Soliciting and Depositing Gifts

Plant Funds – 370
Soliciting Gifts

- To solicit a wide group of donors for outright gifts, contact Alumni and Parent Programs.
  - This office coordinates appeals to ensure gifts received go to the proper gift fund and to ensure donors are not being inundated with requests for gifts.
  - Direct Mail Solicitation
  - Phone Solicitation
  - Peer-to-Peer Solicitation
Soliciting Gifts

• To solicit donors for large contributions ($10,000+), contact Campaign Programs.
  – This office manages relationships with top donors.
  – Solicitations $250,000 or more must be approved by the President or Provost
  – Solicitations $25,000 or more must be approved by the Vice President of DAR
  – Minimum thresholds exist for naming new funds and for naming rooms, wings, buildings, etc.
Depositing Gifts

• All gifts are deposited by Gift Records
  – Official tax receipt sent to the donor
  – Gifts inadvertently sent to the Cashier's Office are redirected by the Cashier's Office to Gift Records

• All gifts must have appropriate documentation to be accepted and deposited.

• Each gift is processed as unique transaction in Peoplesoft with a unique Receipt Number

• Reports available to Deans’ Offices for stewarding donors and reconciling deposits with Peoplesoft
  – Shows names and addresses of donors along with amounts of their gifts deposited
Depositing Gifts

• Coordinated by DAR
  – DAR uses preprinted response cards and reply envelopes
  – All donor and fund information is included on the cards and envelopes
  – Envelopes go directly to DAR
  – No processing needed by the department
Depositing Gifts

- Coordinated by Department
  - Include donor name and contact info
    - Check usually has everything on it
    - Use an order form for credit cards
  - Include a copy of the solicitation used
    - Letter, script or phone order form, etc.
- Multiple gifts for deposit
  - First, group by appeal (solicitation)
  - Second, group by fund (chartstring, allocation)
Depositing Gifts

Copy of solicitation

Checks, credit card slips

Use standard deposit form; OK to customize using fund names or allocation codes

Dean’s Spring Newsletter

Please consider a gift to the School of Business Kalkin Hall Fund or the Grinnell Business Scholarship Fund.

Cash Deposit Form

Kalkin Hall Fund $250.00
44309 21 58000 370 700444 131 _ _ _
0000 0000 0157

Grinnell Scholarship Fund $745.00
44309 21 58000 400 330441 131 _ _ _
0000 0484 0000