

Preserving Your History

Raise your hand if you have a plaque (or two or twenty) in your storage closet.

Raise your hand if a donor has ever knocked on your door looking for his/her missing plaque.





You are in good company

- Many of our customers have confessed to the same and we wanted to see if we could help.
- Did a survey of 20 development professionals with the help of our friend and colleague Nancy Simpson-Banker in June 2008.
- Developed a program in the fall 2008
- Here to tell you how you can get the plaques out of the closet and raise more \$ – with or without an outside vendor

What is *Preserving Your History*?

- A method to inventory and catalog past/existing donor recognition pieces
- A system for detailed tracking of current and future donor recognition.
- A program that provides a basis to appropriately consolidate or redistribute all of that information
- An opportunity to re-furbish, re-cycle or retire old recognition



What is *Preserving Your History* (continued)

- Improve the aesthetics of the common areas
- Review your department's guidelines for types and location of recognition
- Build standards for future recognition
- Use the information for future budgeting
- Utilize the information for re-connecting with past donors

What has been your experience?

Our survey tells us that 90% of our surveyed group have plaques in their closet or angry donors who can't find their plaques.

Our field experience tells us that about half of the fundraisers who we have spoken with are implementing at least parts of this process currently.

At least half of them no longer have the staff to complete or continue the project.

100% of those we have spoken to recognized the benefit either initially or after the discussion.

Ask yourself these 10 questions?

- 1. Has your organization added a new building or done reconstruction on an existing building?
- 2. Have old donor recognition pieces and/or information been misplaced?
- 3. Do you have an inventory system that tracks your recognition programs?
- 4. Have you ever had a concerned donor ask about a plaque that could not be located?
- 5. Do you have an area in your facility where old recognition pieces are stored?
- 6. Do you have old cast bronze tablets/plaques that need to be refurbished?

Ask yourself these 10 questions (continued)

- 7. Has your development department undergone a reorganization?
- 8. Is there any chance that your organization may have lost revenue because the history was not preserved?
- 9. Could an individual who made a contribution 20 years ago still find his/her recognition?
- 10. Do you have the staff to set up a complete tracking system that captures the past and plans for the future donations of your organization?



How does *Preserving Your History* work?

- **Needs Assessment**
- **Discovery**
- **Information collection/inventory**
- **Consolidation**
- **Record Keeping**
- **Standardization**
- **Policies**
- **Connecting with lost donors**

How does it work?

Needs assessment

Objective is to verify which of the following exists:

- Lost or stored recognition pieces
- No method of tracking gift giving information
- Aesthetic lack of organization of plaques and displays
- Lack of continuity (theme)
- Valuable refurbishing projects
- Lack of policy/structure pertaining to recognition

How does it work?

Discovery

- Gather, organize and catalog past and present recognition information
- Check sheet
- Photography
- Prioritize

How does it work?

Consolidation

- Create a permanent log of the information
- Custom spread sheet (see hand out for content) (Detailed)
- Categorize and consolidate all recognition
- Determine if there are any re-furbish, re-cycling or gifting opportunities. (Plates or plaques that might be returned to families?)
- Consider a rededication ceremony for consolidated plaques

How does it work?

Benefits of Record Keeping

- Sort information by categories
- Develop programs to contact past donors
- Merge information into DBM tool
- Readily find a plaque when requested

How does it work?

Standardization

- Now is the time to choose a future design concept (materials, colors, font, logo or other graphics)
- Now is the time to create a template of sizes of plaques by size of gift
- Now is the time to create standard styles for types of recognition (naming opportunities, annual funds, employee) with like formats to create continuity.

How does it work?

Policies

- Once standardization is determined, a policy can be established for look, location, price and relationship to other wall hangings
- This information can help to create a budget for this expenditure
- An excellent time to create of authorization flow chart to prevent future problems - rules

What is the benefit of *Preserving Your History*?

- A permanent record of all recognition
- Ability to easily access those records
- Consolidation and standardization of recognition
- Implementing and participating in the “Art of Healing”
- Future budgeting
- Create rules for recognition displays
- Re-connect with donors
 - **PREVENTS LOST DONORS**
 - **TRANSLATES TO FUTURE DONATIONS**