



DISCOVERY: Checklist for a Donor Recognition Inventory

Embarking on a donor recognition inventory can be an enormous undertaking. Capturing information onsite is one of the most crucial components.

Follow this discovery checklist as you prepare for your time onsite:

- Pack Your Tools**
 - Charge technology: cameras, ipad or tablets. Bring extra batteries and chargers
- Check In**
 - If you need security passes or badges, check in with the appropriate people
 - Pick up your badges for the day- don't forget to drop them off at the end of the night if needed
- Plan Your Day**
 - If you have any appointments with sensitive departments, include those in your plans for the day
 - Use your printed copies of floor plans and maps to schedule.
 - Keep a "notes" section for areas to return to, or items to follow up on
- Create and prepare spreadsheet for data entry**
 - Determine criteria that will be collected in columns
- Discover**
 - Get started collecting data!
 - When you arrive on a floor or area, check in with the appropriate people before getting started
 - Start a system of recording data and taking photos so that you can match up the pictures and text back in the office during consolidation
 - Note the predetermined recognition attributes. Complete all of the necessary fields onsite, and save the more intensive data entry for later.
- Wrap Up**
 - Reflect on what you were able to accomplish in the amount of time you spent on sight. Try to calculate how much ground you covered, the hours spent, the number of items captured. This will help you estimate the amount of time left for the project. Consider the size and scope of the buildings you have to cover and the density of recognition you have to collect.

Ready to get started?

Honorcraft offers a variety of services to help you conduct your own recognition inventory, in addition to our full-scale inventory audit service, LegacyCurator™.

To learn more contact Rebecca Jamison, Direct of LegacyCurator™, rijamison@honorcraft.com (781) 341-0410.