



DEPARTMENT OF ANIMAL SERVICES
LOUISVILLE, KENTUCKY

GREGORY E. FISCHER
MAYOR

STEPHANIE K. MOORE
ASSISTANT DIRECTOR

MEMORANDUM

September 29th, 2014

TO: All Animal Services Personnel

FROM: Stephanie K. Moore,
Assistant Director, Department of Animal Services

SUBJECT: New Donation Procedures

MESSAGE:

Private donations from individuals and/or business entities are a very important source of funding that enables Metro Animal Services to further its mission and fulfill the departmental vision. The following policies and procedures are effective immediately and dictate the appropriate handling of monetary donations and supply donations.

Animal Care

All Animal Care Specialists and Animal Care Technicians must direct customers with monetary donations and supply donations to the Business and Administration office to initiate processing.

Business and Administration/Animal House

A. Monetary Donations

- I. Obtain citizen's name, phone number, and address for purposes of locating his or her person ID in Chameleon (be sure to inquire about previous phone numbers and addresses to avoid duplication of person IDs). If a person ID does not exist, create/store a new one with the donor's current contact and address information.
- II. Populate the citizen's person ID onto the Receipt screen in Chameleon **unless he or she is making a donation on behalf of another individual. ***If the citizen is making the donation on behalf of another individual, be sure that individual is populated as the person ID and the citizen is specified in the Received From field. *****



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Modified Fields

Received No: 09/26/17

Person: P178786 JOHN DOE 6382122 1731 WILSON AVE LOUISVILLE 40210

Received From: JOHN DOE Jurisdiction Extra1 Extra2

Comment:

Qty	Item Code	Animal	Reference No	Fee Type	Dest	Extra1	Extra2	Item
1	DON	A						

Total: Cash Check Credit Tendered Card No Exp Auth Trans Charge Balance

- III. Ask the citizen to designate to which fund he or she would like their donation appropriated (animal care, building fund, and/or The S.P.O.T. Fund).
- IV. Utilize the citizen's designation as the Item Code. *****The Animal field will remain blank unless the donation is for a specific animal, which requires the animal ID associated with that specific animal to be notated in the Animal field.*****

Modified Fields

Received No: 09/26/17

Person: P178786 JOHN DOE 6382122 1731 WILSON AVE LOUISVILLE 40210

Received From: JOHN DOE Jurisdiction Extra1 Extra2

Comment:

Animal: A

Reference No: Fee Type: Dest: Extra1: Extra2: Item:

Choose One From DND/DO/DOY

Qty	Item Code	Animal	Reference No	Fee Type	Dest	Extra1	Extra2	Item
1	DON	A						

Total: Cash Check Credit Tendered Card No Exp Auth Trans Charge Balance

- V. Specify the donation amount as the Item (price), and click the green "+" to add the donation to the receipt.

Modified Fields

Received No: 09/26/17

Person: P178786 JOHN DOE 6382122 1731 WILSON AVE LOUISVILLE 40210

Received From: JOHN DOE Jurisdiction Extra1 Extra2

Comment:

Qty: 1 Item Code: DONA AND CARE Animal: A Reference No: Fee Type: Dest: Extra1: Extra2: Item: 50.00

Animal ID: Donor ID: Fee Type: Dest: Subst: Item: Extra1: Extra2: Item:

Total: Cash Check Credit Tendered Card No Exp Auth Trans Charge Balance

Modified Fields

Received No: 09/26/17

Person: P178786 JOHN DOE 6382122 1731 WILSON AVE LOUISVILLE 40210

Received From: JOHN DOE Jurisdiction Extra1 Extra2

Comment:

Qty: 1 Item Code: DONA AND CARE Animal: A Reference No: Fee Type: Dest: Extra1: Extra2: Item: 50.00

Animal ID: Donor ID: Fee Type: Dest: Subst: Item: Extra1: Extra2: Item:

Total: Cash Check Credit Tendered Card No Exp Auth Trans Charge Balance



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- VI. Accept monies in the form of cash, credit, check or money order, and post payment to the account in Chameleon. *****When a check is utilized as the form of payment, be sure to have the citizen specify his or her fund appropriation on the memo line of the check. *****

- VII. Print a copy of the receipt reflecting the donation amount and fund appropriation and give to the citizen for his or her records.
 - VIII. Generate a donation letter from the receipt screen and submit to a manager for signature.
 - IX. Make a copy of the signed donation letter, and file it by month in the donation log.
 - X. Mail the signed original to the donor for documentation and tax purposes.
- B. Supply Donations – Any citizen needing to make a donation of supplies must first be directed to the Business and Administration Office.
- I. Search for the citizen’s person ID in Chameleon (be sure to inquire about previous phone numbers and addresses to avoid duplication of person IDs). If one does not exist, create/store a new person ID with the citizen’s current contact and address information.
 - II. Load the citizen’s person ID onto the Receipt screen in Chameleon. *****If someone is transporting donated supplies on behalf of another individual, be sure the individual in which he or she is transporting the supplies for is populated as the person ID and the transporter is noted in the Received From field. *****
 - III. Type “DON” in Item Code and pop-up to view the selections. Select “DONA SUPPLIES” – this code will always be utilized for supply donations.

- IV. Leave the animal ID in the Animal field blank, unless the supplies are being donated for a specific animal.
- V. In the Reference No field, provide a brief description of the item donated. *****Keep in mind each donated item and its quantity will be noted on the receipt. *****



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VI. In the Extra3 field note the estimated price per item.

VII. Specify the quantity of this donated item in the Qty field, and indicate the Item (price) as \$0. Click the green “+” to add the donation to the receipt.

VIII. Repeat III – VII for all donated items.

IX. Once all donated items and their respective quantities are noted on the receipt, cash the receipt out at \$0 and give a copy of the receipt to the citizen for his or her records.

X. To generate a donation supply letter, go to (G:) drive ► Business Office ► Donations. Open the “Donation Supply Letter”.



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- XI. Update the address block to reflect the donor's mailing address, and overwrite the salutation to reflect the donor's name.

EXAMPLE:

**Linda Allegeier
850 Nantucket Square
Louisville, KY 40214**

Dear Linda Allegeier,

- XII. Add the quantity and list of donated items to the item line in the donation letter, and adjust the total for the estimated dollar value of donated items. Print the letter and submit to a manager for signature.
- XIII. Make a copy of the signed donation supply letter, and file it by month in the donation log.
- XIV. Mail the signed original to the donor for documentation and tax purposes.
- XV. The donated supplies will be transferred to animal care by an Animal Services Clerk, Animal Care Specialist, or Animal Care Technician.

C. Donation Jars

- Each facility, Manslick Road Animal Shelter and Animal House Adoption Center, will have three in-house donation jars appropriated for individual donation funds: (1) animal care, (2) building fund, and (3) The S.P.O.T. Fund.
- At the end of each day or a differential time interval specified by management, funds from each individual jar will be collected, counted, and posted to the MAS Doghouse account (P181121).
- Funds will be posted utilizing the respective Item Code for funds appropriation (DONA ANI CARE, DONA BUILDING, DONATION SPOT).

- D. All donations made outside of normal business hours will be accepted by a supervisor or senior management and routed to the appropriate personnel to generate a receipt and donation letter for documentation and records purposes.

- End -