DonorIdentifier	Text	50		User defined Donor identifier
12	EmployeeNumber	Text	14		Donor's employee number
13	NamePrefix	Text	8		Donor's name prefix
14	FirstName	Text	50		Donor's first name
15	MiddleName	Text	50		Donor's middle name
16	LastName	Text	50		Donor's last name
17	NameSuffix	Text	4		Donor's name suffix
18	LeadershipRecognitionName	Text	65		Donor's preferred leadership recognition name
19	SpouseName	Text	65		Donor's spouse name
20	SpouseEmployer	Text	65		Donor's spouse employer name
21	SpouseDonationAmount	Currency	18	#.00	Donor’s spouse donation amount
22	DonorAddressPreference	Text	1		
23	DonorHomeEmailAddress	Text	80		Donor's home email address
24	DonorHomeAddress1	Text	100		Donor's home address line 1
25	DonorHomeAddress2	Text	100		Donor's home address line 2

Field #	Field Name	Data Type	Maximum Length	Format	Description
26	DonorHomeCity	Text	50		Donor's home address city
27	DonorHomeState	Text	2		Donor's home address state
28	DonorHomeZipCode	Numeric	5		Donor's home address zip code
29	DonorHomeZipCodeExt	Numeric	4		Donor's home address zip code extension
30	DonorHomeCountryCode	Text	2		Donor's home address country
31	DonorHomePhoneNumber	Numeric	15		Donor's home phone number
32	WorkEmailAddress	Text	80		Donor's work email address
33	DonorWorkAddress1	Text	100		Donor's work address line 1
34	DonorWorkAddress2	Text	100		Donor's work address line 2
35	DonorWorkCity	Text	50		Donor's work address city
36	DonorWorkState	Text	2		Donor's work address state
37	DonorWorkZipCode	Numeric	5		Donor's work address zip code
38	DonorWorkZipCodeExt	Numeric	4		Donor's work address zip code extension
39	DonorWorkCountryCode	Text	2		Donor's work address country
40	DonorWorkPhoneNumber	Numeric	15		Donor's work phone number
41	DonorWhereRaisedZipCode	Text	10		Default zip code for donor
42	DonorTotalPledgeAmount	Currency	10		Total amount of the donation.
43	DonorAppliedPledgeAmount	Currency	10		Amount of Donor's pledge that applies to this export.
44	AcknowledgementFlag [A]	Text	1		Answer provided for the "I would like to receive an acknowledgement from United Way confirming my contribution." question
45	ReleaseFlag [A]	Text	1		Answer provided for the "I would like to release my name to the agency(ies) receiving my contribution." question
46	CommunicateFlag [A]	Text	1		Answer provided for the "I would like to receive future emails from United Way." question
47	DonorCustomField1Description	Text	50		Description of data provided in

Field #	Field Name	Data Type	Maximum Length	Format	Description
					DonorCustomField1
48	DonorCustomField1	Text	50		Donor specific data as described by DonorCustomField1Description
49	DonorCustomField2Description	Text	50		Description of data provided in DonorCustomField2
50	DonorCustomfield2	Text	50		Donor specific data as described by DonorCustomField2Description
51	DonorCustomField3Description	Text	50		Description of data provided in DonorCustomField3
52	DonorCustomfield3	Text	50		Donor specific data as described by DonorCustomField3Description
53	DonorCustomField4Description	Text	50		Description of data provided in DonorCustomField4
54	DonorCustomfield4	Text	50		Donor specific data as described by DonorCustomField4Description
55	DonorCustomField5Description	Text	50		Description of data provided in DonorCustomField5
56	DonorCustomfield5	Text	50		Donor specific data as described by DonorCustomField5Description
57	DonorCustomField6Description	Text	50		Description of data provided in DonorCustomField6
58	DonorCustomfield6	Text	50		Donor specific data as described by DonorCustomField6Description
59	DonorCustomField7Description	Text	50		Description of data provided in DonorCustomField7
60	DonorCustomfield7	Text	50		Donor specific data as described by DonorCustomField7Description
61	DonorCustomField8Description	Text	50		Description of data provided in DonorCustomField8
62	DonorCustomfield8	Text	50		Donor specific data as described by DonorCustomField8Description
63	RegistrationCustomField1Description	Text	100		Description of data provided in RegistrationCustomField1
64	RegistrationCustomField1	Test	50		Donor specific data as described by

Field #	Field Name	Data Type	Maximum Length	Format	Description
					RegistrationCustomField1Description
65	RegistrationCustomField2Description	Text	100		Description of data provided in RegistrationCustomField2
66	RegistrationCustomField2	Test	50		Donor specific data as described by RegistrationCustomField2Description
67	RegistrationCustomField3Description	Text	100		Description of data provided in RegistrationCustomField3
68	RegistrationCustomField3	Test	50		Donor specific data as described by RegistrationCustomField3Description
69	RegistrationCustomField4Description	Text	100		Description of data provided in RegistrationCustomField4
70	RegistrationCustomField4	Test	50		Donor specific data as described by RegistrationCustomField4Description
71	RegistrationCustomField5Description	Text	100		Description of data provided in RegistrationCustomField5
72	RegistrationCustomField5	Test	50		Donor specific data as described by RegistrationCustomField5Description
73	RegistrationCustomField6Description	Text	100		Description of data provided in RegistrationCustomField6
74	RegistrationCustomField6	Test	50		Donor specific data as described by RegistrationCustomField6Description
75	RegistrationCustomField7Description	Text	100		Description of data provided in RegistrationCustomField7
76	RegistrationCustomField7	Test	50		Donor specific data as described by RegistrationCustomField7Description
77	RegistrationCustomField8Description	Text	100		Description of data provided in RegistrationCustomField8
78	RegistrationCustomField8	Test	50		Donor specific data as described by RegistrationCustomField8Description

[A] Values for IsAnonymous, Acknowledgement, Release, and CommunicateFlag are:
Y - Yes
N - No

Other Notes

- The comma delimited export (csv) uses the double quote (“) as the text qualifier and the comma character as a field delimiter.
- The tab delimited export (txt) uses the tab character as a field delimiter.
- Field names may be included as the first row of the file, the first row of the file is optional.

Frequently Asked Questions

Local United Ways can access the FAQs by clicking the "**Frequently Asked Questions**" link on the Where Raised Reporting main report screen.

Why don't I have access to the "Where Raised Reports" for ALL GCL Campaigns?

- Currently, you will only find reports for those GCL Campaigns that are being managed by FrontStream and are using FrontStream's Campaign Management tool to manage their workplace giving campaigns. For information about GCL companies not processed by FrontStream, you can call the GCL Help Desk at (877) 625-4630 or email gclinfo@unitedway.org.

What if I share a zip code with another United Way?

- If a donor's "**Where Raised Zip Code**" is a zip code shared by more than one United Way, the system will automatically calculate the percent of the pledge to be applied to those United Ways affected. The summary data that you see displays the applied pledge amount based on any percentage splits. This means that dollar amounts you see depend not only on the size of the gifts but the percentage of that donor's zip code allocated to your community. When you download the data you will see a column for '**Donor Total Pledge Amount**' and another for '**Donor Applied Pledge Amount**.' The 'Donor Applied Pledge Amount' field will tell you what portion of the total pledge amount your United Way can count towards your "Where Raised" total for that campaign. If you have additional questions about Giftlink zip code assignments, you can contact Jenny Palazio at United Way Worldwide at (800) 892-2757 x 511 or email jenny.palazio@uww.unitedway.org.

How are individual donors aligned to my community?

- Every donor is aligned to your community by following two simple rules:
    - The company can provide specific Where Raised Zip Codes for each individual donor. We call this a Where Raised Zip Code Override. If provided, we use this zip code for alignment.
    - We look to see how the company asked for donors to be aligned - by home or work address - and use the corresponding zip code.

- In some cases, donors may not have a Where Raised Zip Code. At the end of the campaign, FrontStream works with each company to align as many of these donors to their appropriate communities as possible. In some cases, there is simply not enough information to align these donors.

What is the difference between "Restricted" and "Unrestricted" dollars?

- For the purpose of calculating Where Raised Reports, FrontStream defines "**Unrestricted**" dollars as those that have been designated to a United Way and/or its

Impact Areas (also commonly referred to as Service Areas/Targeted Care Areas and Vision Councils). "**Restricted**" dollars are defined as dollars designated directly to agencies within or outside of your United Way's Solicitation/Service Area.

Why are the totals in the "Where Raised Reports" different from the totals the Company gave me?

- There are many possible explanations for why the totals might be different. The Where Raised Reports provided online are based on how the campaign is structured. More specifically, calculations are based off of the provided '**Where Raised Zip Code**'; it is possible the company has calculated your local total differently. Also, there is a possibility that not all donors are aligned to a United Way and/or have been included in the online tools.

Why don't I see detailed Donor information when I download the data?

- In every case, the company determines what donor information can and cannot be shared based on their internal rules. Be sure to reference all related *Campaign Notes*.

How is my Solicitation/Service Area determined?

- Your United Way "**Solicitation/Service Area**" is determined based on the zip codes that are aligned to you in the Giftlink, maintained by United Way Worldwide. FrontStream checks for Giftlink updates monthly. However, it is important to note that the company provides us with the Where Raised Zip Code used for reporting. This can be either a donor's home or work zip code, dependent on company preference. If you have additional questions about Giftlink zip code assignments, you can contact Jenny Palazio at United Way Worldwide (800) 892-2757 x 511.

What are "Campaign Notes"?

- "**Campaign Notes**" are used in cases where additional explanation is needed to understand the way in which a campaign has been structured, reported and/or distributed. In many cases, *Campaign Notes* are not relevant.

What portion of the "Where Raised Reports" can my United Way expect to receive?

- Ultimately, the answer to this question is dependent on how pledges are collected. In determining how you should process the information available through Where Raised Reports, we recommend engaging your Finance staff to ensure proper accounting.

How are split zip codes handled?

- FrontStream online Where Raised Reports fully respect any percentage splits as defined in the United Way Worldwide Giftlink file. The summary data that you see displays an applied pledge amount based on any percentage splits. This means that dollar amounts you see depend not only on the size of the gifts but the percentage of that donor's zip code allocated to your community. When you download the detailed information from the Where Raised reports, you will be provided the original total pledge amount and the amount applied to your community based on Giftlink.

When can we expect "Where Raised Reports" to be available?

- FrontStream works with companies and their account managers to provide campaign results as early as possible. Where Raised Reports will be made available upon the close of a campaign and approval from the individual Companies. For additional information on GCL Companies, you can call the GCL Help Desk at 877-625-4630 or email GCLinfo@unitedway.org or you may visit the GCL Company Profiles posted on United Way Online.

Appendix A: Where Raised Reporting – Suggested Columns to Release

Report Column(s)	*Flex Donor Information*	*Flex Donor Information Including Designation*	*Comments*
Campaign Name	RELEASE	RELEASE	
Campaign Code	RELEASE	RELEASE	
Campaign Year	RELEASE	RELEASE	
Managing Organization Name Managing Organization Number	MAYBE	MAYBE	Only needs to be released if campaign was managed by a company other than FrontStream
Distribution Name Distribution	Maybe	Maybe	Only if being distributed by an organization other than FrontStream

Report Column(s)	*Flex Donor Information*	*Flex Donor Information Including Designation*	*Comments*
Number			
Company Name	RELEASE	RELEASE	
Company Number	No	No	
Donor Record Identifier	RELEASE	RELEASE	
Donor Identifier Employee Number	No	No	For security reasons, do not release – unless at client company request
Name Prefix First Name Last Name Name Suffix	Client Preference	Client Preference	
Leadership Recognition Name	Depends on campaign configuration	Depends on campaign configuration	Only needed if Leadership Option Set was set to request recognition name
Spouse Name Spouse Employer Spouse Donation Amount	Depends on campaign configuration	Depends on campaign configuration	Only needed if Leadership Option Set was set to allow combined giving
Donor Address Preference	Maybe	Maybe	Only needed if release both home and work address information
Donation Transaction Number		RELEASE	Good to have if you need to research Where Raised Reporting issues
Designation Amount	N/A	RELEASE	For accurate reporting must release
Entity Identifier Account Code Organization CFC Account Code Designation Name EIN Address 1 Address 2 City State Zip Code Country Code Phone Number	N/A	RELEASE	

Report Column(s)	*Flex Donor Information*	*Flex Donor Information Including Designation*	*Comments*
Contact			
Donor Customer Field 1-8 Description Donor Custom field 1 – 8	Client Preference	Client Preference	
Registration Custom Field 1 – 8 Description Registration Customer Field 1 – 8	Client Preference	Client Preference	