

Planned Giving Tip

September 2006

Thanking Donors

We are nearing the end of the year and so it may be time to think about how we thank our donors, especially those who make significant gifts in December. Does your parish or school have a gift acknowledgement policy? If not, the following are some suggestions -- some do's and don'ts -- that have been adapted from planned giving consultant, Robert Sharpe, which may be useful as we near the end of the year.

1. Do acknowledge all gifts promptly. Once a gift has been received, timely acknowledgment is essential. While you may specify that larger gifts ideally call for a personal visit in addition to a handwritten letter and/or phone call, gifts of any size merit an appropriate and timely thank-you.

2. Don't assume a donor's small gift indicates a small interest in your mission. When a donor makes a gift of a smaller amount, that does not necessarily mean he or she has little interest [in the parish or school]. Treat all donors -- even those of modest amounts -- with the respect they deserve and thank them accordingly.

Keep in mind that older, long-term donors who may be living on a fixed income may be in the process of "downgrading" their giving. For example, a donor who has been a loyal supporter for 25 years may feel she is only able to give \$5 [per week] currently. Thanking a long-term donor like this may yield tremendous benefits when that person decides how to distribute her \$150,000 estate.

3. Do respect requests for privacy when thanking your donors. Some parishes and schools are beginning the process of establishing special giving societies to thank donors for remembering the parish or school in their will or through some other estate gift. These can be very effective for maintaining ongoing relationship with donors. The experts say that the best candidate for a planned giving prospect is someone who has already made one or is the kind of donor described in #2 above.

While you may offer to include recognition society donors' names in your communication pieces, be sensitive to the fact that some persons will wish to remain anonymous for various reasons. Be sure your gift acknowledgment system is designed to preserve the anonymity of these donors where appropriate. Remember, though, that just because some do not want their names published does not mean they do not want and need to be thanked. Find less public ways to thank these donors, and they will appreciate your regard for their wishes.

4. Don't spend more time asking than thanking. There is a temptation to curb gift acknowledgment efforts in order to save funds. Be wary, however, of cutting back on thanking donors because that decision may backfire. The Sharpe Company has observed that charities that make attempts to thank as many donors as possible tend to raise more cumulative funds, both current and deferred, at lower overall costs than those that do not.

5. Do communicate thanks by sharing how donors' gifts are making a difference. Once a year it may be worth the time and effort to choose 10-15 of your top 100 most consistent givers and send them a personal note sharing how important their gifts are to the mission of the parish or school. Tell them about special projects that were completed or families that were helped with tuition assistance or new ministries that were launched in part because of their generosity. Donors enjoy hearing about how their gifts are being used and how those who have benefited appreciate their help.

Hopefully some of these suggestions will help you say thank you to your parishioners/donors in a way you had not previously thought of or done in the past. The more personal, the better. Feel free to pass on any ideas that have worked for you that were not mentioned here and I will gladly share them in a future tip.

For the bulletin:

Many parishioners make contributions outside the parish because we have not asked them for their help. Bequests to the parish, gifts of real estate and life insurance, stocks, bonds and certificates of deposit can perpetuate your ideals and faith here in our own parish. Please remember the ongoing and long range needs which exist here at (name of parish). Contact us for specific areas which could benefit from your gift.

Keep planting seeds, John

Rockford Diocese - Office of Stewardship Development