



Building Bridges: Gift Documentation at Butler University

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Butler University

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Session Overview

- Butler University Advancement
- Gift Documentation Process
- SharePoint
- Next Steps



Butler University

- Private liberal arts school - 1855
 - *No. 1 Regional University – Midwest*
 - *No. 1 Most Innovative School - Midwest*
- Indianapolis, IN
- 50,859 living alumni
- 6 Colleges
- 5,559 enrollment
 - ~4,500 undergraduate
 - ~1,000 graduate



University Advancement

Vice President for University Advancement

~40 full-time staff

~13 frontline gift officers

DRS Team:

- Dir. Donor Relations and Stewardship
- Assoc. Dir. Stewardship and Compliance
- Asst. Dir. Donor Relations

- Advancement Operations
 - Communications (1)
 - Community Engagement (4)
 - Digital Outreach (1)
 - Donor Relations (3)
 - Events (1)
 - Marketing (1)
 - Special Projects (1)

Gift Documentation Process

- Staff transition
- Pressure/
responsibility
- Tracking edits –
multiple ongoing
conversations
- Status updates



What We Could Control:



- Approval process – order of approvals internally and externally
- Candid conversations with gift officers
- Build trust and understanding

Improving the Experience

Excel Gift Agreement Tracking Sheet - Saved Search (Alt + Q)

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Editing Comments Catch up Share

Arial 10 B Date

A42 11/11/2021

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Start Date	Last Updated	DR&S Staff	Donor (Last, First)	Advance ID	Name of Fund	Requested by	Amount	Matching F	Gift Officer	Notes	Biz Office?	Stacey?
42	11/11/2021	11/18/2021	Rosie		52362	Dugan Hall- Faculty Office	11/16/2021		n/a	Graham Hona	Complete; w/Stacey for booking		
43	11/9/2021	11/7/2022	Rosie		HOLDINGKE	Amendment- Bud Kerwin JC	asap		n/a	Mike Eikenbe	Complete; w/Stacey	ok	ok
44	11/1/2021	12/18/2021	Rosie		31602	LOI- Johnson, Hillel, & Engli	asap		n/a	MBK	Complete		
45	10/28/2021	10/28/2021	Rosie		147082	TBD	11/4/2021		n/a	Graham Hona	Completed; With	ok	ok
46	10/14/2021	10/29/2021	Rosie		11351065	James and Janet Wuellner E	10/19/2021		N/a	Max Harper	Complete; w/Stacey	ok	ok
47	10/6/2021	10/28/2021	Rosie			Endowed Scholarship	asap		n/a	Michael Lofto	Draft w/GO for donor review- remove per		
48	9/29/2021	10/29/2021	Rosie		121737	Dugan Hall Office and Break	10/1/2021		n/a	Graham Hona	Completed; w/Stacey	n/a	n/a
49	9/27/2021	1/1/2022	Rosie		28734	Amendment- Richard R. Pov	11/1/2021		n/a	Mike Eikenbe	Complete; w/Stacey for booking		
50	9/23/2021	1/1/2021	Rosie		130294	Fletcher Athletics Endowed	10/8/2021		n/a	Jessica Balse	Complete; w/Stacey for booking		
51	9/21/2021	10/18/2021	Rosie		126939	McLaughlin Family Men's Be	9/29/2021		n/a	Mark Brouwer	Complete w/Stacey	ok	ok
52	9/15/2021	1/1/2022	Rosie		3117	Amendment- Lynnette Jorda	asap		n/a	Mike Eikenbe	Complete; w/Stacey for booking		
53	9/9/2021	1/22/2022	Rosie		16163	services for Sciences- Gallahue Hall Auditorium	9/30/2021		n/a	Jonathan Pur	Complete; w/Stacey for booking		
54	9/8/2021	10/1/2021	Rosie		119650	Dugan Hall- Office 238A	9/17/2021		n/a	Graham Hona	Complete; w/Stacey (reviewing	reviewing	reviewing
55	9/8/2021	10/1/2021	Rosie		119650	Smith Family Endowed Scho	9/17/2021		n/a	Graham Hona	Complete; w/Stacey (reviewing	reviewing	reviewing
56	9/8/2021	9/8/2021	Rosie		119650	Current Use- Athletics Capit	9/17/2021		n/a	Graham Hona	Complete; w/Stacey for booking		
57	9/2/2021	11/17/2021	Rosie		1867	Jim's Father- COPS Endov	9/30/2021		n/a	Mike Eikenbe	Completed; w/Stacey	ok	ok
58	8/31/2021	10/29/2021	Rosie		8359	Amendment- Slaby Cheerlea	9/20/2021		n/a	Mike Eikenbe	Complete; w/Stacey	ok	ok
59	8/31/2021	10/18/2021	Rosie		8186	Milton '44 & Theodora Dicko	9/20/2021		n/a	Mike Eikenbe	Completed; w/Stacey	ok	ok
60	8/24/2021	10/29/2021	Rosie		9156	Fenneman Family College o	8/27/2021		n/a	Jonathan Pur	Complete; w/Stacey	ok	ok
61	8/23/2021	9/21/2021	Rosie		107889	Ronald & Marcelle Gress En	9/6/2021		n/a	Michael Lofto	Completed; with	ok	ok
62	8/23/2021	10/19/2021	Rosie		52316	Bill Templeton Travel Fund	9/6/2021		n/a	Michael Lofto	Complete; w/Stacey	ok	ok



SharePoint!

DG

DR&S Gift Documentation

Private group ★ Following 15 member

+ New Edit in grid view Share Export Automate ... All Items Filter Info						
MBK						
Description	Category	Progress	Advance ID	Priority	Name of Fund	
Sciences Naming (Teaching Lab 3rd floor)	Naming Opportu...	In progress	119597	Medium	Sciences Naming	
Kathy Martin Harrison '79 and Mark Harrison Commons	Naming Opportu...	In progress	9941	Medium	Sciences Naming Agreement	
Sciences Research Lab	Naming Opportu...	In progress	1892	Medium	Sciences Naming Agreement	
Given by: Bob and Jane Wildman	Naming Opportu...	In progress	108092	Medium	Sciences Naming Agreement	
To support students with most need studying for the semester at Butler Semester in Spain.	New Endowed S...	Completed	0000202321 0000202320	Medium	Florence Jessup Memorial Study	



Max Harper

Category ▾

Progress ▾

Advance ID ▾

Priority ▾

Annual Scholars...

In progress

Medium

New Current Use...

Completed

New Endowed S...

In progress

OFA Approval?

N/A

Business Office Approval?

Yes

Signature Process

Not ready

Advance ID

16313

Notes/Comments

Refer to the Templeton Passport Fund
Planned gift to fund the endowment at preferred awarding amount. \$40k cash, split over 5 years, to start awarding now (spendable). Annual support would also renewable every 5 years...

Individual tabs for each development officer

Comments ▾

June



Tarlton, Rosie commented
@Harper, Max draft attached. Please review and let me know if you have any edits or questions. I have circulated it for review as well.
Jun 17

All comments about gift documentation housed within the "project"

Request Form

Gift Documentation Worksheet

Please be aware that you will not be able to save your work on this form. However, you can fill it out and later edit your responses if something changes.

rtarnton1@butler.edu [Switch account](#)

Your email will be recorded when you submit this form.

* Required

I need a: *

- Written Proposal (Jen)
- Gift Agreement - New Fund
- Pledge Agreement - Pledge to Existing Fund
- Pledge Agreement - Annual Scholarship Fund
- Amendment to Existing Agreement
- Named Space Reservation

Multiple paths depending on the documentation needed

Gift Agreement (New Fund)

Please use this option when a new fund/account needs to be generated. New endowed funds must be at least \$50k.

Please note that for any gift over \$500,000 we may create a public gift announcement, ex. press release. All announcements will be reviewed by the Office of Donor Relations and Stewardship and managed by the Office of Marketing and Communications.

Donor Name(s) *

Please include any other donor(s) or entity that should be mentioned within the agreement.

Your answer

Donor(s) ID *

Your answer

Date Agreement Needed *

Please note: All draft agreements must have internal approval, and final versions must have internal signatures before they can be shared with donors for signature. Depending on the nature of the fund, agreements to set up new funds can take additional time.

Date

mm/dd/yyyy

All of the details from the submissions had to be manually updated into the SharePoint list item

The questions aren't consistent which means it can be difficult to translate the details to the SharePoint List

1. I need a: *

- Gift Agreement - New Fund
- Pledge Agreement - Pledge to an existing fund
- Pledge Agreement - Annual Scholarship (New or Renewal)
- Amendment to an existing fund (name change, criteria updates, awarding changes)

Section 2

Gift Documentation Details

Please note that this form will be utilized for all documentation needs. Some questions might not apply to your request. Please be aware that for any gift over \$500,000 we may create a public gift announcement which will be reviewed by the Office of Advancement Operations.

2. Gift Officer Name:

*This is the list in which this submission should appear. **

Consistency – Regardless of what is needed everyone sees the same questions.

11. Criteria and/or purpose of the fund:

What criteria (scholarship) or other stipulations (non-scholarship) does the donor expect related to this fund? Please list a college or unit if this is a request for an annual scholarship.

Enter your answer

12. Amendment Details:

If this is a request for an amendment please share the changes that the donor wishes to make here.

Enter your answer

13. Has this fund been discussed with applicable Dean/VP/Faculty member:

- Yes
- No

All of these answers' "flow" directly to SharePoint!



Future Improvements

- Enhancing resources – templates, donor bios, process document
- Involving campus partners with approver roles
- Sharing data on average time to complete gift documentation



Collaboration

- Input/Buy-in for change
- Regular meetings with frontline gift officers
- Better understanding of each other's roles / contributions

Tips & Tricks

- Silos don't have to exist, and donor relations doesn't have a "lane"
- Donor relations has a role to play in all areas of the fundraising process



Look for Wins

- Find a project
- What are your pain points?
- Who else can help?



Questions?

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