Checklist for Promoting a Gift to Duke

• Determine if the donor and development officer want to announce the gift and ensure that all the documentation has been coded in the gift records system (DADD):
  o the gift has been booked and recorded (and therefore Duke has received all necessary documentation)
  o neither the gift nor the donor has been coded “anonymous” (unless you are announcing a significant gift from “an anonymous donor”)
  o you are not characterizing someone as the exclusive donor if another person or entity is the legal donor
  o special care has been given to any complexities regarding the gift agreement (i.e., a non-binding gift intention, or a multi-year commitment that is predicated on certain conditions being met)

  Note, publicizing a gift that has not been properly documented and recorded – or without fully understanding possible complexities regarding the gift agreement or legal donor – can adversely affect the donor and the university.

• Work with the University Development office and the Office of News and Communications regarding the announcement:
  o Notify Jennifer Haslip, University Development’s executive director of development marketing and communications, if you want to announce the gift, and to discuss your communications strategy and channels.
  o Consult the Office of News and Communications’ (ONC) director of media relations, Keith Lawrence, regarding the newsworthiness of the gift and the timing of a release. If the gift involves Duke Medicine, contact the Duke Medicine Office of News and Communications.

• Once the gift has been tracked and all parties agree to a public announcement, develop recommendations for the public announcement and the mix of communications channels based on the audience, news value and donor. In addition to official Duke news releases and media outreach, communicators may also share news through a variety of other communications channels:
  o social media (from both the unit and wider Duke channels)
  o profiles in newsletters and magazines
  o school/program websites
  o school/program magazines or newsletters
  o announcements at events
  o donor honor rolls
  o Duke Forward’s campaign site: http://dukeforward.duke.edu/
• Prepare the press release. Schools and units generally draft releases of gifts to their areas, although Duke’s central offices may choose to take the lead on this. University Development generally drafts releases for “Big D” gifts.

• Consider drafting a social media post(s), such as on Facebook or Twitter, to accompany the release and to help promote it.

• When drafting the release, be aware of the following:
  o Gift announcements should generally be made by the president of the university. From time to time other university officials and deans may be designated to announce a gift.
  o The release must include the amount of money involved.
  o In general, if Duke has previously announced a $5 million+ gift from a donor to any area of the university, that gift should be mentioned again in a release about a new gift. If Duke has previously announced a gift in the $1 - $5 million range, it may be appropriate to mention that earlier gift in a release about a new gift; appropriate development staff should be consulted.
  o If a Duke alumna has married and changed her name since graduating, it is useful to include her maiden name as well as her married name in the release. Similar steps should be taken in other cases where a donor’s relationship to Duke may be unclear.

• The tone of an official university press release is different from the tone of some development newsletters or development marketing publications. It must be written in a non-promotional tone with the news media in mind, following AP style and ONC’s general news guidelines.

• Seek internal and external approvals for the release and any related content (e.g., social media posts, profiles).

  1) Seek internal program/school approvals, including approval from the school or unit’s director of communications.

  2) Share the release with University Development’s executive director of development marketing and communications.

  3) Send the draft release to ONC’s director of media relations. (Duke Medicine news releases should go through the Duke Medicine Office of News and Communications for review.)

  4) Show the release to the donor and seek any quote approvals. The donor may not be shown the release draft before this stage.

  5) Finally, submit the release with any necessary changes to ONC. ONC will review any significant changes proposed by the donor and make final decisions about the content. Distribution will be handled by ONC or the Duke Medicine Office of News and Communications, in coordination with the originating office and University Development, depending on where the gift originated.
• Note, gifts announced through official news releases should not be announced on websites, in social media or in any publications until after the official release has been distributed.

*More information, including Duke University’s policy and guidelines for announcing gifts, is available on the ONC website. These guidelines also apply to content that appears on websites and in publications, e-mail newsletters and other communications that come from programs, schools and other Duke units.*