# Stewardship Tips

## How do I attach gift agreements in Davie?

In Davie, gift agreements should be attached to the corresponding purpose (designation). The UDO Stewardship Office will attach signed copies of gift agreements for UNC-Chapel Hill Foundation Inc. endowments and University Endowment funds under the *Purpose* – **Documentation** tab for the related fund in Davie. School foundations will attach signed copies of gift agreements for their school foundations under the *Purpose* – **Documentation** tab for the related fund in Davie.

(Everyone who has taken the Stewardship 201 class should have the ability to do this. If you need assistance, contact the Davie Helpdesk.)

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## How do I attach student thank you notes for scholarships in Davie?

If you have notes scholarship recipients have written to donors that you'd like to place in Davie, please send them to the Davie Helpdesk. We will place them on the **Documentation** tab of the Constituent that received them. Please include the name and PID for the donor in your request, to ensure we attach the files to the appropriate individuals.

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## Stewarded Donors

Are you trying to find out who the stewarded donors are on a fund? If so:

1. Click on **Fundraising** on the Navigation Bar
2. Click on **Purpose Search**
3. Enter the 6 digit Designation ID in the Lookup ID field <u>or</u> enter a portion of the Name (using the % wildcard) <u>or</u> Report Code 1 (FRS account number) <u>or</u> Report Code 2 (4 digit department code)
4. Search
5. Once the search returns results, click on the Designation you were searching for
6. Click on the **Stewardship** tab to see who the stewarded donors are.

If you'd like to add a stewarded donor, click on the ***Add*** button and search for the constituent. Everyone who has taken the Stewardship training is able to edit the stewarded donors list.

Please note, for all **University and UNC Foundation held funds**, The Assistant Director for Stewardship Services serves as the primary contact for questions/concerns/adding stewarded donors in Davie. They can be reached at (919) 962-2823. For any changes to University or UNC Foundation held funds, please contact her directly and she will make sure that information and changes are handled appropriately.

Types of constituents you may see listed are:

- Donor – constituent who has contributed to the fund and receives stewardship communication
- Executor – constituent who is the executor of the estate of a deceased donor
- Family of Donor – constituent who is a family member of the donor
- Family of Honoree – constituent who is a family member of the honoree (person for whom the purpose is named)

# Stewardship Tips

- Foundation/Corporate Contact – constituent who serves as the contact for the foundation or corporation
- Founder – constituent who established the fund
- Honoree – constituent for whom the purpose was named

These people receive annual reports about the fund.

To see when they were last sent stewardship information:

1. Click on the poplar to the left of the stewarded donor's name on the Stewardship tab of the fund
2. Click the ***Go to constituent*** button
3. Click **Interactions** on the Explorer bar under the More information section
4. Look for Stewardship related interactions on the page. These may be found by filtering by your site, the person that sent the reports, how the reports were sent (mail or electronic), etc.

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## How do I know there's an anonymous gift I need to acknowledge?

*How do I know there's an anonymous gift I need to acknowledge?*

There are a few ways to know an anonymous gift has been given to your school/unit/department.

1. The **UNC Daily Gift Report** will list all gifts that were processed by Gift Services the previous business day. Three columns have been added to identify constituents with anonymous flags.

    - *Gives Anonymously* indicates that the constituent is anonymous from the constituent level.

    - Given Anonymously indicates that the transaction is anonymous.

        - If both have Yes, the constituent receives recognition credit.

        - If Given Anonymously has Yes but the Gives Anonymously has No, that indicates a transaction has been marked anonymous and will not receive recognition credit; therefore, will not be included in acknowledgments, recognition programs or queries created based on Recognition.

    - For the Recognition Recipient at the end of the report, the *Gives Anonymously* column identifies that the person receiving recognition is anonymous at the Constituent level. The full name will display **ANONYMOUS**.

2. The **UNC Revenue Report (Gift 145)** will list all gifts processed by Gift Services for any given date range. The *Anon?* column will indicate whether or not the constituent or transaction is anonymous. Two columns have been added to identify constituents with anonymous flags.

    - *Gives Anonymously* indicates that the constituent is anonymous from the constituent level.

    - Given Anonymously indicates that the transaction is anonymous.

- If both have Yes, the constituent receives recognition credit.

- If Given Anonymously has Yes but the Gives Anonymously has No, that indicates a transaction has been marked anonymous and will not receive recognition credit; therefore, will not be included in acknowledgments, recognition programs or queries created based on Recognition. The full name will display **ANONYMOUS**.

3. **Acknowledgement process outputs** have a column to indicate if the Constituent *Gives Anonymously*.
   - If the constituent gives anonymously, they are anonymous from the constituent level and all of their gifts are given anonymously. The column has Yes in the field.
   - If a gift is marked *Do Not Acknowledge*, the gift will not be in the Acknowledgement output file.
   - If a specific transaction is *Given Anonymously* by a constituent who is not coded *Gives Anonymously*, this transaction does not receive recognition credit and will not be captured in the process.

Ideally, the person handling the thank you notes for your area should compare the UNC Daily Gift Report and/or the UNC Revenue Report (Gift 145) to your Acknowledgement process output, to ensure you thank donors that wish to be thanked for anonymous gifts.

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## Stewardship end dates – manual or automatic for newly deceased stewarded donors?

*When the deceased date is confirmed/added to a constituent record, is the stewardship "end date" automatically populated to match the date of death or is that a manual change that each school/unit will have to make?*

After the Data Entry Team confirms and updates the death date on the Constituent record, the stewardship person for the school/unit will need to go update the Stewarded Donor information on their Purpose(s).

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## Magically re-appearing gifts?!?!

*Why do gifts I have already acknowledged suddenly reappear on my acknowledgement list?*

When gifts are split among several designations (ex: 1 check from the donor includes gifts to 3 designations), there are times when recognition credit falls off the constituent's record. During edit checks, this is discovered by Gift Services and the recognition credit is applied; thereby causing the newly recognized donor to appear on acknowledgements processes.

If you notice that a gift date on your list is outside the acknowledgement date parameters, that is your clue that the gift has been corrected (recognition has been edited, amounts, etc.) since it was originally posted.

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# Stewardship Tips

## Looking for Scholarship recipients?

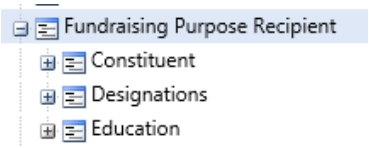
Are you looking for constituents that may have received a scholarship? If so:

1. Click on **Fundraising** on the Navigation Bar
2. Click on **Purpose Search**
3. Enter the Designation ID in the Lookup ID field <u>or</u> enter a portion of the Name (using the % wildcard)
4. Search
5. Once the search returns results, click on the Designation you were searching for
6. Click on the **Recipients** tab and those that have received the scholarship will display.

If you'd like to add scholarship recipients, click on the ***Add*** button and search for the constituent. Everyone who has taken the Stewardship training is able to add recipients.

**To create a query for these** – Use the **Constituent** Source view and scroll to **Fundraising Purpose Recipient** node. Open the node to display **Designations** and in the ***Include Records Where***, select **Lookup ID** and enter the designations for the scholarship.

For the **Results fields to display**, open the **Constituent** node (under **Fundraising Purpose Recipient** node) and select the Constituent of the scholarship recipient you want to see.

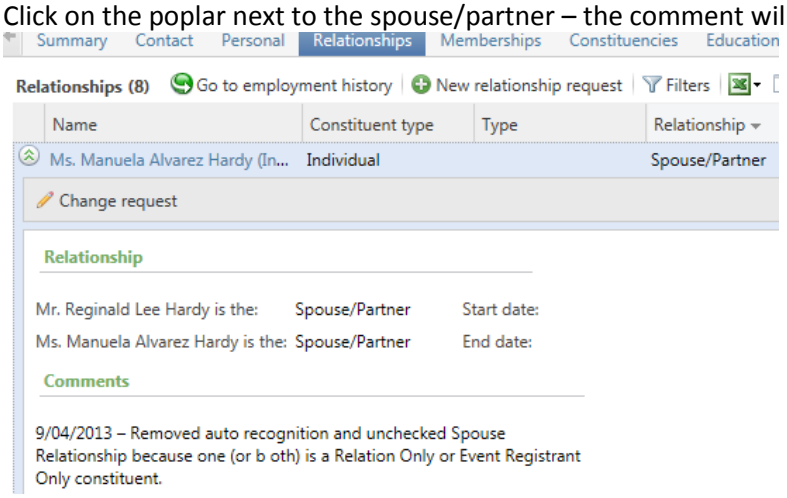



## A spouse not showing in your acknowledgement list?

A spouse not showing in your acknowledgement list? Make sure to check the spousal relationship to determine if the spouse in configured to get recognition. If the couple did not split gifts pre-Davie, the spouse will not get recognition in Davie.

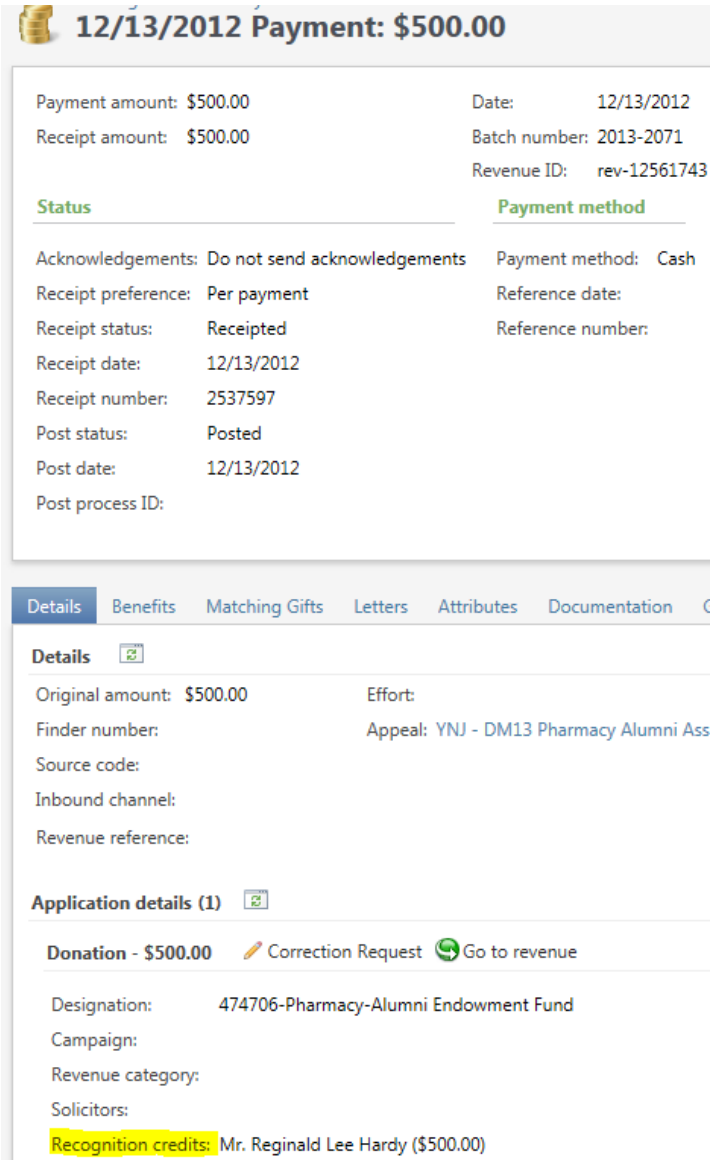
To find out:

1. Find the **Constituent**
2. Click on the **Relationships** tab
3. Click on the poplar next to the spouse/partner – the comment will provide details.



# Stewardship Tips

4. If there isn't a comment regarding recognition credit:
   - Go to the gift detail to see if the spouse received recognition credit



12/13/2012 Payment: $500.00

Payment amount: $500.00
Receipt amount: $500.00
Date: 12/13/2012
Batch number: 2013-2071
Revenue ID: rev-12561743

Status

Acknowledgements: Do not send acknowledgements
Receipt preference: Per payment
Receipt status: Receipted
Receipt date: 12/13/2012
Receipt number: 2537597
Post status: Posted
Post date: 12/13/2012
Post process ID:

Payment method

Payment method: Cash
Reference date:
Reference number:

Details | Benefits | Matching Gifts | Letters | Attributes | Documentation

Details

Original amount: $500.00
Finder number:
Source code:
Inbound channel:
Revenue reference:
Effort:
Appeal: YNJ - DM13 Pharmacy Alumni Ass

Application details (1)

Donation - $500.00 Correction Request Go to revenue

Designation: 474706-Pharmacy-Alumni Endowment Fund
Campaign:
Revenue category:
Solicitors:
Recognition credits: Mr. Reginald Lee Hardy ($500.00)

➢ If they did not and you feel it is an error:
   - Click on ***Correction Request*** and ask for Gift Services to pull the documentation to determine if the spouse should have received recognition credit.
   - **Note:** Although Davie allows us to have a default for spouses to receive recognition credit for each other's gifts, there are exceptions when a donor may request otherwise for a specific transaction.

**Three things to note:**

- Check the Comments on the Spouse/Partner relationship
- Check the Gift Details and when in doubt,
- Request documentation review by the Gift Services team.

# Stewardship Tips

## Stewardship Reports

*Is there a place in Davie where we can see Stewardship reports that have been sent out for a particular fund?*

Stewardship reports can and should be loaded into Davie. They are associated with the purpose.

To see all the documentation files associated with a purpose/designation:

1. Click on **Fundraising** on the Navigation bar
2. Click on **Purpose search**
3. Search for and select the appropriate purpose using wild cards in the name or the designation number, which is the Lookup ID
4. Click on the **Documentation** tab
5. Click on the **poplar** beside each attachment listed
6. Click the File name or the ***Open file*** button to view the attachment