W COLLEGE OF ARTS & SCIENCES | UNIVERSITY *of* WASHINGTON

CAS Guidance: EXPRESSthanks Gift Report

Access and General Use Instructions:

A User Guide to EXPRESSthanks is available here: https://depts.washington.edu/uwadv/data-technology-resources/application-overview/EXPRESSthanks/

EXPRESSthanks is accessed via Reportal, and you first need to request access to Tandem and reporting.

On the form, note that agreeing to the UW's data access and privacy policy is required. Personally identifiable information about donors should be protected. Donor and gift information should only be shared with faculty or staff who have agreed to the data access and use policy. When sharing, UW IT recommends sharing as links to documents stored on secure platforms like SharePoint or OneNote, being aware of the document permissions you're granting and sharing via Teams since email is not as secure.

Once you have access, use the EXPRESSthanks report on Reportal to run regular gift reports and send donor acknowledgements.

The date range of your report can be set to a specific time frame or a custom range. (See the full explanation of date settings in the User Guide.) Note that it only allows you to report four months back in time. If a longer reporting period is needed, contact CASadser@uw.edu. Here is an example of the set-up for a one-month gift report for Classics:

Run the report with the soft credit slider set to "yes" to ensure all donors associated with a gift are listed.
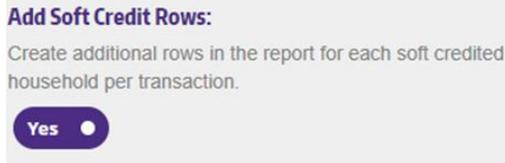
Once the report is downloaded, we recommend reviewing each tab, resizing or hiding columns as needed for ease of review. You may wish to remove those donors/line items we don't need to thank (more on this below). If you intend to merge your acknowledgements, combine all the gifts you want to acknowledge into one tab.

Tips when reviewing the report and acknowledging gifts:

- **Gift Details:** Keep an eye out for the columns Receipt Comments, Internal Gift Comments, and tribute details (Tributee) to better customize the acknowledgment.

- **Stacked Names:** The gift report stacks joint constituent names (like Harriet Husky and Harry Husky) with the constituent with the closest relationship to your unit listed first, but it is not always accurate. For example, you may wish to put a professor first and their partner/spouse second, even if the partner/spouse is an alum. If there's an equal relationship to your unit, such as two alumni or two professors, we generally put the donor with the primary gift credit first.

- **Alerts:** Alerts are not (currently) exported on the standard EXPRESSthanks report, but they can provide important information about the donor's contact preferences. It's worth a quick check in Tandem to review their record unless you are already familiar with them. Alerts often contain information about contact preferences. They show up as a banner at the top of a donor's record. A column for alerts may be added in the future.

- **Bequests / Estate Gifts:** Use caution when acknowledging a bequest (aka estate gift), and please don't assume that family members you are aware of should be acknowledged. Planned Giving handles estates and receives specific information about any appropriate family members or estate representatives to acknowledge for an estate gift. If you have questions, please contact casadser@uw.edu.

- **Donors we don't need to thank (at least not every time):** With the soft credit slider on the report set to "Yes," your report will show both primary credit and soft or associated credit line items when more than one individual or organization is involved in a gift.

  Primary credit goes to the person or organization that actually made the gift (their name is on the giving instrument or is listed first on the giving instrument).

  Soft or associated credit may go to the person who directed an organization to make the gift, to an individual's partner/spouse, or to other people or organizations involved in a gift.

  (Occasionally, credit is shared across multiple individual donors who are not partners/spouses, but it doesn't happen frequently.)

  Recent change: Pass-through organizations such as Benevity or the State of WA should now be suppressed from the gift report and you'll only see them in the INTERNAL COMMENTS or listed as receiving associated credit.

Sometimes the primary donor will be a donor-advised fund (DAF) like Schwab or Fidelity, a community foundation, or an employer using a giving company like Microsoft uses Benevity, or other type of intermediary such as YourCause, King County, or the State of Washington, but the soft or associated credit will go to the individual(s) directing the gift.

While we thank organizations for their donations, whether foundations, corporations, trusts, etc., <u>we do not thank organizations that serve as third parties between the donor and the UW</u>. See the example below, in which we would thank Harriet and Harry Husky, but not the DAF company. Note the transaction IDs match.

STACKED NAME 1	STACKED NAME 2	CREDIT TYPE	TRANSACTION ID	CREDIT AMOUNT	CREDIT DATE
Charities Aid Foundation of America		Primary	TRN-10418168	$1,000.00	6/13/2024
Harriet Husky	Harry Husky	Associated	TRN-10418168	$1,000.00	6/13/2024

- **Credit/Fund/Stewardship Amount:** The columns credit amount, fund amount, and stewardship amount do not always match. While the UW does not include gift amounts in acknowledgements, the credit amount matters most for advancement-related purposes. Credit amount informs a donor's cumulative giving total and their recognition society level. Gift amounts should appear only on receipts from Gift Services.

- **Multiple Gifts on a Single Transaction:** Some donors give multiple gifts on a single transaction, and they show up on multiple rows with matching transaction IDs. (You may also occasionally notice donors giving via multiple gift types, so the same donor is listed on more than one tab of the report.)

EXPRESSthanks Tab by Tab:

- **"Transactions"** tab

  These are simple contributions from individuals or organizations.

- **"Commitments & Payments"** tab

  This tab contains some pledges, pledge payments, and sustaining gifts, including sustaining gifts (credit/debit card on file and charged automatically) and sustaining payroll gifts.

  If you see pledges originating from the Student Calling Program on this tab, we recommend not thanking them. Instead, wait until the pledge payment shows up and acknowledge the gift at that point. Student Calling pledges sometimes go unfulfilled.

  For sustaining gifts, whether they are payroll or auto-charged on a debit or credit card, it is acceptable to thank the donor for their first-time gift, and then once annually or as you deem appropriate. The column SUB DEPARTMENT PREVIOUS TRANSACTION DATE shows you the last time the donor gave to that gift fund.

  Coming soon: UW Advancement is currently working on a change to EXPRESSthanks to more consistently isolate gifts that recur monthly or more frequently - primarily sustaining and payroll deduction gifts. The goal is to more clearly separate these kinds of gifts from other pledge payments, as monthly donors should not be thanked with every installment. The current recommendation for sustainers and payroll donors is to thank them upon initiation of their pledge and then once a year - but EXPRESSthanks is not currently setting you up to make that happen successfully.

- **"Matches"** tab

  These are corporate matching gifts. Some of them come directly from companies, and some come through a third-party company that manages employee giving for large firms such as Benevity. Thanks to recent updates to EXPRESSthanks, "pass-through" organizations like Benevity will no longer show up in EXPRESSthanks since we do not thank them.

  For matching gifts, the choice to acknowledge them is up to you. If you do acknowledge them, thank only the individual, not the corporation. Matches may arrive at the same time as the donor's gift, or there may be a delay, depending on the employer. If they are frequent givers, we'd recommend not thanking them for every matching gift.

- **"Donor Advised Funds"** tab

  The Donor Advised Funds tab includes gifts in which a donor directs a financial management company (like Schwab, Fidelity, a community foundation, or another third party) to make a gift to us. In these cases, we thank only the individual donors, not the companies. Exceptions may occur when you occasionally see a note from Gift Services asking that an acknowledgement be sent to the institution.

  Recent change: Gifts made via the State of WA (Combined Fund Drive or CFD), Benevity, Cybergrants, Blackbaud, YourCause, or other giving systems will now appear on this tab, though the "pass-through" organization will now be suppressed – you won't see them on a separate line item.

  Thanks to this recent update, "pass-through" organizations should no longer appear in EXPRESSthanks reports, as we do not thank them. If you customize your acknowledgements with the giving method and want to know if it was a State of Washington CFD gift, for example, you will now need to review INTERNAL GIFT COMMENTS and/or the columns for associated credit, such as ASSOC DONOR1 PREF MAIL NAME.

- **"Testamentary & Multi-Payment Pledges"** tab

  You may see the occasional planned gift where a donor has shared their estate plans here, as well as major pledges spread out over 2-5 years. (Note that we are using the term "commitment" now, particularly in Tandem, but you'll still see pledge used a lot, too.)

- **"Payroll Deduction"** tab

  Ignore this tab for regular gift acknowledgements. This tab is intended for stewardship purposes, so that units can easily see all the active payroll deductions in a fiscal year for annual acknowledgements. Note that pledges crossing fiscal years won't necessarily be captured here, so a custom report on all active pledges to your unit is likely preferable.

  Coming soon: Depending on how the reporting team updates EXPRESSthanks in terms of sustaining gifts, all sustaining gifts, including payroll ones, could soon be isolated on the same tab.

- **"Modifications"** tab

  This tab is worth paying attention to, as some new gifts will appear here. Gift Services may modify how a gift was entered for several reasons, such as at the donor's request, because a gift was held in suspense while questions were answered, or because a new gift fund had to be created to process the gift. These changes can make a gift appear in your report when it previously did not.