



PREPARE: Checklist for Starting a Donor Recognition Inventory

So you're interested in learning about how to prepare for an inventory or you're planning to get started on an inventory soon? Preparation is a crucial part that can be time consuming and often overlooked.

Follow this preparation checklist to save time & prepare to embark on this project!

- ☑ **Review and confirm your institution's standards and policies for donor and honorary recognition.** If you have a specific policy, it will be easier to note if the recognition meets your standards or not.
- ☑ **Gather maps/floorplans** in electronic format. It is most helpful if the maps are broken down by department. You might also want printed copies for reference as the inventory is conducted.
- ☑ **Prepare security clearance/passes** in advance to confirm access to all spaces
- ☑ **Work with facilities to identify stored recognition** and to gain access to these areas
 - Request to have a facilities person available for support should you need a ladder, access, or other assistance
- ☑ **Email interoffice memos** to alert each department that the project will be taking place
 - Include the date of the inventory and ask managers to email back with any known recognition that is hard to find or stored away
 - Have department managers request appointments if desired
 - Emergency, Psych, Maternity, Surgery, etc. are sensitive departments where an appointment may be best
- ☑ **Schedule and plan your time**
 - Make a priority list of buildings and areas that are most important to you
 - Think about peak times, high traffic areas, class schedules, conference room schedules, etc.
- ☑ **Determine the attributes you want to collect**
 - Decide how you will use the data once it is collected. This will help you think through what data fields you want to collect
- ☑ **Consolidate existing recognition files**
 - You can save time by collecting and consolidating data from files you already have
 - Examples include brick, donor walls, etc.
 - Bear in mind that while spreadsheets and files provided often help to speed up time, you will want to spot check to confirm the files are accurate and reliable

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™, rjamison@honorcraft.com (781) 341-0410.