

## Step 2-Review Written Guidelines

### *How We Thank: Guidelines and Tools for Thanking WCU Donors*

#### Overview of the *How We Thank Initiative*

The *How We Thank Initiative* was established to provide a minimal standard for acknowledging gifts made to WCU. The guidelines and toolkit provide a philosophical framework for thanking donors consistently and strategically across campus, to deepen relationships and further the mission of the University and its meaningful impact.

#### Gift Acknowledgements: Recommended Minimum Expectations

The Division of Advancement is responsible for:

- Processing all WCU gifts
- Providing a weekly gift report to colleges and units for generating their own acknowledgements
- Acknowledging all gifts with a mailed tax receipt
- Acknowledging all gifts from members of leadership with a customized letter
- Acknowledging all gifts made in memory or honor of, with a customized thank you card
- Acknowledging all gifts \$5,000 or greater with a customized letter signed by the VC for Advancement
- Acknowledging all gifts \$25,000 or greater with a customized letter signed by the Chancellor

The College or Unit Level is responsible for:

- Developing a plan to identify individuals responsible for generating regular thank you notes or letters on behalf of your unit
- Using the weekly gift report from the Division of Advancement to generate unit-specific thank you notes/letters
- Acknowledging gifts within 2 weeks of receipt
- Acknowledging all designated gifts from Faculty/Staff donors with a customized signed card or letter from the Department Chair
- Acknowledging all other designated gifts with a customized signed card or letter appropriate to gift level from the Dean/Division Head
- The following should be included in unit-specific acknowledgements:
  - A personal salutation

- Reference to a specific use of funds—equipment, student experience, faculty support, etc.—to illustrate impact

### How to Use the *How We Thank* Toolkit on Microsoft Teams

Each College or Unit at Western Carolina University will be able to utilize these written guidelines and an online toolkit through Microsoft Teams, as a method of meeting the minimum expectations approved by Executive Council regarding thanking donors at WCU.

*Note: Make sure you have access to the Microsoft Teams portal called “Those Who Thank.” For access questions and/or to add any new faculty/staff who assist with the thanking process, email [DonorRelations@wcu.edu](mailto:DonorRelations@wcu.edu).*

#### STEP 1:

In the “Those Who Thank” Microsoft Teams portal, open the *How We Thank User TOOLKIT >> How We Thank 101 Training* folder >> *Step 1-Video Tutorial* to view a video presentation and overview of the How We Thank initiative.

#### STEP 2:

Open the *Step 2-Review Written Guidelines* document to become more familiar with the minimum expectations for thanking WCU donors.

#### STEP 3:

Open the *Step 3-Review Gift Map* document to become more familiar with what happens when WCU receives a gift from a donor.

#### STEP 4:

Open the *Step 3-Review Thank You Matrix* document to become more familiar with this helpful reference document.

#### STEP 5:

Open the *Step 5-Review Sample Letters* document to become more familiar with other thank you letters/check-in notes that are being sent from WCU colleges or units.

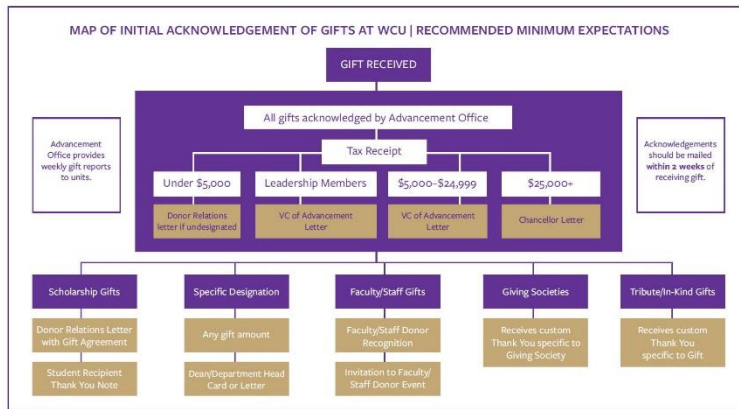
#### STEP 6:

Open the *Step -Frequently Asked Questions* guide to review additional details.

Throughout the year, utilize the entire *How We Thank* online toolkit as a reference for your unit’s acknowledgement program.

## Gift Map

You'll have access "Gift Map" diagram in the How We Thank TOOLKIT:



## Thank You Matrix

You'll view this "Thank You Matrix" diagram in the How We Thank TOOLKIT:

MATRIX FOR INITIAL ACKNOWLEDGEMENT OF GIFTS   RECOMMENDED MINIMUM EXPECTATIONS								
Gift Type	Gift Amount	Gift Processing	DIVISION OF ADVANCEMENT			COLLEGE OR UNIT		
			Gift Officer/Donor Relations	VC for Advancement	Chancellor	Department Chair	Dean/Division Head	Student
UNDESIGNATED GIFTS	Under \$5,000	Tax Receipt	Send acknowledgment appropriate to gift level					
	\$5,000 to \$9,999	Tax Receipt		Send customized signed letter or other acknowledgment appropriate to gift level				
	\$10,000+	Tax Receipt			Send customized signed letter or other acknowledgment appropriate to gift level			
DESIGNATED GIFTS	Under \$5,000	Tax Receipt						
	\$5,000 to \$9,999	Tax Receipt		Send customized signed letter or other acknowledgment appropriate to gift level		If donor is WCU Faculty/Staff send a customized signed letter or card	Send customized signed letter, hand written card, or other acknowledgment appropriate to gift level	
	\$10,000+	Tax Receipt			Send customized signed letter or other acknowledgment appropriate to gift level			If applicable gift, send thank you note through scholarship donor portal
LEADERSHIP GIFTS	Under \$5,000	Tax Receipt						
	\$5,000 to \$24,999	Tax Receipt		Send customized signed letter or other acknowledgment appropriate to gift level			Send customized signed letter, hand written card, or other acknowledgment appropriate to gift level	
	\$25,000+	Tax Receipt			Send customized signed letter or other acknowledgment appropriate to gift level			

\* Acknowledgments should be sent within two weeks of gift receipt.

## Donor Stewardship and Using the Matrix

Donor stewardship is a relationship-building process that occurs once a donor has given a gift to an organization. The *Thank You Matrix* presented above represents the *initial* formal communication of gratitude by the university to the donor. The matrix structure provides the recommended minimum acknowledgements a donor should receive depending on the value and focus of the gift.

There are three gift types presented in the matrix:

- Undesignated: Unrestricted gifts of any value, both monetary and in-kind not designated to a specific unit, department, or college
- Designated: Unrestricted and/or restricted gifts, both monetary and in-kind, identified for allocation to a specific unit
- Leadership: Unrestricted and/or restricted gifts of any value, both monetary and in-kind, given by a member of any WCU Board, Executive Council, Provost's Council or the Chancellor's Leadership Council. These gifts may be designated or undesignated.

*NOTE: Tribute gifts may be included in all three categories: The term tribute gift refers to both unrestricted and/or restricted gifts of any value, both monetary and in-kind, given in honor of or in memory of a specific person.*

These categories are subdivided into various recognition levels based on the value of the gift.

The matrix is also divided into two "Acknowledgement Action Groups" organized around the Advancement Office and College/Units. These groups are further subdivided to identify the person or office responsible for the acknowledgement. Utilizing this structure, the matrix details the specific minimum acknowledgment and the person or office responsible for facilitating that action.

For example, all gifts, regardless of gift type or value, are acknowledged with a tax receipt generated by the gift processing office in the Division of Advancement. Likewise, all gifts given by a faculty member, regardless of gift type or value, are acknowledged with a customized sign letter by the Department Chair of the faculty member making the gift.

As defined in the matrix, gifts of greater value could receive multiple acknowledgments. For example, a major scholarship gift of \$25,000 or more designated to a specific academic unit is acknowledged by offices and individuals across the matrix.

The donor stewardship process, which involves managing the donor's expectations in regard to the use of gifts, keeping them current on the progress and impact of their investment, and encouraging their connection and involvement with a unit to cultivate future support, continues from this initial expression of gratitude of their support and generosity.

### Additional Thanking: Optional Opportunities to Acknowledge Donors

Keep Donors Up-to-date

- Newsletters

- Press releases/coverage
- Impact stories
- Check-in communication

#### Unique Gifts

- Video Thank Yous
- Birthday/anniversary/holiday cards
- Flowers/gift baskets
- Branded gifts/keepsakes
  - Signed Faculty publications
  - Unit-specific items
  - Other memorabilia/keepsakes: If your work has artisan beneficiaries or you have a work program that produces products, create a custom “thank you” gift for donors

#### Public recognition

- Donor walls/plaques (see Donor Relations staff for consistency across campus)
- Digital appreciation on web/social media
- Profile donors in annual reports
- Public Introductions
  - Curtain speeches
  - Welcoming events
  - Public events

#### Service Opportunities (Getting donors engaged)

- Advisory Boards
- Special projects
- Cultivation events/Salons
- Fundraising

#### Student Interactions

- Facility tours
- Classroom visits
- Student project presentations
- Student travel
- Internships

#### Invitations to special events

- Receptions with guest speakers/unit-specific professionals
- Private events

- Dinner/dessert before or after an event
- Donor appreciation party
- Sporting events
- Conferences
- Travel events

### Institutional Engagement of Faculty/Staff Donors

- See WCU Giving Societies information for employee giving society description and benefits <https://www.wcu.edu/engage/give-to-wcu/giving-societies/shetland-society.aspx>
- Annual social event for Faculty/Staff donors
- Special invitations from colleges/units for their own Faculty/Staff donors
- Reports from Advancement that list current employee donors for each college/unit
- Employee Appreciation events and special invitations

### How We Thank Training Information

- Training sessions can be planned for:
  - New Faculty/Staff Orientation
    - (every August) offer general information session for all new faculty – could be short and sweet with the greater emphasis for new department heads (below)
  - Department Head Workshops
    - (usually two per semester) possible annual training that would provide needed information to new individuals and a refresher for others
  - Provost Council workdays
    - (monthly) possible annual training that would provide needed information to new individuals and a refresher for others
  - Associate Deans Council
    - Possible refresher course at one of the monthly meetings
  - Summer Institute for Administrative Support Staff
    - (open to all of campus support staff) – the institute takes place on 1-2 days during the last two weeks of July.
  - Executive Assistants to Executive Council
    - monthly meetings managed by Jessica Woods – possible annual training
  - Provide sample language to include in future job descriptions for administrative support positions
- Framework for training:
  - Training video or guided PowerPoint
  - Easy to follow step by step instructions

- Easy access to Matrix, Gift Map, and sample Thank You letters
- FAQ's
- Registration for Training Sessions

### Contact Us

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