

## Guidelines and Expectations for Acknowledgment Process

WFAA and campus staff members who produce gift-pledge acknowledgments will now send the Donor Acknowledgment Report back to WFAA so that the gift-pledge acknowledgment can be recorded onto the appropriate gift and constituent record in ABE.

### Expectations

- *All gifts-pledges of \$1,000 or above* will receive an acknowledgment from the unit receiving the gift-pledge.
  - Some units send acknowledgments for gifts-pledges *under \$1,000* – those units should continue to acknowledge based on their own best practices and guidelines.
- The acknowledgment can be in the form of a letter, handwritten note, phone call, etc. – in *all* scenarios, the gift-pledge acknowledgment should be recorded in ABE by following the acknowledgment process.
- Because development staff receive information about new gifts in a variety of ways (pulling the Donor Acknowledgment Report, receiving a phone call from a donor, or getting a notification from ABE about a new gift, etc.), advancement teams should work together to determine the best workflow to ensure that *all* acknowledgment activity is recorded back into ABE.
  - *For example:* A DoD gets a notification from ABE that one of their donors has given a gift. They call that donor to thank them, and then they also notify their development support staff that that gift has been acknowledged. This can either be then entered manually onto the gift record in ABE, or included the next time that the Donor Acknowledgment Report is submitted.
- In some cases, the gift-pledge acknowledgment is accompanied by a more personalized exchange of information or communication with the donor – in this case, development staff (at WFAA or on campus) should *also* enter a completed step on their prospect plan with the donor (i.e. a contact report).
  - A good way to remember this is:
    - Information in **Communications** in ABE records *one-way communications* (e.g. the donor was invited to an event, or sent a mailing, or received an acknowledgment for a gift).
    - Information in **Interactions** (including completed steps from prospect plans) records *exchanges of information* with the donor (e.g. a phone call to discuss overall stewardship plans, or a personal visit to deliver an impact report – a **Communication** piece – that also results in a conversation with the donor).
  - So, *all* acknowledgments are **Communications**, but only *some* acknowledgments are *also* **Interactions**.

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### Process/Technical

- Gift-pledge acknowledgments will be recorded on each individual gift record, under the “Letters” tab –even if the acknowledgment was delivered via phone or in person. The gift-pledge acknowledgments will *also* be visible on the Summary and Communications tabs of the constituent record.
  
- The following acknowledgment **types** can be recorded:
  - Chancellor Acknowledgment
  - WFAA Executive Acknowledgment
  - School/College Leadership Acknowledgment
  - Department Chair/Director Leadership Acknowledgment
  - Coach/Celebrity/Spokesperson Acknowledgment
  - Student Acknowledgment
  - Volunteer Acknowledgment
  - DoD Acknowledgment
  - General Acknowledgment
  
- If one person is responsible for preparing *multiple* acknowledgment types for *one* gift, there are two options for submitting this report:
  - Insert an additional row (or rows) below the original revenue record on the DAR, copying *all data* from the original row. Enter appropriate acknowledgment type for each row.
  - Pull a *separate* Donor Acknowledgment Report for *each* acknowledgment type (e.g. one report for DoD acknowledgments, one report for Dean’s acknowledgments, etc.) and submit all reports back to be recorded.
  
- Historical acknowledgment activity will *not* be converted into this new format. That was entered as either a “General Correspondence” or as an interaction, and will remain there.
  
- Once the Donor Acknowledgment Report is submitted with acknowledgment data, those reports, if pulled again, will not reflect the acknowledgment information that you have submitted. To check if a gift has been acknowledged, you can check the individual gift or constituent record or submit a BI request.