Stewardship – Gifts, Acknowledgements and Recognition

The Associate Director of Advancement, Stewardship, will receive, review, and coordinate the processing and acknowledgement (tax receipts and personal acknowledgement) of all gifts and pledges for the Advancement areas of, Annual Major Gifts and Member Groups, Principal Gifts, Foundations and Corporations, Planned Giving, and Program Marketing. This includes the preparation of gift transmittal forms, the deposit of all funds received, and the tracking and reporting of pledges and funds received.

The Associate Director of Advancement, Stewardship will work with relationship coordinators, to ensure that all communications with constituents are consistent and follow the approved cultivation plan. Board members and other constituents who give gifts to multiple areas – membership, events, planned gifts, principal gifts, etc. – will require the approval of the Relationship Coordinator or designate on all communications.

To facilitate these processes, relationship coordinators or their designates must communicate information regarding pledges made, and any gifts received directly by them to Stewardship. All original checks and accompanying documentation must be delivered to Stewardship at the time they first notify Stewardship about the gift or pledge. A Gift Transmittal (see attached) or Pledge Form (to be designed) will be completed for every gift or pledge received. Copies of all checks and original accompanying background information (Pledge Forms and/or Letters of Intent and grant documentation) will be attached to the Gift Transmittal or Pledge Form and placed in the donor’s file.

When unexpected gifts are received, stewardship staff will request the background information from the donor’s Relationship Coordinator. If the donor has not been assigned a relationship coordinator, receipt of gift will trigger assignment to an office or specified advancement officer.

Giving Avenues – Volunteers and Soft Credit

Constituents may have a number of giving avenues that we will need to track. These may include direct giving, matching gifts, and soft credits. We want to recognize donors who not only give, but who also help us in requesting gifts (soft credits) and obtaining additional gifts from their institutions that have matching gift programs. We also want to track what our Board or Campaign Committee members donate through direct giving and “get” (soft credits) to meet their goals. Thus it will be important that Relationship Coordinators are aware of these giving avenues for their prospects. It is the responsibility of the Relationship Coordinator when reviewing the Gift Transmittal to note any constituent who should receive a soft credit for a gift made by another prospect. This will allow us to acknowledge the work of those volunteers/prospects that are also helping to obtain gifts from others for KCET.

Gift Processing

The Associate Director of Advancement, Stewardship will manage the processing of all gifts received, including gifts that are pledged on-air through membership for any constituents that have an advancement activity code, including foundations and program marketing. The Stewardship office will work with other offices (as noted above), and with relationship coordinators, to ensure that all gifts are correctly processed and acknowledged, and that classification codes are updated to reflect the current recognition level.

Gift Transmittal Form

When gifts are received, Stewardship staff will complete the Gift Transmittal based on information in Team Approach. The Gift Transmittal contains the instructions for deposit, acknowledgement, recognition, as well as noting the relationship coordinator and/or solicitor(s) who should receive credit (and/or soft-credit) for a gift.

Stewardship staff will notify relationship coordinators, via e-mail daily, of all gifts received that morning so that any special instructions for acknowledgements, gifts, and/or recognition may be communicated. Original checks and copies of transmittals will be delivered to Finance with the daily deposit. A copy will also be delivered to the appropriate relationship coordinator or office for review. It is the responsibility of the relationship coordinator to verify that all information is complete and correct and notify Stewardship immediately of any discrepancies or additional instructions. Original transmittals with copies of checks and original accompanying documentation attached will be used to enter gift and related information into Team Approach, and then filed in the donor's hard file.

Team Approach – Gift Entry

The Associate Director of Stewardship will manage the entry of gift and related information into Team Approach, including batching, classifications and information updates (e.g., recognition levels, pledge schedules and membership premiums).

Gift Receipts and Acknowledgements

Stewardship staff will generate gift receipts and acknowledgements from the Executive Vice President of Institutional Advancement for all Advancement gifts received. The Associate Director of Advancement Stewardship will work with relationship coordinators to ensure that all communications with constituents are consistent and follow the approved cultivation plan. Board members and other constituents who give gifts to multiple areas – membership, events, planned gifts, principal gifts, etc. – will require the approval of the Relationship Coordinator or designate on all communications. The Executive Vice President of Institutional Advancement will approve all communications with Board members.

Additional Acknowledgments

Other KCET staff or volunteers may acknowledge gifts as the Relationship Coordinator deems necessary. Relationship coordinators may wish to send additional personal acknowledgements or, based upon the size of the gift, may encourage additional staff/volunteers to thank a constituent. The Relationship Coordinator is responsible for managing the acknowledgement process for their assigned prospects with the Stewardship department. Below is an example of a "Thank You Grid" that may be used as guidance. If the Relationship Coordinator determines a thank you letter should come from a solicitor or other relationship, they should draft the letter and send it, as an e-mail attachment, to Stewardship for completion. Stewardship should receive blind copies (bcc) of all correspondence with donors/ prospects.

	Relationship Coordinator	Roger Workman	Al Jerome	Volunteer Solicitor	Board Chair	Campaign Chair
<$10,000	X	X		X		
$10,000-$49,999	X	X		X		
$50,000-$99,999	X	X		X		
$100,000-$499,999	X	X	X	X	X	X
$500,000-$999,999	X	X	X	X	X	X
>$1,000,000	X	X	X	X	X	X

Additional acknowledgements should be noted by entering the EXTHNKU interaction in Team Approach.

Pledges

An electronic template of the pledge form will be created. The printed form with original signatures (of the Relationship Coordinator or designate), plus any required back up, must be received by Stewardship before the Finance office will be notified and a pledge entered into Team Approach. Advancement Services will maintain pledge schedules and alert relationship coordinators of outstanding pledges two months prior to their scheduled due date.

Leadership Circle Renewals

Annual Leadership Circle renewals (including renewal schedules and letters) and event invitations will be generated by Advancement Stewardship. Renewal lists will be created from Team Approach based on the donor's membership date and/or expiration date. The Associate Director of Advancement, Stewardship will work closely with the Associate Director of Annual Major Gifts and Member Groups, and Relationship Coordinators, in producing and reviewing renewal lists and letters to be sent out, including those who will receive upgrade renewal letters.

Current membership level is frequently different from the giving/potential level in which a prospect may be rated. A number of constituents are/will be coded as AD prospects with a current membership below the $1,500 level. It is important that the relationship coordinator(s) work as partners with advancement services and membership staff in crafting solicitations and renewal requests. **Our goal is to coordinate all of our communication with our prospects**.

Transactional donors, (including event donors) who are not likely prospects at the Leadership level or higher, will be coded with an AM or AI activity for cultivation and stewardship by the membership department.

Non-Membership Premiums and Constituent Gifts

Relationship coordinators (or their designate) will be responsible for submitting a request to Stewardship before a premium or gift will be ordered and shipped to a constituent. The Relationship Coordinator should enter an interaction in Team Approach, noting the reason for and/or purpose of the premium (e.g., how it advances the cultivation strategy for the prospect/ donor). The Relationship Coordinator should work closely with Advancement Services staff in monitoring the effective use of premiums in the cultivation process of their prospects.

Recognition -- Team Approach Activity and Classification Codes

Account activity codes and classifications may only be entered and/or modified by Advancement Services staff. Requests for changes may be communicated through emails, contact reports or gift transmittals. Changes in activity code will be first approved by the PMC. (Entered and Maintained by Advancement Services Staff Only)

Activity codes identify the constituent and the type of monies received—annual major gifts (AD), campaign gifts (CD), foundation support (UF), event gifts (EE), planned gifts (PP), and sales / corporate marketing (SS).

Classification codes further define a constituent’s relationship with KCET (Board of Directors, Women’s Council), as well as a constituent’s giving level for purposes of recognition (Viewpoint Newsletter, KCET Magazine, and Annual Report). As gifts are received or as a constituent’s status changes (e.g., increased giving level) the Classification codes will be updated manually by Advancement Services staff.

We will use the following Major Donor Classification codes to identify a donor’s giving level for recognition with the Leadership Circles:

Prospect	<$1,500 (not listed in recognition)
Investor’s Circle	$1,500 - $4,999
Partner’s Circle	$5,000 - $9,999
Sponsor’s Circle	$10,000 - $49,999
Producer’s Circle	$50,000 - $99,999
President’s Circle	$100,000 and above