



Gift Acknowledging and Correspondence



Recognition Standards Grid

Legend

R = Required
S = Suggested
O = Optional

Red = Centrally driven
Blue = Unit driven
Green = Joint ownership

Official Receipt
 University Leadership (personalized)
 Unit Leadership (personalized)
 Development Officer/Unit
 Recipient Thank You
 Expectations in Gift Agreement
 Comprehensive Stewardship Plan
 Gift Announcement
 Donor Honor Roll
 Donor Wall
 Annual Endowment Report
 Demonstrate Impact to Donor
 Changes in Recipient/Awardee
 Personalized/Special Event
 Scholarship Event
 Invitation to Ground Breaking
 Invitation to Dedication Event
 Annual Report on Building Activity
 Physical Donor Signage

		Acknowledgement					Recognition					Reporting			Event		Building Related						
Named Faculty Funds (Gift to Establish)																							
Endowed Dean's Chair	\$3,500,000	R	R	R	R	S	R	R	R	O	O	R	S	R	S					R			
Endowed Chair	\$2,000,000	R	R	R	R	S	R	R	R	O	O	R	S	R	S					R			
Endowed Professorship	\$1,000,000	R	R	R	R	S	R	R	R	O	O	R	S	R	S					R			
Endowed Coaching Positions	varies	R	R	R	R	S	R	S	S	O	O	R	S	R	S					R			
Endowed Distinguished Visitor	\$600,000	R	R	R	R	S	R	O	O	O	O	R	S	R	O					S			
Named Faculty Award	\$250,000	R	R	R	R	S	R	O	O	O	O	R	S	R	O					S			
Named Dean's Leadership Fund	\$100,000	R	R	R	R	S	R	O	O	O	O	R	S	R	O					S			
Named Student Funds (Gift to Establish)																							
Graduate Fellowship	\$1,000,000	R	R	R	R	S	R	R	R	O	O	R	S	R	S	O					R		
Access Scholarship	\$500,000	R	R	R	R	S	R	O	O	O	O	R	S	R	O	O					S		
Graduate Award	\$500,000	R	R	R	R	S	R	O	O	O	O	R	S	R	O	O					S		
Merit/Morrill Scholarships	\$125-750K	R	R	R	R	S	R	O	O	O	O	R	S	R	O	O					S		
Student-Athlete Scholarships	\$150-\$500K	R	R	R	R	S	R	O	O	O	O	R	S	R	O	O					S		
Named Scholarships	\$50,000	R	O	R	R	S	R			O	O	R	S	R	O	O					S		
Graduate Student Assistance	\$50,000	R	O	R	R	S	R			O	O	R	S	R	O	O					S		
Named Endowed Funds (Gift to Establish)																							
Athletics – Program of Excellence	\$100,000	R	R	R	R	S	R	O	O	O	O	R	S		O					S			
Athletics – Team Championship	\$100,000	R	R	R	R	S	R	O	O	O	O	R	S		O					S			
Restricted	\$50,000	R	O	R	R	O	R			O	O	R	S		O					S			
Unrestricted	\$25,000	R	O	R	R	O	R			O	O	R	S		O					S			
Named Current Use Funds (Gift to Establish)																							
Designated Chair	\$85,000/year	R	O	R	R	S	R			O	O		S	R	O					S			
Designated Professorship	\$42,500/year	R	O	R	R	S	R			O	O		S	R	O					S			
Other	varies	Please refer to the corresponding gift type and dollar amount listed below.																					
Gifts																							
Single Gift	\$5M+	R	R	R	R	O		R	R	O	O		S		S					R	R	O	O
Single Gift	\$1-4.99M	R	R	R	R	O		R	R	O	O		S		S					R	R	O	O
Single Gift	\$100K-999K	R	R	R	R	O		O	O	O	O		O		O					S	S	O	O
Single Gift	\$50K-99K	R	O	R	R	O				O	O		O		O					S	S	O	
Single Gift	\$1K-49K	R	O	S	R	O				O	O		O		O					O	O		
Single Gift	<\$1K	R	O	O	S	O				O	O		O		O					O	O		
Pledges*, Namings, Irrevocable Deferred Gifts																							
Pledge/Single Naming Gift	\$5M+	R	R	R	R	O	R	R	R	O	O		S		S					R	R	O	O
Pledge/Single Naming Gift	\$1-4.99M	R	R	R	R	O	R	R	R	O	O		S		S					R	R	O	O
Pledge/Single Naming Gift	\$100K-999K	R	R	R	R	O	R	O	O	O	O		O		O					S	S	O	O
Pledge/Single Naming Gift	\$50K-99K	R	O	R	R	O	R			O	O		O		O					S	S	O	
Pledge/Single Naming Gift	\$1K-49K	R	O	S	R	O	R			O	O		O		O					O	O		
Pledge/Single Naming Gift	<\$1K	R	O	O	S	O	R			O	O		O		O					O	O		

*In addition to acknowledging the initial pledge, pledge payments should also be acknowledged by the units and/or unit and university leadership at the level corresponding to the payment.

Recognition Standards – Frequently Asked Questions

General

Single vs. Cumulative Giving? – Only individual gifts and pledges are covered by these standards of recognition. Standards for cumulative giving recognition are under further review by the central donor relations team and are currently covered through giving societies such as the Oval Society. Contact: Tammy Savage in Donor Relations.

Suggested vs. Optional? – Suggested activities are good stewardship practices that should be undertaken if the resources are available; optional activities are practices that may be appropriate for some donors/units but are not universally appropriate.

How do Planned Gifts Fit In? – Named funds established with an irrevocable deferred gift follow the corresponding named fund guidelines. Irrevocable deferred gifts that do not establish a new fund follow guidelines for pledges and namings. Revocable deferred gifts are acknowledged at the discretion of the units.

Living vs. Deceased Donors – The standards were written to handle the recognition of living donors.

Acknowledgment

Forms of Acknowledgement – Acknowledgments may include: phone calls, emails, letters, personal visits, etc.

Who is included in University Leadership? – Includes the Presidents of the University and the Foundation and the Chairs of the Board of Trustees and Foundation Board. Contact: Megan Laurent in the Foundation’s SVP Office.

Who is included in Unit Leadership? – Includes leaders such as deans, directors, department chairs, physicians, leadership volunteers, or coaches.

What is required by Development Officer/Unit? – When a gift of more than \$1000 is received the unit development staff is required to prepare an acknowledgement. Units will independently determine the levels of personalization for acknowledgments, however it is suggested that development officers personally acknowledge all donations of \$50K+ and named gifts.

Recognition

Donor Honor Rolls/Walls – Donor Honor Rolls/Walls are lists of donor names that are published or posted. Units who plan on publishing a donor’s name must confirm the donor’s willingness to be listed in a public form.

Gift Announcements – Gift announcements should be collaborations between the unit and central foundation communications teams. The Central team can help coordinate timing and placement to ensure that other announcements and university news will not overshadow the gift being announced. Contact: Jane Carroll in Advancement Communications.

Reporting

Demonstrating Impact – While the most traditional way to demonstrate impact to donors is through the use of annual reports from the unit, and/or impact statements on the Foundation’s Annual Endowment Report, other options exist. Other ways impact has been shown include a phone call/meeting with the beneficiary, a copy of published work of the beneficiary accompanied by a brief note, inclusion in a campus event that demonstrates the use of the gift, video messages from recipients, and social media. The Central Donor Relations team is available to help brainstorm additional means for demonstrating impact.

Building Related

Invitation to Dedication or Ground breaking events – If an individual unit dedicates a facility that correlates with the giving interests of a donor who has established a named fund the donor should be invited to the dedication activities; if a ground breaking event is hosted, donors of \$1M to that particular capital project should be invited to the ground breaking.

Physical Donor Signage – Signage associated with a capital/naming project is based on the requirements of the project and the naming agreements with the donor. Donor signage must follow the naming guidelines and university signage requirements in place at the time of the gift.



draft thank you

The Ohio State University Foundation 1480 West Lane Avenue, Columbus, OH 43221 (614) 292-2141 gifts@osu.edu

<<Brutus and Betty Buckeye>>
<<1480 West Lane Avenue>>
<<Columbus OH, 43221>>

On behalf of The Ohio State University campus community, please accept our appreciation for your generous support. You make possible the dreams and the discoveries that inspire our students, faculty, staff, patients and researchers.

Simply put, your gift makes our success possible.



gift receipt

Your gift received on <<2/6/2012>>, has been designated as follows:

307676	Athletic Advancement Fund	\$11,000.00
301475	Fisher College of Business	\$5,342.00

Total Received: \$16,342.00

In exchange for this contribution you received Buckeye Club/Scholar Athlete Level: Scholar Athlete Banquet, Membership Card, Auto Decal, Golf Course Privileges, Buckeye Club Reception, and Buckeye Club Special Event.

Estimated fair market value: \$261.00

Net Charitable Tax Contribution:

We received 100 shares of SPDR Gold Trust stock. The high was 166.55, low was 160.29, and the mean was 163.42.

The above information is as of 2/6/2012, the date of your gift is provided to assist you in determining the amount of your gift. Please consult your tax advisor regarding the deductability of your gift.

rev-<<123456789>> Donor ID <<987654321>>

Please retain this receipt for your tax records.



draft thank you

The Ohio State University Foundation 1480 West Lane Avenue, Columbus, OH 43221 (614) 292-2141 gifts@osu.edu

<<Brutus and Betty Buckeye>>
<<1480 West Lane Avenue>>
<<Columbus OH, 43221>>

On behalf of The Ohio State University campus community, please accept our appreciation for your generous support. You make possible the dreams and the discoveries that inspire our students, faculty, staff, patients and researchers.

Simply put, your gift makes our success possible.



gift receipt

Your gift received on <<2/6/2012>>, has been designated as follows:

307676	Athletic Advancement Fund	\$11,000.00
301475	Fisher College of Business	\$5,342.00

Total Received: \$16,342.00

In exchange for this contribution you received Buckeye Club/Scholar Athlete Level: Scholar Athlete Banquet, Membership Card, Auto Decal, Golf Course Privileges, Buckeye Club Reception, and Buckeye Club Special Event.

Estimated fair market value: \$261.00

Net Charitable Tax Contribution:

We received 100 shares of SPDR Gold Trust stock. The high was 166.55, low was 160.29, and the mean was 163.42.

The above information is as of 2/6/2012, the date of your gift is provided to assist you in determining the amount of your gift. Please consult your tax advisor regarding the deductability of your gift.

rev-<<123456789>> Donor ID <<987654321>>

Please retain this receipt for your tax records.

ACKNOWLEDGEMENTS AND CORRESPONDENCE

TAS provides the ability to send correspondence to constituents such as revenue acknowledgements, one-off letters to one constituent, and bulk correspondence to multiple constituents.

Lesson Objectives

After you complete this lesson, you will be able to:

- Generate acknowledgements to revenue (gifts!)
- Write a single letter to a constituent or constituent couple or a constituent organization and create interaction in one step

TABLE OF CONTENTS

Acknowledgments produced centrally	3
Receipt	4
Revenue Acknowledgements	6
Templates	6
Run Revenue Acknowledgement Process	7
Create an Acknowledgment Letter in Word	9
Write a Letter to a Constituent	11
How to see background information on a gift	14

For Help and Support with TAS

Email the help desk at 2tech@osu.edu

Or call 614-292-Tech

Acknowledgments Produced Centrally

Currently, every gift to the university over \$5 receives a tax receipt from the office of gift processing. An example of a receipt is in the back of the manual. At the top of the receipt is acknowledgment language WITH NO SIGNATURE. The receipt contains the amount of the gift, the designation (fund) and the net charitable contribution. This is what a donor saves for their tax records.

We recommend you do not mention the amount of the gift in your letter – The receipt does that- You should speak to the **IMPACT** the gift makes to your area.

A donor will receive an acknowledgment from the President of the University if a gift meets these criteria:

- Board of Trustees
- Foundation Board members
- President's Club Advisory Board members
- The James Foundation Board
- The Medical Center Board
- Principal gift prospects
- Senior University leadership
- Any gift to the university over \$100K

A donor will receive an acknowledgment from the President of the University Foundation and Senior Vice President of Advancement if a gift meets these criteria:

- Board of Trustees members
- Foundation Board members
- President's Club Advisory Board members
- The James Foundation Board (our cancer hospital)
- The Medical Center Board
- Principal gift prospects
- Senior University leadership
- Any gift to the university over \$50K

Acknowledgments by request

Contact Megan Laurent 614-247-8764 laurent.20@osu.edu

Revenue Acknowledgements

Acknowledgements are letters sent to donors to thank them for gifts donated to your organization. They are linked to revenue records (GIFTS!)

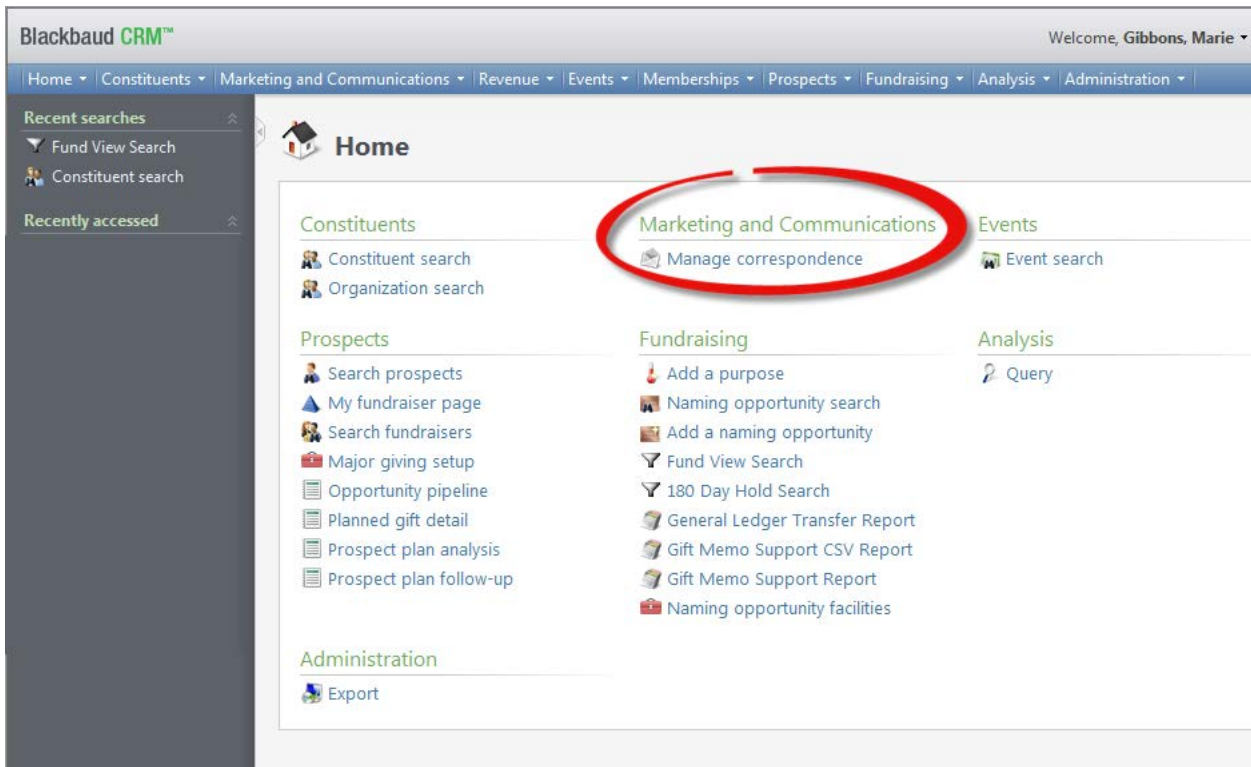
In the Acknowledgements area of *TAS* you can create acknowledgement letters with processes (Queries) which define which letter applies to a particular gift or a specific group of donors.

You can create acknowledgment an acknowledgment matrix in your area based on

- Gift thresholds
- Fund use
 - Scholarships
 - Bricks and Mortar
 - Program support
 - Or to a certain fund (Example: Dean’s Discretionary Fund)

PLEASE SUBMIT YOUR CRITERIA TO 2tech@osu.edu

You can find the **Acknowledgements** area in the **Marketing and Communications** functional area of the program.



When the acknowledgement has been processed, a record of the acknowledgement correspondence is saved on the constituent's revenue payment record.

Acknowledgment Templates

Templates are available on the TAS log in screen under Extra Documentation. An example is in the back of this manual

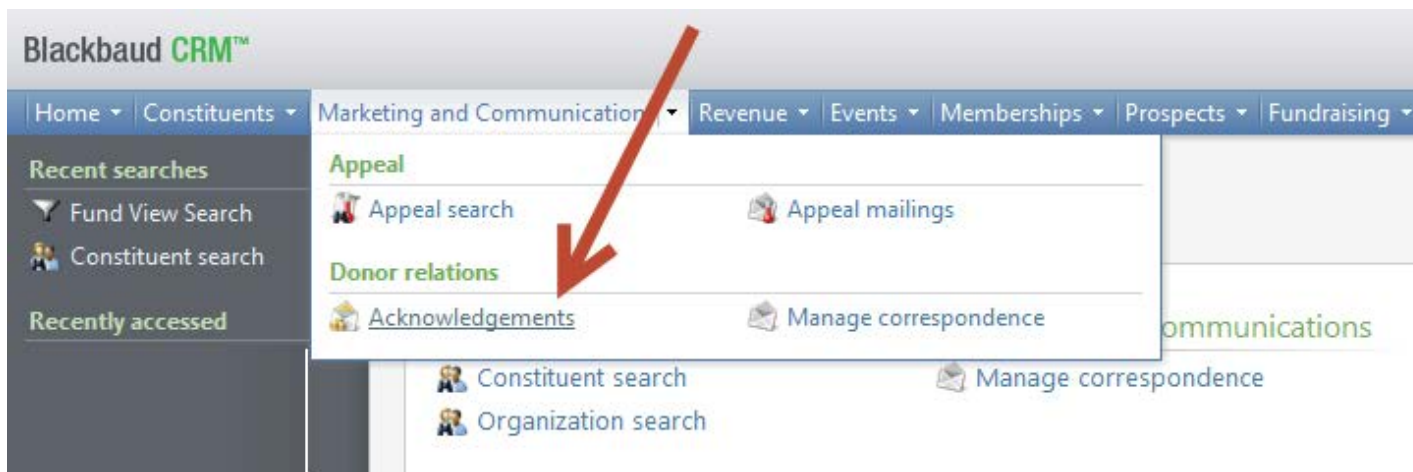
Personalized templates can be requested by submitting a request to 2tech@osu.edu

We recommend you save the template to your hard drive or shared drive in a special folder. You will need to replace the Lorem Ipsum **with ACTUAL TEXT!** Please use caution as not to disturb **the conditional mail merge text**

We recommend you refresh your letters quarterly.

A. Run Revenue Acknowledgement Process

You can run the process using the standard default processes in the system or after you submit your criteria to the help desk and it is created.



To Run an Acknowledgement Process:

1. On the Navigation bar, click **Marketing and Communications**.
1. On the Marketing and Communications page, click **Acknowledgements**.
2. Select the Acknowledgements tab.
3. Select the acknowledgement process to run.

Acknowledgements

Review Acknowledgements Acknowledgements

Acknowledgement processes (271) + Add Filters [Export] [Print] [Refresh]

Type ^	Name	Description	Letter
Revenue			
Revenue	AA Gift Letter \$1-\$1999	AA Gift Letter \$1-\$1999	AA Gift Letter \$1-\$1999
Revenue	AA Gift Letter \$2000-\$4999	AA Gift Letter \$2000-\$4999	AA Gift Letter \$2000-\$4999

Acknowledgements

Review Acknowledgements Acknowledgements

Acknowledgement processes (271) + Add Filters [Export] [Print] [Refresh]

Type ^	Name	Description	Letter	A
Revenue				
Revenue	AA Gift Letter \$1-\$1999	AA Gift Letter \$1-\$1999	AA Gift Letter \$1-\$1999	4,
Revenue	AA Gift Letter \$2000-\$4999	AA Gift Letter \$2000-\$4999	AA Gift Letter \$2000-\$4999	1,
Start process Set format options Edit Assign permissions				
Revenue	AA Gift Letter ASHS	Alumnae Scholarship Housi...	AA Gift Letter ASHS	4,

4. Click on small arrows to left of process to your process.

Run revenue acknowledgement process

Process name: AA Gift Letter \$2000-\$4999
 For gifts with letter: AA Gift Letter \$2000-\$4999

Results

Mark letters 'Acknowledged' when process completes

Acknowledge date: <Specific date> 12/27/2012

Create selection from results

Selection type: [dropdown]
 Selection name: [text box]

Overwrite existing selection

Pick date that gift will be marked as acknowledged on gift record.

[Acknowledge revenue list](#)

AA Gift Letter \$1-\$1999

Description: AA Gift Letter \$1-\$1999

Include selection:	Create output selection:	No
Mark letters 'Acknowledged': Yes	Overwrite existing selection:	No
Acknowledge date: 4/17/2013	Output selection name:	4/4/2012
Letter: AA Gift Letter \$1-\$1999	Output selection type:	Revenue
Letter template:	Label template:	

Recent status | History | Job schedules

Recent status

Status: **Completed**

Status message: Completed

Started by: ISLAND\shenk	Server name: UDP-ASA-02
Started: 3/1/2013 3:44:51 PM	Total records processed: 1038
Ended: 3/1/2013 3:45:08 PM	Number of exceptions: 0
Duration: 17 seconds	Records successfully processed: 1038

5. Click on the Download output file icon and name the file and save the csv file to a location you will remember.

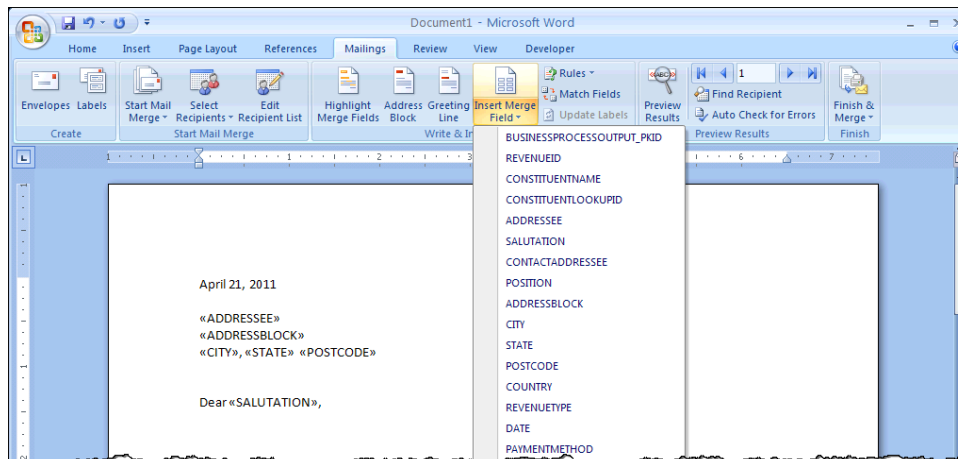
NOTE: We recommend creating a folder on your hard drive or shared drive to store these downloaded input files and naming them by date and signor.

Once you run an acknowledgement process, the process status page displays automatically. This page contains the recent status, History, and Job schedules tabs. The top half of the page contains the parameters and properties for the acknowledgement process.

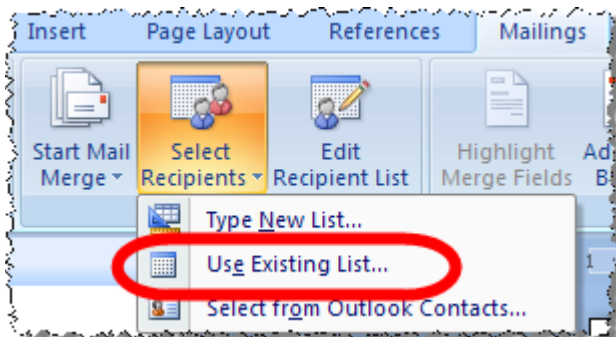
B. Create Letter in Word

Templates for revenue acknowledgement letters will be provided on DevNet with appropriate merge fields. You may also request templates with different (formal/informal address fields).

1. Open a supplied template in Microsoft Word®.
2. Select the Mailings tab.



3. Click **Select Recipients** and select **Use existing list**. The Select Data Source window displays.



4. Browse to your file you downloaded in the previous section, select the file name, and click **Open**.
5. On the Header Record Delimiters window, click **OK**.
6. Click on **Finish & Merge**
7. Save the merged acknowledgement document on your hard drive or network. We recommend you create a special file for these letters and save them for a minimum of 90 days.

On the action bar of the recent status tab, you can perform functions to manage the most recent process, such as merging the letter with the data.

Page item	Information
Download output file	To save a copy of the output file to your hard drive or network, click Download output file .
Mark acknowledged	If you do not select the Mark letters 'Acknowledged' when process completes checkbox when you add the process, this button is enabled. To mark assigned letters for revenue acknowledged, click Mark acknowledged . A confirmation message appears. Click Yes .
Clear results	To run an acknowledgment process again, use Clear results to reverse the process.

Writing Letters through TAS

A. Write a Letter to a Constituent

When you need the ability to communicate with constituents “on the fly,” you can write a letter to a constituent from within the constituent record.

Creates one letter to single constituent, a couple or an organization, creates an interaction and stores the document in TAS

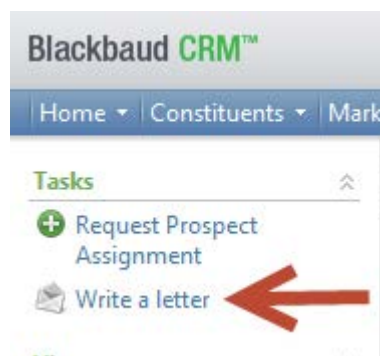
EXAMPLES

- Meeting follow up
- Congratulations
- Condolence
- Issue resolution

1. Open the constituent record of an individual donor for which you want to write a letter.

NOTE: YOU CAN NOT USE THE **HOUSEHOLD** RECORD

2. On the explorer bar, under **Tasks** (upper left side) click **Write a letter**.



3. The Write a letter window displays.

4. Complete the fields and options on the Write a letter window.

Write a letter
✕

Letter

Letter name:

Letter template:

Address

Addressee: ▼

Address: ▼
 (Primary) - Home - 24 Elizabeth St
 24 Elizabeth St
 Canal Winchester, OH 43110-1057

Salutation: ▼

Details

Mail date:

Interaction type: ▼

Category: ▼

Subcategory: ▼

Sites:

	Site
*	<input style="width: 95%; height: 20px;" type="text"/>

Comment:

Help

- A. Enter a name for the letter.
- B. Click on the magnifying glass on Letter template and select template

- C. Select the addressee to use.
- D. Select the address to use.
- E. Select the salutation to use.
- F. Select interaction type.
- G. Select Category.
- H. Select Sub Category.
- I. **NOTE: Do not SAVE until you have opened the word document and created your letter.**
- J. Click **Edit letter** to customize the letter and save it for this constituent's interaction record.
 - a. Set up your letter by go to Mailings on Menu bar.
 - b. Insert Merge fields.
 - c. Write letter.
 - d. Click on blue floppy icon in upper left hand corner.
- K. Note the mail date to be saved on the interaction record.
- 5. Click **Save**. **TAS** saves the letter as an interaction and open's the constituent's Interaction page.
- 6. Select the interaction,
- 7. On the action bar, click **Go to, Interaction**. The details of this specific interaction display.
- 8. Click the edit icon under Owner field search for the record of the individual who signed the letter. **SAVE**
- 9. Add participant under interactions – spouses, kids.
- 10. Add contactors – OSU people.
- 11. Select the Documentation tab.
- 12. Select the letter to open.
- 13. On the action bar, click **Open file**.
- 14. If final "mail ready" print for signature.
- 15. If editing is needed, you must delete and re-save.

Writing Letters through TAS

FAQ

1) How do you find out background information on a gift?


Go to the individual constituent's record. Under recent revenue on the middle right of the page, find the gift

Recent revenue

4/3/2013	Donation	\$150.00
4/3/2013	Donation	\$0.00
11/9/2012	Donation	\$1,650.00
8/28/2012	Donation	\$250.00
6/27/2012	Donation	\$5,000.00
5/30/2012	Donation	\$2,500.00
5/21/2012	Donation	\$17,900.00
5/18/2012	Donation	\$2,500.00
1/12/2012	Donation	\$1,500.00
5/18/2011	Donation	\$2,500.00

Click on the blue hyperlink to see gift detail. In the center of the page you will see a [Related documents](#) Link. This link opens all information related to the gift.

Status

Acknowledgements: Not acknowledged
 Receipt preference: Per payment
 Receipt status: Receipted
 Receipt date: 11/13/2012
 Receipt number: 355827
 Post status: Posted
 Post date: 11/13/2012
 Post process ID: gl-10000476
 External Post Status: Posted
 External Post Date: 11/30/2012
 Related documents 
 Endowment Post Status: Not posted
 Endowment Post Date:

Payment method

Payment method: Credit card
 Card type:
 Card number:
 Name on card:
 Expires on:
 Authorization code:

Additional Resources:

University Style Guide:

<http://www.osu.edu/resources/styleguide.html>

The Great Acknowledgment Swap

<http://www.donorrelationsguru.com/home/tgas2>

Sargent, Lisa of Network for Good. Best practices for thanking donors by email.

<http://nonprofit.about.com/b/2012/04/01/thanking-online-donors-with-better-emails.htm>

The Gregg Reference Manual

Letitia Baldrige's Guide to Executive Manners

Grammar Girl's Quick and Dirty Tips for Better Writing by Mignon Fogarty
(website and Twitter, as well)

Dictionary

Thesaurus

Speeches, Dictations