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Acknowledging Donors

CASE Annual Meeting of
Donor Relations
Professionals

June 14-16, 2004

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Getting started. . .

1. What three questions about gift acknowledgment would you like answered by the end of the workshop?
 - a.
 - b.
 - c.

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Assessing your program. . .

1. Briefly describe the ideal gift acknowledgment program.
2. Briefly describe your institution's gift acknowledgment program.
3. Briefly describe the obstacles that prevent your institution from having the ideal gift acknowledgment program.

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Page 4

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Assessing your program. . .

- Assessing your writing challenges:
 - briefly describe the mission, core values and core purposes of your institution

 - list three outcomes you want to accomplish from your communications

 - list five reasons why you might correspond with your donors/prospects

 - list five people or constituencies you anticipate writing to

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Resources for Writers. . .

- Acknowledgment letters from past years/cycles
- Institution's fact sheet
- Speeches, statements, letters from current head/president
- Current fund-raising priorities
- List of gift opportunities with "selling price"
- College catalog
- Admissions view book
- Pertinent information off the website
- Budget statements
- Treasurer's reports
- Recent reports to the Board of Trustees
- Campus architectural master plans
- Most recent accreditation study
- The inaugural addresses of all heads/presidents
- Any published histories, collections of letters, etc.
- Reunion yearbooks
- Key media articles about the institution
- Historic time line of pivotal events in the institution's history
- College songbook
- A selection of recent letters written to the president from alumni/friends
- Dictionary/Thesaurus
- Visit the reference section of any and all bookstores to look for other books and manuals that may be of use to you in your writing.
- Read well written magazines and books to study how the professionals write.

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Minneapolis, Minnesota
Julia S. Emlen Associates

Page 7

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A Checklist for Donor Correspondence. . .

- What is the mission of your organization? Core values? Core purposes?
- What important messages must be transmitted with every communication? How are messages delivered at your institution?
- In whose name are you writing? How will you represent the signer's point of view?
- What is the purpose of the letter? Gift acknowledgment, fund report, personal note, invitation, condolence, congratulations, rebuttal, announcement, etc., and how will this influence the way in which the letter is composed?
- What information will you need to write the letter? Salutation, preferred address, amount of gift, legacy information, personal information, volunteer status, recent giving history, current solicitation plan, etc. How will you get that information?
- How will you decide the tone of the letter?
- What should the letter or note look like? Paper, size, typed, handwritten, enclosures, cards, notes?
- How will you insure an efficient writing process?
- What will be the disposition of the written document? Reviewers? Copies?
- Above all, how you will deliver the organization's message to the recipient of the written document?

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It's as easy as **APIE** . . .

- **Assess**
 - What is the acknowledgment process (draw a flow chart)? In particular, what chain of review and approval will you follow?
 - What is the anticipated outcome of personal correspondence on the occasion of a gift?
 - Are there alternatives to letters as acknowledgment?
 - To whom will you be writing letters?
 - For whom will you be writing letters? Will you have access to this person?
 - How many letters will you be writing in a day/week/month?
 - Will you be able to draft letters well in advance of having to write them?
 - What support will you have to produce letters, especially in relation to the acknowledgment process?
 - Will this be your sole assignment?
 - Do you have experience as a writer? In letter writing?
 - Is your office set up to best accommodate your writing style and needs?

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It's as easy as APIE. . .

- *Plan*
 - Organize a meeting schedule with the key players
 - Develop a flow chart for your own work in relation to the overall acknowledgment process
 - Anticipate how letters will be routed, copied, mailed and filed
 - Accumulate all the necessary materials to support your writing sessions
 - Review files and research on anticipated letter recipients; make notes, keep records as appropriate
 - Draft letters in advance as possible
 - Strategize ways to use acknowledgment to promote philanthropy among new groups of donors

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It's as easy as APIE. . .

- *Implement*
 - Be prepared to assess again as you implement your plan
 - Allow six months before radically modifying your plan
 - Collect information on problems, slow spots, unexpected requests, successes
 - Keep records on predetermined categories of evaluation
 - Review your job description every six weeks within the first year of your work as an acknowledgment writer
 - Seek counsel and collaboration from colleagues at your institution and with others through conferences, visits, email, etc.

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It's as easy as APIE. . .

- *Evaluate*
 - Did you meet the goals of the acknowledgment program?
 - What can be changed in the flow chart/process to improve your work efficiency?
 - Are there other activities that you wish to include to increase the effectiveness of your work?
 - What macro-projects have arisen that will have to be factored into your work going forward?
 - To what priorities would you like to divert some of your energy; for what reason?
 - Is there an opportunity for you to present your evaluation to the entire advancement team?

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These materials were gathered from the Internet and represent a selection of policy and procedure documents related to acknowledgment.

POLICY OVERVIEW

Since private donors play a critical role in the growth of The University of Texas Health Science Center at Houston (UTHSC-H), all gifts will be acknowledged within the established gift acknowledgment system. The system ensures that donors are informed of the receipt and use of their gifts.

The president has delegated to the Development Office the responsibility of administering the gift acknowledgment system.

The UTHSC-H will effectively communicate the university's appreciation to all major donors in a systematic manner. Stewardship recognizes that each donor is unique. Stewardship attempts to bring the donor into a more intimate relationship with the university. It is the university's responsibility to instill in the donor a confidence that the gift was given to the right institution.

Individual schools may also wish to recognize donors or groups of donors in other ways at the school's expense and in coordination with the Development Office. All donor recognition is subject to the availability of funds within each school or unit that is the donee.

PROCEDURE

In every case, the recipient of a gift should acknowledge it promptly with a thank-you letter to the donor. Program directors, department chairs, and deans are encouraged to express appreciation to donors. When appropriate, thank-you letters may also be sent by the president, the vice president for development, and development officers involved in soliciting the gift.

Official receipts for all gift types are generated through the Development Office's electronic record-keeping system and are mailed within 24 hours to the donor.

After a gift is recorded in the Development Office, the Development Office will follow the protocol for thanking the donor and acknowledging receipt of the gift.

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All individuals or foundations making gifts of \$1,000 or more, and all companies/corporations making gifts of more than \$3,000 receive a thank-you letter from the president, generated by the Office of Development. Copies of the signed thank-you letters are sent to the appropriate program directors, department chairs, and deans, who are encouraged to write thank you letters. All individuals or foundations who contribute \$999.99 or less (or, in the case of companies/corporations, \$3,000 or less) receive acknowledgment in the form of a receipt and thank you card.

Appreciation and recognition of major gifts may take place in a number of ways: Every major donor may expect expeditious acknowledgment and appropriate recognition from the president, dean, and development board chair. A donor who has established a chair or professorship will have an opportunity to visit with the holder along with the president, dean, and/or appropriate individuals. Each endowment donor will receive a report (produced by the appropriate endowment holder) on the use of the gift. Stewardship will continually look for new opportunities and methods to show appreciation to donors.

Updated 2/01

Development Policy: Gift Acknowledgment Procedures

Too often, gifts are not appropriately acknowledged and the donor is offended. Care must be taken to ensure that donors are appropriately acknowledged so that future cultivation is possible. Although the dean, director, or Chancellor are identified here as individuals required to acknowledge the gift, the individual recipient or department head is also encouraged to send a thank you. The Development Office is to be sent copies of all acknowledgements so that donor files may be kept current.

All gifts to the University of Alaska Fairbanks must be acknowledged by the receiving unit and the Development Office as follows:

1. Gifts of \$1,000 and more are acknowledged by a letter from the Chancellor, the Development office, the department head and/or dean or director as appropriate.
2. Gifts under \$1,000 are acknowledged by the Development office and the Chancellor as deemed appropriate.

CASE Annual Meeting of Donor Relations Professionals, June 2004
Minneapolis, Minnesota
Julia S. Emlen Associates

Page 15

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In cases where a personal relationship exists between the donor and a faculty member and/or other administrators, the appropriate faculty member, dean or director should acknowledge the gift.

All donors who make a donation to a fund managed by the University of Alaska Foundation will receive a Foundation acknowledgement and receipt. This acknowledgment will indicate the name and address of the donor, the date, the amount of the gift, and the fund credited with the gift.

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General Guidelines on Gift Acknowledgment

The Rotary Foundation will:

- Send receipts and letters of appreciation for all gifts.
- Honor requests for privacy. If a donor wishes to remain anonymous, the Foundation must be notified at the time the gift is made. A request for anonymity means, among other things, that the donor's name will not be published in any public document such as the *Salute to Donors* publication circulated at the Rotary International Convention.
- Subtract the fair market value of recognition items from receipts when required to do so by US law.
- Acknowledge major gift pledges at their full value when written documentation and an initial gift installment payment are received.

Additional questions about gift acknowledgement should be directed to your [Development Services representative](#).

Planned Parenthood of the St. Louis Region Gift Acknowledgment & Database Assistant

POSITION: Gift Acknowledgment & Database Assistant

STATUS: Part-time (20 hours/week)

REPORTS TO: Director of Development

POSITION OVERVIEW:

Responsible for managing donor databases: taking care of donor records including managing of contributions processing and data entry, list maintenance and filing. Requires the ability to communicate effectively with PPSLR's constituency via the telephone, excellent written communication skills, grammatical skills required for the production of gift acknowledgment letters to donors, and the ability to handle the demands of coordinating and processing bulk mailing. Includes word processing and data entry that may require sitting at a desk for extended periods of time.

SPECIFIC RESPONSIBILITIES:

- Contributions processing:** Receive contributions daily, enter into computer, assure accuracy of all data, prepare appropriate thank-you letters within 24 hours of receipt of gift. Bring to the attention of Director of Development all unusual contributions, including reinstatement of lapsed donors, increased gifts, all gifts with any personal or handwritten notes, etc.
- File maintenance:** Maintain donor list of approximately 10,000 names, assuring accuracy of addresses and phone numbers as well as names. Change addresses, phone numbers and legislative districts as needed. Maintain complete and accurate paper files for all major individual, corporate and foundation donors.
- Monthly reports:** Prepare monthly reports, assuring accuracy of all figures by balancing totals with the accounting office. Compute all statistics and assure accuracy of all reports.
- Prospect information:** Enter all lists received for potential new donors. Look up addresses, cross-checking with current donor list and input new names.
- Telephone communication:** Speak with donors by telephone when they call with questions or concerns. Must be

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handled in a professional and courteous manner. Bring to the attention of the Director of Development all unusual or problematic discussions with a donor.

- Other duties as assigned, including general support of the activities of the Development Department.

QUALIFICATIONS AND REQUIREMENTS:

- Minimum of bachelor's degree, and at least two years experience as a paid employee in a position of responsibility and/or volunteer in a leadership role. Minimum of 2 years previous experience in fundraising/development preferred.
- Excellent verbal and written communication skills
- Computer literacy in Microsoft Word, Excel and database experience with DonorPerfect software a plus
- Ability to work with figures with speed and accuracy
- Excellent organization skills and attention to detail
- A thorough knowledge of database management
- Excellent written and verbal skills
- Personal commitment to the Planned Parenthood mission

The position requires an individual who is self-motivated, learns quickly, is highly responsible. It also requires excellent team work, including assertive communication, generous provision of assistance to fellow team members, readiness to ask for assistance and support, and ability to keep focused on the overall goals and mission of the Development Department and of PPSLR.

GIFT ACKNOWLEDGMENT GUIDELINES: Gift acknowledgment letters are generated in the Gifts Office using the Donor Information Forms. Acknowledgments get generated at the end of each month. All letters get signed by the Director of Libraries.

LETTERS: Use stationary the "Director of Libraries" letterhead. Supply is kept in the Director's Office.

Title: If the title (Professor, Dr., Mr., Mrs., Ms.) is missing from the donor form, the Gifts Office Assistant will check the MIT Staff Directory. If title is not given, cannot be found in the Staff Directory the title will be assigned as "Mr." or "Ms.", depending on gender. If gender cannot be determined, we will use the donor's full name in the salutation.

Layout: Three fields in the letter should maintain consistent positioning:

Date of letter

Salutation

Line which reads "The MIT Libraries gratefully acknowledge...." should always line up with the bold MIT in the left margin.

Dates: Each letter has 2 dates: the date the letter was generated and the date the gift was received.

Contents of Gift: If the gift is 10 items or less, the letter will list the titles of items donated.

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If the gift is more than 10 items, the letter will list a count by category of material.
Contents of Letter: The Director of Libraries may wish to revise the contents on an annual basis.

ENVELOPES: Use envelopes with "Director of Libraries" as the return address, to match the letterhead. Supply is kept in the Director's Office. Window envelopes will be used until the supply is depleted. After that, donor addresses should be printed up directly on the envelopes or on labels. Interdepartmental envelopes can be used for those envelopes being delivered on-campus.

POSTCARDS: Postcards should be ordered through our department secretary. Postcards are NOT signed by the Director of Libraries, although this title is printed on the postcard. Postcards are used for acknowledging gifts from corporations or gifts of questionable value to our collections, where we don't want to encourage the donor to give us additional gifts of like quality.

DISTRIBUTION: After letters are signed by the Director of Libraries, the letters should be retrieved by the Gifts Office Assistant and stuffed into envelopes for mailing.

Acknowledgment System (F45)

Last Update: 04/12/04

Acknowledgment of gifts and pledges is the foundation for maintaining and increasing donor support to the University. This is a decentralized operation, with each School/College/Area responsible for acknowledging gifts received. The generation of acknowledgment letters, for donations of \$1,000 or more, is required within 48 hours of receipt of gift.

A. Schools, Colleges and Areas

Gables/Rosenstiel - Each school and college, as well as Athletics, the Lowe and Richter Library, is responsible for generating its own acknowledgment letters for gifts/pledges of \$1,000+.

Medical - The following departments are responsible for generating their own acknowledgment letters: Sylvester Comprehensive Cancer Center, The Miami Project, Medicine, Neurology, Psychiatry, Surgery, Bascom Palmer, Pediatrics, Diabetes and Orthopaedics. Medical Development acknowledges gifts/pledges of \$1,000+ for the remaining departments. Letters are to

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be written over the Dean's signature, with copies sent to the Department chairs and Development Communications.

1. Internal Support Process

Receipts are sent from the Advancement Office to all donors giving CASH gifts regardless of the amount of the contribution. The receipt forms, which include tax deductibility statements, serve as the document required by the donors for their taxes.

Gifts/pledges are received either through Advancement or directly by Schools/Colleges/Areas. For those received by Advancement as well as those *not given directly to the School/College/Area that is the beneficiary of the donation*, Advancement Services will fax the back-up documentation to the appropriate School/College/Area responsible for acknowledging the gift.

Development Communications provides two reports, to facilitate the acknowledgment process:

- *Weekly Gift Acknowledgment Report* (by School/Department/Area) sent as a paper copy, an Access or Excel download, to advise of gifts within the dollar amount range that you choose.
- *Quarterly Tracking Report*, sent as an e-mail, listing overdue acknowledgment letters not yet received by Development Communications.

The *Weekly Gift Acknowledgment Report* is for use in identifying those gifts of \$1,000 or more that must be immediately acknowledged. The *Quarterly Tracking Report*, with a cover memo from Development Communications, is a follow-up to ensure that copies of the letters are sent to Development Communications and to advise which acknowledgments have not yet been received.

2. Acknowledgment Procedures

a) If a cash/check/credit card gift is received directly by a School/College/Area on a campus other than Medical: Make a copy of documentation to retain for your records, and immediately deliver **the actual check and a duplicate copy, the original documentation and two transmittal forms**, to Advancement Services attention: Advancement Receptionist, Advancement Services, McKnight Bldg, 1210. For further details, please see Gift Processing Procedures (F30).

b) If a cash/check/credit card gift is received directly by a Medical School Department: Make a copy of documentation to retain for your records, and immediately forward **the actual check, original documentation and transmittal form** to the Medical Finance Office, Hallissee Hall (D2-4). After copying documentation for pledges and gifts-in-kind, please forward **original documents and transmittal forms** to Associate Director, Development Services, 18 Plumer Bldg, 2437.

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c) Send an acknowledgment letter, using the Dean's/Director's signature, to the donor within 48 hours of receipt of direct gift or documentation from Advancement. **The letter should state whom the gift is from in the first paragraph** (for example: Dear Mr. Jones, Thank you for your gift of \$10,000 from the Calpac Foundation, in support of.....or, Thank you for your personal gift of \$10,000 to support....). Do **not include a tax statement**. This will appear on the official receipt from Development Services.

d) Send a copy of the original acknowledgment letter (**including the batch number and/or copy of corresponding weekly report or download**) to Development Communications attention: Staff Associate for Acknowledgment, Development Communications, 201 McKnight Bldg. Locator 1210. Development Communications will prepare letters from the Vice President of University Advancement and the President based on the level of giving.

e) Include in the text of the acknowledgment letter any specific restrictions or instructions **“per the donor’s verbal request” when the donor provides verbal direction that is different from existing written instructions or if there is no written record of the donor’s intent** – and provide an opportunity for the donor to advise if this interpretation is incorrect (for example: We received your gift of \$\$\$. As you requested, we have allocated this funding to support...If this does not accurately reflect your preference, please advise us so that the designation of your gift is corrected.) Forward a copy of this to Development Services to be stored with the gift’s supporting documents.

3. Specific Gift Types

Foundation/Corporate Gifts - For these gifts and pledges, supporting documents should be reviewed to identify the appropriate contact person. The Office of Foundation Relations or the Corporate Relations Office can answer questions concerning contacts.

Gifts in Kind - If the apparent value is \$1,000 or more, follow normal procedures for acknowledgments, however, DO NOT state the value (apparent or appraised) in the acknowledgement letters for these gifts/pledges. For further details see [Gifts of Non-Cash Items \(F40\)](#).

Gifts through Other Organizations – For gifts made through the United Way and other organizations, acknowledge the individual donor and express thanks for the gift made “through” the organization (for example: Thank you for your donation of \$\$, made through the United Way of Miami-Dade, to support the University of Miami School of...).

Honorary/Memorial Gifts – These gifts require a memorial/honorary card to be sent to the family of the honored/memorialized individual to advise them of the donation in their relative's name. Each School/College/Area is responsible for preparing its own cards. If the donation is \$1,000+, normal procedures apply for each School/College/Area to send an acknowledgment letter to the donor as well.

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Matching Gifts - All Schools/Colleges/Areas are responsible for acknowledging gifts from both donors and their matching gift companies, for gifts of \$1,000 or more.

Planned Gifts - All Schools/Colleges/Areas wishing to acknowledge these gifts are advised to contact the Office of Planned Giving for assistance with wording. Acknowledgments for planned gifts such as bequests and trusts are the responsibility of Development Communications.

Pledges - Pledge commitments of \$1,000 or more are to be acknowledged, along with all pledge payments, even if an individual payment falls below \$1,000. Copies of these letters, for payments of \$1,000 or more, should be distributed to Development Communications.

Split Gifts - Gifts to more than one School/College/Area receive an acknowledgment letter from each School/College/Area referencing the amount given to that particular one.

Stock Gifts - Schools/Colleges/Areas acknowledge only the number and type of shares, sending the letter within 48 hours of receipt of stock. (A separate acknowledgment letter, signed by the Vice President for University Advancement, is prepared by Development Communications, to include the mean dollar value of the stock donation on the date of the gift, as well as the appropriate tax statement).

VIP/Trustee Gifts - All Schools/Colleges/Areas are responsible for acknowledging gifts of \$1,000 or more. Development Communications may prepare additional letters for the Vice President or President.

Gifts Above \$1,000 - Acknowledgment letters are required within 48 hours of receipt of gift.

B. Development Communications

1. Responsible for acknowledging gifts of \$1,000 or more, under the signature of the Vice President for University Advancement, unless otherwise noted, for the following areas:

- Alumni Office (funding to support the Alumni Association)
- Citizens Board
- General Unrestricted/Undesignated Gifts
- Honorary/Memorial Gift Cards*
- Matching Split Gifts/Unrestricted Matching Gifts
- Planned Giving (Bequests and Charitable Remainder Trusts)
- Stock Gifts** (include stock value on gift date and the *benefits received* statement)
- VIP/Trustee/Top UM Administrator Gifts

*Development Communications sends for unrestricted gifts.

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**Stock gift acknowledgment letters include a statement explaining valuation requirements per tax codes. If the *Treasurer's Office* receives notification of a stock gift that cannot be immediately sold, this information is conveyed to Development Services, which then contacts Development Communications to send an immediate acknowledgement without a stock value. Once the stock transaction is completed, the Treasurer's Office advises Development Services who passes this information to Development Communications to send another acknowledgement letter, which includes the specific stock value.

2. Preparation of acknowledgement letters under the signature of the President, including planned giving.

3. Provides daily gift logs, to University fundraisers, that include:

- Donor Name and ID Number
- Amount and Purpose of Gift (Account Title)
- Salutation

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16.1 General Introduction

Recognition of donors is an integral part of the University's advancement efforts. It is important to thank donors promptly for their gifts in a manner appropriate to the size of their gifts and consistent with their personal wishes. Donor recognition begins and ends with the desires and wishes of the donor. The guiding principle of all donor recognition endeavors is to abide with donors' wishes for recognition or anonymity. It sets the stage for continuing correspondence with the donor and lays the foundation for continuing a mutually satisfying relationship between the donor and the University. Donors who are given the opportunity to join in University community activities and who are recognized for their participation are often the best sources for future gifts.

A university-wide gift recognition policy will assure consistency in honoring donors and establish the acknowledgment responsibility for the various steps in the recognition process.

16.2 Gift Clubs

- A. The University and its colleges, schools and departments receive many gifts annually for a myriad of purposes. All gifts must be acknowledged in a consistent manner and receive equivalent gift club membership and benefits, keeping in mind that the more personal the recognition, the more likely additional gifts will be received.
- B. Membership in University gift clubs is generally based on cumulative annual giving during a fiscal year, which may include corporate matching gifts generated by the individual donor. Foundation and corporate gifts are included for purposes of donor recognition. In-kind gifts are handled at the discretion of the individual college/school/program for the purpose of donor recognition. In addition, soft credit may also be added for foundation/corporation matching gifts received that came about as a result of or are controlled by the individual donor.
- C. All gifts will be recorded in the current electronic database. Donors of gifts between \$1 and \$1,499 will receive predetermined benefits, incentives and acknowledgment as outlined in Appendix 15. Recognition of donors of gifts of \$1,500 or more will be more personal based on interest or purpose of the gift, and may include permanent recognition, publicity and other honors. Guidelines for personalized recognition also are included in Appendix 17.

16.3 Colleges/Schools/Programs Donor Recognition Programs

Gift Club designations are handled at the discretion of the individual college/program within general guidelines.

- A. Gift acknowledgment and recognition levels for gifts between \$1 and \$2,499 is at the discretion of the individual college/school/program.

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B. To enhance the value of campus wide recognition of gifts of \$2,500 or greater, colleges/schools/programs are asked to demonstrate a continuity with the University giving levels, designations, and means of recognition for gift acknowledgment. Based upon cumulative giving, these levels are:

University Associate \$2,500 - \$9,999
University Patron \$10,000 – \$24,999
University Colleague \$25,000 - \$49,999
University Bronze \$50,000 – \$99,999
University Silver \$100,000 – \$249,999
University Gold \$250,000 - \$499,999
University Platinum \$500,000 – \$999,999
University Benefactor \$1,000,000 or more

C. Colleges/schools/programs can recognize donors at their discretion with token items within guidelines and parameters established by IRS regulations regarding safe harbor. Current regulations are shown in Appendix 6.

16.4 University-wide Recognition

A. University-wide donor wall

1. Categories

The name of major donors to the University (\$25,000 or more) will be recognized publicly for their contributions in a central location on campus. Inclusion at the donor recognition site is based on the following criteria:

- *Single gifts from individuals of \$25,000 or more (single gift)
- *Single gifts from corporations and foundations of \$100,000 or more (single gift)
- *Cumulative life-time gifts of \$100,000 or more by an individual
- *Cumulative life-time gifts of \$500,000 or more by a corporation or foundation

Each categories of giving will be listed in separate sections at the donor recognition site.

2. Location

The President and Vice President of Advancement will determine the location and design of the donor recognition site. It should be a unique design that does not compete with recognition or activities of other groups.

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3. Stewardship

The Director of Constituent Relations, who will also arrange events to honor inductees to the site, will maintain the donor recognition site.

B. Other recognition sites

The establishment of a University donor recognition site does not preclude colleges, schools or departments from erecting their own donor recognition areas for donors to capital campaigns or specific programs. (See Section 17)

C. Annual Honor Roll of Donors

Based upon cumulative annual giving within the fiscal year, a university-wide Annual Honor Roll of Donors should be developed for university publications such as the Annual Report or as an insert in Poly Trends. The list for publication for the Annual Honor Roll of Donors will be screened by the Director of Development for each college/school/program prior to printing for any additions or deletions, with particular attention to those donors who wish to remain anonymous.

Suggested levels for the Honor Roll of Donors are:

\$1-99
\$100 - \$499
\$500 - \$1,499
\$1,500 - \$4,999
\$5,000 - \$9,999
\$10,000 - \$24,999
\$25,000 - \$49,999
\$50,000 - \$99,999
\$100,000 or more

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This section is a literature search in Amazon.com on American Usage and Writing Letters. You can see that there are innumerable resources to support your writing and English language usage in book form. There are also websites that address these issues, so that you don't have to purchase books if you don't wish to. In addition, reading magazines of high quality, such as The New Yorker and Atlantic Magazine, among others, will help you develop your skill as a writer.

Garner's Modern American Usage by Bryan A. Garner (Hardcover - October 2003)

Practical English Usage by Michael Swan (Paperback - April 1995)

The New Fowler's Modern English Usage (New Fowler's Modern English Usage, 3rd Ed) by R. W. Burchfield (Editor)

Merriam-Webster's Dictionary of English Usage by Merriam-Webster (Hardcover)

Common Errors in English Usage by Paul Brians (Paperback - June 2003)

The Most Common Mistakes in English Usage (Schaum's Paperbacks) by Thomas E. Berry (Paperback)

Penguin Dictionary of American English Usage and Style [DOWNLOAD: ADOBE READER] by Paul W. Lovinger

A Dictionary of Modern English Usage (Oxford Language Classics Series) by Henry Fowler, Simon Winchester

The American Heritage Book of English Usage : A Practical and Authoritative Guide to Contemporary English

The Cambridge Guide to English Usage by Pam Peters

Merriam-Webster's Concise Dictionary of English Usage by Merriam Webster

Medical English Usage And Abuse: by Edith Schwager

The Oxford Guide to English Usage (Oxford Paperback Reference)

The Elements of Style, Fourth Edition by William Strunk Jr., et al.

Great Letters for Every Occasion by Rosalie Maggio

Over 300 Successful Business Letters for All Occasions by Alan J. Bond

Sponsored Links: What's this? Over 2,100 letter writing templates - business, sales and personal. --
www.WriteExpress.com

Great Personal Letters for Busy People: 300 Ready-to-Use Letters for Every Occasion by Dianna Booher

Everyday Letters for Busy People: Hundreds of Sample Letters You Can Copy or Adapt at a Minute's Notice

1001 Letters for All Occasions: The Best Models for Every Business and Personal Need by Cory Sandler, et al

Just a Note to Say . . . : The Perfect Words for Every Occasion by Florence Isaacs

Effective Letters for Every Occasion by Casey Fitts Hawley

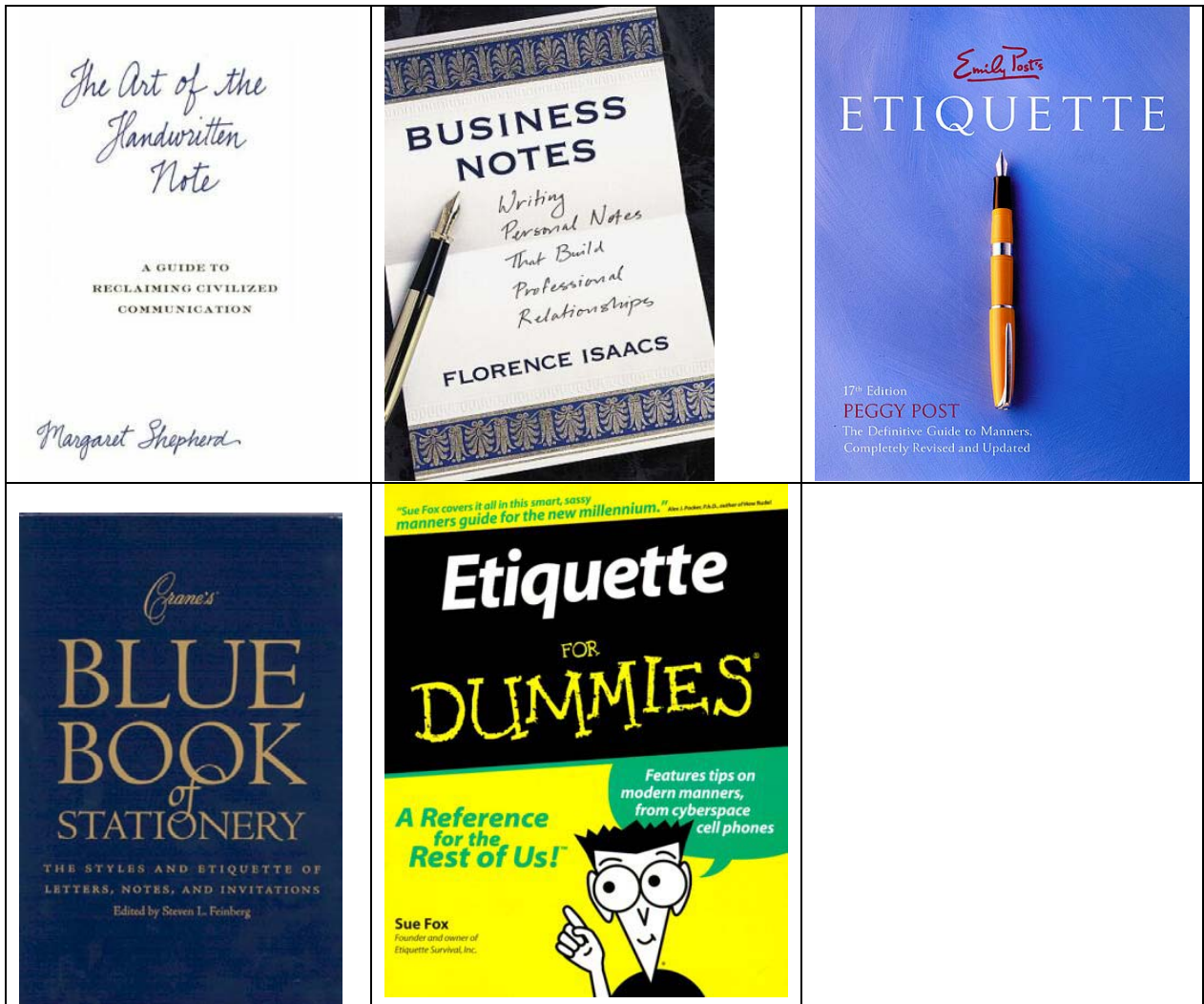
How to Say It: Choice Words, Phrases, Sentences & Paragraphs for Every Situation by Rosalie Maggio

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When Words Matter Most : Thoughtful Words and Deeds to Express Just the Right Thing at Just the Right Time by Robyn Freedman Spizman

The Classic Guide to Better Writing : Step-by-Step Techniques and Exercises to Write Simply, Clearly and Correctly by Rudolf Flesch

Here are some etiquette books that cover the subject of letter writing:



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I found this q and a on the Internet. You might think about using it as a template for explaining your own system. I don't recommend that you take on all these processes as your own.

1. *Who writes donor acknowledgments for the Chancellor's signature?*

The Donor Acknowledgments writer in Development Communications and Donor Relations is officially designated to draft the Chancellor's thank-you letters to UCLA's major donors. We research, write and coordinate the review and signing of some 40-70 letters, including letters of condolence, every month. Chancellor Carnesale also drafts some thank-you letters by hand, and his office sends us copies for our files.

2. *Who receives an acknowledgment letter from the Chancellor?*

- A donor who has made a single gift or pledge of \$20,000 or more.
- A donor who has made two or more gifts totaling \$20,000 or more within a given period (usually 90 days).
- A donor who completes an outstanding pledge of \$20,000 or more (note: mid-pledge payments, regardless of size, are not acknowledged).
- A Foundation board member who has made a gift or pledge of usually \$5,000 or more.
- A donor for whom a letter is written at the request of a Development officer.

Note: Donors of gifts to annual-giving groups for events (e.g., Couches Roundtable, Royce Center Circle, Aesculapians Ball) typically do not receive a Chancellor's acknowledgment. New and continuing Chancellor's Associates receive standard, tailored letters each year; these are coordinated by the UCLA Fund.

3. *How are donor acknowledgment letters researched, written and reviewed?*

Expressing written appreciation to donors from a university's chief executive is simply good stewardship. To ensure their accuracy, quality and integrity, preparing an acknowledgment involves a team approach:

Donor Acknowledgment Writer	Development Officer	Chancellor's Office
* Downloads gift paperwork from OTG * Researches missing information * Writes and edits the letter * Coordinates review * May also receive direct information from the Development officer in advance of gift paperwork	* Reviews letter for accuracy * Adds timely information to personalize the message * In some cases, requests that a letter be drafted before paperwork is received	* Signs and sends the letter * Sends blind copies to Development officers and Donor Acknowledgment writer

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4. *Who reviews donor acknowledgments after they are written and in what order?*

- Development Communications reviews for proper grammar and punctuation, for appropriate Chancellorial style and consistency of message.
- The Development officer in the unit receiving the gift reviews for accuracy of content and may add information to personalize the letter.
- The PMATS Manager (if different from the Development officer) reviews for overall donor cultivation.
- Corporate, Foundation and Research Relations reviews corporate and foundation gift acknowledgments.
- The Associate Vice Chancellor for Development reviews letters to members of the Campaign Cabinet and other special friends.

Note: In rare instances (e.g., a principal gift to multiple programs) as many as seven different Development officers may be involved in the review of a single letter.

E-mail and faxes help speed the process and are our best way to ensure an accurate letter.

5. *What should a Development officer look for in reviewing an acknowledgment letter?*

Does the letter have the correct address and salutation? Is the gift information accurate? Does the letter convey the “personal touch” (e.g., “Richard, it was a pleasure seeing you and Barbara at the College Awards Dinner last week.”)? Has the donor been ill, and should the Chancellor include get-well wishes.

6. *Does the Chancellor ever edit letters?*

Rarely. He’s been known to revise a salutation from time to time (e.g., from “Dear Mr. Smith” to “Dear John”), but that’s about all.

7. *How does the Donor Acknowledgments writer know the names of donors the Chancellor knows on a first-name basis?*

We rely on our Development colleagues to advise us when the Chancellor has met a donor and can henceforth address him/her on a first-name basis. That’s the only way, short of asking the Chancellor himself, to keep our Chancellor’s Salutation Database current. You can access the Database, and provide information to us, by visiting the Island External Affairs Home Page. Log in, click on *Development*, then *Campaign Operations*.

8. *Who has the last word on a letter?*

We usually defer to the Development officer/PMATS Manager to advise on the content of a letter. Responsibility for resolving sticky grammar, punctuation and certain word-choice issues rests with Development Communications

9. *When is a gift considered too old to acknowledge?*

We try to acknowledge gifts as soon as possible after they are booked. The Chancellor’s prompt recognition conveys not only appreciation to donors, but also that their gift has been smoothly processed through the system. For this reason, barring special circumstances or a request from the Development officer – and as long as the donor has been thanked at the school level – the Chancellor does not acknowledge gifts that are more than two months old.

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10. *What else can we say?*

We've been working to streamline, hasten and otherwise improve the way we research, write and review letters. But all the database-management in the world can't replace the value of word-of-mouth. As you continue working closely with the Chancellor, and with your donors, the knowledge and insights you gain into their relationship, and the degree to which you can pass along relevant information to us, will help us better serve you.

Prepared by Development Communications and Donor Relations
October 2004

Donor Acknowledgments Writer

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This template might be useful in auditing acknowledgment processes and procedures, separate from the issue of letter content. The template is based on a flow chart of an acknowledgment program. You can create your own template by first drawing your own acknowledgment flow chart and then distributing the elements in the table format presented here. You can assign time limits or ideals to each element and then track acknowledgment batches against the ideals. You can use the information gathered in this way to make quality control improvements in your acknowledgment program.

Flow Chart Element	Ideal Processing Time	Batch 1	Batch 2 . . .	Actions
Gifts entered	<i>Daily gift entry</i>			
Electronic file transferred to donor relations letter writer	<i>Every three days in order to provide volume Daily during end-of-year gift season</i>			
Letters prioritized by donor relations letter writer	<i>Within 24 hours of receiving file; each file kept separate and managed sequentially</i>			
Form letters produced by MSW table merge, by donor relations letter writer	<i>Within two days of prioritization; within one week during high volume times</i>			
Form letters sent to director of donor relations for review, correction, reassignment	<i>Within one week of having prioritized letters; within two weeks during high volume times</i>			
Special letters drafted	<i>Within two weeks of prioritization</i>			
Special letters sent to gift officers for input, editing, correction	<i>Returned to letter writer within three days of distribution</i>			
Special letters redrafted and/or sent to director for review, etc.	<i>Returned to letter writer within three days</i>			
Special letters sent to President's office for review	<i>Returned to letter writer within three days</i>			
Letters redrafted and/or printed on letterhead; redrafted letters rerouted to president's office for review; etc.	<i>Letters for signing routed to President's office and returned within five days</i>			
Letters copied for	<i>Letters mailed within</i>			

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files; prepared for mailing; copies sent to records for filing	<i>three days of return from President's office</i>			
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+/- 30 days