Updated
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Best Practices for Alumni Outreach and Stewardship in the College of Letters & Science

COLLEGE OF
Letters & Science
UNIVERSITY OF WISCONSIN-MADISON
The Heart of a Great University

UNIVERSITY OF WISCONSIN
FOUNDATION

Holly Hartung

A creative partnership between the UW Foundation and the College of Letters & Science

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August 2010

Dear Letters & Science Community,

It is my pleasure to present the *Best Practices for Alumni Outreach and Stewardship*. This report was created through a collaborative effort between the College of Letters & Science and the UW Foundation this summer. I am thankful for the time and effort that our student intern, Holly Hartung, put into the document's creation and equally thankful to the departments and programs that lent their time to Holly.

There is much to be celebrated in the College of Letters & Science – many schools, departments and programs are accomplishing great things with minimal resources. The dedicated L&S faculty, staff and students are responsible for our continued success, prestige and honors.

You have no doubt felt the need to engage more with alumni, donors and friends. I know many departments and programs are trying to do more collaborative work to reach out through newsletters, thank-you letters, events and more.

As you know, times are tight, and we expect another difficult biennium. More and more, we rely on the annual financial support of alumni and friends. Private support for the University accounts for nearly 20 percent of our annual budget, equal to the amount of state support. That is why this guide is so important.

This guide outlines the ways your school, department or program can utilize minimal resources for effective alumni outreach and donor relations. It is designed to help you think strategically about your options and how you can use campus partners to further your efforts.

This document is just a starting point for ways in which the College and the UW Foundation can better assist you in your alumni outreach and stewardship efforts. I look forward to hearing your comments and suggestions.

On Wisconsin!

Gary Sandefur
Dean, College of Letters & Science

Forward

Why Development?

As the chair, director or administrator of your department, school or program, you undoubtedly have numerous responsibilities. Amid preparing lectures, conducting research, advising students and making sure day-to-day operations run smoothly, you may feel uncertain about adding development to your other responsibilities. However, development work, although time consuming, can be tremendously rewarding both monetarily and personally.

In a time when the state assistance for the University as a percentage of the overall budget continues to decrease, private support is increasingly important to fill budgetary gaps. To be more specific, private support comprises 18 percent of UW-Madison's operating budget, greater than the portion covered by the state. Encouraging friends and alumni to support the University is a proactive way to address budgetary issues that will not likely subside in the foreseeable future.

Beyond the financial benefits, many departments have found development work to be personally rewarding. Professors and administrative staff members alike have remarked that working with alumni has become one of the unforeseen joys of the job. All alumni have something to offer, even if they are unable to make a gift. Whether it means providing internship opportunities for students, finding someone to be a guest lecturer on a relevant topic or simply sharing a fond memory of an influential professor, engaging alumni with the institution will certainly be rewarding for those who invest the time and effort.

We understand that development work is not the department's main focus. However, it should be recognized for its role in improving the quality of education at UW-Madison as a whole and on a departmental level.

How Can This Guide Help?

The intent of this guide is to provide ideas on how to better manage your development activities in a strategic and organized manner. It is broken down into the following sections: *Understanding the Roles of the College of Letters & Science and the UW Foundation, Structuring Alumni Outreach and Stewardship, Stewarding Donors,* and *Suggested Outreach Activities.*

Given the importance of development, we encourage the unit chairs or directors and administrative staff to thoroughly read and review this document, as many of the parts are interrelated. Included in the guide you will find reference to an appendix. The appendix includes sample documents, detailed instructions, key contacts and other information for reference. We hope you find the guide useful as a comprehensive resource for many aspects of alumni relations and stewardship.

Section I

Understanding the Roles of the College of Letters & Science and the UW Foundation

This document was produced as a collaborative effort between the UW Foundation and the College of Letters & Science. Both are here to assist you in maximizing your development efforts.

THE UNIVERSITY OF WISCONSIN FOUNDATION

The UW Foundation is a private nonprofit and the official fundraiser for the University. Although it is a separate entity from the University, in part to keep donor records confidential, its philanthropy directly benefits UW-Madison. The Foundation has staff members who specialize in building relationships with alumni and friends, as well as stewarding donors who make gifts to the University. They can advise you about the most efficient strategies for engaging your alumni and share the best practices for expressing gratitude. Developing a strong relationship with your Foundation liaison will help you further engage alumni and friends and encourage them to support the department.

Another resource for campus partners is an online guide to the UW Foundation that can be found at http://www.supportuw.org/campus-partners. The guide was developed to help campus users understand what the Foundation is, how it works, how campus and the Foundation can work together and the nuts and bolts of day-to-day interaction with UWF. It also includes sections on Campus Access and Web Strategy, the online links for campus to access donor and fund information.

THE COLLEGE OF LETTERS & SCIENCE

The College of Letters & Science recently assumed a more active role in development. The College hired Sue Zaeske as the Associate Dean for Advancement to coordinate the College's development, communications and alumni relations. The Advancement Team includes Megan Costello as Director of Communications, Ann Groves-Lloyd in Student-Alumni Relations and Sarah Morton, who coordinates events and logistics.

Due to the large size of the College and the limited administrative staff, the Advancement Team's main role is as an advisor and liaison. Megan can provide guidance to your department about how to communicate effectively with your alumni and direct you to the best person to speak with about your specific inquiry. Ann can provide guidance on student and alumni programming including events and donor cultivation efforts.

Section II

Structuring Alumni Outreach and Stewardship

Many departments in the College of Letters & Science say that reaching out to alumni and maintaining relationships with donors, however valuable, is a major time commitment. Because of this, there is often an issue with turning ideas into actions.

Listed below are some helpful tips from departments that have an organized approach for handling outreach. Some ideas may not work for every department, but many of them have a broad application for anyone seeking to increase the effectiveness of their development efforts. Please understand that most of these practices are about building relationships with alumni and friends to lay the groundwork for future gifts down the road and may not yield immediate results in terms of increased gifts.

Overview of Practices

- Making Development a Collaborative Effort
- Maintaining a Calendar of Events

MAKING DEVELOPMENT A COLLABORATIVE EFFORT

For development to be successful, it needs to be an established part of the department's infrastructure. This can be difficult because many departments elect a new chair every three years and chairs have many other responsibilities beyond alumni relations. Ideally, outreach work should be shared among several people in the department to promote continuity and to make sure goals are accomplished in a timely fashion. Listed below are some ways to involve others with outreach.

<u>Faculty or Staff Members</u>

Recruit faculty and staff members to assist the chair with alumni outreach and stewardship. At first this may need to be on a volunteer basis, but eventually it should be listed as part of the job description. Prime candidates for outreach include faculty members who already have a good connection with students as an academic or career advisor. Because students likely have a close relationship with this person, he or she will be an asset in maintaining relationships with the department as students graduate and become alumni.

<u>Staffing Possibilities</u>

A few departments have recently dedicated part-time or full-time positions to alumni outreach, and these duties are listed as part of their job descriptions. They are also people with close ties to the department and a genuine passion for staying in touch with former students—a must for this position. Here are some current practices in L&S:

- **Part of job listing for current faculty/staff member(s)**:
  Ideally, this should be a more permanent listing (longer than the chair's term) to ensure continuity. Departments with a faculty or staff member dedicated to alumni outreach and donor relations said it accounted for about 20 percent of the job. Because this is a large undertaking, it must be someone with a real desire to reconnect with alumni. Again, it is a good idea to appoint this position to someone with a close relationship with current students.

- **Part-time outreach staff member:**
  A few departments hired, or were able to secure, a volunteer to work part time (about 20 percent) with alumni. Often this person was a retired faculty member. This position can serve as a valuable resource because the person holding it already may have a broad knowledge of the department and the alumni base. This is a more costly option and should only be pursued if there is significant funding and a need for help from someone outside the department.

- **Full-time outreach staff person:**
  Only one department reported having a full-time person dedicated to both career advising for students and alumni outreach. It has been very successful in improving development in the department, but it was financed by its Board of Visitors and is not a practical solution for most departments. This is only an option for departments with a significant source of funding and a high demand for career advising services and/or alumni outreach.

Student Hourly Position

Several departments have hired students to assist the chair with basic administrative tasks related to outreach. Some of the tasks include:

- Writing articles for newsletters
- Copy-editing for newsletters
- Managing and proofing correspondence, thank-you and "saw you" letters
- Managing Facebook and Twitter pages

Typically, these students worked about 5 to 12 hours per week depending on their schedules and the department's need. Many units paid for these employees out of their discretionary funding, while a few had particular funds set aside for such expenses. However, this does not necessarily have to be a paid position. Some students are just looking for the chance to get experience outside of class. While it may require some funding, it may be the best option if no one else in the department is able to assist with alumni outreach.

MAINTAINING A CALENDAR OF EVENTS

If one does not already exist, each department should work on creating a calendar of events related to alumni outreach and donor relations. It can be a simple list of tasks with the times of year they should be performed or a detailed timeline with specific deadlines and information about who is responsible for completing each task. Regardless of the format, a calendar is important to establish consistency and make sure that the same work is done each year. This will help the department collaborate and promote communication, which will set clear expectations. One thing to keep in mind when formulating a calendar is that the Wisconsin Alumni Association and the UW Foundation are also planning events. It is a good idea to **check with your Director of Development at the UW Foundation or your WAA contact before planning any alumni events** to avoid any conflicts.

Section III

Stewarding Donors

Although development is about building lasting relationships with the goal of securing gifts sometime in the future, it is very important to recognize current donors. This is the first step that must be taken before initiating any new development plans.

Private support can improve the quality of education a department is able to offer. A department that is able to draw private support also must show gratitude to donors, which lays the foundation for future outreach.

With so much importance placed on stewardship, it is crucial to manage it effectively.

This section will provide a brief overview of the best ways to thank donors and includes references to more detailed guidelines for stewardship. *(See appendix pp. 24-30 for more information about thanking donors and stewardship.)*

Overview of Practices

- Attributes of a Good Thank You
- Guidelines for Students
- Guidelines for the Chair
- Different Forms of Stewardship

ATTRIBUTES OF A GOOD THANK YOU

The most common way to show gratitude to a donor is with a thank-you letter. Here is an overview of the qualities of a good thank you:

- Sent in a timely manner
- Personalized
- Explains how the gift was used

Did you know?

Campus Access sends out monthly alerts stating that the month's gifts have been posted. Paying attention to these alerts will help you manage stewardship in a timely manner.

<u>Timeliness</u>

For donors to feel that their gifts truly make a difference, they must receive some form of thank you shortly after making their gift. The best way to show that a donor's gift was vital and had an immediate impact on the department is to send them a letter. There should be a set schedule in place for sending out thank-you letters. Departments receiving a high volume or more frequent gifts should consider sending thank yous on a more frequent basis.

Making It Personal

When writing a thank-you letter, you want to make sure that it reads as a genuine display of gratitude rather than a form letter. Here are some ways to give your thank-you letter a more personal touch:

- **Develop a custom card**:
  A few departments created their own card for the purpose of sending a more personalized thank you and to build the department's brand image. This adds a personal touch and is less formal than a typed letter. The manner in which the cards were used varied greatly by department. Some use cards for every gift, while others reserve them for first-time or loyal donors. You may choose to develop a card on your own or use one of the campus partners listed in the appendix to help you. Please note, there will be a fee if you utilize campus partners.
- **Write it by hand**:
  If time allows, think about writing a thank-you letter by hand. As with the custom card idea, it does not need to be a practice for every thank you. Handwritten cards can be reserved for first-time donors, loyal donors or large gifts.
- **Make a form letter a little more personal**:
  Even if you do use a form letter, it is a good practice to vary the letter from time to time. Some donors may give more than once a year and may find the department insincere or uncaring if they receive the same letter year after year. Be sure to change the language and highlight new uses for gifts each year. You may also choose to hand write a small note at the bottom of the form letter to show the donor you recognize their loyalty. Web Strategy is a good tool to find out more about donors. (*Refer to appendix pp. 25-30 for sample letters; for general information about Web Strategy, please refer to appendix p. 33.*)

What is a "saw you" letter?

As the name suggests, a "saw you" letter is a letter sent to alumni to congratulate them for appearing in the news (e.g. winning an award). Although not technically a form of stewardship, the practice of making the communication personal still applies.

Explaining How Gifts Are Used

To convey the message of the importance of a gift, a thank-you letter should briefly illustrate how gifts were used. Explain, in a concise manner, the positive impact that private donations made on the department during the course of the year.

GUIDELINES FOR STUDENTS

If a student receives an award, scholarship or grant from donor money, they must send a thank you. Communication is the key to ensuring that students actually write a thank-you letter.

For example, it is a good practice to mention in their award notification letters that they will be expected to write a thank-you letter BEFORE they receive their awards. In this letter you can include some guidelines for what to include in the letter and explain that they must submit a copy to the chair or department administrator for review before the money will be transferred into their account.

You also may want to encourage students to include copies of the work that helped them earn their award (essays, research proposals, etc.) with their thank-you letter as a way to further show the donor of the impact of their gift. (*See appendix pp. 27-29 for some sample letters.*)

GUIDELINES FOR THE CHAIR

Many departments mentioned that thank-you letters from the chair really resonate with donors—it means a lot to them to see someone from the department take time just to say "thank you." The letter does not need to be lengthy—a concise, one-page letter will suffice.

DIFFERENT FORMS OF STEWARDSHIP

Stewardship encompasses more than simply sending thank-you letters. It is an attitude of appreciation that can be conveyed at any time in a variety of ways. If you would like to become more engaged with thanking your alumni via donor visits or if you have other ideas not listed in this guide, please contact your UW Foundation liaison. Some additional ways departments are showing gratitude include:

- Thank-you phone calls
- Personal visits
- Plaques/visual recognition*
- Alumni awards
- Holiday cards

A Creative Idea…

The Department of Geoscience gives its students pre-addressed, stamped postcards to send to the donors who supported their field trip. Donors frequently comment how much enjoy receiving these notes from students in the field.

* *A few departments expressed interest in creating some sort of visual way to recognize their top or most loyal donors, such as with a plaque. Please understand that this sort of stewardship can be very costly and there is room for error. Some donors may wish to remain anonymous and giving information may be outdated, which incurs further cost to the department to fix these errors. Please check with the UW Foundation before pursuing this form of stewardship.*

Section IV

Suggested Outreach Activities

This section provides information about various ways to reach out to alumni on a departmental level. The goal of performing these activities is to build new relationships with alumni who currently have little connection to the department, as well as to maintain connections with alumni who already have a strong affinity for their department.

The ideas listed range from very general activities that can benefit any department in the College of Letters & Science to very specific practices that have been tailored to fit a particular department's unique circumstance. Because L&S is so diverse in terms of alumni base, academic discipline and available department resources, each activity will list the resources necessary to complete the task.

Overview of Practices

- Newsletter(s)
- Web Presence
- Event Planning
- Board of Visitors

ALUMNI NEWSLETTER

A newsletter is key to informing alumni about exciting department news, and it is a valuable way to maintain alumni connections to the department. It is a must-have in some form or another. Because a newsletter is a serious undertaking in terms of time and resources, listed below are ways to maximize a newsletter's impact while managing its production efficiently.

At a glance

A good newsletter…

- Is timely and consistently produced
- Has interesting and engaging stories
- Is produced collaboratively
- Has accurate giving information
- Acknowledges donors and highlights how funds have been used
- Is visually appealing
- Is not too lengthy

Timeliness and Consistency

A newsletter should be distributed at least once a year (print or electronic form). If there are sufficient resources and enough committed faculty and staff members to produce a biannual newsletter with quarterly updates, the extra effort is encouraged. However, one newsletter is sufficient as long as it is issued consistently and at generally the same time each year (for example: fall and spring). This will create an expectation in your alumni of regular communication from the department.

Engaging Stories

Because a newsletter may be the only manner in which your alumni hear about the department for an entire year, it is important to make the content of the newsletter exciting and reflect the department's accomplishments.

Some possible stories may include but are not limited to:

- Faculty research
- Graduate student profiles
- Undergraduate student profiles
- Donor stories/gift impact
- The department/faculty in the news
- Alumni in the news

Improving Your Newsletter…

In one study, donors were asked *"How could not for profits' newsletters be improved?"* These are their responses:

- 54 percent wanted more targeted information about how donations are being used
- 12 percent said to include more human interest stories
- 9 percent said to reduce the newsletter size

Source: *Donor-Centered Fundraising* by Penelope Burk, Burk & Associates Ltd., Chicago IL, 2003.

Collaboratively Produced

One of the obstacles to completing a newsletter in a timely fashion is that it takes a tremendous amount of time to write and compile stories. For this reason, it is ideal to divide the work among other staff and faculty members of the department or even graduate or undergraduate students. Removing the sole responsibility of the newsletter from the chair also will ensure continuity of newsletter appearance and content, which will help the department build a recognizable brand for alumni.

Accurate Giving Information

Because the newsletter will reach all alumni, it is a good opportunity to describe the areas of greatest need within the department. You may choose to include brief descriptions of the various funds in your department and how gifts will be used. Some departments include a tear-out form, which can be mailed in, and others include a pre-addressed envelope for contributions.

Accurate Giving Information (continued)

However you choose to include giving information, you should remember the following points:

- Make it clear that checks MUST be payable to the UW Foundation and NOT the department or the university.
- Include the proper address to send gifts:
- If your website is set up to accept online gifts, include a link to your own website. If not linked to the UW Foundation page, make sure to tell them which fund name or number to enter.
- Include contact information for your Director of Development at the UW Foundation.

UW Foundation
U.S. Bank Lockbox
Box 78807
Milwaukee, WI 53278-0807

See appendix p. 31 for more details.

Donor Acknowledgement

There are a number of ways to acknowledge donors for their gifts within a newsletter. Some departments choose to recognize donors of the department by name. However, this is not encouraged because of the number of problems that may arise. A donor list must be carefully checked for complete accuracy so as not to exclude any donor, misspell a donor's name or include a donor who wished to remain anonymous. Please contact your UW Foundation liaison for an accurate and up-to-date donor list if you choose to do this.

A more effective way to thank donors is to highlight accomplishments that would not have been possible without their support. This can be in a special section or it can be included as part of a letter from the chair. Either way, there should be some mention of private support's role in advancing the department's mission.

Some Interesting Statistics…

One study showed that:

- 81 percent of individual donors and
- 71 percent of corporate donors say having their names published in a not for profit's annual report, newsletter or program has no influence on whether they will give again.

Source: *Donor-Centered Fundraising* by Penelope Burk, Burk & Associates Ltd., Chicago IL, 2003.

Visual Appeal and Length

Although the newsletter does not need to be printed in color, it is important to create a product that looks professional and has visual appeal. This may mean including pictures and experimenting with style. There are several campus resources listed below to help with publication if there are no in-house opportunities. Neither the newsletter nor the articles have to be lengthy, as long as they are filled with engaging content. In other words—keep it short and sweet. This also will help save money for print versions of newsletters.

Alternatives to a Print Newsletter

Many departments remarked that cost is the main issue when deciding whether to create or maintain a newsletter. To combat this, some departments have developed creative, cost-saving solutions with various online alternatives. Here is a brief list:

- Supplement the annual print version with an *e*-version* later in the year. This will effectively increase communication between alumni and the department without increasing costs.
- Be selective about who receives the print version. Sending actual newsletters to highly engaged alumni (i.e. donors of the past 3-5 years, WAA members, those who request a copy). This ensures that those who want to be informed stay informed. Be sure to make the *e*-version* available to the rest of the alumni.
- Replace the print version entirely with an *e*-version*. This should ONLY be done if the department absolutely cannot afford any sort of print version of the newsletter.

*Note: When deciding to publish an electronic version of the newsletter, **it is crucial to ensure that alumni are aware of the online version**. Some options to promote newsletter awareness include:*

A Postcard Notification…

Send a postcard to alumni without e-mail addresses notifying them of the newsletter and request that they update their information to secure an e-mail address for future use. There is a small cost associated with this, but it will be more effective in reaching all alumni.

An E-mail Notification…

E-mailing a direct link to the newsletter or sending it as an attachment. Although this is a cost-effective alternative, it will inevitably exclude some alumni. Currently, the database maintained by WAA/UWF has e-mail address for only 40 percent of all alumni.

Newsletter Resources

When deciding how to best manage a newsletter, please contact Megan Costello *(see appendix p. 23)*. Megan can help determine the best options for each individual department. Based on opportunities and desired impact, she can help you determine whether it would be best to publish in-house or whether it would be better to let a third party (such as University Communications or the Wisconsin Alumni Association) handle publication for a cost.

ESTABLISHING AND MAINTAINING A WEB PRESENCE

A website is an excellent tool to inform alumni about news and current events, as well as educate them about areas of greatest need while providing opportunities to donate. It serves a similar function as a newsletter, but it is less formal and more responsive to changes in the department, as it can be updated frequently. Simply having a website is not necessarily the best way to reach out to alumni—it must be engaging, informative and up to date. There is an art to effectively managing a website and other forms of Web communication via social networking sites like Facebook and Twitter. Here are some guidelines determined by L&S and the UW Foundation as well as success stories from departments in L&S.

<u>Website</u>

Determining Layout

- Must be user friendly and easy to navigate. If you have questions about improving your website, please contact Megan Costello (*see appendix p. 23*).
- It should be both visually appealing and should help market the department as a brand, ideally in keeping with UW-Madison theme and colors. See University Communication's style guide for helpful hints and resources: http://uc.wisc.edu/brand.

Content Ideas

If the department does not have very many events planned, consider featuring a single event on the website instead of using a calendar.

- **Calendar of events**:
  This will make it easy for alums to become informed about what is going on in the department. It is a good idea to have this on the first page to target alumni who are not specifically searching for event information but may still be interested in attending.
- **Department news**:
  This does not necessarily have to be the same information included in the newsletter. The stories can be shorter and less formal. The key point is to update the website frequently and keep it fresh. Encourage all members of the faculty and staff to assist with updating the website with new, exciting stories.
- **Student, faculty, staff and donor profiles**:
  Include some stories that highlight undergraduate and graduate student accomplishments as well as updates about professors' research. It is also a good idea to highlight notable alumni and donors to the department with a short story about what they've done with their degrees and how their gifts have impacted the department.
- **Direct link to online giving**:
  This should be easy to find, preferably at the top right corner of the page—many departments choose to include a small "Make a Gift" logo. It should take the user to a page that describes how the department uses private gifts, and links directly to a pre-filled online giving form.

To see examples of eye-catching logos, follow these links to the web pages for journalism and L&S:

http://www.journalism.wisc.edu
http://news.ls.wisc.edu

- **Create a giving page**:
  To inform your alumni about the impact their gifts will have, create a simple page that briefly describes the impact of private support and your areas of highest priority. If your department has several funds, it is a good idea to **list only your top 3-4 priorities on this page** so as not to overwhelm a potential donor. A good idea is to list: (1) the general department fund, (2) undergraduate support, (3) graduate support and (4) faculty support. A good thing to remember is the general department fund is *discretionary*, so the chair can direct those gifts wherever they are needed. If there is a special campaign fund, create a separate page with details about that project. *(See appendix pp. 31-33 for more information about creating a giving page and for some reminders about working with gift funds.)*

To see examples of giving pages, follow these links:

http://www.polisci.wisc.edu/give
http://www.ssc.wisc.edu/soc/giving.php
http://www.zoology.wisc.edu/support/excellence.html

Using Social Networking Media

Social networking sites like Facebook and Twitter are increasing in popularity among alumni of all ages. Many departments have been working to capture these audiences by maintaining a presence on these sites. **The main function of these tools is to redirect users back to your official website.** Because they are typically used to redistribute information that already is found on your department website, it is important to have a well-managed, up-to-date website before experimenting with social networking. Here is a list of some items to keep in mind when using social networking sites:

Keep up on the latest L&S news!
http://news.ls.wisc.edu

- Users of Facebook and Twitter expect frequent updates, so there should be someone in charge of managing the account(s) in a timely manner. Student hourly workers are a great resource for this because they are familiar with the technology and they can consult with the chair and other faculty members to find appropriate information for updating both pages.
- These are **two-way forms of communication**, not one-way forms as with a newsletter or a basic website. Both offer a chance to promote dialogue between the department and alumni, as well as among alumni. This is another reason why it is important to update the pages frequently.
- Although no actual research supports this, departments using both Facebook and Twitter commented that Facebook has a more formal feel whereas Twitter is more casual. While both can be used for updates about department news, Twitter is better suited for sharing fleeting information such as sightings of prominent alumni in the news or in person, notifying people of an event happening in the near future or making announcements about faculty awards and accomplishments.

If you have any questions about how to begin using social networking websites or how to best manage them, please contact Megan Costello *(See appendix p. 23. Also, for more tips about Twitter, see appendix pp. 34-36)*

Find L&S on Facebook & Twitter!

http://www.facebook.com/UWMadisonLS

http://www.twitter.com/UWMadisonLS

EVENT PLANNING

A well planned event is a great way to establish and maintain a very personal relationship with your alumni and donors. The most efficient events incorporate students, alumni and the community to foster relationships between current and past students while gaining visibility from community members who may be interested in supporting the department. Listed below are some ideas for types of events to host and how to execute their planning, along with some resources available to aid in the process. These are events that departments have noted as being successful in terms of turnout and positive response from those who attended:

Award Ceremonies

If your department gives awards to students, alumni or faculty members, you may want to recognize award recipients at a ceremony or banquet. If there is a donor associated with an award, it is a very good practice to invite both the student recipient and the donor. Even if the awards are not monetary—such as a distinguished alumni award—it is still a good idea to involve both students and alumni to provide opportunities for networking facilitated by the department. Connecting these individuals can have a tremendous impact on both parties and foster stronger relationships with the department.

Commencement Events

Some departments noted that they have a special event for their students during commencement. Sometimes these events double as award ceremonies, and other times they are simply banquets for students and their families.

A few departments noted that they invited local alumni, which, again, provides opportunities for networking and engaging some of the department's biggest supporters and, in some cases, donors. This is also an opportunity to build students' loyalty to the department.

Recognizing Notable Retirements

Some departments choose to recognize notable faculty members with special retirement events. This sort of event is uncommon and should be reserved for professors who have left a long legacy with the department. You can invite alumni as well as the professor's professional colleagues to the event. If you are starting a fund in the professor's name as part of the event, you should mention this in the invitation so that invitees may contribute to the fund even if they are unable to attend. Please contact your UW Foundation liaison if you are incorporating fundraising into the retirement celebration.

Receptions at Professional Conferences

If there is a professional conference related to your department's field of study, you may want to host a reception at the event. This is a good way to build relationships with alumni who live away from Madison and offers additional opportunities for networking and reconnecting with the department.

Coordinating with Existing Campus Events

If you know that a sizeable portion of your alumni base will already be coming to campus for another event such as a Bascom Hill Society function or an Alumni Weekend, you may want to schedule a department event in conjunction with that date. This can help maximize turnout and the overall success of your event.

Football Tailgate Events

There have been mixed reports of success and failure when departments have tried to plan tailgate events before football games. The obvious advantage is providing a networking and relationship building opportunity at an event that draws alumni with a high affinity for the University.

However, there are some obstacles to overcome when planning a successful tailgating event. Currently, most Badger games are scheduled to start at 11 a.m., and it is difficult to get people to commit to an earlier event.

Also, when receiving an invitation to a tailgate event, alumni may expect the department to provide tickets. Although departments can order group tickets (end zone seats) through the UW Foundation, they must plan ahead because the Foundation places the orders in March and tickets are limited. In other words, football events, although very popular with alumni, still require plenty of forethought and planning to run smoothly.

Other Alumni Events

You may choose to invite alumni to campus for a special event such as an anniversary, an alumni weekend or a special lecture given by a professor. Here are some things to keep in mind when planning any event:

- **Scale:**
  Make sure there is sufficient interest from alumni before coordinating any event. It may be best to start small when planning your first event as a way gauge interest for future events. You also may want to keep it local at first. If your campus event(s) become more popular, you can start to develop plans for events in areas outside of Wisconsin with large concentrations of alumni.

- **Coordinating with campus partners:**
  The WAA, the UW Foundation and Letters & Science can help you maximize the success of events you are planning by advising you on some best practices and helping you compile an accurate list of people to invite. Because the purpose of the event is to build relationships on a departmental level, the department bears the responsibility of coordinating and facilitating the event. With this in mind, please consider the time and energy your department will need to put into planning an event.

BOARDS OF VISITORS

Several departments expressed an interest in forming a Board of Visitors. Although a board can be very effective in advancing development goals, a board does not materialize without plenty of forethought and planning. This requires coordination among the chair, all faculty members and your Director of Development at the UW Foundation. This team, along with the dean, must collectively decide that there is a need for a board as well as enough energetic alumni to serve as board members. They also must decide the board's specific purpose and actively seek out key prospects for members. For more information about how to begin the formal process of creating a Board of Visitors, please consult Megan Costello *(see appendix p. 23)*.

August 2010

Dear Letters & Science Community,

This summer I learned a tremendous amount about the College of Letters & Science as a whole and gained a deeper understanding of the role development plays on a departmental level. I would like to thank everyone who offered their time and insight – critical components to this guide's creation.

As this document is quite lengthy, I would like to summarize my findings with some background information and concluding thoughts about my summer project which resulted in the *Best Practices for Alumni Outreach and Stewardship.*

Although I was hired as an intern by the UW Foundation, the guidelines for my project made it clear that I should serve as a liaison for both the College of Letters & Science and the UW Foundation. My task was to identify the best ways to engage L&S alumni by reviewing current practices among many different units in the College.

Throughout the month of July, I conducted numerous interviews with chairs, directors and administrative staff from about 20 different disciplines in L&S. In choosing which units to speak with, I made sure to get a variety of perspectives from all areas: the arts, humanities, social sciences and physical sciences. I also worked closely with Megan Costello in the L&S Dean's Office to better understand the unique mission and struggles of the College.

From these meetings, I noticed several trends, which I incorporated into the guide's content. The first is that departments that focus on engaging current students also seem to have the most organized approach to development work. These same departments reported their development efforts to be successful in advancing their goals and increasing opportunities for their students, faculty and staff. Simply put, the best way to engage alumni is to begin when they are still students to ensure a seamless transition.

Another common theme is that, although most recognize the benefits of development, many are unsure of how to best organize their efforts and have received inconsistent advice over the years. This is the main reason for creating this guide. It is meant to provide creative ideas, serve as a resource for development-related questions, and promote communication within the College.

Although the College of Letters & Science is diverse, it is my intention that everyone can find some beneficial information for improving outreach and stewardship with this guide.

Sincerely,

Holly Hartung

Holly Hartung
2010 Student Intern, UW Foundation

Appendix

Contacts

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University of Wisconsin Foundation
Statement on Stewardship

Central to the mission of the University of Wisconsin Foundation is a commitment to long-term relationships with our donors and the understanding that exceptional stewardship is essential to our success.

Building on this distinctive legacy, our organization values stewardship practices that are rooted in authentic relationships, where donors know the impact of their gifts and recognize their essential role in the life and destiny of the University of Wisconsin-Madison.

UWF stewardship practices are focused on three core objectives:

1) Donors will receive prompt and meaningful acknowledgement whenever they give.

2) Donors will get meaningful and measurable results on their last gift at work before being asked for another one.

3) Donors will receive the highest level of financial accountability for their gifts/funds.

Show gratitude to your donor with a great thank you letter!

Why it's important

In receiving a scholarship, you have been recognized for your hard work. Your award has been made possible through the generous support of friends and alumni of the University of Wisconsin-Madison. Now you can give something back.

A thank you letter is a wonderful way to let donors know how much you appreciate their generosity and how their investment is making a real difference.

A nicely written thank you lets donors know their gifts are meaningful. Your writing such a note demonstrates that you are the sort of person they hoped would benefit from their philanthropy – a sincere, responsible and grateful student whose life has been enhanced through the scholarship they have funded.

What you should write

- Donors want to know who you are.
- Let them know where you grew up and any plans you may have for the future.
- Inform them about awards and honors you have received.
- Tell them about your volunteer experiences or community service you have performed.
- Do you have a part-time job? Are you in a club or other extracurricular activity? Tell them about it!
- Say straightforwardly how the scholarship has helped you further your education.

Suggested outline

1. Thank the donor for their generosity in providing this scholarship. Tell the donor how this scholarship makes a difference to you and your ability to receive an education.
2. Tell the donor a little about yourself—where you come from, why you chose UW-Madison, and what field(s) of study you have chosen for a major.
3. Talk about your goals and future plans after completing your undergraduate education.

How you should do it

- Use 8 ½" x 11" quality paper or a personal notecard.
- Type your letter or use legible handwriting. Many of the donors are older people and small print can be difficult for them to read.
- Begin with the correct and formal salutation and title. (Mr. and Ms., if unknown; or the company/ foundation name).
- If there are two individuals to thank, address a thank-you letter to each separately. Write one letter per couple.
- Mention the award or scholarship by name.
- Use phrases such as "thank you," "I am grateful" and "I appreciate."
- Make sure your spelling and grammar are correct.
- One page is sufficient. Be clear and concise.
- Be sure to sign your letter.
- Include a photograph of yourself, if you wish.
- Once finished, send your letter to ____ in the enclosed return envelope.

Sample Award Letter

April 9, 2009

[redacted]

Dear [redacted]:

We are pleased to inform you that you are the recipient of a Chase Noland Award in Limnology for summer 2009. We understand that you will be working under the direction of Dr. Jim Kitchell, Dr. Stanley Dodson and Dr. Brian Weidel on your project.

The Chase Noland Award is funded from an endowment established by Wayland E. Noland in memory of his grandfather (Wayland J. Chase) and his mother (Ruth Chase Noland). Dr. Noland is currently a professor of organic chemistry at the University of Minnesota. As an undergraduate at the University of Wisconsin, he was a recipient of a research apprenticeship, and he wants others to have the same chance to develop their interests and skills early in their training.

The Chase Noland Award is to be used for salary stipend, travel support, supplies and/or equipment. Although you will be performing various assignments as part of this project, you should know that this is an "award" and not an employment situation (payments are not considered to be wages). Please keep a copy of this letter for tax purposes; you are responsible to report this income. Withholding is not taken and the payments are not reportable on a 1099 or W2 form. Accordingly, just as you would if you were performing your own research or attending class, you will be responsible for any injuries that you might incur as a result of you activities.

Please write to Dr. Wayland Noland now to acknowledge your award. His address is [redacted]. At the end of the summer, please submit to your advisor and to Dr. Noland a report of 500 to 1,000 words summarizing the results of your research project. Make sure to include an indication of your future academic plans (e.g. graduate school, career in biological sciences, etc.).

Congratulations on receiving this award! You will be a valuable addition to the Center's research program, and we look forward to working with you. Please contact Trish Haza at 262-3304 or phaza@wisc.edu if you have any questions.

Sincerely,

James F. Kitchell
Director, Center for Limnology

Sample Department Thank You Letter

Department of Sociology

University of Wisconsin-Madison
8128 Social Science Bldg.
1180 Observatory Drive
Madison, WI 53706-1393

May 13, 2010

[redacted]

Dear [redacted],

Your continued generosity sustains the future of sociology by helping to provide valuable support for expanded research opportunities and experience for graduate students in sociology. We are able to continue to attract a highly talented and intellectually and socially diverse group of young scholars into our program because of the support offered by this fund, which grants them financial support for summer research opportunities. In our newsletters, we will be keeping you abreast of their accomplishments.

The Department is always changing as new faculty and students come and others leave. At the same time, our core values endure. We strive to remain at the forefront of the field by performing the highest quality research on important social issues and by providing the best graduate and undergraduate education possible. We also bring our sociological expertise to bear on important social questions and communicating this information to other institutions, agencies and the public. We deeply appreciate your willingness to contribute to our efforts, and look forward to continuing our relationship.

On behalf of the Department of Sociology and the sociology graduate program, I thank you for your contribution in 2009-10 to the Department of Sociology. Please feel free to contact me by mail, phone, or e-mail to discuss any matters relating to the Department of Sociology or your continued support of our work.

Sincerely,

Douglas Maynard
Conway-Bascom Professor and Chair

Sample Student Thank You Letter

Tuesday, June 30, 2009

[redacted]

Dear [redacted]

Hello, my name is [redacted] and I am writing to you as the recipient of the Theodore Herfurth scholarship. I would like to thank you from the bottom of my heart for your generous donation. Your generosity means so much to me and my family because this scholarship has lightened the financial burden of paying for college. I am so honored and touched that you believe in my abilities to make a difference in this world.

My plans are to major in biochemistry and hopefully go on to medical school but there are also other areas of interest I have such as English and International Studies. I graduated from Ashwaubenon High School and come from a large family with three sisters and three brothers. I am a first generation college student since neither of my parents went to college but they have always been role models to me and I owe everything to them. My choice to attend UW-Madison was an easy one to make since it is an incredibly prestigious university and it has always been my dream school. Being able to go to my first choice college has really been a dream come true.

Once again I would just like to thank you for all the doors you have opened up for me. Thank you for believing in me and inspiring me to give back to my community as well. This scholarship that you have presented me with has done more for me than just paying for college, it has given me confidence in myself and my abilities. I promise you that I will put forth one hundred percent effort and use your generous donation to the best of my ability and beyond. Hopefully someday I will be able to give back to the community and help others just like you have done for me. Thank you very much!

Sincerely,

[redacted]

Sample Student Thank You Letter

August 31, 2010

[redacted] Foundation
[redacted]

Dear [redacted]:

I would like to take this opportunity to thank you from the bottom of my heart for your generosity in providing me with the [redacted] Foundation Scholarship. This scholarship now allows me to attend the University of Wisconsin-Madison without forcing my family into undue financial distress. This opportunity with which you have provided me is extraordinary and I can't tell you how much I appreciate it and how much my family appreciates it.

I come from the small town of Lisbon, a town so small, in fact, that it lacks a post office. My family has always supported me in my efforts to strive for a more complete understanding of the world around me. They have always encouraged me to challenge myself and set my own standards. This encouragement was especially helpful in high school where I was able to achieve the high rank of valedictorian. Throughout high school I discovered a love of languages and science. I studied Spanish and German simultaneously all four years and excelled in them both. I took nearly every science course my school had to offer and was always fascinated by what I learned. It was these fascinations with science and language that drove me to apply to the UW Madison. Madison has a world renowned science program in addition to an extensive selection to languages taught by talented professors. I have decided upon a biology major with a focus on German, Spanish and Arabic. I have been accepted to the WISc Program, a program that brings together students intent on studying abroad or simply deepening their cultural understanding of the world around them and I am extremely excited about the opportunities this program will provide.

I hope to study abroad for a semester or two in German or Spain as well during my time at the UW. After I graduate I plan to continue onto medical school in order to become a surgeon. At some point in my life I intend to travel the world with the program Doctors Without Borders and use both my language and medical skills to help people who could not otherwise afford medical care.

Thank you again for your incredible and irreplaceable generosity in providing me with this scholarship. It has made quite a difference in my life and I hope someday this contribution allows me to make a difference in the lives of others as well.

Deepest Gratitude,

[redacted]

Twenty Attributes of a Great Thank-You Letter

1. It's a real letter, not a pre-printed card.
2. It is personally addressed.
3. It has a personal salutation (no "Dear Donor" or "Dear Friend").
4. It is personally signed.
5. It is personally signed by someone from the highest ranks of the organization.
6. It makes specific reference to the intended use of funds.
7. It indicates approximately when the donor will receive an update on the program being funded.
8. It includes the name and phone number of staff whom the donor can contact or an invitation to contact the writer directly.
9. It does not ask for another gift.
10. It does not ask the donor to do anything (like complete an enclosed survey, for example).
11. It acknowledges the donor's past giving, where applicable.
12. It contains no spelling or grammatical errors.
13. It has an overall "can do," positive tone as opposed to a hand-wringing one.
14. It communicates the excitement, gratitude and inner warmth of the writer.
15. It grabs the reader's attention in the opening sentence.
16. It speaks directly to the donor.
17. It does not continue to "sell."
18. It is concise – no more than two short paragraphs.
19. It is received by the donor promptly.
20. Plus, in some circumstances, the letter is handwritten.

From *Donor-Centered Fundraising* by Penelope Burk, Burk & Associates Ltd., Chicago IL, 2003.

Creating an Effective Giving Web Page

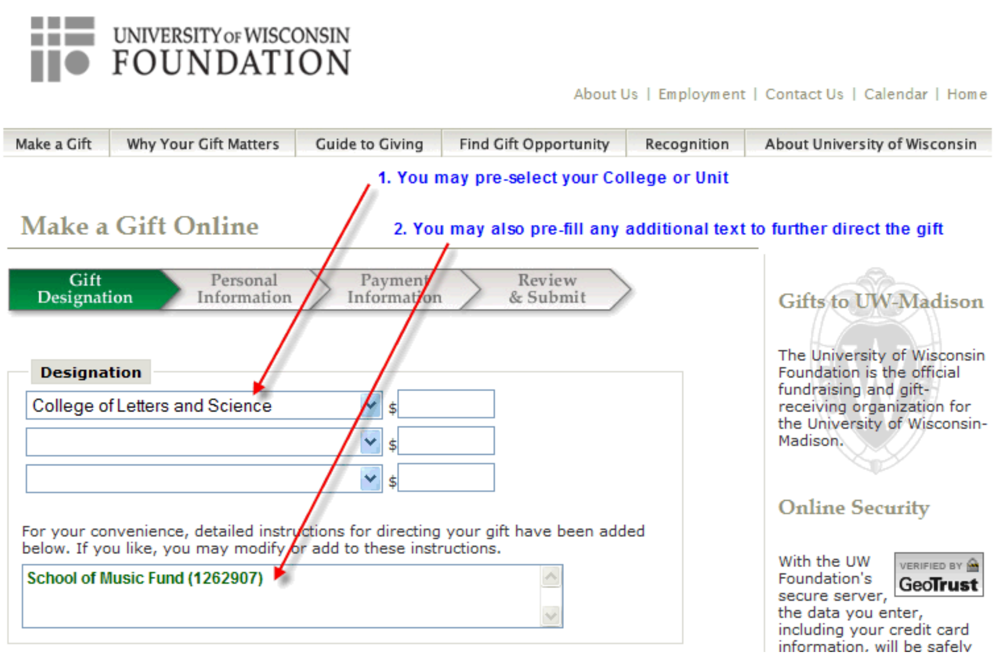
One of the easiest ways for potential donors to make a gift is through online giving. The UW Foundation can set up a fund-specific giving link to take donors from your Web site directly to the Foundation's online giving form for your school, college, department or program.

The process to create a link is **simple and fully automated**, but any new link needs approval from both the Foundation and the dean or director in charge of the campus unit. The Dean of Letters & Science has designated Megan Costello as the approval contact.

Each campus unit determines the default values and can designate specific funds for its online giving form. Although donors using the form can override the default settings, they usually make a gift to the area of campus they were visiting online.

To set up a giving link, visit http://www.supportuw.org/givingsetup.

Example of a customized pre-filled web page linked from your school or college's web page:



Reminders for working with gift funds

Using the University of Wisconsin Foundation Lockbox Address

Many departments and programs ask for gifts from alumni, friends and donors on their websites, in annual solicitations and newsletters. It is critical that all mailed checks/gifts are directed to the **UWF Lockbox address ONLY.**

That address is:

UW Foundation
U.S. Bank Lockbox
Box 78807
Milwaukee, WI 53278-0807

Sending gifts to other addresses is problematic because:

- The process will take much longer. Checks mailed to departments or programs must be sent through the L&S Dean's Office for processing. The check is then sent to the lockbox, and then the check is posted. The extra steps delay the tax receipt getting to the donor.
- More people are handling the check. This offers more opportunities for checks to be lost, misdirected, etc.

Information on giving also should include instructions on writing the fund number and name on the check memo line. Please be assured that, if correctly designated, gifts sent to the lockbox will be posted to your fund, and all pertinent enclosures for the department will be forwarded once the gift is processed.

To check on new gifts, departments or programs can utilize the UWF Campus Access program. For more information on Campus Access, please contact your Foundation representative.

Finally, web gifts have increased in number and size over the last few years. Check that your website has an easy to find "giving" webpage that is properly linked to the UW Foundation online giving form. You can request a customized online giving form that will pre-fill fund information by going to http://www.supportuw.org/givingsetup.

"How to Give" – What Information is Needed

Any "how to give" information should include three parts:

1. Giving by mail: The check should be made out the *University of Wisconsin Foundation*, with the fund name and number in the memo line, and mailed to:

   UW Foundation
   U.S. Bank Lockbox
   Box 78807
   Milwaukee, WI 53278-0807

2. Giving by credit card, through secure online form: Visit http://www.supportuw.org/giving and include the fund name and number in the designation box. Or, refer to the department homepage if the unit has a prefilled form.

3. Contact information for your UW Foundation liaison if the donor has questions or more information.

Web Strategy – Your source for alumni information

Web Strategy (http://www.supportuw.org/apps) provides access to the University of Wisconsin-Madison alumni, donors and friends database. It is provided to campus partners who have a business need to access basic information about alumni or friends of the university.

Access is provided at different levels, depending on your role. A typical view includes degree information, addresses, phone numbers, email addresses, employment and spouse information and basic demographics, including age, birth date and date of death. Details on gifts to your unit's funds also are available with additional approval.

Information is updated centrally and then synchronized with the Wisconsin Alumni Association system. Mailing lists are free from the WAA or the UW Foundation and are created upon request. With several formats available, lists also can be requested for purposes other than mailings.
More information or login requests can be directed to Sharon Adler, Senior Director of Database Services, at 263-8419 or sharon.adler@supportuw.org.

Tips for Twitter Newbies & Veterans
via http://twittercism.com/more-newbie-twitter-tips

More great information available at
http://dotedGuru
http://mashable.com/guidebook/twitter

1. Twitter Isn't Third Person

Twitter has *never* been third person. Each tweet is a standalone piece of news delivered in 140 characters or less. It is not your name doing or saying something. It is not an action. It's a message.

So, how should you craft your tweet? Any way you like. There are no hard and fast rules and guidelines. Tweets are essentially first person in nature (so, "I love the new Muse album!" is fine) but can often be quite toneless, like when delivering a news item or sharing something interesting that you have found.

If you're a heavy link sharer, most of your tweets will be built around a headline and a link, with possibly a little creative prose if and when necessary. Or, like a lot of people, you'll be in the middle – an engaging blend of content-sharing and personality. If you're unsure of what to say in your tweets, strive for balance.

2. Monitor Your Replies and Mentions

On Twitter.com there is a sidebar on the right side of the window that contains a number of goodies, the most important of which is the replies/mentions link, which is directly below the Home button and reads @username (where username = your actual username, i.e., @Sheamus). Click on this, and Twitter will re-populate your timeline so only the messages sent *to* you, or any of those in which your username has been mentioned, appear.

Why does this matter? Because Twitter is all about *engagement*. If people are sending you messages and you're not seeing them, then you can't respond.

And if you don't respond, people will stop sending you messages. It pays to monitor your replies very closely.

3. Be Personable, Not Personal

For an entirely open, public network, Twitter often attracts strange behavior. It seems that for every person who is super-cautious about the things they say and the way they behave on the platform, there is another who approaches from an entirely opposite angle, being entirely casual with their personal data.

Again, the best approach here is to be found somewhere in the middle. If you're too distant and aloof, others are going to struggle to warm to you because you can come across as cold and robotic. Conversely, if you're too personal and share just that little bit too much, you're likely to make other people nervous about how they can interact with you, for fear of what you might say or do.

The secret is to be engaging and friendly, but at all times to remember that Twitter is an open network.

4. Master The URL Shortener

Twitter's 140-character message limit means we often have to be creative with our messages, and this is certainly true when it comes to sharing links. Most links, certainly to blogs or news portals, are often far too long to be manageable and this has led to the creation (and boon) of various link-shortening websites. It's important that you familiarize yourself with URL shortening and make a habit of it.

Twitter recently partnered with bit.ly, and as a result the already-popular URL shortener is now the industry leader.

5. Try Looking at Twitter in a Different Way (With Software)

Everybody starts on Twitter.com, and a lot of people realize fairly quickly that interactions with the Twitter network via that website are (ironically) a bit limiting.

Twitter.com has improved dramatically over the past six or seven months, but it still doesn't stand up compared to the good Twitter software clients, many of which are now available across all platforms.

- For your **home computer**, download Seesmic Desktop or TweetDeck. Different people have different opinions about which is better. Both have similar functionality and allow you to set up manageable groups and lists so that you can more easily follow your Twitter contacts. They also provide notifications when you receive new replies and mentions.
- At **work**, we're often not allowed to install software, so a web-based Twitter application is necessary. Seesmic Web is the best.
- If you're a **business** looking to manage your Twitter account with multiple users, I recommend HootSuite.
- The **iPhone** has a plethora of Twitter clients, including TweetDeck, Tweetie, Twitterrific and many more. For your **Blackberry**, I recommend ÜberTwitter. Your **Android** phone could do a lot worse than Twidroid.

Twitter: 140 Characters of Engagement

A Case Study

- **Process Improved:** Increased engagement and interaction with key stakeholders: students, alumni, donors and friends using minimal resources – an early start to relationship building and lifelong stewardship.

- **Unit:** College of Letters & Science Administration

- **Problem Opportunity Statement:** It is critical for the university to engage key stakeholders to ensure the long-term success of the institution. These are our supporters and ambassadors. In L&S, there are 180,000 living alumni and 22,000 students. How can we find them? How can we do it efficiently with limited time and resources? We go online where they already are. We re-connect and become a part of their conversation.

- **Changes Made:** Adding Twitter to communications cycle and plan; integrating with other L&S social media platforms: blogs, Facebook, Flickr.

- **Results:**
  - Daily, personal interaction online with our “followers” – many who we may never have been able to connect and engage with before. We are nearing 1,000 followers.
  - It’s fun! Many followers are happy to find us on the Twitterverse. The quality of interactions with students, alumni and friends is enjoyable and meaningful. They like and want to hear from us.
  - Increased, targeted traffic and click-throughs on the L&S blog and other social media sites.
  - A broad sounding board for communications – a place for good news, awards, honors and rankings. This platform is available to our programs and departments who cannot do this type of communications on their own.
  - Integration of online tools. Twitter drives content from our blog to the universe. It connects with Facebook. Its strongest potential is in linking multiple platforms in your communications repertoire.

- **Lessons Learned:**
  - Twitter is only a piece of a communications plan. Consider: *What is your unit’s voice? Who are you representing? What is your intended audience? What are your goals? Can you make the time commitment?*
  - Twitter is a daily task and will require staff time – the best Twitterers are diligent, maybe 5-10 Tweets a day. But time commitment is minimal: ~5 minutes each hour; sometimes less, sometimes more.
  - Twitter is best used in conjunction with other social media platforms: Facebook, LinkedIn, blogs, etc.
  - Twitter is an open-ended conversation – be prepared about putting yourself into the public domain and being criticized or talked about. This is an inherent risk in all social media.

- **Next Steps:**
  - Increase participation from faculty and staff
  - Encourage more students to follow us on Twitter
  - Hone in on the content that our followers find most interesting and appealing – is there a place for philanthropy?

- **Additional Information:**
  Megan Costello, Letters & Science Office of Advancement
  http://www.mashable.com – Mashable: the one-stop shop for all social media news