



## Donor Wall Creation

### Step-by-Step Guidelines

*This guide is designed to facilitate the donor wall creation process. Planning is key—the earlier, the better. At a minimum, walls take months to complete—many take years to move from concept to fabrication to completion. While this document can help you get started, each project will take on a life of its own and may result in additional steps and procedures outside of these guidelines.*

### Part 1: Create ‘The Project Scope’

#### Step 1: Identify the key decision maker(s).

- Whose budget?
- Who needs to sign-off on the final project proof?
- Who will serve as your primary point of contact for this project’s logistics?

#### Step 2: Identify purpose and giving parameters/ranges.

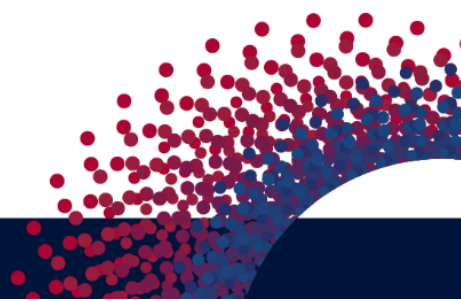
- What event, fund, or gift is ultimately being acknowledged by this wall?
- Identify the giving parameters and giving thresholds.
  - Run giving report(s) to determine the number of donors. eligible to appear on wall.
  - Establish giving ranges amounts (\$ - \$\$\$\$)
  - Use reports to forecast future for 5-10 year growth.
- Is this a fixed giving wall, or will it be updated over time?

#### Step 3: Determine the project’s estimated budget range.

#### Step 4: Discuss possible locations for the wall, sites visits are strongly recommended (include photographs whenever possible).

#### Step 5: Determine the project’s due date.

- If there is no set due date, establish an arbitrary one to keep the project moving forward.
- When establishing deadline be realistic by taking into account the review process and fabrication turnaround times.





## Part 2: Vendor Query

### Step 6: Send Project Scope to Vendor

- Populate email template below with the information gathered in Part 1 to Vendor and be sure to request a follow-up phone call discussion.

- Email Template:

Hello John,

We are looking to create a donor wall at PA hospital to recognize cumulative giving of \$10K+ to Historic Preservation. Here is what I know so far:

- **Location:** PA Hospital, in the foyer, near cafeteria, plaque will replace the bookshelves below.



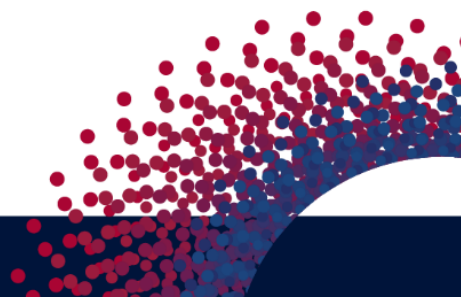
- **Updatable Wall:** every 18 months or when a gift demands we do so
- **Giving Ranges/ Projected Growth:**
  - **\$100,000+** (currently 5 names; projected 5 yr growth 1-2 names)
  - **\$50,000 – \$99,999** (currently 4 names; projected 5 yr growth 2-3 names)
  - **\$25,000 – \$49,999** (currently 7 names; projected 5yr growth 3 names)
  - **\$10,000 – \$24,999** (currently 5 names; projected 5yr growth 3 names)
- **Budget:** \$3,000 – \$6,000
- **Purpose:** To acknowledge donors who have given to historic preservation and to attract new donors.
- **Timeline:** May 20, 2019

After you have had time to review this project scope, let's set up a phone call to discuss next steps directly.

Respectfully

Julia

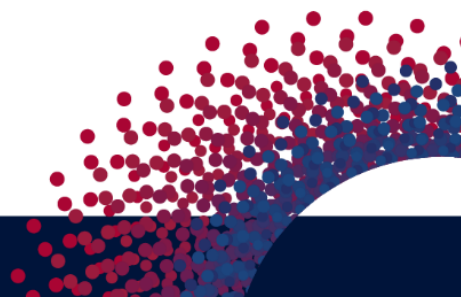
## Part 3: Site Visit

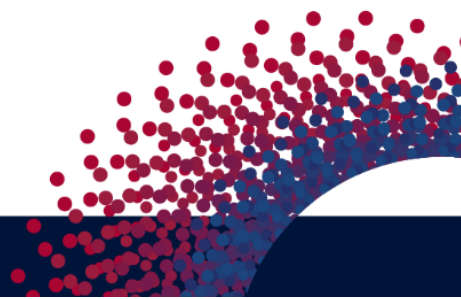




## Step 7: Site Visit

- Set up a meeting with appropriate decision makers and/or vendor to scout out location, take measurements and pictures, and to make notations on surrounding structural details.
  - Noteworthy elements:
    - Lighting: natural or electrical? Make notation on sun's natural movement where applicable, consider possible glare, and always remember lighting fixtures can be added.
    - Measurements: take the length and width of the wall, along with any pre-existing signage. **Ensure the sign company confirms your measurements before fabrication/design.**







- Observe the everyday traffic flow and assess optimal vantage points.
- Take pictures of surrounding elements that could inform design: i.e. wall art, lighting fixtures, wood, wallpaper, fabric, and paint colors, etc.

## Part 4: Initial Design Concepts Review

### Step 8: Conceptual Proofs & Estimates

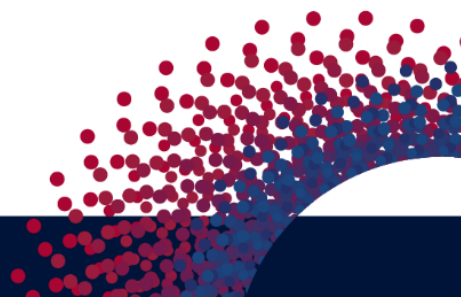
- Vendor will translate your initial scope of work – including wall measurements and pictures – into **Preliminary Design Concepts**.
  - Aim for three, big, broad-stroke concepts.
  - Ask for concepts to be superimposed into a picture of the intended space.
  - Highly recommended: Schedule a meeting or video conference call with vendor and project managers for concept reveal to ensure initial questions and immediate concerns can be answered in real time.

### Step 9: Conceptual Proofs Review Meeting

- Schedule meeting with all appropriate stakeholders to review initial design concepts and estimates.
  - In review, focus on the big structural elements, materials being used, and overall design.
  - The fine print review of names, verbiage, and titles will come later.
  - Discuss pricing along with designs while considering the cost of future updates.
  - Highly recommend: Invite Stewardship to this meeting if you will eventually want assistance with donor wall copy (i.e. dedication paragraph, giving level titles, wall project title).

### Step 10: Feedback to Vendor and Scope of Work

- Provide feedback to vendor and ask for revised proofs along with an official scope of work (or contract).





## Part 5: Contracts

### Step 11: Contracts

- Project manager to review contract for any glaring discrepancies in expected timeline and/or revision policy.
  - **Note: We often require double the normal revision policy limit.**
- Email contract to Penn Purchasing Services [[PurchasingSupport@upenn.edu](mailto:PurchasingSupport@upenn.edu)] for review and signature.

### Step 12: Establish Purchase Order

- After contract is reviewed and signed by both parties, establish a purchase order and make sure to share the purchase order number with the Vendor.

## Part 6: Revised Proofs, Revision, Approvals

### Step 13: Revised Concepts

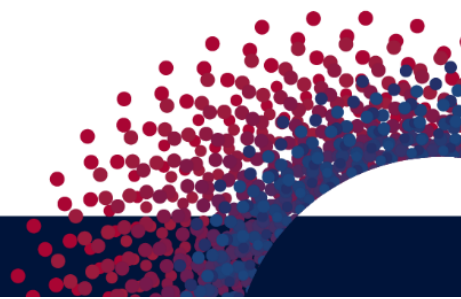
- Vendor to provide a revised concept including the synthesized group feedback.
- Before sharing with the team at large, ask Vendor if they are looking for any specific feedback.

### Step 14: Meeting to Review

- Set up meeting to review nearly final design concept, if possible have Vendor present.
- The purpose of this meeting is to determine a final design concept without worrying yet about the actual content

### Step 15: Provide Vendors with Detailed Wall Content

- After the design concept is finalized and approved, provide Vendor with all relevant content information (ie. headings, titles, names)







### **Step 16: Vendor to supply New Proof Including Content**

### **Step 17: Review of Detailed Proof**

- Print an enlarged copy for all stakeholders to review and proof.
- Proof names against Atlas; Atlas IDs should be included in parameter report.
- Proof against style guidelines.

### **Step 18: Final Approval**

- Must pass through two rounds of approval:
  - Development Officers approval is on behalf of the physicians, development team, and donors.
  - Stewardship's approval is for copyedits and for quality control that all Penn Standards are met.

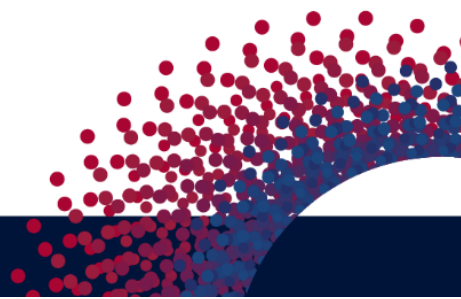
## **Part 7: Scheduling the Installation**

### **Step 19: Set Date & Time**

- Before confirming a date & time make sure to touch base with the buildings facilities team to discuss:
  - Loading dock access and material delivery.
  - Time (paying special attention to clinical departments' busy times).
  - Any special equipment requests from Vendor.
  - Any clearances needed for Vendor.
  - Collect the contact information of the Vendor's installers and facilities point person.

### **Step 20: Install Day**

- Plan to be onsite for the entire process.
- Bring a print out of the final approved donor wall proof to install.
- Take several pictures to document





## **Part 8: Update the Donor Recognition Website**

### **Step 21: Update Website**

- Including the follow information:
  - Design specs (Vendor to provide)
  - Parameter giving report(s)
  - Pictures
  - Frequency of future wall updates (ie. every 18 months)

