

# Answers to Frequently Asked Questions at Year's End



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*(Courtesy of the National Park Foundation)*

### General Questions

#### 1) Address, phones and general information:

- a. Our mailing address is:
- b. Our phone number is:
- c. Our fax number is:
- d. General e-mail:
- e. [We are](#) a 501 (c) 3 non-profit organization. Our Tax Identification number is:

#### 2) Charity Navigator/990/Charity Rating

- a. Charity Navigator Rating:
- b. Location of 990 Online:
- c. Location of Financial Reports Online:
- d. Annual Reports Online:

#### 3) How much of my donation goes to programs?

- a. Currently XX% of funds are spent on programmatic costs, with the remaining XX% spent on administrative and fundraising.

#### 4) Our Organization compared to Other Organization(s)

- a. Our organization is different/special because.....

#### 5) Specific Programs Managed by Organization

- a. Program A, what it is, more info....
- b. Program B, what it is, more info....

#### 6) Premium Fulfillment

- a. If you receive a call from someone who asks about receiving a premium (calendar, tote bag, etc) or notes that they did not receive their calendar/the calendar was damaged, take down their mailing information and forward it to the Direct Response Specialist for fulfillment.

## **7) Stocking Stuffers**

- a. We are able to offer digital cards located online....
- b. Other materials in the office that we can send to donors who ask....

## **Inquiries about Mailing List Removal**

### **1) "I would like to be taken off the mailing list."**

- c. Mailing list removal is one of the more common requests we receive. All requests to be removed from the mailing list are tracked on the [Master Suppression and Update List](#) located on the Direct Marketing team SharePoint site. In order to properly take care of it and keep the potential donor happy, please follow the instructions below:
  - i. Ask if they are or have ever been a member of the National Park Foundation. If they were, then you can look them up in Raiser's Edge. Please refer to the Master Suppression List Guide for instructions on how to process these.
  - ii. Ask for them to give you the name as it appears on the mailing.
  - iii. Repeat the address that you are suppressing for confirmation.
  - iv. Assure the person that the process takes time, usually 6-8 weeks as lists for mailings are pulled in advance.
- d. *SAMPLE SCRIPT (USE FOR EMAIL REQUESTS):* "Thank you for choosing to support the organization. We are extremely fortunate to have such a passionate community of support. Per your request, I have removed your name(s) from our mailing list. As our mailings are processed in advance, please disregard any mailings 6-8 weeks after the change has been made, as they are the result of having been created prior to your request."

### **2) "Remove a deceased person from your mailing list."**

- a. Similar process to a standard mailing list removal, but be sure to mark that the individual is deceased in our records. For more information on where to mark someone as deceased, please refer to the Master Suppression List Guide.

### **3) “I’m receiving duplicate mailings.”**

- a. Look the individual up in Raiser’s Edge based on their address. If they are in the database, you will be able to determine if there are duplicate records with the same address. Provide name and Constituent ID numbers of the duplicate records to the Database Team, who will be able to merge the duplicate records in Raiser’s Edge.
  - i. If you cannot find the duplicate record based on mailing address, ask if the person has moved recently and verify the address.
- b. For both donors and non-donors you may also confirm that the mailings are not coming to a spouse or other resident of the same address, or that the mailings are coming due to a slight variation in name (i.e. John Smith and Jon Smith).

### **4) “How did you get my name?”**

- a. The organization occasionally trades with, or rents names from other like-minded charitable organizations. Your name was likely provided to us through one of these exchanges by another organization you have supported in the past.

## **How to Make a Gift**

### **1) “I would like to contribute to your organization.”**

- a. Begin by thanking the person for their contribution today to the National Park Foundation.
- b. Ask if they had tried giving to the National Park Foundation on our website. If they would like to do so, please direct them to the online donation page. If they would like to continue with giving over the phone, please follow the instructions below:
  - i. Determine how much they are looking to contribute today.
  - ii. Collect their billing information (name, address, email if using online portal). Before proceeding, verify the information for accuracy.
  - iii. Collect their credit card information. Be sure to repeat it again for accuracy.
  - iv. Confirm everything once more and thank them for their contribution to the National Park Foundation. If using the online portal, let them know that they should receive a receipt at the email address provided shortly. If you took the information on an authorization form, let them know that they should receive an

acknowledgement letter for their contribution in 1-2 weeks. If they need one sooner, please refer to the “Acknowledging a Gift” section.

**2) “I would like to make a gift in honor/memory of someone.”**

- a. Begin by thanking the person choosing to contribute to the organization in that person’s name.
- b. Ask if they would like to or tried making the tribute gift online. If they are interested, tell them that they can find the information for making a tribute gift online on our website on the “Other Ways to Give” page.
- c. For gifts in honor, you will take down both the donor’s name and address, and the tributee’s name and address. When the gift is processed, the donor will receive a note from the National Park Foundation confirming the gift amount, and serving as a receipt. The tributee will receive a card letting them know that the donor has made a gift to the foundation in their honor (gift amount will not be provided to the tributee).
- d. For a memorial gift, you will take down the donor’s name and address, and if they wish, the name and address of the spouse or family of the memorial gift recipient. The donor will receive a note from us serving as a gift receipt, and the family of the memorial giftee will receive a card letting them know that a donor has made a gift in honor of their family member (again, gift amount will not be provided).
- e. If they have any questions or a particular way they would like their tribute card to read (multiple family members on it, etc.), please direct them to the Direct Response Specialist.

**3) “I would like to make a gift of stock.”**

- a. Take the donor’s information, and you may then mail or e-mail the “Stock Transfer Instructions & Form” located online.
- b. If they have any further questions, please direct them to the Planned Giving Specialist.

**4) “I would like to make a planned gift to the Foundation.”**

- a. Any calls or emails concerning wills, bequests, trusts, annuities, or IRAs should be directed to a member of the Planned Giving team as many of these have a specialized procedure that must be followed.

**Acknowledging a Gift**

### **1) “I did not receive an acknowledgement/I need a new acknowledgement.”**

- b. For online donors, an acknowledgement is immediately generated and sent by e-mail. Ask them to please check their junk mail/spam folder to see if the message may have been filtered.
  - i. If they still did not receive it, let them know that you create and send another acknowledgement. If this is the case, then please refer to the next section for a step-by-step process for generating an acknowledgement. (Please note that you may need to wait to confirm the gift in Raiser’s Edge before you recreate the acknowledgement.)
- c. For offline donors, an acknowledgement is typically sent within two weeks of their donation being processed.
  - i. If they have not received it, or need an immediate acknowledgement, confirm the gift in Raiser’s Edge, and tell them that you will create and send an acknowledgement.

### **2) Acknowledging a Gift Process**

- a. Begin by confirming the date of the gift that needs an acknowledgement. If they are looking for a summary of all their gifts made to the organization within a calendar year, please refer to the next section on Year-End Summaries.
- b. Once you have confirmed the date of the gift for acknowledgement, ask how they would like to receive their acknowledgement letter. If possible, encourage emailing them a copy for faster delivery.
- c. After confirming the gift and delivery method, thank them for their support and begin working on the acknowledgement letter. If they are on the phone, assure them that you will create the letter and send it to them as soon as possible.
- d. Follow the acknowledgement letter template on the shared drive.
- e. Fill in the highlighted areas with the proper information and save a PDF copy entitled ??? to ????
- f. Send out the acknowledgement letter to the donor.

### **3) Year-End Summaries**

- a. Individuals who have a recurring gift set up with the organization should receive a summary of their calendar year contributions in January.

- b. If the donor has made multiple donations and has requested a summary of their giving, please confirm their information in Raiser's Edge.
- c. Like with single acknowledgements, confirm how they would like to receive their summary. If possible, encourage emailing them a copy for faster delivery.
- d. Once confirming the information and delivery method, thank them for their support and begin working on the summary letter. If they are on the phone, assure them that you will create the summary and send it to them as soon as possible.

**Contact List**

*[Insert your key contacts here].*

- Direct Response Team
  
- Donor Relations and Stewardship Team
  
- Planned Giving Team
  
- Finance Team
  
- Database Team