

# 2025 ADRP Northeast – Mid-Atlantic Regional Conference

May 16 | SUNY Global Center  
New York, New York



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD

TM

# *Special Thanks!*

## Transforming the Acknowledgment Process






Danyte Reisinger Tampellini, Donor Relations Associate

Debbie Meyers, Freelance Writer



Stony Brook University

# What we'll cover today

- By the numbers 
- Defining our needed improvements 
- Our goal: effective practices 
- Revised production timeline, infrastructure and samples 
- Future enhancements 



# What about you?

1. What are your current *pain points*?
2. What is your current *turnaround time*, from data extraction to mailing?
3. How often do you *refresh your template* language?
4. Do you ask for *input from development officers or leadership*?
5. How many people on your donor relations team work on acknowledgments?
6. *How many letters* on average do you produce each year?



# Why?

*In our research, donors are clear in telling us what they need. They want to be acknowledged promptly and in a gratifying and gracious way.*

– Penelope Burk



# The goal: effective practices

## Timely

- Letters pulled frequently (at least once a week)
- Drafting and editing completed efficiently and quickly (2-4 days)
- Flexibility with input and signing
- Mailed quickly

## Accurate

- Fund purposes reviewed
- Giving history checked
- Families, organizations researched
- DOs review
- Templates reviewed by leadership using university resources

## Sincere

- Templates refreshed at least twice a year
- Voice matches the signatory
- DOs add personal details
- Review of historical letters to ensure no duplication



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# By the numbers



7,000+ donors



220,000+ alumni



9,000+ Gifts  
Processed in  
FY 24-25

ACKNOWLEDGMENT COVER PAGE			
<b>DONOR INFORMATION</b>		Org. Contact (from Gift Documentation): N/A	
Donor Name:		Soft credit(s):	
Donor CID: 107125767			
Affiliations:			
<b>GIFT INFORMATION</b>			
Total Gifts: \$22,500.00		Gift Type: Pay-Cash	
		Gift Subtype:	
Fund 1 Name: Sherrie Glasser Mayrosh, Metro Physical Therapy Scholarship		Fund 1 Amount: \$12,500.00	
Fund 2 Name: The Sherrie Glasser Mayrosh Metro Speech-Language Pathology Scholarship		Fund 2 Amount: \$2,500.00	
Fund 3 Name: The Sherrie Glasser Mayrosh, Metro Occupational Therapy Scholarship		Fund 3 Amount: \$7,500.00	
Pending Fund Name (if in holding account): None or not recorded			
<b>IMPORTANT NOTES &amp; PENDING QUESTIONS</b>			
Database Update: ADD SPACE AFTER DPT, IN DONOR NAME; REMOVE COMMA AFTER MAYROSH IN THIRD FUND NAME			
Simons match: not marked/applicable			
<b>REVIEW/APPROVAL INFORMATION</b>			
Acknowledgment Type: VP Personalized Letter			
Appeal Code: 2022 Advancement Office General Appeal			
Other notes/special handling: Iss of 10/1/2024			
Danyte Reviewed: Shipped in new SHP language, PR, last letter received was September			
Gift Date: 03/11/25		Gift Report Date: 03/17/25	
Gift Posted to RE: 03/14/25		Draft Completed: 3/18/25	
<b>REVIEWER TYPE</b>	<b>REVIEWER</b>	<b>DATE SUBMITTED</b>	<b>DATE APPROVED</b>
Primary Manager	Samantha LaDuca	3/18/25	3/21/25 via email
Spouse Primary Manager	---		
Gift Solicitor(s)			
Other DO Reviewer(s)			
DLK Review/Approval		3/24/25	Y
Submitted for Printing & Signatures:			

1,600+ letters



# Defining our needed improvements

	<i><b>February 2024</b></i>	<i><b>May 2025</b></i>
1. TIMELINESS	2 weeks - 2 months	⇒ 1 week or less
2. FEEDBACK	Limited DO feedback	⇒ Feedback on each letter
3. METRICS	No metrics	⇒ Extensive metrics using Monday.com
4. LIMITED STAFF	One freelancer	⇒ One FTE, one freelancer and one SA
5. OUTDATED TEMPLATES	Refreshed 1X per year	⇒ Refreshed 3 - 4X a year

# Customization

## Customization

- **Unique language** based on info in RE about the donor and gift impact
- Requires highest level of attention to detail, **input from DOs**

## Personalization

- Use language from one of **47 area-specific templates**
- Personalized using info from contact reports
- Requires **input from DOs**

## Standardization

- From one of **47 area-specific templates** to automate the higher volume
- Minimal customization with content added for specific gifts/donors (e.g., first-time donors, recurring donors, alma mater)
- **DOs review managed donors**

# Acknowledgement types



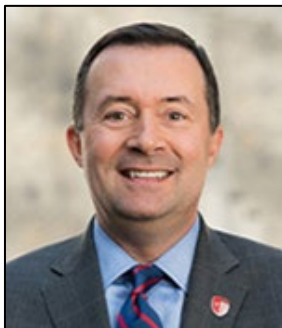
Richard L. McCormick, PhD  
Interim President

## Presidential

- Pledges, pledge payments and outright gifts of \$100k+
- Fully custom letters
- Drafts reviewed by primary manager and senior AVP
- Live signature from president

## Closer To Yes

- Pledges and outright gifts with high priority
- Fully custom letters **written while signatures are collected for gift agreement**
- Drafts reviewed by primary manager and senior AVP
- Live signature from president



*Scott Barrett*

*Interim Vice President of Advancement*



*Brooke Carroll*

*Assistant Vice President of Constituent Experience*

## VP Personalized

- Pledges, pledge payments and outright gifts between \$20,000 to \$99,999
- Personalized letters
- Drafts reviewed by primary manager and senior AVP
- Live signature from VP

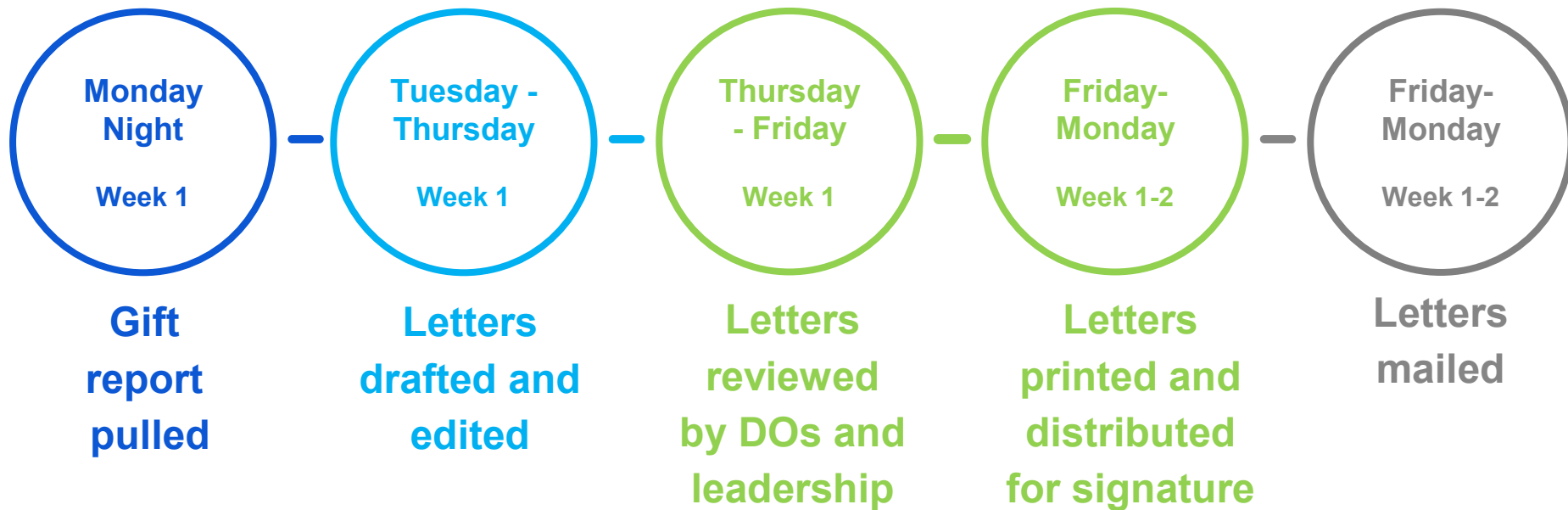
## VP Template

- Pledges, pledge payments and gifts \$1,000 to \$19,999
- Templated letters separated into two segments
- Reviewed by primary manager, freelancer and DR team
- Autopen VP signature

## Tributes (IMO/IHO)

- Notification letters to tributes of a gift in their honor or in memory of a loved one
- Templated letters
- Drafts reviewed by DR team
- Live signature from AVP

# Timeline



# Infrastructure and Samples



File 1

PRESIDENTIAL MANAGED BY AVP (HAND SIGNED)



File 2

PRESIDENTIAL MANAGED BY DOS (HAND SIGNED)



File 3

VICE PRESIDENT PERSONALIZED (HAND SIGNED)



File 4

VICE PRESIDENT TEMPLATE MANAGED BY DOS (MACHINE SIGNED)



File 5

VICE PRESIDENT TEMPLATE UNMANAGED (MACHINE SIGNED)



File 6 Tributes, Congrats and Condolence



File 7 Closer to Yes



ACKNOWLEDGMENT COVER PAGE			
<b>DONOR INFORMATION</b>			
Donor Name: Donor CID: 107125767 Affiliations:		Org. Contact (from Gift Documentation): N/A Soft credit(s):	
<b>GIFT INFORMATION</b>			
Total Gift: \$22,500.00		Gift Type: Pay-Cash Gift Subtype:	
Fund 1 Name: Sherrie Glasser Mayrsohn, Metro Physical Therapy Scholarship Fund 2 Name: The Sherrie Glasser Mayrsohn Metro Speech-Language Pathology Scholarship Fund 3 Name: The Sherrie Glasser Mayrsohn, Metro Occupational Therapy Scholarship		Fund 1 Amount: \$12,500.00 Fund 2 Amount: \$2,500.00 Fund 3 Amount: \$7,500.00	
Pending Fund Name (if in holding account): None or not recorded			
<b>IMPORTANT NOTES &amp; PENDING QUESTIONS</b>			
Database Updates: ADD SPACE AFTER DPT, IN DONOR NAME; REMOVE COMMA AFTER MAYRSOHN IN THIRD FUND NAME			
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<b>REVIEW/APPROVAL INFORMATION</b>			
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<b>REVIEWER TYPE</b>	<b>REVIEWER</b>	<b>DATE SUBMITTED</b>	<b>DATE APPROVED</b>
Primary Manager	Samantha LaDuca	3/18/25	3/21/25 via email
Spouse Primary Manager	--		
Gift Solicitor(s)			
Other DO Reviewer(s)			
DLK Review/Approval		3/24/25	--
Submitted for Printing & Signatures:			

← Donor info

← Fund and gift info

← Corrections, matching info

} Letter info

} Tracking and review



## Praise and thank.

January 21, 2025

\*Donor Name\*

\*Donor Address\*

Dear ,

Thank you for your compassionate gift providing emergency assistance to the many species in danger from fires in Madagascar's Ranomafana National Park, near our Centre Val Bio.

Your support will help battle the effects of this disaster, as it threatens the world's rarest lemur collection and countless other forms of wildlife. We are grateful for your contribution that will help firefighters as they work tirelessly to ward off further deforestation.

Humanitarian efforts such as yours will give hope that we can save this invaluable ecosystem. Thank you again for your loyal partnership and for all the many ways you help Stony Brook University and the Centre Val Bio.

Best,

Scott Barrett



Message of gratitude naming the gift allocation.



Statement of mission. Explain how donor's gift helps fulfill the mission.



Closing message of gratitude and reference to donor behavior/affiliation.



Hand or machine signature

# Google Suite Functionality

Name ↑

W File 4 -Mailed 3/20 Holding 2- VP Template - Managed, Sort by DO 03.04.25 to 03.10.25v2.docx 👤

W File 4 -Ready to Print- VP Template - Managed, Sort by DO 03.11.25 to 03.17.25.docx 👤

W MAILED 3/13, 2 Mailed 3/14, Held 1 - File 4 - DO Review only - VP Template - Managed, Sort by DO 02.25.25 to 03.03... 👤



**Debbie Meyers**

9:16 AM Yesterday

@michael.dambrosio@stonybrook.edu  
u -- for your review, please.

Assigned to Michael D'ambrosio



**Michael D'ambrosio**

9:25 AM Yesterday

thanks  
@debbie.meyers@stonybrook.edu.

@dina.demeo@stonybrook.edu  
Deferring to you on letter content  
since WLC is your area. Thanks.



**Jennifer Becker**

3:32 PM Mar 28

Add: "3/28/25"



**Jennifer Becker**

3:32 PM Mar 28

approved with suggested edit  
incorporated as you see fit



**Debbie Meyers**

3:36 PM Mar 28

Suggestion accepted



ACK Letters FY 24-25

Main Table Table

New project Search Person Filter Sort Hide Group by

Current Holds

<input type="checkbox"/>	Project	Person	Status	Approver	Date	Notes	Number of Letters
File 5: Template Letters (Machine Signed)							
<input type="checkbox"/>	Project	Person	Status	Approver	Date	Notes	Number of Letters
<input type="checkbox"/>	3.11-3.17		Ready to Print	Scott Signature Machine		With Debbie/DOs	6
<input type="checkbox"/>	3.4-3.10		Mailed	Scott Signature Machine	Mar 17	With Debbie/DOs	12
<input type="checkbox"/>	2.25-3.3		Mailed	Scott Signature Machine	Mar 7		10
<input type="checkbox"/>	2.18-2.24		Mailed	Scott Signature Machine	Mar 3	Held 1 (America's Charities)	5
<input type="checkbox"/>	2.11-2.17		Mailed	Scott Signature Machine	Feb 20		5
<input type="checkbox"/>	2.4-2.10		Mailed	Scott Signature Machine	Feb 12		7
<input type="checkbox"/>	1.28-2.3		Mailed	Scott Signature Machine	Feb 7	2 Held (Daria) (mailed 2/12)	8
<input type="checkbox"/>	1.21-1.27		Mailed	Scott Signature Machine	Jan 31		16
<input type="checkbox"/>	1.14-1.20		Mailed	Scott Signature Machine	Jan 27	Waiting on Amanda to approve one letter. Printing 1/27	13
<input type="checkbox"/>	1.7-1.13		Mailed	Scott Signature Machine	Jan 17		11

File 2- Presidential (Hand Signed by President)


<input type="checkbox"/>	Project	Person	Status	Approver	Date	Notes	Number of Letters
<input type="checkbox"/>	3.11-3.17 File 2		Mailed		Mar 22	With DLK 3/18	2
<input type="checkbox"/>	3.4-3.10 File 2		Mailed	President McCormick	Mar 17	With Pres 3/13	1
<input type="checkbox"/>	2.25-3.03 File 2		Mailed	President McCormick	Mar 11	With DLK 3/7	3
<input type="checkbox"/>	2.18-2.24 File 2		Mailed		Feb 28	With Pres 2/26	1
<input type="checkbox"/>	2.11-2.17 File 2		No Action Needed/Letters			Letters suppressed	0
<input type="checkbox"/>	2.4-2.10 File 2		Mailed		Feb 14		6
<input type="checkbox"/>	Special File 2 Batch 2.7		Mailed		Feb 14		1
<input type="checkbox"/>	1.28-2.3 File 2		Mailed	President McCormick	Feb 10		3
<input type="checkbox"/>	1.21-1.27 File 2		Mailed		Feb 4		1



ATHLETICS				
Template 2022	Template 2023	Template 2024	Template 2024 Rewrite	2025
<p>From LaValle Stadium to the Tokyo Olympics, our Seawolves are making a big name for Stony Brook - and themselves.</p> <p>We are so proud of our student athletes and the incredible work they do on and off the field, and it is because of your support that they are able to score points and good grades. Thank you for your gift to the <b>Fund Name(s)</b> and for being the <b>super fan/fans</b> our Seawolves deserve.</p>	<p>Thanks to you, our student-athletes have a greater opportunity to excel in the classroom and on the field.</p> <p>Every gift you make is an investment in their success, providing them with the best coaching staff, the necessary equipment, the safest transportation and the finest academic support available.</p> <p>Your contribution to the <b>Fund Name(s)</b> is a fantastic show of confidence in our athletics program and the people it serves. We are grateful to have you on our side, and we'll look for you in the stands.</p> <p>Go Seawolves!</p>	<p>On behalf of the athletes who will benefit from your loyalty and thoughtfulness, thank you for your recent commitment to the <b>&lt;&lt;FUND NAME&gt;&gt;</b>.</p> <p>Your support provides our student-athletes with a solid foundation of financial resources to help them excel. Knowing they have you behind them, supporting them in the athletic arena and the classroom, is a fantastic gift.</p> <p>Again, thank you. We are grateful for your Seawolf pride.</p>	<p>Thank you for your recent contribution to Stony Brook Athletics.</p> <p>Through your commitment to the <b>&lt;&lt;FUND NAME&gt;&gt;</b>, our student athletes will have the best resources possible to fuel their success, from world class facilities, to exceptional coaches and competitive athletic opportunities. Your generosity is helping to positively transform their lives.</p> <p>On behalf of our student athletes and dedicated athletic department, thank you again. Go Seawolves!</p>	<p>In the world of college athletics, every victory and milestone are fueled by passion and support from incredible individuals like you.</p> <p>At Stony Brook, our mission is to provide a well rounded athletic experience that empowers our student-athletes to excel in competition, academics and personal development. Your gift to the <b>&lt;&lt;FUND NAME&gt;&gt;</b> directly supports these efforts and plays a key role in helping us stay on top of the competition.</p> <p>We greatly appreciate your support. Keep believing, and Go Seawolves!</p>

EAST CAMPUS – CANCER CENTER				
2022	2023	2024	2024 (Rewrite)	2025
<p>Thank you for your meaningful support of the Stony Brook Cancer Center. Stony Brook Medicine is known for its dedication and discovery-driven ethos, and it is your generosity that enables us to provide our patients with the very best in high-quality healthcare, our team with access to cutting-edge resources and technologies, and many families <b>with the hope that we will one day live in a world without cancer.</b></p> <p>Your contribution to the <b>Fund Name(s)</b> is a deeply kind gift to so many doctors, patients, and families. Thank you, again, for your support.</p>	<p>Your investment in the Fund Name(s) ensures that our medical professionals can provide exceptional service and support to our patients and their families. On their behalf, I send my deepest thanks.</p> <p>The Stony Brook Cancer Center is committed to reducing suffering, conducting meaningful research and providing for the community's most vulnerable populations. Because of you, our medical professionals will be able to fulfill this mission, providing our patients and their families with the best possible care.</p> <p>Thank you again. We are grateful for your partnership as we continue to lead the fight against cancer.</p>	<p>Thank you for your gift to the <b>&lt;&lt;FUND NAME&gt;&gt;</b> at the Stony Brook Cancer Center. Your thoughtfulness is greatly appreciated.</p> <p>Our medical professionals, researchers, students and staff have dedicated their lives to delivering the best in advanced care to their cancer patients. Your generosity helps them continue to support their patients and their families, as they face one of life's greatest challenges.</p> <p>On behalf of all who will benefit from your generosity, please accept my gratitude.</p>	<p>Thank you for your thoughtful contribution to <b>&lt;&lt;FUND NAME&gt;&gt;</b> at the Stony Brook Cancer Center. Your generosity is deeply appreciated.</p> <p>With your support, our center strives to reshape the future of cancer care and research. Our patients, their families and our medical staff will have hope that we will one day live in a world without cancer, thanks to you.</p> <p>On behalf of all whose lives you will touch through your commitment, you have my deep appreciation.</p>	<p>Every breakthrough in the fight against cancer starts with a spark — a moment when the right resources, research and care come together. Thanks to you, we have that spark.</p> <p>Your gift to <b>&lt;&lt;FUND NAME&gt;&gt;</b> is crucial in helping us continue to provide world-class healthcare, from early detection and cutting-edge treatments to compassionate support services for patients and their families.</p> <p>Thank you for your belief in our work and for being a vital part of the journey toward a cancer-free future.</p>

# Closer to Yes


 1





Once the document is completed by all signers, you will be able to download a signed copy.


The 


Endowed Fund for Excellence in Psychology


 1 of 1 document


**Stony Brook Foundation**  
  
**THE ENDOWMENT FUND AGREEMENT**  
  
**ESTABLISHMENT**  
  
\_\_\_\_ (the "Donors") and Stony Brook Foundation, Inc. ("SBF" or the "Foundation") hereby agree to establish the The \_\_\_\_\_ Fund for Excellence in Psychology (the "Fund"). This Fund shall be managed exclusively by the Foundation for the sole benefit of Stony Brook University ("Stony Brook" or the "University"). This Agreement (the "Agreement") shall be legally binding by and between the aforementioned parties.  
  
**PURPOSE**





**Recipients analytics** 


**DONOR** **Signed**  
viewed 1 time 10 days ago >


**DONOR** **Signed**  
viewed 2 times 10 days ago >


**GIFT OFFICER** CC  
viewed 1 time 13 days ago >


**GIFT OFFICER** CC  
viewed 7 times 7 days ago >

**DEAN** ... **Signed**  
viewed 1 time 8 days ago >

**PROVOST** **Signer**  
viewed 2 times 12 days ago >

**Gift Admin** CC  
viewed 3 times 12 days ago >

**CFO** **Signer**  
viewed 1 time 12 days ago >

**AUTHOR** CC  
viewed 9 times about 1 h... >

# Evolving improvements

## Debbie & Danyte

Your gift to the Child Life Services Fund is a thoughtful contribution to our youngest patient population.

Thanks to you, our medical professionals will be able to offer celebrations, therapeutic play and educational programs that help our pediatric patients navigate their time in the hospital with greater comfort and joy. Your commitment to their well-being will truly make a lasting impact on them and their families.

On behalf of all who will benefit from your thoughtful support, you have my gratitude.

## ChatGPT

On behalf of Stony Brook Children's Hospital, I want to thank you for your generous gift to the Child Life Services Fund. Your support will directly impact the lives of our pediatric patients by helping us provide essential programs that ease their emotional and psychological challenges during hospitalization.

We are deeply grateful for your commitment to improving the care and well-being of children and families at Stony Brook Children's. Your generosity makes a lasting difference, and we are honored to have you as a partner in this important work.

## CoPilot

We are deeply grateful for your generous contribution to the Child Life Services Fund at Stony Brook Children's Hospital. Your support is crucial in enhancing the care and comfort of our young patients and their families.

With your gift, we can continue to provide essential services that alleviate stress and foster a healing environment for the children in our care. Your generosity makes a significant difference in their lives and helps us deliver compassionate and comprehensive care.

Thank you for your remarkable support and for being a valued member of our community.

## Acknowledgment Letters

### Select an Acknowledgment Letter Option:

- ☐ File 1 - DLK Review Only, Sort by Type **(4 gifts)**
- ☐ File 2 - DO then DLK Review - Pres, Sort by DO **(1 gifts)**
- ☐ File 3 - DO then DLK Review - VP Pers - Managed, Sort by DO then Unmanaged **(1 gifts)**
- ☐ File 4 - DO Review Only - VP Template - Managed, Sort by DO **(6 gifts)**
- ☐ File 5 - No DO Review - VP Template - Unmanaged, Sort by Segment **(89 gifts)**

Acknowledgement Letters	
Previously Run Acknowledgment Letters	
20250331 - File 1 - DLK Review Only, Sort by Type.docx	
20250331 - File 2 - DO then DLK Review - Pres, Sort by DO.docx	
20250330 - File 1 - DLK Review Only, Sort by Type.docx	
20250330 - File 2 - DO then DLK Review - Pres, Sort by DO.docx	
20250330 - File 3 - DO then DLK Review - VP Pers - Managed, Sort by DO then Unmanaged.docx	
20250327 - File 1 - DLK Review Only, Sort by Type.docx	
20250327 - File 2 - DO then DLK Review - Pres, Sort by DO.docx	
20250327 - File 3 - DO then DLK Review - VP Pers - Managed, Sort by DO then Unmanaged.docx	
20250327 - File 4 - DO Review Only - VP Template - Managed, Sort by DO.docx	
20250326 - File 1 - DLK Review Only, Sort by Type.docx	

Developed by Stony Brook Advancement Strategy and Administration  
This website contains confidential information which is privileged, and/or intended only for the party to whom it is addressed



# Key Takeaways

	<i><b>February 2024</b></i>	<i><b>May 2025</b></i>
1. TIMELINESS	2 weeks - 2 months	⇒ 1 week or less
2. FEEDBACK	Limited DO feedback	⇒ Feedback on each letter
3. METRICS	No metrics	⇒ Extensive metrics using Monday.com
4. LIMITED STAFF	One freelancer	⇒ One FTE, one freelancer and one SA
5. OUTDATED TEMPLATES	Refreshed 1x per year	⇒ Refreshed 3 - 4X a year

# Key takeaways

- Letters should be *timely, accurate and sincere*, no matter the gift level or whether they are mailed or emailed.
- *Leverage existing systems* to your advantage that work for your institution – e.g., your CRM, project-management software, G-drive or shared drive.
- Make your process as *user friendly* as possible so it is easier for DOs and leadership.
- Get creative with staffing. If you have limited full-time staff resources, look into *student assistants or freelancers* to help with part of the process.
- *Refreshing your templates* more than once year will save you editing time!
- Try to *automate and use AI* wherever possible to speed up your workflow.

# Questions?





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