**Three Thank You Templates and You’re OUT!**

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*by Deborah Kaplan Polivy, Ph.D.*

Because I coach so many fund raising professionals, a friend called the other day to ask my opinion of the way in which she was thanked by a nonprofit organization. Within a short time she had received three template letters and wondered if that was “normal”. She described the scenario as follows.

Last spring a fund raising executive came to her home. They “chit chatted” for an hour or so, the professional then solicited her and she made a pledge. Shortly thereafter she received a letter beginning with the words, “Women throughout history … ”. The letter continued with a generic thank you – “thank you for your commitment” – and then a discussion about needs and mission. No mention was made of her specific gift.

She transferred shares of appreciated stock to the organization at the end of November in order to pay her pledge, and she received another letter. In this one it was stated that “x” shares of “a,b,c company” were donated and worth “x,y,z” on the date of conveyance. She received the same exact letter the year before when she transferred shares of stock (with changes in the numbers). This time – the same as the prior year – the CEO signed the letter with no personal note whatsoever. She was told that this is the correspondence that is used for the IRS and tax returns. That doesn’t mean, I explained to her, that such communication cannot be more personal.

Three weeks later this same nonprofit organization sent her a letter inquiring if it could “count” on her support “again this year”. She was asked if a volunteer could call to obtain her pledge, or if she preferred, would she e-mail or call the office with it. This letter was signed by a lay leader. Once again, it was generic.  
She was considering not contributing the following year since she obviously was just a number in a big “pool” of donors and she felt she could have a more noticeable and real impact on a smaller charity. She asked me what I thought.

I told her that the organization was probably on “autopilot”. Templates were entered into the computer, a button was “pushed” according to particular prompts and letters were sent with specific information on an individual’s giving history easily imported. However, I noted to her that even when an airplane pilot or boat captain inserts a route into autopilot, each checks the horizon for hazards, wind changes, etc. The craft isn’t just left to proceed on a course while the crew snoozes.

In this time of the proliferation of nonprofit organizations, they have to be extraordinarily adept at recognizing donors since the latter have so many choices for their philanthropic dollars. A template letter of any kind could serve as a reason “not to give” if the donor so decides. “One donation is never a promise of another,” wrote Jo-Ann Mort and Judith Wineman in *eJewish Philanthropy*. ([*How to Use Strategic Communications for More Successful Donor Cultivation*](http://ejewishphilanthropy.com/how-to-use-strategic-communications-for-more-successful-donor-cultivation/), January 5, 2012.)

There are many ways to thank a donor, but before those are even considered, the first step is to establish an explicit policy that states that acknowledgements are a priority of the organization. These are recognized as an important component of the cultivation process not just another administrative obligation. As Mort and Wineman explain, “cultivation is more than an ask … raising money is a goal, not a step”.

Some organizations are just too big to thank each individual donor personally. In that case, do not write a template letter with the donor’s name and address. Just send a postcard – maybe with a compelling photograph on the front and a sentence or two thanking the person for his or her contribution toward supporting the mission of the charity. No signature is necessary.

If the charity can manage a card including a donor’s gifting data, all the better. This, too, entails no signature. While it may be printed automatically by the computer, the organization is making no pretense of trying to send personal acknowledgements.

However, in all other cases, a personal response is required. For those gifts that are large, new or include a substantial increase over prior years, management must let the donor know that his or her contribution has not only been “noticed” but is very much appreciated. An individualized letter doesn’t take long to write.

A telephone call from leadership (staff or board member) is incumbent on the organization if the gift is a surprise whether in size or source. Telephone calls still need to be followed up with notes, and one from staff and a separate letter from a board member are just fine. Timing is important and if there will be a wait of more than a couple of days to obtain the personal signature of the latter, then a thank you from staff is appropriate followed by one from the board member at a reasonable interlude.

A telephone call is a valuable tool for acknowledgement as well as data gathering. Such questions as “can you tell me why you suddenly increased your gift”, “made a gift” or “continue supporting our organization” can provide a wealth of information if the donor is forthcoming. (Since so few charities make such calls, the donor is usually thrilled to be personally acknowledged and will gladly partake in a conversation.) If the person has given over a number of years, the call provides the opportunity to ask if someone might come and visit to say thank you and talk about an endowment gift.

What if a volunteer has secured the contribution? Then that person must be instantly notified and a plan for calling the donor determined. In addition, the solicitor must be copied on all thank you notes so that she knows that the organization has acknowledged the contributor appropriately. The volunteer who has participated in a solicitation should not have to wonder if a letter was sent.

What about copied signatures or faxed ones? Never. If donor acknowledgement is a priority of the organization, then it must be done with some class and good taste. Again, write two letters – one from staff and one from the volunteer – if the latter’s personal signature is not readily available and several days are necessary to procure it. (I have often sent a group of letters to a board member for signatures with enclosed, stamped envelopes for her to mail.)

What about the template letter wherein the signer writes a personal message such as “thank you for your continued support”? I rather see that included within the context of the correspondence, but if there are large numbers of acknowledgements to be sent, it is acceptable. Often a staff person will stick a colored “post it” memo to a completed letter suggesting to the signer what might be added if the latter doesn’t know the individual personally. Such recommendations could include background information, for example, “thank you for increasing your gift”, or “happy anniversary or birthday”. Such memoranda demonstrate that the staff is doing its job in terms of really looking at the donor’s history, contributions, etc.

What about e-mail? This is truly an issue of “it depends” upon the circumstance. As long as the effort is personal, it works. The advantage of e-mail is that it is a very quick way to acknowledge a gift. However, especially in the case of a contribution of $250 or more where a receipt is necessary for tax purposes, an individual thank you letter should still be sent.

Personal acknowledgements take time, a thought process and some creativity. However, they can be a highly profitable investment in the future of the organization. They help ensure continuous giving and can even lead to that final donation that remains in perpetuity – the endowment.

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