Donor acknowledgements

## ****Guide to Acknowledgements from COVID-19 Forward****

## ****Purpose:****

* OBJECTIVE: Provide donation acknos within 48 hours of receipt of bookable donation or payment through a stream-lined process focused on donor experience/customer service.
* COVID-19, and our related move to remote work, complicated producing printed and mailed Acknowledgement Letters to our donors in a timely manner. With remote work, and the need to acknowledge COVID-19 specific donations emerging, we’ve re-evaluated our ackno process to make it more efficient, timely, and easier to execute without the need to be in the office.

## ****Process:****

* In response to COVID-19, and in an effort to improve our Acknowledgement system, **we as an organization are transitioning to an E-mail based acknowledgement system.** Please note - the new process will apply to all acknowledgements from here moving forward, including post COVID-19 changes to normal business. This process improves our current acknowledgment process overall regardless of the current situation, and ultimately helps bring us closer to our goal of sending timely ackno’s to all of our donors and be able to keep track of these interactions.All team members should know how to carry out the process, and regions can decide which specific members of their team will be sending out Acknowledgements ​​​​​​​
  + This means our primary means of getting our donors acknowledgements in hand is through email, however this system keeps in mind donors who want mailed acknowledgements, or do not have an email address recorded in Salesforce
  + E-mail acknowledgments additionally save paper, reduce the number of follow up requests about acknowledgements during tax season, and make it easier to keep track of who has or hasn’t actually received an ackno from Bottom Line
  + Lastly the below process is meant to be used for all donor types; Corporate Partners, Foundations, Individual Givers, etc. (with the idea being that our point of contact/ program officer/ appropriate parties is who should be sent the email acknowledgement). In situations where a Corporate Partner or Foundation has outlined a process that should be followed for them to receive a tax acknowledgement, the development team should defer to that process.

1. You should default to the **preferred email address** on a contact record in order to send an email acknowledgement
   1. If there is no email address on the contact record you should instead send a **print acknowledgement letter** in the mail. In this case default to the process that was previously carried out
      1. Regions may also choose to send an additional hard copy acknowledgement to gifts over a certain size/ to specific donors/ funders/ corporate partners because that is their preference; teams can determine what the right course of action is/ when this is appropriate for those specific groups
   2. For the time being/ whenever the mailing of print acknowledgements is unavailable and there is no email on the contact record, portfolio managers should call donors to thank them for their donation, and let them know a print acknowledgement letter will come in the mail at a later date
2. The acknowledgement letter should be sent as a**PDF attachment**
   1. Use the COVID-19 acknowledgement letter (print and digital available) for COVID-19 related donations, otherwise use standard regional acknowledgement letter, or letter specific to the campaign
3. The**body of the email should be approximately 3-4 sentences long** and:
   1. Let the donor know the attachment includes an acknowledgement of their gift, including tax specific language. You may also include a specific and personalized note, or an excerpt from the letter itself in the body of the email as well.
   2. It should also let the donor know that if they would prefer a hard copy of their acknowledgement letter mailed to them, they are welcome to request one
   3. The subject line should read; ***Thank you from Bottom Line; Tax Acknowledgement Included***, the essential piece being that the donor should quickly know there is tax information included
   4. If the donor is new to Bottom Line, **please include the New Donor Kit Materials** either as PDF attachments (with a note about this in the e-mail body), or as hard copies included in a mail Ackno letter
4. Following sending the e-mailed ackno letter, Portfolio Managers should:
   1. Check **Acknowledgement Sent** on the corresponding donation record in Salesforce, so that we know the donation has been acknowledged
   2. Add an activity to contacts for whom a **New Donor Kit**was also sent as a meaningful donor touchpoint (Portfolio managers can do this directly from the email itself using Cirrus to add the activity)

## ****Training:****

* This page serves as the primary training and guidance for this new process.  Please read through this site page in order to understand how to send email acknowledgements
* A post will be shared (and pinned) in the #DonorCommunications Slack channel explaining the new process, and including a link to the folder on the Bottom Line Sharepoint that contains this Training guide and the templates for both an E-mail Ackno or a Print Ackno for when necessary
* Regions can always ask for a walk through of the email acknowledgement process.

## ****Tools:****

* COVID-19 Specific acknowledgment templates:
  + [Digital Version](https://tbl500amory-my.sharepoint.com/:w:/g/personal/hsingh_bottomline_org/EegXcV4je-RChI-K7C1zOF4BR40b6a4Yoy53tCVe8R2c-Q?e=OVu87y)
  + [Print Version](https://tbl500amory-my.sharepoint.com/:w:/g/personal/hsingh_bottomline_org/EWDyie8W_E5KkMWYi2CdpWgBbrLsYtorYg20ptSV9CMUBg?e=lpOGkA)
  + [COVID-19 Ackno Regional Templates](https://tbl500amory-my.sharepoint.com/:u:/g/personal/hsingh_bottomline_org/ERG0pMk6fHxJj8nMEHFRDsgBOOtbbjDKn46jrECoVZzpHw?e=GoGOEg)
* Recognizing Our Graduates acknowledgement template:​​​​​​​
  + [Digital and print](https://tbl500amory.sharepoint.com/:w:/r/sites/BLDevelopment/_layouts/15/Doc.aspx?sourcedoc=%7b69ADE0F6-7621-44BA-BC21-6BEF49408EA5%7d&file=Recognizing%20Our%20Grads%20Ackno_FINAL.docx&action=default&mobileredirect=true)
  + [Recognizing Our Graduates](https://tbl500amory-my.sharepoint.com/:u:/g/personal/hsingh_bottomline_org/EdRY_4LlhPJFsWbxIb2iWV8BJenZ5tqp9q28bQziKqVgMA?e=aecgEP)[Regional Templates](https://tbl500amory-my.sharepoint.com/:u:/g/personal/hsingh_bottomline_org/ESHDikEPWgxMjOQHBK0lyBYBRYNA-f4yr6Q2NM8WWQ_x_g?e=cOv6uo)
* Ackno Reports in Salesforce- based on payment for us to make sure we ackno donors as soon as we have received payment on their gifts:
  + ​​​​​​​[New York Ackno Report](https://na88.salesforce.com/00O1Y000006kdFr)
  + [Chicago Ackno Report](https://na88.salesforce.com/00O1Y000006kdFN)
  + [MA Ackno Report](https://na88.salesforce.com/00O1Y000006kYZq)
  + [National Ackno Report](https://na88.salesforce.com/00O1Y0000070neF)
* Acknowledgement Guide [(this document)](https://tbl500amory-my.sharepoint.com/:w:/g/personal/hsingh_bottomline_org/EQ1PFNpdqSRHsWiIqoDMcKsBy4Mbfk9UdhpF1Brx4em27w?e=o23ka7), which is simply a document form of what is outlined here
  + New Donor Kit materials which can be found on the common drive here:  Common>marketing and branding>approved marketing collateral>new donor kit
    - They can also all be found in this [One Drive Folder called New Donor Kit](https://tbl500amory-my.sharepoint.com/:f:/g/personal/hsingh_bottomline_org/Esb7KT_zx-JOpodIwnI51RgBWERIgbQjd1LsRfuVFPfMdQ?e=SNHIIq)
  + Sharepoint: <https://tbl500amory.sharepoint.com/sites/BLDevelopment>
* Note: new language regarding 2020 taxes has been added to the acknowledgement language to indicate changes in how donors can claim their donations. It states, “Beginning with 2020 tax returns, taxpayers will be able to claim up to $300 in cash contributions to charity as a deduction without Itemizing.”