



Gift Journal FAQs and Tips

What is a gift journal?

The Gift Journal report provides a weekly snapshot of gift transactions posted to UH Foundation accounts. Gift details along with donor contact information are included and can be used to produce gift acknowledgements.

What are the standard acknowledgement letters sent from Foundation's Central Offices?

An acknowledgement letter from the UH Foundation Vice President for Administration/Chief Financial Officer is attached to each receipt and emailed or mailed out to all donors who make a tax-deductible contribution (excluding non-cash gifts). An additional acknowledgment letter is sent from the UH Vice President for Advancement for gifts of \$1,500 or more, the UH Mānoa Provost for gifts to UH Mānoa of \$5,000-\$24,999, and from the University System President for gifts of \$25,000 or more to UH Mānoa and \$10,000 or more for all other campuses. Special acknowledgement/receipt is sent to donors from the UH Foundation Vice President for Administration/Chief Financial Officer for non-cash gifts.

Is there a difference between the PDF and Excel versions of the gift journal?

The standard format (PDF report) of the gift journal report sorts the gift transactions by unit, department, account, gift date of record, then by transaction receipt number. The Excel version of the gift journal report sorts the gift/pledge transactions by week then receipt number. This version can be used in a mail merge to produce acknowledgement letters.

Tips on how to effectively use the gift journal

- **The Foundation handles the tax-deductible receipting of gifts. Please do not include any values on any acknowledgement letter.**
- Be selective on who you acknowledge. Look at the transaction types on the gift journal. Decide which ones are appropriate. For example, you do not need to acknowledge monthly recurring gifts such as payroll deduction or recurring credit card charges. A realized bequest needs no acknowledgement since the gift comes from the proceeds of donor's bequest.
- Based on your discretion you may or may not want to acknowledge matching gifts based on the donor or the amount.
- Upon completion of use of gift journal, any electronic and/or paper originals and copies should be appropriately disposed (i.e., deletion from computer, shredding).
- Reproducing, copying, routing, and/or electronically distributing this document without prior approval is prohibited. If you are found in violation of UH Foundation policies, access to this report could be terminated.
- It is highly recommended that gift journals be pulled on a weekly basis. Up to six months of weekly transactions are available at a given time. A weekly snapshot is taken in order to consistently provide the same transactions for that week regardless of the report run date. Gifts can be modified at any time after it has originally been posted for various reasons, at which time a modification note will be indicated in the report.