



# Gift Accounting and Acknowledgement

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**Michel Hudson, CFRE**  
**APRA International Conference**  
**August 16, 2003**



# Agenda

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- Small Shop Issues
- Policies and Procedures
- Events
- Acknowledgements and Receipts
- Reporting
- Resources
- Q&A



# Small Shop Issues

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- Responsibilities/Department Roles
- Checks and Balances
- Workload
- Gift/Donor Types
- Volunteers
- Resources
- Conversions



# Policies and Procedures

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- Gift Acceptance Policies
- Gift Processing/Accounting Policies
- Procedures Manuals
  - Gift & Pledge Entry
  - Gift Acknowledgement
  - Gift Reporting
- Web sites



# Events

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- Galas
- Auctions
- Raffles
- Golf/Tennis Tournaments
- Phonathons/Radiothons/Telethons
- Membership Drives



# Acknowledgements and Receipts

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- 24-hour Turnaround
- Hard Credits and Soft Credits
- Tracking
- Automation and Personalization
- Verbal Acknowledgements
- Trinkets



# Reporting

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- To Whom
- Timelines
- Types
  - Campaign
  - Honor/Memorial
  - Annual Giving
  - Web Site
  - Event Giving
  - Board Reports
  - Moves Management/Tracking
  - Interface with Research



# Resources

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- Budgets
  - Equipment, Software
  - Staff, Training
- FUNDSVCS
- Database User Groups/Conferences
- CASE Reporting Standards
- CASE Conferences



# Q&A

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Michel Hudson, CFRE

501(c)onsulting

1805 Gnu Gap

Round Rock, TX 78664

512-565-0142

[mhudson@501consulting.com](mailto:mhudson@501consulting.com)