Alumni Engagement & Fundraising Best Practices for CALS Departments

Prepared by the CALS Office of External Relations & Advancement
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Why is Alumni Engagement and Fundraising Important?

The college experience, whether a journey to a four-year undergraduate degree or PhD, is life-changing. It is important to maintain a strong connection with alumni after they graduate as they will become our future volunteers, mentors and donors. Good relationships have long-term benefits for your program.

Keeping alumni engaged and invested in the university takes a bit of effort and this document outlines several important ways you can maintain the relationship with your alumni and donors in perpetuity.

Organizations of Interest for CALS Alumni

These organizations are dedicated to alumni and donor advancement for the college and the university as a whole. They can help supplement your department-level work:

- The Wisconsin Agricultural and Life Sciences Alumni Association (WALSAA) – http://walsaa.org
  - WALSAA is the CALS alumni organization that connects students, faculty and alumni
  - Alumni can become a member, support outstanding students and advisors and learn about WALSAA events for CALS grads
- The Wisconsin Foundation and Alumni Association (WFAA) – the following two organizations merged July 1, 2014.
  - The Wisconsin Alumni Association (WAA) – http://uwalumni.com
    - Alumni can become a member, find their local chapter (http://www.uwalumni.com/home/chaptersandaffiliates/chaptersandaffiliates.aspx), and discover learning opportunities or other great ways to stay connected
  - The University of Wisconsin Foundation (UWF) – http://supportuw.org
    - The UWF raises, invests and distributes funds for the benefit of the UW-Madison (more information for YOU can be found at https://www.supportuw.org/campus-partners/)
    - Each department has a development director as a representative. To find out who represents your department, see Appendix 3.

Website

These days, a website is one of your most critical communication tools for alumni, donors and other supporters. If you have limited resources available for advancement activities, an easy to navigate, up-to-date website should be your first priority.

- If listing current department employees, be sure it is up-to-date
- Check to be sure all current links are working and directed to the correct location
- Include a section or separate page for alumni on your site (example: https://aae.wisc.edu/alumni/)
  - Describe your alumni – the types of careers they pursue and how they can remain engaged with your department (i.e., hosting interns, speaking to student organizations, making a gift)
- Include a link to the UW-Madison alumni directory Badger Bridge
- Post past versions of your alumni newsletters, or any other relevant publications
- “Make a Gift” link prominently located on your homepage (example: https://forestandwildlifeecology.wisc.edu/)
  - Making a gift should be intuitive and easy for alumni
  - Gifts to your department funds will be processed by the Foundation and should be mailed to (see appendix 6):
  - UW Foundation
  - U.S. Bank Lockbox
  - Box 78807
Note that checks should be made payable to the University of Wisconsin Foundation and the fund name (or number) should be written in the memo.

The general CALS point of contact at the WFAA is Henry Lagrimini (henry.lagrimini@supportuw.org; 608-308-5375)

How to direct people to give to your department or program annual fund:

- Explain why you would like them to support your annual fund:
  - What have you used the annual fund for in the past?
  - What could you do if you had more annual fund support?
  - Donors like to hear specific stories of gift impact, especially as they relate to students (example: https://www.facebook.com/UWMadisonCALS/photos/a.127032690693401.21302.107900952606575/1354321174631207/?type=3&theater)
  - Make your case for support.

- If you would like your annual fund listed as the default gift designation, you can use your department’s link (see Appendix 1).
- If you would like a custom link to a different fund, you can request it using this form: http://www.supportuw.org/givingsetup
  - https://secure.supportuw.org/give/ goes to the general giving form and http://supportuw.org/giveto/cals goes to the CALS Fund

- Add references to other alumni/campus organizations:
  - The Wisconsin Agricultural and Life Sciences Alumni Association (WALSAA) – http://walsaa.org
  - The Wisconsin Foundation and Alumni Association and its affiliates (https://www.advanceuw.org/)
    - The Wisconsin Alumni Association (WAA) – http://uwalumni.com
    - The University of Wisconsin Foundation (UWF) – http://supportuw.org

### Newsletter (print or email)

A newsletter is a great way to stay in touch and make sure your alumni know about all of the wonderful things happening in your department.

- CALS External Relations send CALS Connection and Grow magazine to alumni.
  - CALS Connection is a monthly electronic newsletter that is sent to all CALS alumni with an email address. It features news, events and alumni stories.
  - Grow magazine is sent three times per year to all CALS alumni with a mailing address as well as some donors to the college. It features research news, alumni highlights, a message from the dean and events.
  - External Relations is always looking for story ideas for both of these communication pieces. Your department newsletter can serve as a source for stories for the college-wide communications.
  - Share a copy with CALS External Relations (kara.luedtke@wisc.edu or 136 Ag Hall) for possible story ideas for Grow and CALS Connection.

- CALS communication resources (logos, style guides, mailing services, etc.): https://cals.wisc.edu/external-relations/communication-resources/

To request a list of your alumni, visit https://about.uwadvancement.org/marketing/list-report-request/.

You should consider the following before requesting your list:

- Do you want to include all of your alumni?
- Is your newsletter going to be mailed, emailed or both?
- You may want to exclude international alumni for a print mailing to help control costs
- Do you want to send your newsletter only to alumni from certain years?

- Distribution of your newsletter
Email – there are several email marketing solutions that you can use (Constant Contact is used by CALS External Relations, but many other units on campus use MailChimp, Campaign Monitor or WiscList)

Mail – UW-Extension Mail Services is a great resource for bulk mailings. See the FAQ section on their website: [http://www.mailservices.uwex.edu/](http://www.mailservices.uwex.edu/)

- If it has been awhile, consider the process, layout, format and frequency:
  - How much does it cost to produce?
  - The College of Letters and Science put together this great toolkit for newsletters: [https://kb.wisc.edu/images/group86/38204/NewsletterToolkit.pdf](https://kb.wisc.edu/images/group86/38204/NewsletterToolkit.pdf)
  - If you include a giving form, consider using this form as a guide for you to determine which fields to include: [https://www.supportuw.org/wp-content/uploads/uwf_printable_form.pdf](https://www.supportuw.org/wp-content/uploads/uwf_printable_form.pdf)

- Note that the address for gifts is:
  UW Foundation
  U.S. Bank Lockbox
  Box 78807
  Milwaukee, WI 53278-0807

- Checks should be made payable to the University of Wisconsin Foundation and the fund name (or number) should be written in the memo.

Social Media

Social media is a great way to connect with alumni, donors and friends. Though not all of your audience will be on social media, it is important to connect with those who are. Social media is also a great way to obtain new supporters of your unit and its mission. Tell your great stories and connect!

- If you have a department Facebook Page:
  - Try to add new content to your Page on a regular schedule, between 1-3 times per week.
  - Post a mix of content, including department, CALS and UW-Madison news, updates and announcements about your department, students, fac/staff and alumni, event announcements and other relevant items.
  - Photos and videos do well on Facebook. Attach some sort of visual element to each post.
  - Be sure to “Like” and monitor Facebook Pages that are relevant to your department (such as the CALS Facebook Page) and interact with their content by “Liking,” commenting and/or sharing it.
  - Be sure to respond to comments you receive with a “Like” or a reply comment.
  - Be sure to respond to messages sent to your Page, as well as “Posts by Others” in a timely fashion.
  - In early 2018, Facebook algorithms changed to give brands lower priority in people’s feeds. Content that engages followers and starts conversations tends to do best. Be thoughtful about the content you post and how it adds value to your followers. Fewer, more thoughtful posts are better than many posts of little value.

- If you have a department Twitter account:
  - Try to tweet regularly, between 1-4 times per day (M-F).
  - Tweet a mix of content, including department, CALS and UW-Madison news, updates and announcements about your department, students, fac/staff and alumni, event announcements, national news related to your field and other relevant items.
  - Visual elements are very important on Twitter due to the sheer number of posts that run through people’s feeds. Adding a photo, GIF or video to your tweets helps you catch your followers’ eyes. Attach some sort of visual element to each tweet.
  - Follow your students, fac/staff, alumni, as well as businesses, organizations and thought leaders in your field.
Be sure to “listen” to the accounts you follow and interact with them, by liking, replying to and/or retweeting their content. If you want to reuse someone else’s content, but you want to add your own information or commentary, you can use the “quote tweet” function.

Be sure to monitor Twitter interactions such as mentions and retweets and respond in an appropriate fashion. For example, be sure to thank accounts that mention, RT and otherwise help promote your department’s Twitter account.

- The **CALS LinkedIn Group**
  - Encourage your students, fac/staff and alumni to join the CALS LinkedIn Group
  - LinkedIn is a social network focusing on professional development, allowing you to connect with your alumni and other people in your field.
  - The **CALS group** includes job postings and notifications about career fairs, conferences and other events of interest to alumni and students alike.
  - If your department has its own LinkedIn page, share it with us.

- Sample posts related to alumni giving can be found in **Appendix 2**.

**Fund Management for UW Foundation Accounts**

The WFAA will schedule an annual (or as needed) fund review meeting with each department in January and February. This coincides with the annual development department meeting. Departments can review fund balances at any time using Advancement Resources (http://www.uwadvancement.org), the WFAA’s fund management tool.

To request access to this fund management tool for your department, contact Angie Seitler (aseitler@cals.wisc.edu) in CALS Business Services. After approved, you will receive your credentials and video training from WFAA.

To set up a fund review meeting or ask a question about Advancement Resources, contact Brooke Mulvaney at WFAA (brooke.mulvaney@supportuw.org, 608-308-5330).

**How-Tos:**

- Request a new department initiated fund:
  - Be prepared to provide the information about the purpose of the fund and how it will be initiated.
  - A fund and account number will be created and a Fund Operation Agreement will be completed that requires approval and signatures from the department, college and UWF.
  - Each department has a general fund. See **Appendix 1**.
  - Contact Brooke Mulvaney (brooke.mulvaney@supportuw.org, 308-5330) at UWF.

- Request money from a UWF fund:
  - Use Advancement Resources to fill out a Check Request.
  - Submit the check request and UW gift routing slip to the CALS Business office for signatures. They will then send the request to WFAA in order to process the check.

- Transfer money from one fund to another:
  - Complete an Accounting Transfer Form from Advancement Resources.
  - Once completed, obtain the required signatures and either create a Help Center ticket through Advancement Resources or attach the completed form to an email and send to help@uwadvancement.org.
  - If you’re choosing the email option, please add this note in your subject line: “Accounting Transfer Form attached”. WFAA will respond to your request.
• Close a fund:
  o Request a transfer of any remaining balances with a Check Request from Advancement Resources.
  o Complete the Fund Closure Request from Advancement Resources.
    ▪ Once completed, obtain the required signatures and either create a Help Center ticket through Advancement Resources or attach the completed form to an email and send to
    ▪ If you’re choosing the email option, please add this note in your subject line: “Fund Closure Request form attached”. WFAA will respond to your request.

**Donor Stewardship**

Proper donor stewardship leads to continued giving. It is important to thank donors for their support and tell them how their gifts were used before asking them to make another gift.

• Check Advancement Resources for donors to your department/program’s funds (http://www.uwadancement.org). You can pull a Donor Acknowledgement Report on your fund(s) to see gifts and donor contact information by selecting your fund(s) from the fund list and then selecting the Donor Acknowledgement Report option in the Report section below your list of funds. You are then able to select a specific timeframe from which to pull donor gifts.

• Determine what approach is appropriate for your department. Suggested strategies:
  o Call and thank a donor (it only takes a minute, usually just involves leaving a message and is the most meaningful)
  o Send a hand-written note (also very meaningful)
  o Send a personal email
  o Send a bulk email or letter (least meaningful approach but certainly better than nothing)
  o Consider a combination of these strategies based on dollar amount, number of donors and fund designations. Brooke Mulvaney (WFAA) and Kara Luedtke (CALS) can help you decide what the best strategy is for your unit.

• Be timely with your stewardship – ideally donors are thanked on a monthly basis
• Change the content of your thank you at least once/year so regular donors continue to feel appreciated

• Stewardship resources are available here: http://about.uwadancement.org/development/stewardship-resources/

• See [Scholarship Recipient Acknowledgement Tips](#) document for thank you note tips
• Also see Appendix 5, for “thank you” tips

**CALS Stewardship Coordinated via CALS development team at WFAA**

The UW Foundation acknowledges gifts to CALS funds and sends receipts.

• **Gift receipts and acknowledgements** (receipts go out automatically as gifts are processed)
  o Generally, gifts over $5,000 (including gifts in kind), gifts from BOV members, faculty and emeritus faculty, and gifts over $1,000 to the CALS Fund receive a letter from the Dean
  o For gifts of any amount, the development director determines which to acknowledge in their assigned “division” (phone call, email, handwritten note or nothing)
  o Best practice: Departments should be acknowledging gifts to their areas at least once a month

• **Endowment Reports**
  UWF sends Endowment Financial Reports to donors with established endowment funds each year in May/June. The report shows the activity of the fund in the previous year.

• **Stewarding and updating donors of named professorships/chairs, graduate support funds and undergraduate support funds**
A strong partnership between departments and WFAA is essential in acknowledging our most generous supporters and providing meaningful impact of their gifts.

- When a new faculty recipient is awarded for an existing or newly established professorship/chair, WFAA will work directly with the department on writing a thank you letter from the chair and faculty recipient.
  - Each spring, WFAA will reach out to named professors/chairs to encourage them to provide an update on their work to the donor (brief report, one-on-one meeting, phone call, lab visit, lunch, dinner, etc).
  - Copies of reports to a donor or stewardship activities with a donor should be recorded in the central database managed by WFAA.

- Departments are encouraged to collect thank you letters from graduate student award recipients and to send those letters to the donor with a cover letter.
  - Copies of thank you letters should be recorded in the central database managed by WFAA.

- For undergraduate student awards NOT managed and administered by Karen Martin’s office (see Scholarships below), departments are encouraged to collect thank you letters from students and to send those letters to the donor with a cover letter.
  - Copies of thank you letters should be recorded in the central database managed by WFAA. This applies to letters NOT collected by Karen Martin.

- Stewardship guidelines and best practices will be provided but may change from time to time.

Questions can be directed to your development liaison or Brooke Mulvaney (brooke.mulvaney@supportuw.org; 608-308-5330).

**Alumni and Donor Records**

WFAA manages the alumni and donor database (known fondly as ABE – Advancing Badger Engagement) and partners with the Office of the Registrar to ensure alumni and donor records are up-to-date. WFAA runs their entire database through National Change of Address (NCOA) every week to ensure information is current. This is the best way to track contact information for your alumni and donors.

- Updating records: If you obtain new information from your constituents (new address, phone, email, deceased, employment, etc.), send an email directly to the Help Center at help@uwadvancement.org or submit a ticket to the Help Center through Advancement Resources. Constituent updates can be requested directly in a constituent record but ABE database access is required in order to do this.
- Currently enrolled students are added to ABE with minimal information.
- To request a list of your alumni, visit https://about.uwadvancement.org/marketing/list-report-request/
- To gain access to ABE, contact Kara Luedtke (kara.luedtke@wisc.edu; 608-890-2999) in the External Relations office. After approved, you will receive your credentials and video training from WFAA.

**Scholarships**

Karen Martin (karen.martin@cals.wisc.edu, 262-3001) in the Office of Academic Affairs manages many of the undergraduate scholarships in CALS.

- In November, students apply for scholarships for the following academic year through an application system (currently CSA but UW is transitioning to Academic Works) and are generally notified in March of their award.
- After being selected, students are required to write a thank you letter.
- The CALS Academic Affairs coordinates a mailing to scholarship donors in August/September which tells the donor that their scholarship has been awarded (and to whom) and includes the thank you letters the students wrote.
• Scholarships administered through departments should handle collecting thank you letters from scholarship recipients and mailing the letters to the donors
• Best practices and a toolkit exist on the Advancement Resources website: https://about.uwadvancement.org/development/stewardship-resources/
• Some donors request or they are invited to meet their scholarship recipient which is coordinated by the UW Foundation

Questions can be directed to Brooke Mulvaney (brooke.mulvaney@supportuw.org; 608-308-5330).

Events

Events are a great way to engage alumni, donors, students and friends of your unit and bring them back to campus. The CALS External Relations department can help guide you in the execution of your event by suggesting locations, caterers, registration services, invitations and guest lists. See Appendix 4 for the External Relations Event Planning Checklist.

Students

It is important to engage with students because, after all, they are future alumni, friends and supporters. As referenced in Why Alumni Engagement and Fundraising are Important, good relationships have long-term benefits for your program. Early engagement and understanding of the importance of staying connected and giving back to one’s alma mater means a stronger connection and likelihood that alumni will add the university to their list of annual philanthropic contributions.

CALS students are already highly engaged in student organizations, but the message of continued connection and giving to the university, the college and the departments are not a part of the conversation. If your unit has an affiliated student organization, talk to them about alumni engagement. You can also add the topic to your exit interviews for graduating students.

Helpful Resources

• https://www.supportuw.org/campus-partners/
• http://www.advancementresources.org
• http://www.mailservices.uwex.edu/
• https://www.supportuw.org/share-your-story/
• http://www.cygresearch.com/burksblog/?p=542
• CALS communication resources: https://cals.wisc.edu/external-relations/communication-resources/
• http://www.donorrelationsguru.com/#resources/c1rnq

Important Contacts

• Kara Luedtke, Development Specialist, CALS External Relations: kara.luedtke@wisc.edu, 890-2999
• Heidi Zoerb, Associate Dean of External Relations and Advancement: hezoerb@wisc.edu, 262-4849
• Brooke Mulvaney, Development Program Manager, WFAA: brooke.mulvaney@supportuw.org, 308-5330
• Henry Lagrimini, Development Program Specialist, WFAA: henry.lagrimini@supportuw.org, 308-5375
• WALSAA: admin@walsaa.org, 438-1994
Appendix 1: Online Giving Department Fund Links

If you would like your annual fund listed as the default gift designation, you can use your department’s link:

- Ag and Applied Econ: [http://supportuw.org/giving?seq=10502](http://supportuw.org/giving?seq=10502)
- Ag Research Stations: [http://supportuw.org/giving?seq=10519](http://supportuw.org/giving?seq=10519)
- Animal Science: [http://supportuw.org/giving?seq=6677](http://supportuw.org/giving?seq=6677)
- Bacteriology: [http://supportuw.org/giving?seq=10570](http://supportuw.org/giving?seq=10570)
- Biological Systems Engineering: [http://supportuw.org/giving?seq=10587](http://supportuw.org/giving?seq=10587)
- Center for Biology Education: [http://supportuw.org/giving?seq=10604](http://supportuw.org/giving?seq=10604)
- Community and Environmental Sociology: [http://supportuw.org/giving?seq=5453](http://supportuw.org/giving?seq=5453)
- Dairy Science: [http://supportuw.org/giving?seq=10638](http://supportuw.org/giving?seq=10638)
- Entomology: [http://supportuw.org/giving?seq=6711](http://supportuw.org/giving?seq=6711)
- Farm and Industry Short Course: [http://supportuw.org/giving?seq=10672](http://supportuw.org/giving?seq=10672)
- Food Science: [http://supportuw.org/giving?seq=9176](http://supportuw.org/giving?seq=9176)
- Genetics: [http://supportuw.org/giving?seq=7000](http://supportuw.org/giving?seq=7000)
- Life Sciences Communication: [http://supportuw.org/giving?seq=1441](http://supportuw.org/giving?seq=1441)
- Plant Pathology: [http://supportuw.org/giving?seq=10723](http://supportuw.org/giving?seq=10723)
- Soil Science: [http://supportuw.org/giving?seq=9975](http://supportuw.org/giving?seq=9975)
Appendix 2: Sample Social Media Posts

- https://www.facebook.com/UWMadisonCALS/photos/a.127032690693401.21302.107900952606575/1256809101049082/?type=3&theater
- https://www.facebook.com/UWMadisonCALS/photos/a.127032690693401.21302.107900952606575/1220103754719617/?type=3&theater
- https://www.facebook.com/UWMadisonCALS/photos/a.127032690693401.21302.107900952606575/1129150287148298/?type=3&theater
- https://www.facebook.com/UWMadisonCALS/photos/a.127032690693401.21302.107900952606575/1161871043876222/?type=3&theater
Appendix 3: Departmental WFAA Development Staff

- Annie Engebretson, Associate Vice President and Managing Director (308-5312, andrea.engebretson@supportuw.org)
  - Animal Science/Meat and Muscle Lab
  - Genetics

- Brandi Funk, Associate Director of Development (308-5204, brandi.funk@supportuw.org)

- David Heinrich, Leadership Annual Giving Officer (308-5369, david.heinrich@supportuw.org)

- Henry Lagrimini, Development Program Specialist (308-5375; henry.lagrimini@supportuw.org)
  - General inquiries
  - Gift processing questions

- Barb McCarthy, Senior Director of Development (308-5347, barb.mccarhy@supportuw.org)
  - Agronomy
  - Biochemistry
  - BSE
  - CDR/Dairy Plant
  - Entomology
  - Food Science
  - Horticulture
  - Nutritional Sciences
  - Plant Breeding Plant Genetics
  - Plant Pathology

- Brooke Mulvaney, Development Program Manager (308-5330, brooke.mulvaney@supportuw.org)
  - Fund management for UWF CALS accounts
  - Overall stewardship best practices
  - Overall WFAA policy-related questions

- Jodi Wickham, Senior Director of Development (308-5315, jodi.wickham@supportuw.org)
  - Ag and Applied Econ/Renk Institute
  - Allen Centennial Gardens
  - Bacteriology
  - Community and Environmental Sociology
  - Dairy Science
  - FISC
  - Forest and Wildlife Ecology
  - International Programs/Scholarships
  - Life Sciences Communication
  - WSBDF
  - Soil Science
Appendix 4: Event Planning Checklist

Name/Date/Time of Event ____________________________________________________________

Programming Lead ___________________________ Marketing Lead _____________________________

Prepared by __________________________________________ Date ______________________________

Event description _________________________________________________________________________

Audience/Guests _________________________________________________________________________

Expected attendance ________________________________________________________________

Location ________________________________________________________________________________

Day of contact and phone number _______________________________________________________________________

Location

Room name ___________________________ Capacity ___________________________

Room fee ___________________________

Guest information (contact Kara Luedtke (kara.luedtke@wisc.edu, 890-2999) for help with alumni and donor lists)

Who is your audience? ____________________ Parking required? ____________________

Estimated attendees ____________________ Lodging required? ____________________

Marketing

UW Events Calendar (www.today.wisc.edu/) ______ Email invitation list __________

Print invitation _______________ Web address _______________

Print invitation list _______________ Social media _______________

Email invitation _______________

Lodging (if applicable)
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**Registration** *(service options include CALS Conference Services, WFAA, Pyle Center)*

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**Event Set Up**

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<td>Banners</td>
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<tr>
<td>Tables</td>
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<td>Podium (table/floor)</td>
<td>______________________</td>
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<td>Flipcharts/Markers</td>
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<tr>
<td>Display</td>
<td>______________________</td>
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**Technology Set Up**

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### Program

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<th>Speech Title</th>
<th>Awards</th>
<th>Vendor</th>
<th>Cost</th>
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</table>

### Entertainment

<table>
<thead>
<tr>
<th>Type</th>
<th>Cost</th>
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</table>

### Budget (CALS has a budget template worksheet available for your use)

<table>
<thead>
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<th>Budget</th>
<th>Fund(s)</th>
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<tbody>
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<table>
<thead>
<tr>
<th>Cost per attendee</th>
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### Follow-Up

<table>
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<tr>
<th>Budget report</th>
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<table>
<thead>
<tr>
<th>Thank you notes</th>
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</table>
Appendix 5: Easier, Faster Thank Yous

It’s “thank you” time and once again you’re facing a blank page and the task of writing yet another note of appreciation. You want your words to sound genuine and personal. You’re stumped and frankly, uninspired. What to do? Give these tips a try and writing thank you notes will become faster, easier and ultimately, better.

1. Why re-invent the wheel?

What was it about a thank you letter you received that touched you? Was it handwritten? Did it share something personal or special between you and the writer? Was it a little rough around the edges which made it even more personal and memorable? Or was it obviously a form letter?

If you received a thank you letter or note you can’t forget or you might even have saved, use it as a template and inspiration for the letters you write. If it touched you, chances are it will touch someone else.

2. It’s not the great American novel. It’s a thank-you letter.

What’s wrong with beginning a thank-you letter with a simple, sincere thank you? The key is to be specific and to mean what you say.

Thank you for your gift to the Department of Nutritional Sciences. Your investment means a great deal to me and everyone in the department.

Your gift to the Great People Scholarship Fund means so much to us and even more to the students who will be able to attend the University of Wisconsin-Madison. Thank you.

I am writing to extend a sincere thank you for your generous gift to the Department of Life Sciences Communication.

As director of development for the College of Agricultural and Life Sciences, I have the privilege of writing to thank you for your gift to support research in the Department of Dairy Science.

Sure, you could come up with a hundred wonderful openings, but you don’t have to and your letter will probably be better if you spend your time on step 3.

3. When I say your gift is important, I’m not just blowing smoke.

Prove that your gratitude is genuine. Again, it is not necessary to invent the wheel, just share some excitement/news/basic facts/pride/goals with the reader.

If you are blocked—and it happens to everyone—say these words in your head: Ms. Smith, I want you to feel good about your gift because... Now just write.

You may not know that the Department of Botany has been ranked first nationally and third internationally. It is the home of the first lettuce breeding lab in the United States. You gift will help us maintain our position and advance our goals. [Insert a few goals here.]
Just this year, two of our outstanding faculty received recognition for their work. Professors Jack Bucket and Jill Pail were inducted into the National Academy of Science. They also received outstanding teacher awards. Their work in the lab and the classroom is touching many lives. Thank you for supporting this extraordinary faculty member.

Your gift will enable the department to recruit a new faculty member to teach two new undergraduate courses in South East Asian history. This means we are not only able to offer a comprehensive program in Asian history, language and culture, we also will have the largest such program in the country.

Your gift to support lung cancer research at the Cancer Center will enable researchers, led by Dr. Smith, to continue their study of the HIP-12 protein as a pre-cursor to tumor growth. The implications for treatment and cure are extremely promising. Your generosity has the potential to benefit the thousands of people diagnosed with lung cancer.

The Great People Scholarship will keep the doors of the University open to students to qualify for admission academically but cannot afford to attend. The first Great People Scholarships were awarded in 2009 to three promising incoming freshman. Thanks to you, they can now begin turning their dreams into reality.

4. Keep the communication channels open.

A closing is a closing. Why overstay your welcome? Provide contact information and the offer to be of further assistance. Of course, this also is a convenient opportunity to reinforce existing “hooks.” For example:

Again, thank you for your gift to the College of Letters and Science—the heart of a great university. (the last phrase is the College’s identifying hook). If you have any questions or if I can be of any assistance, please feel free to contact me at:

The Arboretum is where ecological restoration began (the last four words are the Arboretum’s identifying hook). Thanks to you this important work will continue. We are grateful for your support. Please feel free to contact me at _____________ with any questions.

5. P.S. The most frequently read part of a letter is the P.S.

The Direct Mail Marketing Association, or some such organization, discovered that the first and usually only part of a direct mail letter people read is the P.S. And, if it is handwritten, your chances of getting read are even better.

I am planning a trip to Cincinnati in June and hope we can meet then so I can thank you in person. The next time you are in Madison, I would be happy to arrange a tour of Dr. Smith’s lab. I know she would love to thank you in person.
Appendix 6: CALS Gift Check Deposit Process

University Gift Guidelines:
• **The gift must provide funding for activities:** This might include professorships, scholarships, building projects, fellowships, and other activities in support of the research, instruction, and service mission of the University. The donor may restrict the use of funds to a specific program area or purpose.

• **No detailed technical or fiscal reports are required as a condition of the gift:** The unit or faculty member involved may provide the donor with a brief summary of the results of supported activities and a statement that expenditures were made in accordance with the intent of the gift.

• **Certain restrictions are not applied:** The gift does not grant the donor with rights to, or impose any restrictions with respect to patents, copyrights, and other intellectual property rights that result from activities supported by the gift.

• **The gift contains no restrictive provisions:** This might include delays or advance notice concerning publication or dissemination of data and information derived from activities supported by the gift.

• **The gift is irrevocable by the donor.**

Bench fees and reimbursements for travel expenses paid by the UW are not gifts. Bench fees are processed as sponsored projects and reimbursement to the UW are processed via a [Check Deposit Form](#).

Please contact your CALS Business Services accountant if you are unsure which criteria the payment fits. They will be able to help determine the correct routing process and funding source to use.

**Gift Check Deposit Procedure:**
1. Department representative will receive check, determine as a gift, verify that the check is written out to "University of Wisconsin Foundation", and is accompanied with a gift letter.

2. **WFAA will not accept checks made out to any variation of “UW Board of Regents”**. Please contact donor for a new check.
3. Write WFAA fund number in the memo line of check
4. Stamp or write “for deposit only” on back of check.
5. Department Chair/Director (or representative) will complete and sign a [WFAA Gift Deposit Form](#).
6. Signed deposit form, endorsed check, and required gift letter can be mailed in a sealed envelope to:

   University of Wisconsin Foundation
   US Bank Lockbox
   Box 78807
   Milwaukee, WI 53278-0807

**DO NOT MAIL CASH DONATIONS** – Please see Wisconsin Foundation and Alumni Association Cash Processing procedure.
7. Department sends acknowledgement letter to donor.
8. Department must maintain records and reconcile the deposit at WFAA by logging in to the [Advancement Resources](#) website.
Please reach out to Brandon Blackburn (brandon.blackburn@wisc.edu) or Sandy Fowler (sandy.fowler@wisc.edu) with any questions or concerns about the gift new process.

**Alternate Gift Giving WFAA Options:**

- Credit Card Online Processing: One time or recurring donations can be made at the SupportUW site.

- Checks or Credit Cards via US Mail: Donors can mail the WFAA’s Gift Form with their check or credit card info to:
  
  University of Wisconsin Foundation  
  US Bank Lockbox  
  Box 78807  
  Milwaukee, WI 53278-0807

- ACH/EFT automatic payments can be set up for either monthly or quarterly transfers. Authorization Agreement for Direct Payment ACH Debits forms can be mailed with a voided check to:

  UW Foundation  
  Attn: Gift Processing  
  1848 University Ave.