

DEPARTMENT OF DONOR SERVICES

OVERVIEW

FISCAL YEAR 2022—2023

UNIVERSITY of SOUTH FLORIDA

Advancement

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DONOR SERVICES

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Administrative Support, Milestone Recognition, Tribute Acknowledgements, Special Gifts and U-Store Management

We are Here for You!

Contact Us!
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Donor Relations and Stewardship



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Donor Recognition Program, Strategic Stewardship and Engagement Initiatives, ThankView, Premier Special Events and Recognition, Amalie Arena Suite Hospitality



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USF Loyalty Herd Stewardship, Donor Recognition Program Support, Suite Hospitality Assistance, ENGAGE e-Newsletters



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Pledge Reminders, Quarterly Stewardship Meetings, University Acknowledgements

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Oversight of the College of Arts and Sciences Scholarship Administration and Reconciliation, Scholarship Training and Resources to CAS Faculty and Staff



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Administration of University-wide Scholarships, Scholarship Advertising and Outreach, Personalized Donor Stewardship, First-Time Donor Program



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Stewardship Reports and Other Donor Impact Reporting, Administration of University-wide Scholarships

Donor Events



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Donor and Special Events, Grateful Bulls Day, USF Football Club Tickets and Suite Hospitality



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Donor Events and Conferences



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Donor Events and Conferences



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Donor Events and Conferences

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DONOR SERVICES

OVERVIEW

The mission of the Department of Donor Services is to sustain and nurture the university's lifelong relationship with its invaluable donors, while providing accurate and timely information pertaining to the investment, use and impact of gifts.

Our values are evident through the following:

• Our team believes in the mission of our department, the University of South Florida and the USF Foundation.

• Our team exemplifies responsibility and accountability through our attitudes and work product. Each team member operates with a high level of quality and integrity and is focused and committed to achieving individual, office, Foundation and university goals.

• Our team is committed to exemplary customer service. We strive to create positive, productive and respectful interactions among and between our staff, donors and the USF community. We foster an environment that engages others to build longstanding and loyal relationships by providing timely acknowledgments and being responsive to needs.

• Our team is characterized by our individual and collective professionalism. We hold ourselves accountable and all of our work product and interactions will be facilitated through honesty, trust and ethical practices.

• Our team will continually strive for excellence. We aim to exceed the standards of our profession. We actively seek opportunities to learn and grow by integrating trusted practices and innovative ideas to improve the standard of service to others.

Our staff is guided by the following principles:

• We honor, thank and celebrate our donors.

• We seek to positively influence donor retention and donor giving by building, strengthening and maintaining lasting relationships with past, present and future donors through effective stewardship and communications.

• We are committed to being a staff that exudes a mindset and work product that is service-oriented and donor-focused by developing and growing acknowledgment, recognition and engagement programs that are meaningful, consistent and timely.

• We strive to ensure donor intentions are documented and carried out accordingly.

• We collaborate with university stakeholders to execute effective donor stewardship by serving as the central resource for all donor services activities.

• We pledge to continually strengthen our donor services program and serve as a beacon of best practices for other universities to emulate.

STRATEGIC PLAN

FY24 GOALS

Donor Services

Bringing together the Offices of Donor Relations and Stewardship, Foundation Scholarships and Donor Events, our overall goal is to create meaningful connections with those who have chosen to invest philanthropically with the University of South Florida. Through our various programs and initiatives, all we do is aimed at achieving the highest success for our university. This is made possible by focusing on the following:

• Strategic communications that acknowledge, recognize, report and engage

• Foster a meaningful community that celebrates donors – new donors, loyal donors, major donors and planned giving donors

• Deliberate stewardship that cultivates meaningful experiences and denotes the impact of giving

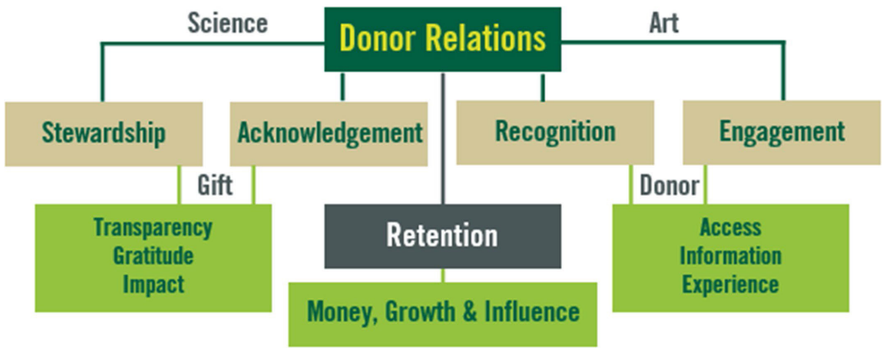


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DONOR RELATIONS AND STEWARDSHIP

OVERVIEW

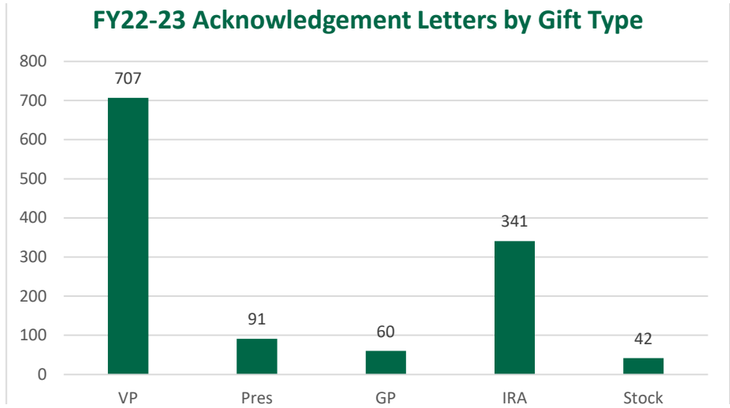
Our goal is to nurture, engage and recognize donors across the university through stewardship programs, events and communications. Donor-focused stewardship is accomplished through timely and appropriate gift acknowledgement, fund reporting, donor recognition, donor appreciation events and stewardship activities. Through meaningful and consistent contacts with donors and prospective supporters, this office aids fundraising efforts that result in lifelong relationships with donors and instills in them the trust that their gifts and investments are supporting the success of the USF.

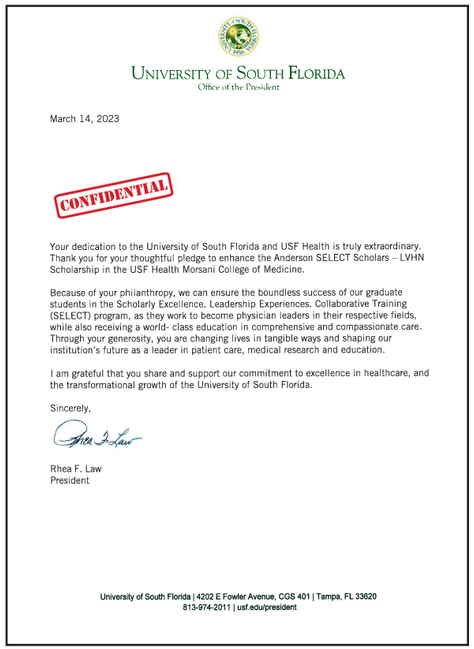


ACKNOWLEDGEMENTS AND REPORTS

ACKNOWLEDGEMENT PROCESS

All gifts received by the University of South Florida receive a standard tax receipt. The Foundation expresses gratitude and impact to donors for gifts or pledges of **$5,000 or more** through customized acknowledgement letters. The stewardship officer is responsible for crafting these letters, which are hand signed by the senior vice president and CEO of the Foundation. For gifts **$25,000 or more**, development officers have the opportunity to review for further personalization. Gifts of **$100,000 and above** are acknowledged quickly, accurately and appropriately with a letter signed by the president of the university. All president-level gifts are reviewed by a relationship manager for further personalization.





UNIVERSITY OF SOUTH FLORIDA
Office of the President

March 14, 2023

CONFIDENTIAL

Your dedication to the University of South Florida and USF Health is truly extraordinary. Thank you for your thoughtful pledge to enhance the Anderson SELECT Scholars – LVHN Scholarship in the USF Health Morsani College of Medicine.

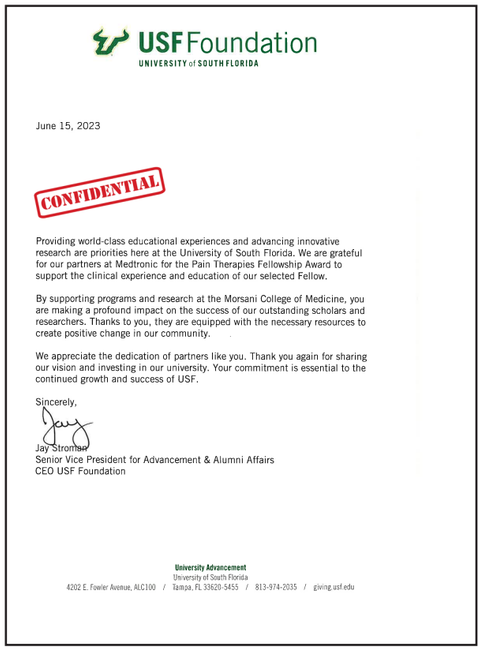
Because of your philanthropy, we can ensure the boundless success of our graduate students in the Scholarly Excellence, Leadership Experiences, Collaborative Training (SELECT) program, as they work to become physician leaders in their respective fields, while also receiving a world- class education in comprehensive and compassionate care. Through your generosity, you are changing lives in tangible ways and shaping our institution's future as a leader in patient care, medical research and education.

I am grateful that you share and support our commitment to excellence in healthcare, and the transformational growth of the University of South Florida.

Sincerely,

Rhea F. Law
President

University of South Florida | 4202 E Fowler Avenue, CGS 401 | Tampa, FL 33620
813-974-2011 | usf.edu/president



USF Foundation
UNIVERSITY of SOUTH FLORIDA

June 15, 2023

CONFIDENTIAL

Providing world-class educational experiences and advancing innovative research are priorities here at the University of South Florida. We are grateful for our partners at Medtronic for the Pain Therapies Fellowship Award to support the clinical experience and education of our selected Fellow.

By supporting programs and research at the Morsani College of Medicine, you are making a profound impact on the success of our outstanding scholars and researchers. Thanks to you, they are equipped with the necessary resources to create positive change in our community.

We appreciate the dedication of partners like you. Thank you again for sharing our vision and investing in our university. Your commitment is essential to the continued growth and success of USF.

Sincerely,

Jay Stromer
Senior Vice President for Advancement & Alumni Affairs
CEO USF Foundation

University Advancement
University of South Florida
4202 E. Fowler Avenue, ALC100 / Tampa, FL 33620-5455 / 813-974-2035 / giving.usf.edu

REPORTING

Special editions of the donor impact e-newsletter *Inspire* are emailed to all donors within our Recognition Societies ($100,000+) and Legacy Society (planned gifts at any dollar amount) as well as all President's Circle ($1,500—$99,999.99) donors.





September 28, 2023

Framing of Featured Stories and Commemorative Articles:

Featured donor stories published in *USF* magazine, *Inspire* and the Foundation website are custom framed and gifted by the donor's respective giving area each year. The Office of Donor Relations and Stewardship manages this process from formatting to printing and framing. When complete, the framed articles are tied with a bow and made available for pick up by the respective area. In Fall 2022, Donor Relations and Stewardship framed 17 donor articles that were presented to donors.





Anthony James '73, *Chair, USF Foundation Board, and* ***Jay Stroman,*** *Senior Vice President of Advancement & Alumni Affairs and CEO, USF Foundation*

A Message from Foundation Leadership

The 2022-23 fiscal year was truly historic. With great pride, USF joined the Association of American Universities, the most prestigious association in higher education. The AAU comprises just 71 institutions — the top 3% of research universities in the U.S. and Canada. For the fifth consecutive year, *U.S. News & World Report* ranks USF among the top 50 public universities in America.

STEWARDSHIP

THOUGHTFUL GIFTS

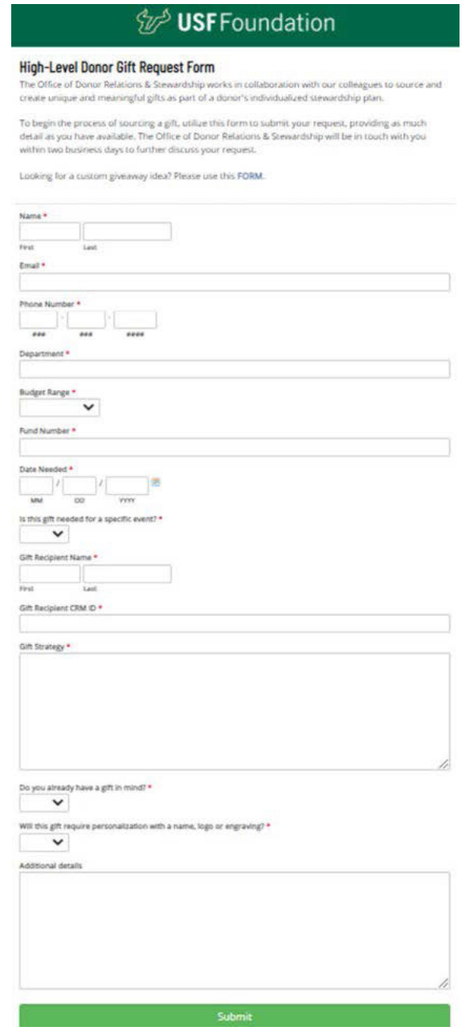
University and Foundation Leadership

Exclusive High-Level Gift Items
The Office of Donor Relations and Stewardship sources exclusive, high-level gift items to be given to top donors, major gift prospects and key stakeholders at the discretion of the university president and senior vice president and Foundation CEO. These items are often custom-made and are purchased in lower quantities as they are gifted by university and Foundation leadership on a limited basis.

VIP and Custom Gift Request Form

Custom VIP Donor Gifts
Throughout the year, the Office of Donor Relations and Stewardship manages requests for custom gifts intended for identified donors and prospects. We work together in collaboration with our colleagues to source and create unique and meaningful gifts as part of a donor's individualized stewardship plan.

The Development officers are asked to complete the High-Level Donor Gift Request Form providing as much detail as possible related to the donor as well as the gift they have in mind. The Office of Donor Relations and Stewardship monitors form submissions and then works alongside of the requesting area to suggest unique mementos. Once a gift is selected, Donor Relations will share the source/vendor of the item so the requestor may move forward with the purchase of their special gift.


USF Foundation

High-Level Donor Gift Request Form

The Office of Donor Relations & Stewardship works in collaboration with our colleagues to source and create unique and meaningful gifts as part of a donor's individualized stewardship plan.

To begin the process of sourcing a gift, utilize this form to submit your request, providing as much detail as you have available. The Office of Donor Relations & Stewardship will be in touch with you within two business days to further discuss your request.

Looking for a custom giveaway idea? Please use this FORM.

Name *
First Last
Email *
Phone Number *
####
Department *
Budget Range *
Fund Number *
Date Needed *
MM DD YYYY
Is this gift needed for a specific event? *
Gift Recipient Name *
First Last
Gift Recipient CRM ID *
Gift Strategy *
Do you already have a gift in mind? *
Will this gift require personalization with a name, logo or engraving? *
Additional details
Submit

Resources for Advancement Staff

U-Store

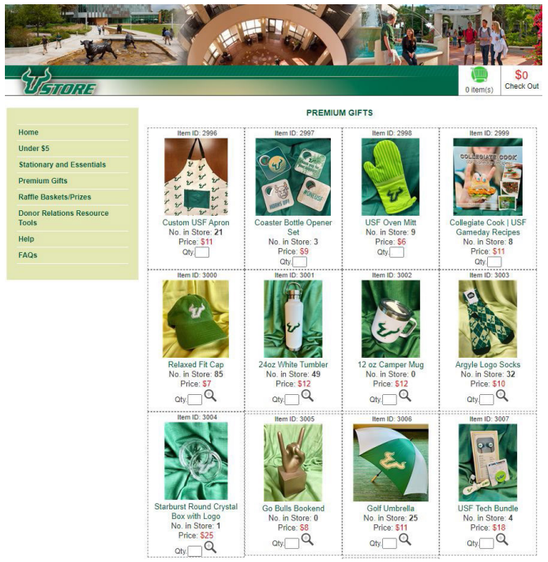
The U-Store provides our internal constituents in University Advancement with access to meaningful USF-branded mementos for donors and prospects, as well as unique giveaway items for events. The Donor Relations team maintains the U-Store inventory and website. New items are added to keep the inventory fresh and creative. A quarterly digital catalogue is shared with the department, informing them of current and newly added items. The website currently offers items in the following categories:

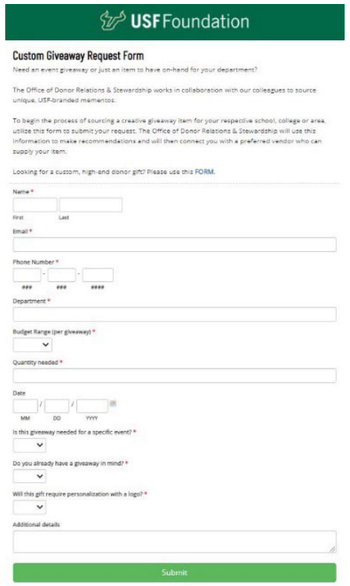
$5 and under
Small items we often have a large stock of that are readily available and can be delivered quickly for last-minute needs.

Stationery Essentials
Stationery including holiday cards and thank you cards, as well as pens and notepads.

Raffle Baskets
Supplies available to assemble the baskets, given advance notice.

Premium Gifts
Higher-end items kept at a lesser stock, sourced for an event or by our colleagues with a strategic business purpose and donor(s) in mind.





Giveaways

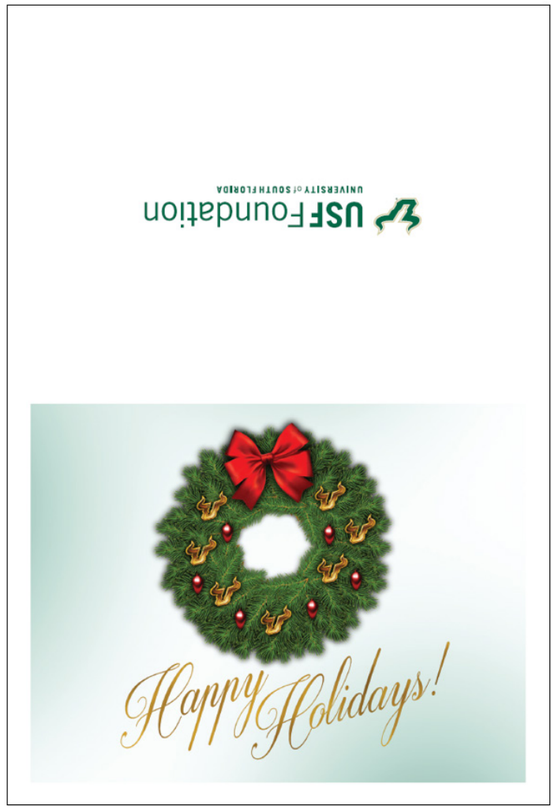
Colleagues across campus are encouraged to fill out the **Custom Giveaway Request Form** to source unique, USF-branded items for custom giveaways for their school, college or areas. Once the form is submitted, the Office of Donor Relations makes recommendations and connects to a preferred vendor who can supply the item.

PRESIDENTIAL-LEVEL STEWARDSHIP

Holiday Cards

The university president and Foundation CEO send custom holiday cards to a select group of major donors, university leadership, Foundation Board of Directors, University Board of Trustees, government officials and key stakeholders during the month of December. A version of the university president's holiday card is also shared electronically with all President's Circle donors ($1,500-$99,999).

In FY23, 1,890 holiday special communications were sent to President's Circle donors:



Holiday card featuring holiday well-wishes from Foundation CEO.



Holiday – e-card featuring holiday well-wishes from President Rhea Law and husband Wayne.

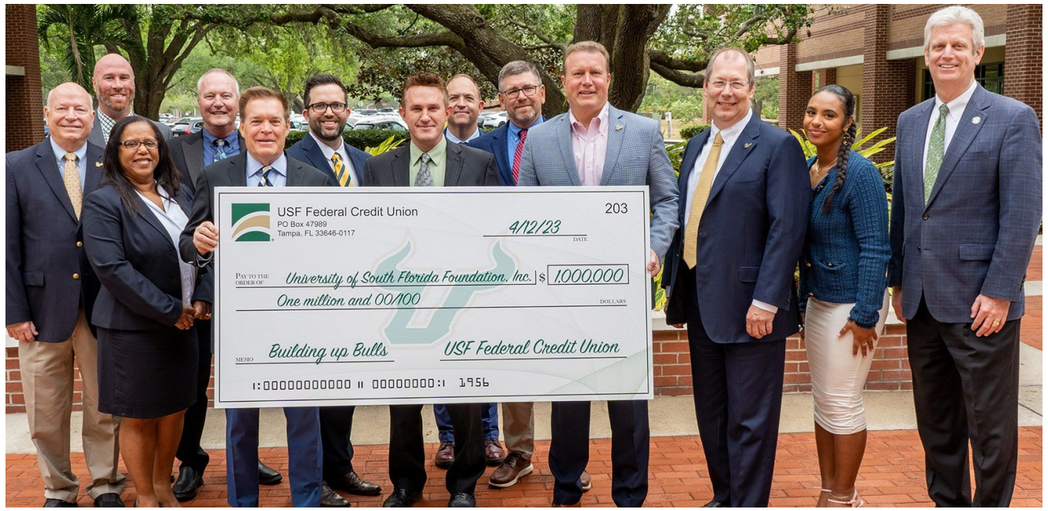
Major Gift Announcements and Namings

For gifts of $1 million or more, with the donor's consent, an enhanced level of recognition may include a gift announcement or unveiling of a naming event. The Office of Donor Relations and Stewardship serves as the central coordinator for all gift announcement events throughout the university, collaborating with the benefitting units and the Office of the President to ensure the highest standards of the university and the Foundation are being met and that all stakeholders are represented and the donor feels honored and celebrated.

Considerations include location, seating, staging, audio-visual needs, corresponding private luncheon, catering, decor, etc. Should a donor gift be deemed appropriate by the Office of the President and/or Foundation leadership, gift considerations are to be presented for final approval to the Office of Donor Relations and Stewardship. This maintains historical continuity and ensures the decided upon gift meets presidential standards.







Confidential Event Briefings

Official briefing documents are created by the Office of Donor Relations and Stewardship and distributed to the President's Office and the office of the senior vice president in advance of each presidential-level or Foundation event they are attending. Briefing documents will outline event details, speaking program, catering menu and the role of the president and first spouse (or university/Foundation leadership). The briefing will also include guest biographical information, capacity rating and photo/headshot, when available. Additional recipients of the briefing are added at the discretion of the senior vice president.

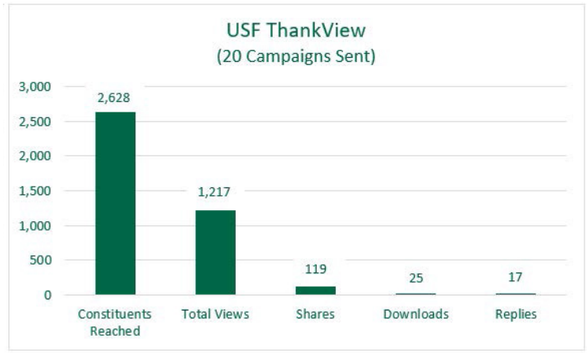
QUARTERLY STEWARDSHIP MEETINGS

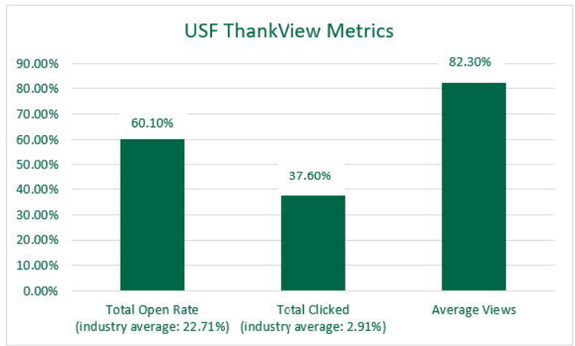
The Office of Donor Relations and Stewardship meets annually with USF campuses, colleges and units to better understand the current stewardship practices of each area and how we can better collaborate and assist. The Donor Relations and Stewardship team implemented Quarterly Stewardship Meetings in 2021, which include staff across colleges/campuses/units in the university to discuss best donor relations practices, highlight stewardship across the university and regional campuses, and create a communication pipeline that allows us to collaborate efficiently. These meetings provide a space for us to come together and share ideas and successes and collaborate in a creative way.

THANKVIEW

As of FY21, the USF Foundation began utilizing ThankView, a popular electronic stewardship platform managed by the Office of Donor Relations and Stewardship to offer USF entities a way to engage with our donors and prospects through meaningful and timely communications and stewardship. With ThankView, colleges, campuses and units can raise awareness, promote events, update supporters and thank those who matter most. Similar to handwritten cards sent after a birthday party, fundraiser or just a general note to say thanks, ThankView allows our teams to address their recipients individually or in groups while using specialized video recorded messages.

The Office of Donor Relations utilizes ThankView to share grateful messages from scholarship recipients, send digital pledge reminders and will begin using the platform in FY24 to share birthday communications and milestone giving.





RECOGNITION

RECOGNITION SOCIETIES (CUMULATIVE GIVING)

Members of the esteemed University of South Florida Recognition Societies — formerly known as President's Council Society — are among our most valued philanthropic partners, providing leadership-level support to any USF program on the Tampa, St. Petersburg and/or Sarasota-Manatee campuses. The cumulative generosity of donors at each of these levels clears the path for university to reach high standards in education, research and community service.

Gibbons Society ($50,000,000—$74,999,999)

As chairman of the House Education and Higher Education Appropriations Committees, Sam Gibbons championed the 1955 report that recommended the addition of three new universities located in major urban Florida epicenters. Congressman Gibbons drafted the 80-word bill that would establish USF as a state university in Hillsborough County, labeling him as the "Father of USF." The generosity of this elite group of benefactors transforms the University of South Florida, allowing it to achieve global excellence.

1956 Society ($20,000,000—$49,999,999)

In 1956, the University of South Florida became a reality founded on the support of a special group of legislators and friends. Named after this landmark year, these generous philanthropists bring focus to the vision of establishing USF as a premier research university and to ensuring that every student receives an exceptional, world-class education.

Collins Society ($5,000,000—$19,999,999)

The distinguished members of the Collins Society embody the spirit and leadership qualities of former governor, T. LeRoy Collins who, in 1955, gave the authority to build a bold, new university in Tampa. These donors lead by example through their generosity and set a standard for excellence that guides USF as a nationally regarded university.

Allen Society ($100,000—$4,999,999)

The University of South Florida's founding president and first lady, John and Grace Allen, helped to build USF from a few classrooms in a single building to the top-tier preeminent university that we know today. The realization of the vision for USF, set forth by the Allens, continues to be made possible by the generosity of alumni and friends who share the same vision for the advancement of the university.

Legacy Society (Planned gifts of any amount)

Legacy Society members are committed to supporting the mission and vision of the University of South Florida through their estates and other planned gifts at any dollar amount. Membership in the Legacy Society is a statement of our donors' long-term commitment to the university and is their permanent link to future generations at USF.

PRESIDENT'S CIRCLE (ANNUAL GIVING)

The University of South Florida President's Circle recognizes alumni, faculty, staff, parents and friends of our great university who make annual contributions within a fiscal year to any USF program on the Tampa, St. Petersburg and/or Sarasota-Manatee campuses.

Celebrating Continued Commitment

Qualifying Gifts:

- Recognition status in President's Circle is achieved for individuals who make an outright gift or cumulative charitable contributions totaling $1,500 or more throughout the fiscal year (July 1—June 30).
- President's Circle membership is based on cash gifts and pledge payments. Commitments and open pledge balances do not qualify.
- Gifts which benefit WUSF Public Media, USF Botanical Gardens, USF Athletics and the USF Alumni Association are counted towards qualifying President's Circle recognition, minus the amount of any goods or services received.
- Corporations and foundations are included in our recognition program when they reach a cumulative giving threshold of $1 million or more.
- Once outright gifts or cumulative giving has reached $100,000 or more, donors will be celebrated in our recognition societies as well.



Membership welcome for USF President's Circle donors.

Membership Welcome

Welcome emails are sent to those whose giving has reached the President's Circle level on a quarterly basis. Exclusive courtesies, including event invitations and opportunities to connect, are extended to donors throughout the year via email.

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LOYALTY HERD (CONSECUTIVE GIVING)

The ongoing, annual support of our donors touches every corner of our university and strengthens the foundation upon which excellence is built. In recognition of this vital commitment, the Office of Donor Relations and Stewardship celebrates loyal donors who have given consecutively, three or more years. Cash gifts of any dollar amount to any area of the university are counted towards Loyalty Herd membership. Consecutive years of giving are counted by fiscal year, July 1 to June 30. Here at USF, we are dedicated to the herd!





Greetings,

We are proud to welcome you to the University of South Florida Loyalty Herd! Your annual support enables our students, faculty and staff to explore their passions and uplift our communities.

We are pleased to share that you have achieved our 3-year consecutive giving milestone! Not only are you one of our most loyal supporters, we recognize you may have been giving for a longer period of time in total, making a tremendous impact on USF's growth and success!

In appreciation of your loyalty and to recognize this accomplishment, you will be receiving a special communication exclusively for Loyalty Herd members in the upcoming months.

We look forward to celebrating many more milestones and creating a brighter future for generations to come. For more information on Loyalty Herd, click here to download an overview of the program, or visit our website.

With gratitude,

USF Donor Relations & Stewardship Team

Gifts that benefit WUSF Public Media, USF Botanical Gardens, USF Athletics and the USF Alumni Association are counted toward qualifying Loyalty Herd recognition, minus the amount of any goods or services received.

Contact Us

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USF Foundation



In partnership with WUSF *and* WSMR

Greetings,

We are proud to welcome you to the University of South Florida Loyalty Herd! Your partnership has helped WUSF Public Media grow and thrive, year after year.

We are pleased to share that you have achieved our 3-year consecutive giving milestone! Not only are you one of our most loyal supporters, we recognize you may have been giving for a longer period of time in total, making a tremendous impact on our public media service!

We look forward to serving listeners and strengthening our community through trusted journalism, classical music and culture for years to come. For more information on Loyalty Herd, click here to download an overview of the program, or visit our website.

With gratitude,

USF Donor Relations & Stewardship Team

Gifts that benefit USF Botanical Gardens, USF Athletics and the USF Alumni Association are counted toward qualifying Loyalty Herd recognition, minus the amount of any goods or services received.

Contact Us

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USF Foundation

MEANINGFUL COMMUNICATIONS

It is our continued goal to foster and deepen relationships with President's Circle and Recognition Society members and keep them connected through meaningful and informative communications. This special group of givers receives the *USF* magazine, *Inspire* e-newsletter and communications regarding changes within leadership and press releases of transformational gift announcements on behalf of the USF Foundation.

Engage E-Newsletter

This e-newsletter is designed to connect donors to the university and create a greater sense of community within President's Circle and Recognition Societies. These communications typically include, but are not limited to:

- A message of gratitude from the Donor Relations and Stewardship team
- Stories of impactful giving and inspiration from peers
- Student testimonials
- Upcoming event information and save-the-dates
- Noteworthy information on the regional campuses
- Donor feedback surveys

In FY23, 2,160 President's Circle members received two newsletters in the Fall '22 and Spring '23. 718 Recognition Societies members received one newsletter in Spring '23.



agine this: a thriving university soaring toward new heights and on the rise
a **national leader in higher education** – all powered by **your invaluable**
ntributions.

anks to you, **this is our reality** at the University of South Florida.

this edition of ENGAGE, we are excited to launch the reimagined **USF**
cognition Societies – formerly President's Council Society. We hope the
dates to this program inspire pride for your role in shaping USF's **rich**
story and even brighter future.

ur dedication has stimulated growth across all campuses – from the
ading-edge Porter Family Indoor Performance Facility on the Tampa
mpus, to major enhancements within the **Nelson Poynter Memorial Libra**
the St. Petersburg campus to the **first-ever student center and residenc**
ll on the Sarasota-Manatee campus.

hether you support academic initiatives, trustworthy news programming fro
r public broadcasting station, groundbreaking research or revolutionary
alth care, **we are thankful for you**.

e USF Donor Relations & Stewardship Team



Imagine this: a thriving university soaring toward new heights and on the rise as a **national leader in higher education** – all powered by **your invaluable contributions**.

Thanks to you, **this is our reality** at the University of South Florida.

In this edition of ENGAGE, we highlight the role your annual support plays in our pursuit of excellence in education, innovation, competition and research.

Your dedication has inspired growth across all campuses – from the **leading-edge Porter Family Indoor Performance Facility** on the Tampa campus, to major enhancements within the **Nelson Poynter Memorial Library** on the St. Petersburg campus to the **first-ever student center and residence hall** on the Sarasota-Manatee campus.

Whether you support academic initiatives, trustworthy news programming from our public broadcasting station, groundbreaking research or revolutionary health care, **we are thankful for you**.

The USF Donor Relations & Stewardship Team

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Stewardship Mailings

Stewardship mailings are evaluated on a yearly basis and executed based on a calendar of communications as to not overwhelm donors with mailed pieces or email communications.

Gratitude Videos and Special Communications

The Office of Donor Relations and Stewardship partners with various areas throughout the university to curate and disseminate meaningful stewardship videos during the year. These special communications often feature university and Foundation leadership, as well as grateful USF students who share messages of gratitude for our donors' support.

In FY23, 3,687 Thanksgiving special communications were sent to President's Circle donors:



In this season of thanks, we want to express our gratitude to **YOU**. Through your support of scholarships, vital research, innovative programming and faculty excellence, we're providing invaluable opportunities for students to be successful in their lives and careers.

As we reflect on this past year, we want to share a special video message from a few of our grateful Bulls. Their words convey the enormous impact your generosity has on our greater community.

Thanksgiving – Grateful students expressed their gratitude over scenic shots of the Tampa campus, featuring a brief message of thanks from President Rhea Law.

MILESTONE AND MEMORIAM PROGRAM

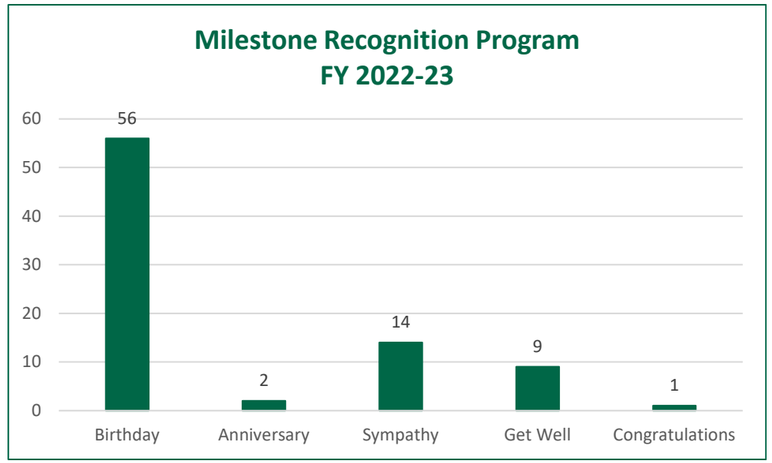
An acknowledgement of support during times of illness, bereavement or a significant life event recognizes and strengthens the bond between the university and our donors, providing an important act of stewardship.

The Office of the President and the Foundation have designated the Department of Donor Services as the central point of coordination for acknowledgement of milestone events in the lives of our donors and friends of USF.

The Foundation makes efforts to acknowledge select milestone events for transformational donors as appropriate and at the request of leadership and/or a development officer. When making decisions about this stewardship touch, we take into consideration the request of the university president and senior vice president for University Advancement, budgetary and staff limitations, relationships to the university and stewardship status of the donor. In some cases, donors at the highest levels may be receiving exceptional stewardship directly at the college/unit level; therefore, it may be unnecessary for the Foundation to interject into the relationship. In cases where the donor does not meet the 1956 – Visionary level threshold, we work closely with the development office to determine if an official acknowledgment would be in the best interest of the unit/president/Foundation and if it would help advance the relationship between that person and the university to send something on behalf of the President and the Foundation.

The Department of Donor Services, in coordination with the development officers, maintains responsibility for the Foundation's response and recognition of donors in the case of death, illness or other significant events.

By supporting our students, faculty, research and exceptional programs year after year, this community of generous givers is helping to raise the standard and catapult the trajectory of the University of South Florida.



SPECIAL RECOGNITION

$1M+ Donors

Once a donor crosses the $1M+ Recognition Societies level threshold, new members are reviewed by the Office of Donor Relations and Stewardship and Foundation leadership team to determine an appropriate strategy to foster and deepen relationships with our most esteemed benefactors. At this level, we may develop individualized stewardship plans to help guide acknowledgement and recognition efforts in the most meaningful way for each donor's particular preferences. Donors at this threshold are also considered for the Milestone and Memoriam Program.

Planned Giving Donors

The Office of Donor Relations and Stewardship works in concert with the Office of Gift Planning to ensure our Legacy Society members are receiving a specialized level of stewardship for the nature of their philanthropic support. It is crucial that we show our appreciation for these donors as they may not see first-hand the impact that their giving will have on future generations.

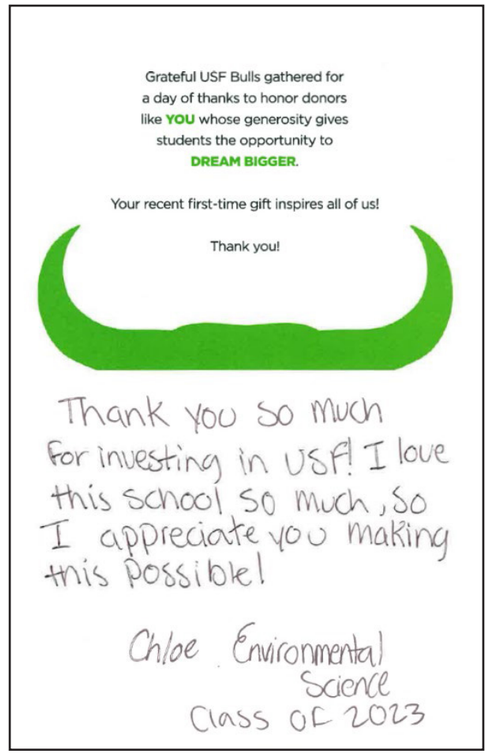
In addition to their eligible Recognition Societies incentives and communications from the Office of Donor Relations and Stewardship, Legacy Society donors may receive the following in honor of their generosity:

- Personalized holiday greetings from the Office of Gift Planning.
- Custom lapel pins showcasing their status are given by a member of the Gift Planning team once a donor has received their membership packet in the mail; this effort is coordinated by a member of the Donor Relations and Stewardship team to ensure both touchpoints happen in a timely manner.
- Where budget and strategic planning allows, an annual gratitude event exclusively for Legacy Society members may be held.
- Gift Planning e-newsletter.
- Opportunity to participate in online donor testimonials.

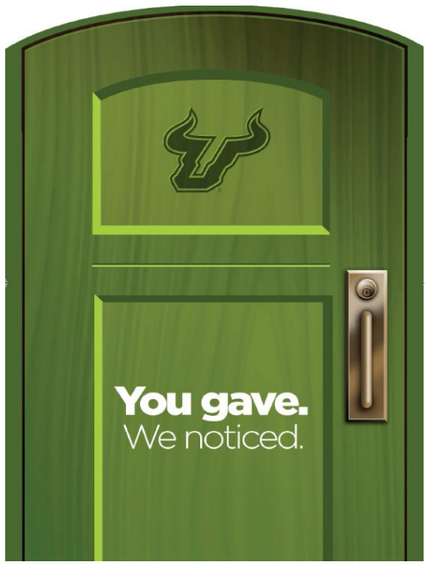
First Time Donors

The USF Foundation's First-Time Donor stewardship program was implemented and is maintained by the Office of Donor Relations and Stewardship to increase donor retention and to encourage repeat giving. It is crucial to show first-time donors that their gifts of any size are meaningful and have an impact on our organization. This first-time group needs special attention when they give their money and trust to us for the first time. It is our first opportunity to make a good impression and keep them engaged.

The first-time donor program is comprised of four separate stewardship touches throughout the year, following their first gift of $1 or more. These stewardship touches are detailed below. Populations excluded: In Memory Of and In Honor Of (IMO/IHO) gifts, WUSF Public Broadcasting, Botanical Garden Memberships and Bulls Club Priority Seating. After the year anniversary of a donor's first-time gift, renewal/ solicitation efforts will be managed by the Office of Annual Giving or specific colleges/units for programs to which the donor has given.



First-Time Donor Card collected at Grateful Bulls Day

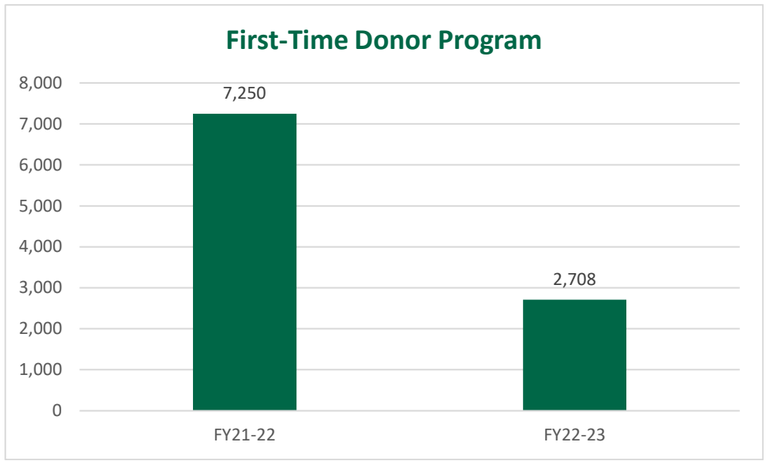




First-Time Donor Card

1st Acknowlegement	2nd Acknowlegement	3rd Acknowledgement	4th Acknowledgement	Renewal/Solicitation
Occurrence: -within 2 weeks of initial gift receipt	Occurrence: -2-3 months after receiving 1st acknowledgement postcard	Occurrence: -6-7 months after receiving 1st acknowledgement postcard	Occurrence: -10-11months after initial gift - 2 part process: (1)- Thank you to donors who have given again within the first year (2)- Thank you and ask tc donors who have not given again	-All renewal/solicitation efforts will be managed by the Office of Annual Giving or specific colleges/units for programs to which the donor has given their first gift
Contact Method: -"You Gave. We Noticed" Postcard	Contact Method: -Handwritten 'I'm Grateful for You' thank you note from a student *TY cards collected at Grateful Bulls Day	Contact Method: -Video (via email) emphasizing the impact that their gifts have on a student's USF experience and future success	Contact Method(s): -(1) Happy Anniversary print mail piece focusing on the impact their gift has made throughout the first year- no ask; to include tech tags -(1) Happy Anniversary print mail piece again focusing on impact, but including the ask; reply card	
Process: -Donor Relations will run weekly transaction reports and segment data -Postcards are mailed in-house on a weekly basis Exclusions: In Memory/Honor Of WUSF Botanical Memberships	Process: -Blank cards to be provided for students at Grateful Bulls Day each year and are reviewed by Donor Relations & Scholarship Office before mailing -Donor Relations to maintain and refresh data bi-monthly for card mailing	Process: -Video produced in collaboration with outside videographer and/or Foundation Communications & Marketing team to be emailed to donors through iModules -Donor Relations to maintain and refresh data bi-monthly	Process: -Office of Annual Giving to manage IM request to determine donors that have given again in the first year -Both print pieces including ask to be mailed by outside print company; printing coordinated by the Office of Annual Giving	

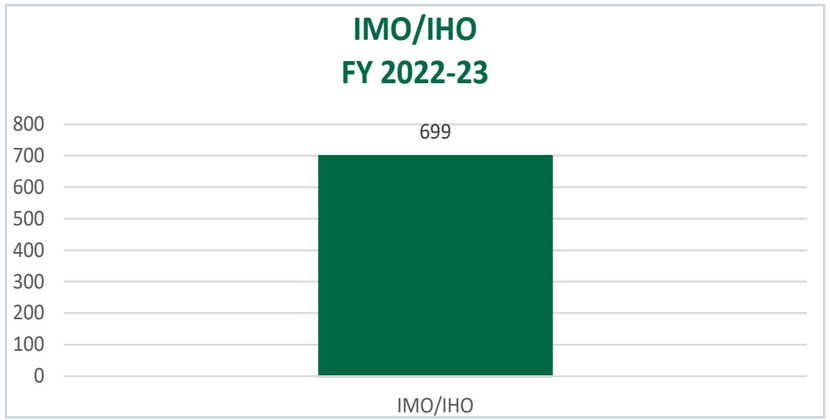
First-Time Donor Acknowledgement Timeline



*Please note that the FY22-23 efforts were impacted due to the transition to Ellucian donor database. The FY22-23 touches for the program were limited to two—the first touch (welcome postcard) as well as the fourth touch (anniversary card). The communication plan has been updated and the second and third touchpoints resumed in late FY23.

Memorial and Honorary Gift Notification

All memorial and honorary gifts (IMO/IHO) receive a special acknowledgement by Donors Services. Notification letters are sent to the honoree or family members of the deceased. This touch is especially important as donors are dealing with personal loss and are experiencing emotional times in their lives.



*These counts reflect the number of letters sent to the honoree. Please note that there are often multiple donors giving IHO/IMO to a specific honoree.

ENGAGEMENT

PARTNERSHIP EVENTS

Through recognition programming initiatives, the Office of Donor Relations and Stewardship has created and maintained meaningful partnerships throughout USF that allow donors to explore other areas and events that they may not be familiar with, while also providing other campus entities the opportunity to get to know these esteemed benefactors. Strategic partnerships provide a unique opportunity for donors to interact with current USF students who may be benefitting from their philanthropic support.

The Office of Donor Relations and Stewardship collaborates with pre-conceived events on campus and works with that entity to promote the event and create an element of exclusivity for members of our Recognition Societies. Our involvement with each event is determined on a case-by-case basis. In some instances, we've offered reserved seating at lectures, private VIP receptions or we've simply notified donors of the event.

Past partnership events have included special musical or theatrical performances by College of The Arts scholars, opportunities to meet keynote speakers with University Lecture Series and College of Arts and Sciences Frontier Forum lectures.

GRATEFUL BULLS DAY

Grateful Bulls Day is an annual Foundation initiative designed to engage students in expressing gratitude to our philanthropic donors. The primary goal of this event is to collect thank you cards, photographs and video content used for stewardship purposes throughout the year. Grateful Bulls Day allows us to not only collect this thoughtful content, but also educates students about the importance of philanthropic support, with hopes to inspire their future giving back to the university.





Grateful Bulls Day is hosted on the USF Tampa campus at the Marshall Student Center Amphitheater. A smaller-scale Grateful Bulls Day is also hosted on the USF St. Petersburg campus and for the first time expanded further to our Sarasota-Manatee campus in FY22. Students enjoy music, snacks and giveaways each day on all campuses. The collection for FY23 totaled 1,366 thank you notes combined for all three campuses.

HOSPITALITY AND ATHLETIC EVENTS

It is one of our goals to build and strengthen relationships with current donors and rated prospects providing cultivation and stewardship opportunities in partnership with our leadership and fundraising teams. These opportunities may include hosting guests in a suite for hockey games and concerts at Amalie Arena as well as USF athletic events.

We strive to provide a high level of customer service to our donors and prospects and ensure guest satisfaction beginning with the invitation, hosting during the event and proper follow-up after the event. We focus on strategies that will help move the relationship forward with our donors and prospects.


UNIVERSITY of SOUTH FLORIDA

You and a guest are cordially invited to join us in the USF Suite!

Tampa Bay Lightning vs. Edmonton Oilers
Tuesday, November 8
Amalie Arena

Game begins at 7:30 p.m.
Suite hospitality begins 6:30 p.m.

This invitation is non-transferable and tickets are on a first response basis, as space is limited.

To reserve tickets, contact
Name
Email
Phone

USF Foundation

2023 Football Suite Ticket Request Form

University of South Florida Foundation

The USF Foundation maintains suite access for all home football games. Suite tickets are intended to provide cultivation and stewardship opportunities for our leadership and fundraising teams. The Office of Donor Relations & Stewardship will cover the cost of suite tickets for guests who, after meeting Foundation leadership criteria, are invited to attend.

HOME GAME FOUNDATION SUITE TICKETS
USF Foundation manages a suite share in partnership with Athletics. Invites are reserved for donors who have given $100k+ and other populations as identified by Foundation leadership.

REQUESTS
Using the form below, share your requested games in order of preference, along with a detailed cultivation/stewardship strategy. Requests are for **EIGHT SUITE TICKETS.** Availability is limited and we will do our best to accommodate.

PLEASE NOTE that invitations are not to be extended to donors/prospects until you have received formal confirmation of your request from the Office of Donor Relations & Stewardship.

Have a question OR a suite ticket request that falls outside the form parameters?
Please email DonorRelations@usf.edu.

Who are you?

Name *
First Last

Email *

Phone Number *
####

College / Unit *

Suite Requests

Share your **TOP 2** requested games in order of preference. Along with your cultivation/stewardship strategy, feel free to include specific donor names if these have been already been identified.

PLEASE NOTE that home games are limited; requests are not guaranteed and are subject to the review of Foundation leadership.

1- First Game Choice: *

1- Share your cultivation/stewardship strategy in detail: *

USF Foundation

Amalie Arena Suite Ticket Request Form 2022-2023

Office of Donor Relations & Stewardship

Through our continued partnership with the Tampa Bay Lightning, the USF Foundation Suite at Amalie Arena is available for the University Advancement Division to enhance cultivation and stewardship efforts. In collaboration with the Office of the Sr. Vice President, it is our goal to help you provide an exceptional experience for your guests.

The suite is available for Tampa Bay Lightning home games and other premier entertainment events. For hockey games, development units have the opportunity to reserve the entire suite or share half the suite with another unit. For premier events, leadership will determine if the suite will be reserved for VIPs and other strategic purposes, or if it will be available for general development use.

REQUESTS:
Using the form below, please share your requested games/premier events in order of preference, with a detailed cultivation/stewardship strategy. Availability is limited and we will do our best to accommodate every area.

Have a question? Please email DonorRelations@usf.edu.

Who are you?

Please provide the requested information.

Date *
07 / 21 / 2023
MM DD YYYY

Name *
First Last

Email *

Phone Number *
####

College/Unit *

Suite Requests

Please share your requested games/premier events in order of preference.

1- First Choice *

1- Requesting: *
- Entire Suite
- Suite Share

FOUNDATION SCHOLARSHIPS

OVERVIEW

The USF Foundation Scholarship Office administers all university-wide scholarships including the Black Leadership Network, Latino Scholarship Program, and the Osher and Crankstart Re-entry Scholarships. More than $8 million is awarded annually in privately funded scholarships. We are committed to being the best resource of customer service to past, present and future USF students, and educating and encouraging the development of these students into future philanthropists. We strive to continually foster lifelong relationships with our donors through meaningful stewardship initiatives.

The USF Foundation Scholarship Office serves as a resource to USF Foundation scholarship fund administrators across USF to create consistency in awarding and donor experience throughout the University. The Foundation Scholarship Office provides the resources necessary for financial administrators to effectively award scholarships and maintain compliance with the USF Foundation's policies.

SCHOLARSHIP DONOR STEWARDSHIP

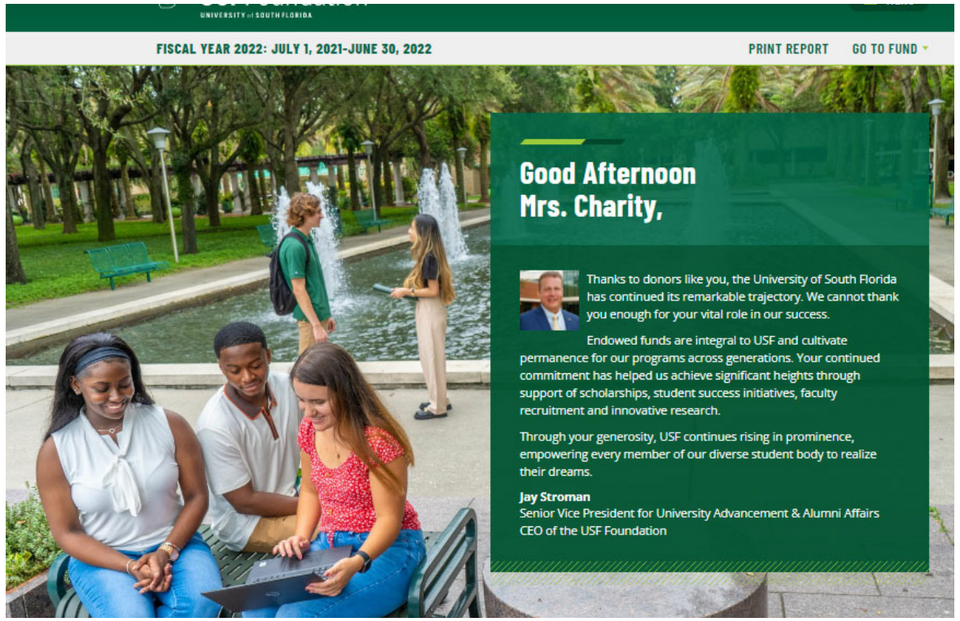
Vital to the process of helping donors see and feel the impact of their generosity, our office facilitates the following:

- Thank-you letter mailing
- Coordination of one-one-one meetings between donors and scholars
- Engagement of donors through virtual meetings with their scholars
- Organization and preparation of student speaker at donor-sponsored events
- Social media highlights (in collaboration with Advancement Communications and Marketing)
- Custom stewardship reports for donors and private foundations
- Aripoli Scholarship Luncheon
- General stewardship piece to be included with all scholarship endowment reports
- Gratitude videos in collaboration with Donor Relations

ENDOWMENT/IMPACT REPORTS

The stewardship reporting process is one of the most important initiatives for the USF Foundation. The endowed fund report provides a unique opportunity to showcase to donors how their investment is positively impacting the USF community. It is important for donors to feel their investment in USF was a wise decision, in part accomplished by annually demonstrating prudent management of their gift and illustrating the impact their gift has had on the university.

- In FY22, the Foundation's second year of electronic endowment reporting:
  - 1,034 unique reports were created on 1,117 different funds.
  - Each report was customized to the donor's interest/area of giving.
  - Donor response and engagement increased.
- Our department works with internal contacts for every fund to gather impact information.
- These reports illustrate the impact of gifts beyond endowment performance.
  - This process starts in early spring in preparation for the close of the fiscal year during the summer, and is sent out in the fall.
- Customized quarterly reports are sent to key stakeholders.



Endowment Report Sample



USF Foundation
UNIVERSITY of SOUTH FLORIDA

MENU

2021 REPORT PRINT REPORT GO TO FUND

YOUR IMPACT: FISCAL YEAR 2020 - 2021

ST PETERSBURG DOWNTOWN PARTNERSHIP FELLOW COASTAL SCIENCE

FUND: 286300

USF continues to rise because of donors like you!

The St. Petersburg Downtown Partnership Fellowship in Coastal Science was awarded to Jonathan Peake, a doctoral student studying marine resource assessment.

Peake's research focuses on fish communities in the Gulf of Mexico and the Caribbean. He is applying metacommunity theory, which seeks to reconcile the local and regional processes that influence ecological communities, to fish communities in these regions to identify patterns of fish species composition and abundance across locations and time periods, as well as at different spatial and temporal resolutions.

By identifying patterns of metacommunity structure, and relating them to the physical, chemical and environmental conditions within each community, we can begin to tease apart the processes that influence fish species composition and abundance in a dynamic marine environment.

Thanks to the generosity of donors like you, the college's $20 million endowment provided $319,000 for endowed fellowships and awards to 29 CMS graduate students in 2020-2021.

The inaugural award of the Norman Blake Endowed Memorial Fellowship in Marine Science was offered this past year, and a new fellowship was established in honor of Kent A. Fanning, PhD, to benefit students focusing on marine geochemistry. In addition to the awards from endowed funds, our graduate students received 22 new external awards and one honorable mention in 2020. Of these, eight were multiyear awards providing $234,000 in support this year. Combined with one-time awards, the students brought in $313,000 in external funding to the College of Marine Science.

Fiscal Year 2021

Market Value	$585,332.00
Principal	$333,178.00

DOWNLOAD

Spending Fund Activity

Beginning Balance	$4,773.00
Dividends, Gifts and Transfers-In	$20,203.00
Expenditures	$15,000.00
Ending Balance	$9,975.00

Endowment Report Sample continued

DONOR EVENTS

OVERVIEW

The Office of Donor Events serves as a centralized event planning resource to support the Foundation's mission and priorities through event engagement. To establish and maintain a high-level event standard, our team serves as the principal office supporting logistics related to all Foundation events. Our primary focus is events with a donor stewardship purpose.

Primary Areas of Support

- Alumni Association
- Corporate and Foundation Relations
- Foundation Board of Directors
- Parent and Diversity Initiatives
- President's Circle and Recognition Societies
- Talent Management and Human Resources (Advancement Staff Events)
- Women in Leadership and Philanthropy
- Development-related events (extending to schools, colleges and units)
    - Gift Announcements/Namings
    - Suite Hospitality Programs
    - Presidential Event Support (as called upon)
        - Groundbreakings
        - Ribbon-cuttings

Services include but are not limited to:

- Identifies and secures venues that best meet event need as outlined by hosting department.
    - Lead site visits, logistics walk-throughs.
- Secures all catering needs as determined by hosting department.
    - Presents options for review and selection.
    - Organizes tastings (as needed).

- Coordinates all rental and décor.
    - Presents options for review and selection.
- Coordinates AV/photography/video needs determined by hosting department and program/run of show.
    - Reserved spaces.
    - Valet services.
- Supports the organization of day-of guest registration.
    - Provides staffing support.
    - Secures volunteers (as needed).
- Manages set-up and event service flow; review of run-of-show as it relates to service standards.
- Acts as primary point of contact for all contracted event vendors leading up to and including day-of.
- Routes contracts and invoices through the proper departments for signature/payment processing.
- Consultation services available to support colleges or units hosting events that do not have a stewardship purpose aligned with Foundation.

*Organization and logistics associated with raffles, silent auctions, sponsorships and EBA processes managed by hosting department. Hosting organization coordinates all details surrounding speaker selection and develops program run of show.



2023 Latino Scholarship Program (LSP) Awards



2023 Kente Awards event setup



2023 Judy Genshaft Honors College Grand Opening

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STEWARDSHIP MATRIX

The FY2023-24 Stewardship Matrix is a strutured framework, used by the Office of Donor Relations and Stewardship, which outlines donor engagement and the corresponding stewardship activities at each level.

GIFT ACKNOWLEDGEMENT & SPECIAL COMMUNICATIONS

$1+ Gift
All Gifts

- Tax Receipt
- **$1K+ USF Advancement Staff** Personalized ThankView from DR&S Team

Other:

- **VIP Special Handling** Letters/Receipts for a select group of VIPs are pulled to be reviewed by DR&S before being mailed.
- **Stock Gifts** Tax receipt

  $5K+ Additional TY letter from Foundation CEO or USF president
- **In Honor Of / In Memory Of** Notification letter sent to honoree or family members of deceased.
- **Planned/Estate Gifts** Acknowledged by Gift Planning Office in collaboration with Donor Relations.

  Additional TY letter sent from USF president
- **ThankView Pledge Reminder** "Your Pledge Reminder is Ready" digital pledge reminder

  "Thank You for Making Your Pledge Payment" Video
- **Comprehensive Giving Report for VIP Society Donors** Per Leadership request

$5K+ Gift/ Pledge

- Tax Receipt
- Personalized TY letter hand signed by senior VPCEO of Foundation
- **$25K+** Letters reviewed and personalized by the assigned relationship manager

$100K+ Gift/ Pledge

- Tax Receipt
- Personalized TY letter from USF president reviewed and personalized by the assigned relationship manager

ANNUAL STEWARDSHIP

$1,500+ Annual Giving
President's Circle

- Tax Receipt
- Performance Report via mail
- President's Circle Welcome E-mail
- Quarterly ENGAGE E-Communication
- Appreciation email for Thanksgiving (video or animated communication)
- Appreciation email for the holidays (video or animated communication)
- Invitation to attend USF Athletic events when applicable
- Invitations to attend partnership events throughout the university
- Personalized stewardship communications and donor outreach via ThankView platform
- Custom framed commemorative Performance Report story/ USF Magazine articles given to featured donors
- Spring stewardship video featuring thankful students filmed at Grateful Bulls Day

$1+ Consecutive Giving
Loyalty Herd

Stewardship plan for donors who have given to USF for 3+ consecutive years. Milestone recognition at 3, 5, 10, 25 and 30+ years.

RECURRING STEWARDSHIP

$100K+ Cumulative Giving
Recognition Societies

- Tax Receipt
- Performance Report via mail
- Recognition Societies Welcome Packet
- Quarterly ENGAGE E-Communication
- Appreciation email for Thanksgiving (video or animated communication)
- Holiday Card from USF Foundation VP/CEO Jay Stroman and digital Holiday Card from USF President Rhea Law
- Foundation communications/press releases regarding naming announcements and transformational gifts
- Invitations to attend partnership events and VIP receptions throughout the university
- Monthly 'Happy Birthday' email via ThankView featuring the USF Chamber Singers
- Valspar Golf Championship - USF Suite (donors within the 6-county radius)
- Springtime appreciation mailing
- Invitation to attend a private hospitality USF Suite for Athletic events when applicable
- Invitation to attend a private hospitality USF Football Tailgate
- Personalized stewardship communications and donor outreach via ThankView platform
- Custom framed commemorative Performance Report story/USF Magazine articles given to featured donors
- Spring stewardship video featuring thankful students filmed at Grateful Bulls Day
- Spring Appreciation Event
- **$500K+** Announcement event or Reception Celebration, VIP lunch/dinner, special gifts, commemorative photobook etc.

$1+ Planned Gifts
Legacy Society

- Legacy Society Lapel pin given to planned giving donors by Office of Gift Planning/Donor Relations
- Annual Appreciation Event

$1M+ Cumulative Giving
Recognition Societies

- All Stewardship of $100K+ Cumulative Giving
- Individualized Stewardship Plans
- Donor Milestone and Memoriam Program

First-Time Donors

- "You Gave. We Noticed." Postcard
- Handwritten "I'm Grateful for You" thank you note from a student
- Special 'Thank You' video featuring USF students, faculty and staff.
- Happy Anniversary card: "One Year and Counting"

Endowments
Founding Donors

- Customized stewardship reports: Endowment Report, Performance Report, Prospectus

Scholarship Donors

- Appreciation email for Thanksgiving (video or animated communication)
- Personalized stewardship communications and donor outreach via ThankView platform
- Personalized thank-you letter mailing to donors of named scholarships
- One-on-one donor/scholar meetings
- Scholarship Awarding events hosted by individual colleges/ units

Current Stewardship
Proposed Stewardship

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Department of Donor Services

ACKNOWLEDGEMENT MATRIX

The FY2023-24 Acknowledgement Matrix is a strutured framework, which outlines donor giving and the corresponding acknowledgement activities at each level across the university and regional campuses.

2023-2024 University Advancement Acknowledgement Matrix

	Others	$1 - $4,999	$5,000 - $99,999	$100,000+
USF Foundation The USF Foundation acknowledges all pledges and gifts made to the University of South Florida. • This process is administered by the Office of Donor Relations and Stewardship, in collaboration with Information Management.	<u>VIP Special Handling</u> Letters/receipts for a select group of VIPs are pulled to be reviewed by Donor Relations before being mailed. <u>Stock Gifts</u> Acknowledged by Donor Relations – tax receipt. Additional thank-you letters are sent from Foundation CEO or president for gifts of $5K or more. <u>Planned/Estate Gifts</u> Acknowledged by Gift Planning Office in collaboration with Donor Relations. Additional thank-you letter is sent from USF president. <u>In Honor Of/In Memory Of</u> Notification letters are sent to honoree or family members of deceased.	• Tax receipt. *All gifts to WUSF are tax receipted by WUSF. • All gifts $1K+ made by USF Advancement staff receive a personalized 'thank you' ThankView from Donor Relations and Stewardship team.	• Tax receipt. *All gifts to WUSF Public Media are tax receipted by WUSF. • Followed by a custom thank-you letter hand signed by senior VP/CEO of Foundation. • For letters for gifts of $25K+, Donor Relations contacts the assigned relationship manager (if applicable) to review the letter for accuracy and provide input to personalize and make more meaningful to the donor.	• Tax receipt. *All gifts to WUSF are tax receipted by WUSF. • Followed by a personalized thank-you letter from USF president. For this letter, Donor Relations contacts the assigned relationship manager (if applicable) to review the letter for accuracy and provide input to personalize and make more meaningful to the donor.

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	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
Alumni Association	• Letter from the executive director.	• Letter from the executive director.	• Letter from the executive director.	• Letter from the executive director.
Athletics	• Thank you from Lelo Prado. • If sport specific, head coach will also send a separate thank you. • For new pledges, the DO sends a personalized thank you. • Annual Fund gift • Thanksgiving/Holiday Card	• Thank you from Lelo Prado. • If sport specific, head coach will also send a separate thank you. • For new pledges, the DO sends a personalized thank you. • Annual Fund gift • Thanksgiving/Holiday Card	• Thank you from Lelo Prado. • A thank-you call from Michael Kelly. • Iron Bull Welcome Basket. • If sport specific, head coach will also send a separate Thank You letter. • For new pledges, the DO sends a personalized thank you. • One (1) Happy Birthday Card from all Bulls Club staff. • IB/GBS specific gift • Annual Fund gift • Thanksgiving/Holiday Card	• Thank You from Lelo Prado. • A thank-you call from Michael Kelly. • Iron Bull Welcome Basket. • If sport specific, head coach will also send a separate thank-you letter. • For new pledges, the DO sends a personalized thank you. • One (1) Happy Birthday card from all Bulls Club staff. • IB/GBS specific gift • Annual Fund gift • Thanksgiving/Holiday Card • $1M+, Bulls Club Legends Plaque
Black Leadership Network	• Personalized letter from DO	• Personalized letter from BLN chair • BLN scholar thank-you letter and gift ($5K or more) • Phone call and/or lunch/dinner with DO	• Personalized letter from BLN chair • BLN scholar thank-you letter and gift ($5K or more) • Phone call and/or lunch/dinner with DO	• Personalized letter from BLN chair • BLN scholar thank-you letter and gift ($5K or more) • Phone call and/or lunch/dinner with DO

Department of Donor Services

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
College of Arts and Sciences	• **$1—$1,000.00** • Acknowledgement letter for gifts of $1 or above are sent to each CAS donor. • For gifts $250 or above, a handwritten thank-you notes are sent from students. • For gifts of $100—$999.99 a letter is signed by the senior director of development, DOD, or assistant DO. • Gifts of $1,000 or more receive call from assigned DO or in the case of unassigned donors and unsolicited gifts they receive a call from DO. • Letter from Dean for gifts of $1000 and above. • Dept. chair/faculty are encouraged to send a note, as appropriate.	• **$1,001—$9,999.99** • Letter signed by the Dean. • Handwritten note or e-mail from soliciting DO sometimes. • Donors receive call from SDO, DOD, or ADO, or in the case of unassigned donors and unsolicited gifts they receive a call from DO. • Dept. chair/faculty are encouraged to send a note, as appropriate.	• Letter and call from the Dean. • Dept. chair/faculty are encouraged to send a note, as appropriate. • Letter from SDO or DO assigned.	• Personal note and call from the Dean. • Dept. chair/faculty will send a note or call. • Letter from SDO or DO assigned.
College of Behavioral and Community Sciences	• Acknowledgement for $1.00 - $24.99 from CBCS Development Office. • Template letter from the Dean with special P.S. for all gifts $25 and above. • May receive a call and/or note from the asst. director of development. • At any gift level, the donor may receive a call and/or note from the department chair or school director.	• Personalized letter from the Dean with special P.S. • Note or call from the asst. director of development, request lunch or meeting bring token TY gift from CBCS. • At any gift level, the donor may receive a call and/or note from the department chair or school director.	• Personalized letter from the Dean with special P.S. • Gifts of $25K or more may receive a phone call from the Dean. • Note or call from the asst. director of development, request lunch or meeting bring token TY gift from CBCS. • At any gift level, the donor may receive a call and/or note from the department chair or school director.	• Personalized letter signed by Dean with special P.S. • Phone call from Dean, possible lunch or meeting request. • Personalized note or call from the asst. director of development, request lunch or meeting bring token TY gift from CBCS. • At any gift level, the donor may receive a call and/or note from the department chair or school director.

Department of Donor Services

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
College of Education	• Personalized letter from Dean. • For gifts over $500, a handwritten note from Dean.	• Handwritten note card from DO. • Scholarship donors are invited to Scholarship Recognition event in the fall. • Scholarship donors sent personalized letters from student recipients.	• Personalized e-mail from Dean. • Lunch with DO. • Handwritten note card from DO. • Scholarship donors are invited to Scholarship Recognition event in the fall. • Scholarship donors sent personalized letters from student recipients.	• Personalized invitation to lunch with Dean. • Handwritten note card from DO. • Scholarship donors are invited to Scholarship Recognition event in the fall. • Scholarship donors sent personalized letters from student recipients.
College of Engineering	• Postcard with automated signature from the Dean. • DO may send a personal postcard if they have a relationship with the donor.	• Template letter from Dean. • Personalized letter from department chair when gift is designated to department. • Thank-you email from development officer.	• Personalized letter from Dean. • Personalized letter from department chair when gift is designated to department. • Thank-you email from Development Officer.	• Personalized letter from Dean. • Personalized letter from department chair when gift is designated to department. • Thank-you email from development officer.
College of Marine Science	• Personalized note from the DO.	• Personalized letter from the Dean and hand-written note card from DO.	• Personalized note from the Dean; phone call from Dean; Lunch with the Dean; hand-written note card from DO; As appropriate, thank-you gift (hat, tote, etc.).	• Personalized note from the Dean; phone call from Dean; Lunch with the Dean; hand- written note card from DO; As appropriate, thank-you gift (hat, tote, etc.).
College of The Arts	• Personalized letter from the Dean.	• Personalized letter from the Dean. • Phone call/note from college staff. • Hand-written note/card from director of development.	• Hand-written note/card from director of development. • Personalized letter from the Dean. • Phone call/lunch with director of development ($25K or more). • Token thank-you gift ($25k or more).	• Hand-written note/card from director of development • Personalized letter from the Dean. • Phone call from the director of development. • Phone call/lunch with Dean. • Thank-you gift.

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
Diversity Initiatives	• Personalized letter from DO	• Personalized letter from Assistant VP of D.I. • Phone call with DO	• Personalized letter from Assistant VP of D.I. • Phone call with DO	• Personalized letter from Assistant VP of D.I. • Phone call with DO
Judy Genshaft Honors College	• Hand-written thank you from the Dean.	• Hand-written thank you from the Dean. • Scholarship donor receives a thank you and photo book or thank-you note and photo (depends on # of students). • Dean phones all donors over $1K.	• Hand-written thank you from the Dean. • Invite to suite events at level of $25K or more. • Invite to campus lunch with student for endowments (local donors). • Scholarship donor receives a thank you and photo book or thank-you note and photo (depends on # of students). • Phone call from the Dean Travel donors of $25K and above are gifted tokens from the study-abroad Honors College class trips.	• Hand-written thank you from the Dean. • Lunch or dinner with Dean. • Invite to suite events and gifts. • Invite to campus lunch with student for endowments (local donors). • Phone call from the Dean Travel donors are gifted tokens from the study-abroad Honors College class trips.
Libraries	• Hand-written thank-you Note signed by the development officer.	• Personalized letter signed by the Dean and development officer. • Gift of USF Libraries lapel pin.	• Personalized letter signed by the Dean and development officer. • Gift of USF Libraries Padfolio and pen. • Case by Case basis: Recognition on social media, LIB news article.	• Personalized letter signed by the Dean and development officer. • Gift of USF Libraries donor pin • Case by Case basis: Recognition on social media, LIB news article.

Department of Donor Services

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
Muma College of Business	• Thank-you postcard from the Dean.	• Letter signed by Dean/DO.	• Personalized letter from the Dean/DO. • Phone call from the Dean for gifts of $25K or more.	• Personalized letter from the Dean. • Phone call from the Dean.
Office of Gift Planning	• Tax receipt and automated acknowledgement. • Personalized TY Letter from USF president. • Personalized TY Letter from Gift Planning Office. • Customized TY Letter from DR&S for stock gifts.			
Patel College of Global Sustainability	• Personalized letter from DO.	• Personalized letter from the Dean.	• Personalized letter from the Dean. • Phone call/lunch with the Dean and DO.	• Personalized letter from the Dean. • Phone call/lunch with the Dean and DO. • PCGS token thank you gift.
USF Health	• For $1-$999: Postcard with HDAR AVP's pre-printed signature, or pre-printed thank you card signed by the appropriate development officer, depending on which fund the gift was made to. • All first-time donors, regardless of the gift/pledge size (excluding honor, memorial and LIFT gifts), will receive a postcard acknowledging their initial gift.	• Pre-printed thank-you card signed by appropriate development officer.	• Personalized letter signed by the Sr. VP of USF Health.	• Personalized letter signed by the Sr. VP of USF Health.

Department of Donor Services

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
USF Health Morsani College of Medicine	• For $1-$999: Postcard with HDAR AVP's pre-printed signature, or pre-printed thank you card signed by the appropriate development officer, depending on which fund the gift was made to. • All first-time donors, regardless of the gift/pledge size (excluding honor, memorial and LIFT gifts), will receive a postcard acknowledging their initial gift.	• Pre-printed thank-you card signed by the appropriate development officer.	• Personalized letter signed by the Dean.	• Personalized letter signed by the Dean.
USF Health College of Nursing	• For $1-$99: Postcard with HDAR AVP's pre-printed signature • For $100-$999: Pre-printed thank you card signed by the Dean, or signed by the appropriate development officer, depending on which fund the gift was made to • All first-time donors, regardless of the gift/pledge size (excluding honor, memorial and LIFT gifts), will receive a postcard acknowledging their initial gift.	• Pre-printed thank-you card signed by Dean.	• Personalized letter signed by the Dean.	• Personalized letter signed by the Dean.

Department of Donor Services

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
USF Health Taneja College of Pharmacy	• For $1-$99: Postcard with HDAR AVP's pre-printed signature. • For $100-$999: Pre-printed thank you card signed by the Dean, or signed by the appropriate development officer, depending on which fund the gift was made to. • All first-time donors, regardless of the gift/pledge size (excluding honor, memorial and LIFT gifts), will receive a postcard acknowledging their initial gift.	• Pre-printed thank-you card signed by Dean.	• Personalized letter signed by the Dean.	• Personalized letter signed by the Dean.
USF Health College of Public Health	• For $1-$99: Postcard with HDAR AVP's pre-printed signature. • For $100-$999: Pre-printed thank you card signed by the Dean, or signed by the appropriate development officer, depending on which fund the gift was made to. • All first-time donors, regardless of the gift/pledge size (excluding honor, memorial and LIFT gifts), will receive a postcard acknowledging their initial gift.	• Pre-printed thank you card signed by Dean.	• Personalized letter signed by the Dean.	• Personalized letter signed by the Dean.
USF Research & Innovation	• Acknowledgement hand signed by the director of development. • Thank-you phone call from DO or program director.	• Acknowledgement hand signed by the director of development. • Hand-written note card from DO. • Thank-you phone call from DO or program director.	• Acknowledgement hand signed by program director and DO. • Personalized thank-you letter from director of development • Hand-written note card from program director or DO.	• Acknowledgement hand signed by VP of research. • Personalized thank-you letter from VP of Research. • Personalized visit from VP of R‹

Department of Donor Services

	$1 - $999	$1,000 - $9,999	$10,000 - $99,999	$100,000+
USF Sarasota-Manatee	• Communication (card, letter, email, call) from any 1: dept./unit leader (Dean, VP, etc.), DO, or AVP for advancement. • Annual thank-you card signed by regional chancellor.	• Letter from any 1: dept./unit leader (Dean, VP, Dir.) or AVP for advancement or regional chancellor. • Annual thank-you card signed by regional chancellor.	• Phone call from any 1: regional chancellor, Dean, unit leader, AVP for advancement. • Letter/card from any 1: Dept./unit leader (Dean, VP, Dir.) or AVP for advancement or regional chancellor. • Annual thank-you card signed by regional chancellor.	• Phone call from regional chancellor. • Letter from any 1: Board chair or Member, regional chancellor, Dean, VP, AVP for advancement. • Annual thank-you card signed by regional chancellor.
USF St. Petersburg	• Handwritten note from the DO when appropriate. • E-mail or letter from AVP of development. • Email from student to scholarship donors.	• Handwritten note from DO. • E-mail, letter or handwritten note from AVP of development. • Dean or unit leader are encouraged to send a note. • Handwritten note from regional chancellor. • E-mail from student to scholarship donors.	• Handwritten note from DO. • Dean or unit leader are encouraged to send a note or make a phone call. • Handwritten note from AVP of development. • Handwritten note and possible phone call from the regional chancellor. • May receive a gift in acknowledgement. • E-mail from student to scholarship donors.	• Handwritten note from DO. • Will receive a small gift. • Handwritten note or phone call from Dean or unit leader. • Handwritten note or phone call from AVP of development. • Handwritten note and possible phone call from the regional chancellor. • E-mail from student to scholarship donors.
WUSF *All gifts to WUSF are tax receipted by WUSF.	• Letter from Member Services. If it's an additional gift from a Cornerstone donor, a letter is sent from the development director with tax receipt information.	• **$1,000-$1,199:** Personal phone call within one business day from development officer; Handwritten thank-you card within one business day from development officer; letter from development director with tax receipt information. • **$1,200-$2,499:** Personal phone call within one business day from development officer or MGO assigned to donor. - Handwritten thank-you card within one business day from	• **$5,000+:** Personal phone call within one business day from MGO assigned to donor, development director or general manager as appropriate. • Handwritten thank-you card within one business day from MGO assigned to donor. • Letter with tax receipt information signed by general manager on Leadership Society Stationary.	In addition to $5,000+ thank you process: • As appropriate, a station event to recognize the gift – i.e., dedication, ribbon cutting. • Hand-written note from development team.

		development officer or MGO assigned to donor. -Letter from general manager with electronic signature that includes tax receipt information on Cornerstone stationary. -Cornerstone sustaining donors receive a custom thank-you card with images of on-air staff 3x per year. A gift accompanies one of the cards. • **$2,500-$4,999:** Personal phone call within one business day from MGO assigned to donor. -Handwritten thank you card within one business day from MGO assigned to donor. -Letter signed by development director with tax receipt information on Cornerstone stationary. -Cornerstone sustaining donors receive a custom thank-you card with images of on-air staff 3x per year. A gift accompanies one of the cards.		