College of Arts and Letters
Scope of Policy: Gifts Received, Development Donor Services
Original Effective Date: 3/1/2014
Date Amended: 4/22/16

Policy: College-generated Donor Thank-you Notes

Policy and Procedure:

Each month, Development Donor Services will provide the designated administrative staff member for each department/institute/program/center/office a Monthly Giving Report – a record of all donor gifts received for the applicable unit during the preceding month (see example attached). The report should be forwarded to the unit chairperson/director. The first tab – Monthly Cash Receipts – should be reviewed to determine gifts received. In months when no gifts are received, the report will still be generated, but the monthly cash receipts will be blank. Even if the Monthly Giving Reports (monthly cash receipts) are routinely blank, the Monthly Giving Report should be checked every month.

For each gift received (as noted in monthly cash receipts on the Monthly Giving Report), a thank-you letter from the director or chair of the unit should be generated. This letter may be generated from boilerplate text and adapted based on the relationship with the recipient and purpose (see attached). Please personalize the letter to fit your department or unit and the style of your chair or director. Use the information from the Monthly Giving Report to generate the letter. The name and address of the benefactor(s) are listed along with the informal name(s) to be used in the salutation of the letter. The body of the letter should mention the name of the fund that received the gift (Allocation, in the green field on the example). It is not necessary to acknowledge the gift amount, but do express the impact of the gift on the work of your department or unit. If the benefactor has an assigned fundraiser, it will be noted in the far right column of the report (see the last entry on the attached report, Transaction Primary Solicitor Name). If a primary solicitor is listed, he or she should be copied on the thank-you letter and a copy should be sent via email.

Process:

1. Review the monthly cash receipts section of the Monthly Giving Report, every month when received from Donor Services.
2. If gifts are received, forward the report to the chairperson/director.
3. For each gift received, generate an appropriate thank-you note in consultation with the chairperson/director. Also consider including your most recent departmental newsletter in the mailing.
4. For gifts of $1000 or more, submit a draft of the thank you note to Chloe Leach, Senior Administrative Assistant to the Academic Advancement Director, (cleach@nd.edu) for approval before mailing to benefactor
5. Once approval is received, the Chairperson/director signs the thank-you note.
6. Send an electronic copy of the thank-you note to the primary solicitor, if applicable.
7. Mail thank-you note to donor.
The best stewardship letters include some interesting news from the department or some indication of how the gift supports the work of your faculty and students. If the department chair has a personal relationship with the benefactor, he/she can amend the text to reflect that. The more personal you can make the letter, the better chance it has of beginning to forge a real relationship with the benefactor and encouraging repeat giving. Do not mention the amount of the gift. The Donor receives a letter for tax purposes that comes from the University.

DATE

NAME (include both spouses’ names – NOT Mr. and Mrs. John Smith)
ADDRESS
ADDRESS

Dear SALUTATION NAMES,

I just learned of your recent gift to ALLOCATION, and I wanted to thank you for your generous support of Notre Dame and INSERT YOU UNIT NAME HERE.

This has been a great year so far for the Department of XXX. We’ll see 50 majors graduate in May, 20 of whom completed a senior thesis. The department also hosted several interesting guest lecturers including Jon Bon Jovi and Pope Francis. Your gift helps to make all this possible, and I am very grateful.

Sincerely,

John Smith
Chair, Department of XXX and Professor of XXX

cc: TRANSACTION PRIMARY SOLICITOR NAME if applicable
Maria E. Di Pasquale, Academic Advancement Director
December 2013 Cash Receipts

Allocation: American Studies Discretionary Fund, xxxxxxx-xxxxxx-xxxxxx-xxxxxx

Restriction/Preferences: Expendable account to be used by the program of American Studies as a Discretionary Fund.

<table>
<thead>
<tr>
<th>Legal Donor ID Number</th>
<th>Legal Donor Primary University Affiliation</th>
<th>Legal Donor Preferred Class Year</th>
<th>Donor Name and Address</th>
<th>Donor Informal Salutation</th>
<th>Gift Total (Cash)</th>
<th>Receipt Date</th>
<th>Gift ID Number</th>
<th>Transaction Type</th>
<th>Transaction Primary Solicitor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000576964</td>
<td>Alumni</td>
<td>2004</td>
<td>Anthony C. Lopeman</td>
<td>9718 Brock Avenue</td>
<td></td>
<td></td>
<td>0003827731</td>
<td>Outright Gift</td>
<td>No Primary</td>
</tr>
<tr>
<td>0000371318</td>
<td>Alumni</td>
<td>1999</td>
<td>Mary E. Lasser</td>
<td>Kenneth N. Mitchell</td>
<td></td>
<td>12/24/2013</td>
<td>0003829013</td>
<td>Outright Gift</td>
<td>No Primary</td>
</tr>
<tr>
<td>0000267906</td>
<td>Alumni</td>
<td>1988</td>
<td>Barbara A. Middendorf</td>
<td>5003 Briargrove Lane</td>
<td></td>
<td>12/26/2013</td>
<td>0003843683</td>
<td>Outright Gift</td>
<td>No Primary</td>
</tr>
<tr>
<td>0000174424</td>
<td>Alumni</td>
<td>1988</td>
<td>Joseph G. Fink</td>
<td>420 E 64th St Apt W7J</td>
<td></td>
<td>12/31/2013</td>
<td>0003848292</td>
<td>Outright Gift</td>
<td>No Primary</td>
</tr>
<tr>
<td>0000394308</td>
<td>Alumni</td>
<td>1991</td>
<td>Mr. and Mrs. Scott C. Hertlhy</td>
<td>12830 Rose Grove Drive</td>
<td></td>
<td>12/31/2013</td>
<td>0003851333</td>
<td>Outright Gift</td>
<td>Jill E. Donnelly</td>
</tr>
</tbody>
</table>

Donor Count: 5

Total Gifts (Credit): 

Confidential