



Sample Form - Preparing Donor Information for the Projects Department

By Gideon Herscher, April 27, 2025

This document is an example of what is meant to be filled out by either the GK or the AM and submitted to the writing team before the writing process begins.

It has not been discussed with the entire team yet, so for now, it is just “food for thought.”

SECTION 1: DONOR INFORMATION

Donor name as it should appear in the document

Is this a first-time donor? A board member? Major donor?

If a federation, does it have a partnership city?

What other University programs/areas has this donor supported?

Please provide giving history.

Who will read this document? (Donor, family member, trustee, professional, committee, etc.)

Is this donor most likely to read in print, on a computer screen, or on a phone?

Do you want hyperlinks to web-based UNIVERSITY content?

SECTION 2: CUSTOMIZATION

• DONOR MINDSET

What aspects of the University' mission speak most deeply to this donor?

How well does this donor know University?

How much general UNIVERSITY information/framing is needed – and should this be UNIVERSITY global, regional, or both?

How well does this donor know this program/area?

How much background (problem/need, explanation of program) is needed?

How much description of the HOW/the field's process is desired?

What are the donor's motivations, values, priorities behind giving to this program/area?

What is the most important information for your donor to receive in this document? If it is "impact", please define that term.
What are the key messages to include?
What was the most recent touchpoint UNIVERSITY has had with this donor, and how might this influence this document? Examples: Might the donor have already been exposed to recent information about this program? Was something said in a recent interaction that could be picked up on in this document?
How much of a Jewish emphasis is desired? (e.g., Jewish values, Jewishness of the target population)
SECTION 3: WRITING STYLE & COMPONENTS
Desired writing style: casual (referring to donor as “you”) vs formal; flowery or businesslike; other....?
How many times do you want to see the words “thank you” written in this document? If only once, do you prefer it in the opening or the closing? Would you like the writer to reference the donor’s support throughout the document, or to just stick to straight reporting?
Is there anything specific that you want said in the opening/closing? If there is an ask, do you want it at the beginning or the end or both?
Any GK pet peeves you’d like the writer to avoid? (Like titles that cross over a single line, use of colored fonts, diverting from the UNIVERSITY template style)