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 four-year undergraduate one or a journey to a 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](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 two organizations merged July 1, 2014.
    - Alumni can become a member, find their local chapter ([http://www.uwalumni.com/home/chaptersandaffiliates/chaptersandaffiliates.aspx](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](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/](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 your most critical communication tool 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
  - 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 ([www.myuwconnect.org](http://www.myuwconnect.org))
- Post past versions of your alumni newsletters, or any other relevant publications
- “Make a Gift” link prominently located on your homepage
  - 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:
    - UW Foundation
    - U.S. Bank Lockbox
    - Box 78807
    - Milwaukee, WI  53278-0807
    - 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 UW Foundation is Kate Bahr (kate.bahr@supportuw.org, 308-5120)

How to link directly 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: http://grow.cals.wisc.edu/environment/seeds-of-greatness)
  - 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
  - http://www.myuwconnect.org/give goes to the general giving form with the Chancellor’s Annual Fund as a default gift designation and http://supportuw.org/giveto/cals goes to the CALS Annual Fund

- Add references to other alumni/campus organizations:
  - The Wisconsin Agricultural and Life Sciences Alumni Association (WALSAA) – http://walsaa.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 logos and templates: http://www.cals.wisc.edu/external-relations/cals-logos-and-templates/
- 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 grad years?

- Distribution of your newsletter
  - Email – there are several email marketing solutions that you can use (Constant Contact is used in 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/

- Share a copy with CALS External Relations (kara.luedtke@wisc.edu or 136 Ag Hall) so that we can track which alumni are receiving what and when
  - 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
    - 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
      - Note that the address for gifts is:
        - UW Foundation
        - U.S. Bank Lockbox
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 1-5 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 do well on Facebook. Whenever possible attach a photo to a 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.

- 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.
  - 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 favoriting, replying and/or retweeting their content.
  - Use #FF (Follow Friday) to promote professional, well-run accounts that you follow and continue to build your social network.
  - 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

The UW Foundation will provide fund balances to each CALS department in August and February. Departments can review fund balances at any time by using Advancement Resources (http://www.uwadvancement.org), the UW Foundation’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 the UW Foundation.

The UW Foundation will also schedule an annual (or as needed) fund review meeting with each department. To set up a meeting or ask a question about Advancement Resources, contact Kate Bahr at the UW Foundation (kate.bahr@supportuw.org, 308-5120).

How-Tos:

- **Request a new fund:**
  - Be prepared to provide the information about the purpose of the fund.
  - Contact Kate Bahr (kate.bahr@supportuw.org, 308-5120) 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 UWF in order to process the check.

- **Transfer money from one fund to another:**
  - A request must be made in writing from the person requesting the transfer, signed by the Dean’s office, then sent to Sally Erdmann (sally.erdmann@supportuw.org, 308-5457) at UWF.

- **Close a fund:**
  - Send a request in writing, signed by the Department Chair and Dean’s office, to Sally Erdmann (sally.erdmann@supportuw.org, 308-5457) at UWF.

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.uwadvancement.org). You can pull a Donor Stewardship 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 Stewardship 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:**
  - Call and thank a donor (it only takes a minute, usually just involves leaving a message and is the most meaningful)
  - Send a hand-written note (also very meaningful)
  - Send a personal email
  - Send a bulk email or letter (least meaningful approach but certainly better than nothing)
  - Consider a combination of these strategies based on dollar amount, number of donors and fund designations. Kate Bahr (UWF) and Kara Luedtke (CALS) can help you decide what the best strategy is for your unit.

- **Be timely with your stewardship** – ideally a donor is thanked within a month of their gift

- **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.uwadvancement.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 UW Foundation

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

- Receipts & Letters (receipts go out automatically as gifts are processed)
  - Gifts over $5,000 and gifts from BOV members, faculty and emeritus faculty receive a letter from Kate VandenBosch
  - Annual Fund gifts of $250+ receive a thank you email from the associate development director
  - For gifts under $5,000, the development director determines which to acknowledge in their assigned “division” (phone call, email, handwritten note or nothing)
  - Departments should be acknowledging gifts to their areas at least once a month

- Endowment Reports
  UWF sends Personal Endowment Reports to donors with established endowment funds each year in May. The report shows the activity of the fund in the previous year.

Alumni and Donor Records

The UW Foundation manages the alumni and donor database and partners with the WAA and the Office of the Registrar to ensure alumni and donor records are up-to-date. The UWF runs their entire database through National Change of Address (NCOA) every week to ensure information is current. This is the best way to keep track of your alumni and donors.

- Updating records: If you obtain new information from your constituents (new address, phone, email, deceased, etc.), email recordsupdates@supportuw.org with the updated information. You can also update a constituent record via Advancement Resources.
- To request a list of your alumni, visit https://about.uwadvancement.org/marketing/list-report-request/.

Scholarships

Scholarship award recipients are generally notified in March. They are required to fill out a UWF profile (accessible here: https://www.supportuw.org/share-your-story/profiles/cals/) and write a thank you letter and submit it to Karen Martin (karen.martin@cals.wisc.edu, 262-3001). UW Foundation and CALS Academic Affairs coordinate a mailing to scholarship donors in August/September each year which tells them their scholarship has been awarded (and to whom), includes the thank you letters the students wrote, as well as the profile they submitted.

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/
- CALS logos and templates: http://www.cals.wisc.edu/external-relations/cals-logos-and-templates/
- http://www.donorrelationsguru.com/#1resources/c1rnq

Important Contacts

- Kate Bahr, Development Program Manager, UW Foundation: kate.bahr@supportuw.org, 308-5120
- Kara Luedtke, Development Specialist, CALS External Relations: kara.luedtke@wisc.edu, 890-2999
- 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
- Ag Research Stations: http://supportuw.org/giving?seq=10519
- Agroecology: http://supportuw.org/giving?seq=10536
- Agronomy: http://supportuw.org/giving?seq=10553
- Animal Science: http://supportuw.org/giving?seq=6677
- Bacteriology: http://supportuw.org/giving?seq=10570
- Beginning Dairy and Livestock Farmers: http://supportuw.org/giving?seq=9669
- Biochemistry: http://supportuw.org/giving?seq=2886
- Biological Systems Engineering: http://supportuw.org/giving?seq=10587
- Center for Biology Education: http://supportuw.org/giving?seq=10604
- Community and Environmental Sociology: http://supportuw.org/giving?seq=5453
- Dairy Science: http://supportuw.org/giving?seq=10638
- Entomology: http://supportuw.org/giving?seq=6711
- Farm and Industry Short Course: http://supportuw.org/giving?seq=10672
- Food Science: http://supportuw.org/giving?seq=9176
- Forest and Wildlife Ecology: http://supportuw.org/giving?seq=10689
- Genetics: http://supportuw.org/giving?seq=7000
- Horticulture: http://supportuw.org/giving?seq=9278
- Landscape Architecture: http://supportuw.org/giving?seq=10706
- Life Sciences Communication: http://supportuw.org/giving?seq=1441
- Nutritional Sciences: http://supportuw.org/giving?seq=9329
- Plant Pathology: http://supportuw.org/giving?seq=10723
- Soil Science: http://supportuw.org/giving?seq=9975
- Urban and Regional Planning: http://supportuw.org/giving?seq=6286
Appendix 2: Sample Social Media Posts

- https://twitter.com/UWMadisonLS/status/321670093698396160
- https://twitter.com/UWMadisonLS/status/271282078916698112
- https://twitter.com/UWMadisonLS/status/264100278524076032
- https://twitter.com/UWMadisonLS/status/263019381846601729
- https://twitter.com/UWMadisonLS/status/296725252757680128
Appendix 3: Departmental UWF Development Staff

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

- Barb McCarthy, Senior Director of Development (308-5347, barb.mccarthy@supportuw.org)
  - Agronomy
  - Biochemistry
  - Biological Systems Engineering
  - CDR/Dairy Plant
  - Entomology
  - Food Research Institute
  - Food Science
  - Horticulture
  - Landscape Architecture
  - Nutritional Sciences
  - Plant Breeding Plant Genetics
  - Plant Pathology

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

- General inquiries: Kate Bahr, Development Program Manager (308-5120, kate.bahr@supportuw.org)
### 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 __________________________________________________

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<tr>
<th>Location</th>
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<tbody>
<tr>
<td>Room name</td>
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<tr>
<td>Room fee</td>
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</table>

**Location**

<table>
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<tr>
<th>Room name</th>
<th>Capacity</th>
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**Guest Information** *(contact Kara Luedtke (kara.luedtke@wisc.edu, 890-2999) for help with alumni and donor lists)*

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<tr>
<th>Who is your audience?</th>
<th>Parking required?</th>
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<table>
<thead>
<tr>
<th>Estimated attendees</th>
<th>Lodging required?</th>
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**Marketing**

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<th>UW Events Calendar (<a href="http://www.today.wisc.edu/">www.today.wisc.edu/</a>)</th>
<th>Email invitation list</th>
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<th>Print invitation</th>
<th>Web address</th>
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<th>Print invitation list</th>
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<th>Email invitation</th>
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**Lodging (if applicable)**

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<th>Hotel</th>
<th>#Rooms reserved</th>
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<table>
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<tr>
<th>Room Rate</th>
<th>Payment responsibility</th>
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</table>
Registration (service options include CALS Conference Services, WFAA, Pyle Center)

Registration service

Deadline

Registration fee

Guests allowed?

Will any guests be comped?

Does registration need to be capped?

Name tags

Event Set Up

Decorations

Registration

Awards

Props

Chairs

Banners

Tables

Podium (table/floor)

Head

Flipcharts/Markers

Display

Staffing needs

Technology Set Up

Audio

Visual

Hand mic

Internet connection

Lavaliere mic

LCD projection

Laptop

Screen

Other

Program

Speaker/s
<table>
<thead>
<tr>
<th>Speech Title</th>
<th>Awards</th>
<th>Vendor</th>
<th>Cost</th>
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<table>
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<th>Entertainment</th>
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<td>Type</td>
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**Budget** *(CALS has a budget template worksheet available for your use)*

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<tr>
<th>Budget</th>
<th>Fund(s)</th>
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<tr>
<th>Cost per attendee</th>
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**Follow-Up**

| Budget report | |
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<th>Thank you notes</th>
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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 Botany Lettuce Breeding Fund. Your investment means a great deal to the people working on this project and to me.

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 African-American Studies.

As director of development for the College of Engineering, I have the privilege of writing to thank you for your gift to support research in the Department of Explosives and Combustibles.

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-curser 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.