

Annual Report – Development Office

1. OBJECTIVE & SUMMARY:

To prepare donor lists for the Annual Report. People involved include the Communications Director and AM's contracted designer of the report. The Development Office prepares the donor lists for the Annual Report including In Memoriam and In Honor, and excluding those who do not wish to be listed.

2. RESPONSIBILITIES:

- The Development Director is responsible the annual report donor lists.
- The Communications Director is responsible for the report content.
- The contractor is responsible for the design.

The Development Director and designer report to the Communications Director who reports to the Executive Director.

3. DEFINITIONS:

NA

4. REFERENCES:

See attachments

5. MATERIALS and/or EQUIPMENT:

Computer

6. PROCEDURES:

Task occurs during the first two weeks of January.

1. Solicit programs for In-Kind and Cash Donations. Cash donations typically come through Donor Perfect, however, it helps to catch any misentries or errors in the system.
2. FROM DONOR PERFECT: Pull the lists according to type of record versus giving level. This is the preference of the current Executive Director (01-09-08).
 - a. Religious Organizations will be one list
 - b. Businesses, Organizations, and Foundations will be another (Government campaign drives and Donor Voice will go in this list)
 - c. Individuals
 - d. In-Kind gifts will be its own list
 - e. In Memoriam gifts will have its own section
 - f. In Honor gifts will have its own section
 - i. Note: For In Memoriam and In Honor gifts, as these sections become more popular, consider listing names of donors just here versus one of these sections AND the regular section (this is something for consideration only, not required)
 - ii. Possible second option: list "Honoring so and so" and "In Memory of so and so" after the individual names may be another option
3. Export lists to Excel (Word, if possible, or Adobe because easier to copy and paste)
4. Transfer the names over to Word

Author:

Loc:

Date:

Reviewed by:

Name & Title

Date

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5. Pull the names out of a table format and into a normal list
6. Remove names of those donors who have requested that they not be listed.
7. Separate the lists into their own documents or separate them within one document
8. FROM MAESTROSOFT:
 - a. Pull donors who donated items to the auction for the INKIND LIST
 - b. Pull attendees who either paid for their registration tickets or who bought something at the auction for the INDIVIDUALS
 - c. Pull sponsors who donated cash to the event; place in MOST APPROPRIATE list
9. FROM PROGRAMS:
 - a. Incorporate names into the INKIND list
 - b. Include donations to the It's a Wonderful Life Benefit, the Hunger Walk, other events, and program activities; don't forget to ask the Office Manager who often puts together meetings for the Executive and Deputy Directors, and who might not think to include nominal donations
 - c. Include volunteers who have donated their time as a part of INKIND
10. FROM FUND DRIVE, DONOR VOICE, & COMPANY GIVING GIFTS:
 - a. Pull names from the Excel lists emailed from Fund drive donations
 - b. Pull names from Donor Voice notifications mailed to the Fiscal Office
 - c. Pull names from company notifications mailed to AM
11. Once cleaned up, email these lists to the contracted designer
12. Designer will provide proof for review, editing, and feedback
13. Style feedback, spelling checks, and possible further name removal (i.e. duplications) will be required

6.1 CALCULATIONS:

Donor Perfect: When pulling lists remove non-tax deductible items. (See Donor Perfect SOP)

6.2 CONTINGENCIES:

None foreseen; if any occur, connect with the Communications Director immediately

7. REPORTING AND DOCUMENTATION:

NA

8. ATTACHMENTS and REFERENCE FORMS:

Please reference Donor Perfect SOP

DOC #	Active Date:	Retired Date:
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