COMMON GROUND™ BEST PRACTICES GUIDE
A complimentary resource exclusively for Convio Common Ground clients

Acknowledgement and Stewardship

Written by Heller Consulting
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About the Author

This guide was written by Heller Consulting, a Convio Solution Provider authorized to provide services around the Common Ground system. It is part of an ongoing effort by Heller Consulting and Convio to get information about nonprofit technology and fundraising and marketing best practices into the nonprofit sector's hands. Heller Consulting brings efficient business practices and effective use of technology to nonprofit fundraisers, supporting greater success with less effort. Since 1996, the company has served more than 700 nonprofits of every type and size. For more information, please visit www.teamheller.com.

I. INTRODUCTION

Acknowledgement and stewardship are cornerstones of effective development programs. Far from being merely a business function, gift acknowledgement is the first rung in the stewardship ladder. Smart organizations put just as much thought and effort into what they do after a gift is received as they did to secure the gift in the first place.

A word about terminology: In fundraising parlance the terms “stewardship” and “donor relations” are often used interchangeably. In other cases, fundraisers talk about carrying out “stewardship” activities for a donation, as opposed to “donor relations” activities they undertake with regards to a person. In this guide we will use the term “stewardship” consistently to refer to both, in order to avoid any confusion.

In this guide, we will begin by discussing the foundations of good acknowledgement practices, and lead you through the development of your own acknowledgement letter structure. Then, we will discuss our “golden rules” of good donor stewardship and how you can develop your own stewardship plan to take your program to the next level. Examples of how Common Ground can be used to support your acknowledgement and stewardship practices will be given throughout the guide.

Please note that this guide focuses on best practices for acknowledging and stewarding gifts from individuals (including most family foundations and donor-advised funds), not grant stewardship. Grant reporting and follow-up is a much different, more regulated field.

II. DETAILS MATTER

We will begin our discussion of acknowledgement and stewardship by going all the way back to best practices for the basic data elements used in acknowledgement and stewardship.

A. Names and Addresses

It doesn’t get more fundamental than this: Error-free entry and maintenance of basic contact information is the foundation for the rest of your acknowledgement and stewardship programs. Building loyalty with your donors starts with this basic courtesy. Think about a time when you received a mailing that was misspelled or inaccurate. Did it make you feel like the organization was in a rush, or just didn’t care enough to check the details?

Names and Addressees/Salutations
For example, pay special attention to capitalizations, hyphens and spacing in names. People whose names include these really notice when they are not printed correctly. This is not too hard when an operator is entering data into your system manually, but it does get a little tricky when large amounts of data are added to Common Ground en masse, as with a data sync or an import, especially if your data is “Title Cased.” Title casing is great for catching data that is in ALL CAPS or all lowercase, but it is not one hundred percent accurate. For example, a name like “DeWitt” would come through as “Dewitt.” It’s worth investing a small amount of time to regularly audit new contacts (perhaps from a second pair of eyes) to double-check the quality of the data.

Every organization has to decide how to handle the situation where there are two names on a check, but it is not clear how they are related to each other or even whether the gift is from both people. In this case, we recommend entering both names as Contacts in the same Household, hard-crediting the person who signed the check and soft-crediting the second name. Until there is more complete information, it is probably best to acknowledge only the person who signed the check.

Consider how your organization uses titles (Mr., Mrs., etc.) and make sure to use them consistently. If your organization defaults to using titles, don’t let an addressee like “Mr. and Smith” or a salutation like “Mrs. and Mr. Jones” creep into your mailing list or acknowledgement letter. Build a step into your procedures to audit your report or letters before they go out, and correct errors at the source, not just in the moment in that document. In Common Ground, make use of Account addressees and salutations for household mailings. Use the Contact record for the singular addressee and salutation.

Addresses
Take advantage of the free address standardization offered by Common Ground. This standardization will remove punctuation from the address and automatically apply USPS-preferred abbreviations. For example, “Avenue” and “Ave.” become “Ave”. Once an address has been standardized, it can easily be copied onto other Contacts in the Household. Please note that address standardization does not imply that the address is correct for that Account or Contact, just that the address exists and can be standardized.

B. Opt-Outs and Contact Preferences

Mail/Email Preferences
It is hard to overstate how important it is to respect a donor’s mailing preferences. For example, one donor may request not to receive event invitations, while another donor may request to receive only one solicitation per year at year-end. At Heller Consulting, we refer to these preferences as “approach restrictions,” since they always refer to a restriction on the way your organization can approach the donor.

Approach restrictions can be thought of as a hierarchy, from more restrictive to less restrictive. Over the last thirteen years we have compiled a list of the most popular approach restrictions, which are listed in the table below. Common Ground offers some native functionality for managing these preferences, while for others you will probably need to set up a multi-select picklist. In the Appendix there is a worksheet for your organization's use in determining your own approach restriction code use, definition and hierarchy.

Approach Restriction	**Guidelines**	**Common Ground Location**
Do Not Contact- Constituent Request	Use this code when a constituent requests no contact from your organization. This includes contact by mail, email, phone and personal approach.	Custom field
Do Not Contact- [your organization] Determination	Use this code when your organization determines that a constituent should never be contacted. This includes contact by mail, email, phone and personal approach.	Custom field
Postal Mail Opt-Out	Use when a contact has requested not to receive mail OR when an address is no longer valid.	Contact → Address Information
Do Not Solicit – Constituent Request	Use this code when a constituent or your organization determines that a constituent should not be asked for a contribution. Non-solicitation contacts are permitted.	Custom field
Do Not Solicit – [your organization] Determination	Use this code when a constituent or your organization determines that a constituent should not be asked for a contribution. Non-solicitation contacts are permitted.	Custom field
Email Opt Out	Use when a contact has requested not to receive emails from your organization.	Contact → Phone and Email
Do Not Call	Use this code when a constituent requests no contact by phone.	Contact → Phone and Email

Approach Restriction	Guidelines	Common Ground Location
Fax Opt Out		Contact → Phone and Email
Send Annual Report Only	Send Annual Report only. No other contact is allowed.	Custom field
Send Invitations Only	Send event invitations only. No other contact is allowed.	Custom field
Send Newsletters Only	Send newsletters only. No other contact is allowed.	Custom field
Solicit Once a Year Only	Solicit only once each year.	Custom field
Do Not Rent, Sell or Trade Name	Use this code to prevent a constituent's data from being shared with other organizations.	Custom field

Once your approach restrictions are in place, it's crucial that they be used in mailing list production. Each time a mailing list is produced, review the approach restrictions and determine which ones apply. For example, "Send Newsletters Only" is a suppression code when an event invitation list is being produced, but not when the newsletter list is being produced. Your organization may want to set up different reports for various sets of frequently-used suppressions (but still double-check them each time).

It's also important that users know that there is only one place in Common Ground for each approach restriction. Nothing ruins mailing list quality faster than having multiple places to check for an approach restriction (for example, what if there are three possible places a bad address flag could be located?) or worse, that approach restriction data was put in a new spot without anyone knowing. Make sure your organization's use of approach restrictions is part of new user training, and be vigilant for new notes or flags that indicate approach restrictions.

<u>Deceased</u>

Many fundraisers have had the cringe-worthy experience of accidentally mailing to a deceased person. It's an experience that no one wants to repeat. Common Ground offers a Deceased field on the contact record, which must be taken into account as a criterion in reports that are used for mailing lists. Common Ground is very flexible in the sense that if a Contact on a household is deceased, that does not stop mail from reaching other contacts in the household. However, be careful to check the Account addressees and salutations in the event that you learn of the death of a Contact on that Account. See the Appendix for details on best practices for deceasing a contact.

<u>Email Opt-Outs</u>

Today it is commonplace for organizations to reach out to their constituencies through both traditional mail and email. Just as donors expect that preferences for traditional mail will be respected, the same holds true for email communications. In recent years the most common approach was to email someone unless they told you to stop (that is, they "opted out" of email communication). Now, it is becoming more common to assume that individuals have opted out of email communication unless or until the organization gets specific permission to add them to the email list. It is generally considered permissible to send one email asking if the person wants to receive further electronic communications from your organization. If the person declines, the organization should take steps to suppress the email from future communications.

In the Convio Online Marketing (COM) – Common Ground Connector, email opt-outs are handled by syncing the Common Ground "Email Opt Out" Contact field to the COM "Accepts Email" field. In both systems these fields mean that the individual has opted out of all email communications. Note that these fields are the converse of each other; if one field is checked in one system, it will be unchecked in the other system. COM has a separate area for tracking interest in particular e-updates or e-newsletters that your organization may offer. These are <u>not</u> currently part of the sync with Common Ground.

C. Recognition Names and Preferences

When it comes to recognition, such as an annual report listing or donor wall, some donors will have a strong preference for how their name appears. They may specify a certain listing, or go the opposite direction and request that their name be withheld. Beyond these special cases, it is a good idea to decide if you are going to generally use informal or formal listings to make the report easier to generate.

If a donor requests a certain listing, it is best to fill in the Recognition field on the donation with the specified listing. If the donor has more than one gift (for example, the donor gave three gifts last year and now you are preparing the annual report listings), you can pick the one that most likely triggered the request (if known) or put the listing on all of them. It is not necessary to change the donor's regular addressees or salutations in order to accommodate the recognition request.

If a donor requests anonymity for one gift, check the "Mark as Anonymous" checkbox on the gift and type "Anonymous" in the Recognition field. If a donor always wants to be anonymous, check the Anonymous checkbox on the Contact and Household record, or on the Organization record for corporations and foundations. You then also have to make sure to check the "Mark as Anonymous" checkbox on every gift and enter "Anonymous" in the Recognition field.

Please see page 12 for more information about producing a recognition list from Common Ground.

III. ACKNOWLEDGEMENT AND RECOGNITION

A. Best Business Practices for Gift Acknowledgement

Your acknowledgement process is the foundation of your donor stewardship efforts. In simplest terms, it is the process of thanking a donor for a gift to your organization. Due to IRS regulations, your organization must send a tax deductibility letter to recognize contributions of $250 or more, although most organizations send an acknowledgement or receipt for every donation. On a grander scale, acknowledgement letters are important to foster good will with your supporters, and let them know more about how they're helping you continue your good work.

Simply, acknowledgement letters consist of several parts: a thank you for their donation, a description of how that donation is used, and details on your programs and initiatives, signed by a prominent member of the organization. They often contain information on the amount and date of the donation, or this info may follow in a separate "receipt." For special relationships and major donors, a note on the acknowledgement or another separate note or phone call may follow.

The thank you letter should be addressed to the donor of the gift, or jointly to a household at the donor's request. Prompt acknowledgement is a great example of good stewardship and proof to the donor that your organization is professional and efficient. Unfortunately, it often seems like prompt acknowledgement is becoming the exception rather than the rule, and becomes a pleasant surprise for the donor and a good reflection on your organization. Prompt acknowledgement should follow prompt depositing of the check or prompt processing of the credit card. If there is a delay, it could cause a perception in the donor's mind that you didn't really need the money or will not use it well.

Many organizations strive for a 48-hour turnaround time for most acknowledgement letters. That means the acknowledgement letter should be sent within 48 hours of receipt of the gift. Ideally the donation would be deposited in the same time frame. In most cases, your business processes can be streamlined so you can meet this deadline, if you are not meeting it now and would like to set that as a goal. This can be accomplished through making better use of Batch, page layouts, workflow and validation rules, and Bulk Acknowledgements.

There are some cases where more care needs to be taken on a custom acknowledgement, such as for a foundation grant or a major gift. Generally, those acknowledgements should be turned around in less than a week.

Of course, the acknowledgement letter should include the donor's name and address, with correct addressee and salutation. It should include the amount of the gift. Some organizations include the date the donation was received, but this is not required. If the gift is restricted, the letter should include the name of the Designation, or in some way reflect the restriction of the gift. If the gift was an honor/memorial gift, the letter should include the tribute type, tribute name, and an assurance that a notification was sent to any specified family acknowledgee (if the donor provided the information). Some organizations acknowledge a donor's first gift differently than subsequent gifts, with a welcoming message and tone in the first letter.

Take advantage of the acknowledgement letter as a way to keep your donors informed of the latest news at your organization. Acknowledgement letters can be one of the best ways of communicating with donors in a non-solicitation context. Don't let your letter templates get stale, boring and generic, or treat them simply as a financial document or receipt. Ideally, your donors will actually read these letters, not just file them away unopened. For example, you could use a different acknowledgement letter for each direct mail appeal you send, with the text tying back to the theme of the appeal in some way. For your "general" acknowledgement, try updating part of the letter (usually the body of the letter between the opening and closing) once per month with the latest tidbit of success or publicity. For event-related acknowledgements, it's great to include the total amount raised or total attendance in the letter.

B. Considerations for Creating Templates

The IRS Publication 1771 on "Charitable Contributions - Substantiation and Disclosure Requirements" (last updated in May 2008) states that the following fields need to be included in a gift acknowledgement:

- name of organization
- amount of cash contribution
- description (but not the value) of non-cash contribution
- statement that no goods or services were provided by the organization in return for the contribution, if that was the case
- description and good faith estimate of the value of goods or services, if any, that an organization provided in return for the contribution
- statement that goods or services, if any, that an organization provided in return for the contribution consisted entirely of intangible religious benefits (described later in the publication), if that was the case

In addition, make sure you are including all the fields in your template that you will need to meet your desired level of customization. Which addressee/salutation should be used – the Contact or the Household? Even though the report you use for acknowledgements is based on Contacts, you can extract the Household addressee and salutation for your letter.

There are three gift amount fields located on the donation record: Amount, Benefit Value and Tax-Deductible Amount. For most straight donations, the Amount and Tax-Deductible Amount will be identical. However, for events and other special donations, you may need to factor in the Benefit Value. For example, if a donor sends a check for the Annual Dinner for $100, they are receiving a dinner in return. The Benefit Value may be entered as the amount of the goods and services (for example: $25). The Tax-Deductible Amount will automatically subtract the Benefit Value from the Amount, and you may output the Tax-Deductible Amount on your acknowledgments and receipts.

In acknowledgement letters to families of honored/memorialized people, it is generally considered bad form to include amounts of specific gifts. What you can do instead is send a report to the family listing all the donors and the total contributed amount.

C. Using Common Ground Bulk Acknowledgements

Most of your donations can probably be acknowledged with the Bulk Acknowledgements tool (assuming again that we are referring to donations from individuals). You just need to plan for the different types of letters you intend to use. These will become Donation Documents that will be applied to gifts. By the end of this section you should have a working knowledge of how many letter templates you need and how a user will decide which Donation Document to use on a gift.

How many acknowledgement letter templates do you need? Different organizations decide on different acknowledgement plans depending on a wide variety of factors. For example, a disaster-relief organization may design its acknowledgement program around the different Designations a donor can give to (representing relief efforts), while a zoo or museum may design acknowledgment letters around membership levels. It is also popular to write acknowledgement letter text specifically for each mail appeal that your organization sends. Keep in mind that your acknowledgement plan will have an impact on your overall stewardship plan, which you can lay out in the last section of this handbook.

Most organizations choose one of the following considerations as the primary criterion for determining which acknowledgement letter a donor will receive:

- Campaign
- Designation
- Gift amount
- Mailed letter vs. handwritten card or phone call (handled in the individual record or outside the system)
- Different letterheads / document layouts

If tribute gifts are significant to your organization, you should also give some thought to the wording and layout of the notification letter received by the family/honoree.

As an example, here is what an acknowledgment plan might look like for a health-related organization. Note that the most situation-specific and recent letters are at the top of the list, and more general letters are at the bottom. The goal of this plan is to provide enough information to a gift entry operator that they know which letter template to select in any situation. Please see the Appendix for a blank template you can use to create your own acknowledgement plan.

Sample Acknowledgement Plan

Donation Document Name	Description	Last Updated	When to Use
Grant awards should be entered as Acknowledged with no Donation Document.			
2010Gala	Includes information about the tax-deductibility of tickets and what the proceeds will support.	Feb 2010	Use for all sponsorships, ticket purchases, and donations to the 2010 Gala.
2009YE	Matches the tone and layout of the 2009 year-end appeal.	Nov 2009	Use for all 2009 Year-End Appeal gifts.
Research	Includes information on the latest research supported by our organization.	Oct 2009	Use for gifts restricted to research.
PubPol	Includes information on the latest state and federal initiatives being supported by our organization.	Sept 2009	Use for gifts restricted to public policy.
Programs	Includes information on the latest programs we offer.	Sept 2009	Use for gifts restricted to program development.
Hon/Mem	A general thank-you that includes the tribute type, tribute name and notificant. Designed for new / one-time donors. General text about the organization's activities is regularly updated.	Nov 2009	Use for unrestricted honor/memorial gifts.
General	A general thank-you that includes recent information about the organization's activities. Updated bi-monthly.	Nov 2009	Use for non-tribute, unrestricted gifts.

D. Acknowledging Online Gifts

Whether your organization uses Convio Online Marketing (COM) or a different online marketing tool, it's important to give some thought as to how online gifts will be acknowledged.

Most organizations arrange for an immediate auto-responder to go out to the donor after a donation is complete. According to IRS Publication 1771, this email can serve as the formal gift acknowledgement, as long as it contains all the required information (see section III-B). In this case, a mailed letter is not required.

Perhaps there are situations in which your organization chooses to send a follow-up written acknowledgement to an online gift, such as for a first-time donor or if the gift is over a certain dollar amount. This should become part of your acknowledgement and stewardship plan.

If your organization does use Convio Online Marketing and uses the Connector to get donations into Common Ground, it is important to note that the Acknowledged field is *not* part of the standard Connector map. To mark Connector-originating gifts as Acknowledged, consider setting up a field update workflow rule that would change a gift to Acknowledged if the eCRM Gift Origin field is checked (this field is automatically checked by the Connector for all COM-originating gifts) and the gift is marked Not Acknowledged. Gift Amount can also be a criterion in this workflow rule as well, if your organization sends acknowledgement letters for gifts over a certain amount, and you would like to leave those not marked as acknowledged until that letter is sent.

E. Producing Recognition Lists

It's almost universal in fundraising that at least once per year an organization will need to produce a recognition list of donors. These lists are often organized by giving clubs or levels, and/or by the designation of the gift. Great care is taken that the listings are accurate and read as the donors wish.

In Common Ground, producing a recognition list is a multi-step process. Before beginning, there are some important considerations, such as:

- Will your list include Households and Organizations, or just one or the other?
- Will Household Contacts be listed individually, or will you use Household listings?
- Do you the need the total amount given (for a donor club-type listing), or just an alphabetical list?
- What types of gifts will be included? Probably the most important consideration here is whether Pledge Installments should be included, or the total pledge amount. Counting both will lead to inaccurate totals. Also, Recurring Gift Installments should be counted, but probably not the Recurring Gift itself.
- Is the Designation important for the listings?
- Do you have soft credits that need to be considered? If you are going to include soft credits, make sure you do not inadvertently add intra-Household soft credits to a Household's total.
- Is it possible that there are any donors who wish to remain anonymous? Was this marked on the transaction, or on the Contact or Account record?

Once a clear understanding of the criteria and outputs has been achieved, the data can be extracted from Common Ground and manipulated into a recognition list.

IV. STEWARDSHIP GOLDEN RULES

The goals of a stewardship program usually include making a repeat gift as likely as possible and increasing the level of future gifts. We have distilled these goals into three "Golden Rules" which are the cornerstones of a good stewardship plan. Translating these rules into action items will have significant impacts on your stewardship program.

A. #1 – Get the Details Right

As we mentioned at the beginning of this guide, paying attention to the quality of your contact information is the most basic element of good stewardship. It is wise to invest in training, documentation, and clean-up to get names, addressees, salutations, and addresses as clean and accurate as possible.

Use the tools in Common Ground to help users enter clean data. These include workflow rules, validation rules, page layouts and address standardization. For example, perhaps your organization decides that a title (Mr., Ms., etc.) is required on all Contacts. You could set up a validation rule that would give the user an error if Title is left blank. Or, perhaps your organization will make it a policy to run the Bulk Address Standardization utility once per month or once per quarter.

Users who add or maintain basic contact information should be held accountable for the quality of their work. Discuss "ownership of accuracy", not just at the time of entry into the system, but afterwards as well. Who is responsible for keeping the data correct, recording divorces, address changes, job changes, deaths, etc.? Ideally, other users will funnel requests for updates to these highly-trained users. (See our "Gift Entry Business Processes Best Practices" handbook for more information on roles and responsibilities.)

Establish standards for accuracy. Is it important that "Avenue" be used instead of "Ave."? Should there be a comma before "Jr."? If an error is discovered, alert the user who entered the data to correct it themselves. Often it is helpful to include the procedures documentation with the request to make sure the user knows how the data is supposed to be entered.

Where possible, go the extra mile. For example, perhaps you could plan on sending a roll-up report/list to the acknowledgee of an honor/memorial or Tribute (before they ask for one). Or, perhaps your organization will always make sure to verify contact information whenever they speak to a donor on the phone. Some organizations will reach out to donors for new contact information via another means of communication if the address, email or phone number goes bad.

B. #2 – Have a Communication Plan

One of the key elements of a stewardship program is to develop a communication plan that goes beyond the fundraising requests your organization makes. Donors should hear from you more often than only from your mail/email appeals.

The idea here is to keep contributors connected to your organization and work on building the relationship. In general, the more personalized the communications can be, the more meaningful they are likely to be to the donor. One way to do this that donors really appreciate is to follow up with the donor about how their gift was used. This can be accomplished with an email update (for donors that have opted in), or in a non-solicitation mailing. For example, say your event featured a special “Fund A Need” activity and a number of donors gave an extra gift to support a particular fund or program. You could plan on sending a follow-up email to those donors letting them know how much was raised and how the funds will be used.

For larger/major gifts, it is common to send at least one personalized report to keep the donor informed of how their gift is helping meet the needs or goals of the donation, especially if the gift is restricted. For example, a donor of a large multi-year pledge may receive a report each year keeping them informed of the developments in the project or program. Endowed gifts may be stewarded indefinitely.

In Common Ground, Donation Tasks are a great tool to help you stay on track with communications or reports related to a particular gift. To take it to the next level, perhaps a workflow rule can be created that would automatically add multiple tasks according to donation criteria.

C. #3 – Encourage Participation

Securing another donation is not the only way to demonstrate the success of a stewardship program. In fact, often it is even more relevant to build participation in other ways. Getting donors to participate in a variety of ways increases the likelihood that they will give again. Here are some examples of other types of participation that can be encouraged:

- Volunteer
- Attend a non-fundraising event, lecture or presentation, especially on a topic known to be of interest to the donor
- Take a tour or attend a site visit
- Special “benefits” of giving: earlier access to events or exhibits
- Invite their friends/family to participate also

Use Common Ground Events and Volunteer tools to track donor participation that extends beyond giving. For example, the Events functionality can track every time a

Contact is invited to an event and what their response was. Over time, this can help you learn which types of events are more likely to appeal to donors, or even if different types of donors prefer different types of events. The Volunteer functionality is designed to track particular “shifts” volunteers work at different “jobs” your organization offers. Over time, you can add up how many hours have been worked and recognize your volunteers for their efforts. One helpful feature on the Volunteer shift is the ability to record the names of other people the volunteer brought with them. This helps you gather names without adding Contact records to Common Ground until you have more complete information.

D. Create Your Own Stewardship Plan

Every organization’s stewardship program is different. A lot depends on the type of organization, the resources available, and the size of the donor pool.

One good way to start fleshing out your stewardship plan is to look back at your acknowledgement plan. Most likely, the ways you thought about your donors for acknowledgement purposes will have some bearing on how you think about them for stewardship purposes. For example, in the sample acknowledgement plan some of the letters were broken down by “Research”, “Public Policy” and “Programs.” To the sample organization, the restriction of the gift mattered a lot in terms of how donors are categorized. This organization might develop a stewardship plan that also focuses on known areas of interest to the donors. Looking over the calendar of events for the year, and the organization’s planned activities, the staff can start thinking of ways to involve donors.

Different “types” of donors, however those types are defined by your organization, will probably have slightly different stewardship plans. Often these categories include some combination of gift size, Designation, Donation Record Type, whether it’s a first gift or subsequent gift, or Classification, or Campaign.

The sample stewardship plan below lists five types of donors and five stewardship actions. The grid identifies which types of donors will be included in each activity. A visual aid like this can be a big help in making sure the right groups of people are included every time. Your grid may have more or fewer segments and activities.

As you develop your plan, don’t forget to use the features in Common Ground that will make it easier to implement, especially workflow rules to schedule follow-up tasks.

Sample Stewardship Plan

	Stewardship Actions				
Segments	Personalized acknowledgment letter	Include by name in Annual Report and ask for confirmation of listing	Invite to join email groups on specific topic of interest	Call for volunteers to help staff the annual conference	Invitation to annual Programs year-end recap
Unrestricted gift of less than $500	Y	N	N	Y	N
Unrestricted gift greater than $500	Y	Y	N	Y	N
Research donor of any amount	Y	Y	Y	N	Y
Public Policy donor of any amount	Y	Y	Y	Y	N
Programs donor of any amount	Y	Y	Y	Y	Y

V. APPENDIX

Approach Restriction Worksheet
How to Handle Deceased Contacts
Acknowledgement Plan Worksheet
Stewardship Plan Worksheet

Approach Restrictions

Approach Restriction	Guidelines	Common Ground Location

How to Handle Deceased Contacts

Marking a Contact Deceased		
Step	**Tab**	**Procedure**
	Search	Search for the **Contact** name by typing it in the **Search** box. Click **Go**. Make sure the box is **unchecked** next to **Limit to items I own**. Click on the contact name. *Ex: Bob Smith*
	Personal Information	Scroll down to this section and **check** the box next to **Deceased.**
	Save	
	Account Detail	Scroll up to this section and click on the **Account Name**.
	Contacts	Scroll down to this section and click on the surviving spouse (if present).
	Contact Detail/Head of Household	Check the box to make this contact the **Head of household**.
	Personal Information	Scroll to this section and change the **Marital Status** type to **Widowed**.
	Save	
	Relationships	Scroll to the **Relationships** sub-header. Double-click the arrow next to the contact's name, then highlight the relationship to the deceased spouse. Click the **Edit Relationships** button.
	Second Contact	Uncheck the box next to **Second contact receives soft credit.**
	Save.	

Acknowledgement Plan

Donation Document Name	Description	Last Updated	When to Use

Stewardship Plan Worksheet

	Stewardship Actions				
Segments	#1	#2	#3	#4	#5
A					
B					
C					
D					
E					
F					
G					
H					
I					
J					
K					
L					