

Building donor relationships



**FORMS**

Welcome Letter and Info Sheet Templates

PGB3-1201

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WEEK 12

Your Legacy Society Membership Materials

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| --- | --- |
| **BACKGROUND** | Name and Branding |
|  | Example: Middlebury College  Welcome Letter and Membership Form |
|  | Membership Roster |
| **PROJECTS** | Develop a Name, Brand and Story for Your Recognition Society |
|  | Create Your Welcome Letter and Information Sheet |
|  | Create Your Membership Roster |
| **DOCUMENTS** | PGB3-1201 – Welcome Letter and Info Sheet Template |
|  | PGB3-1202 – Membership Roster Template |

**Time required:** 1 hour

**What it covers:** Naming and creating membership materials for your new legacy society

**Why:** When a donor sets up a new planned gift, you need materials and procedures to include the donor in your society

**How to get it:** [www.PlannedGivinginaBox.Com/PGB3-1201](http://www.PlannedGivinginaBox.Com/PGB3-1201)

[www.PlannedGivinginaBox.Com/PGB3-1202](http://www.plannedgivinginabox.com/PGB3-1202)

BACKGROUND

*Name and Branding*

The name of your legacy society should be unique and clearly identifiable with your organization. Select a name that **shares an important story** about a planned gift in your past, or a donor who made a planned gift. If you do not have any such gifts, use a more generic name (Evergreen, Legacy), but change it to something meaningful as soon as you have such a gift to use.

* If the story is memorable, it is more likely that people will want to become members of your society.

Middlebury College has a great society name and story. It provides a valuable example even if your own nonprofit isn’t in the education sector. All the principles we’ll discuss about this example hold true across the spectrum of charitable organizations.

**Gamaliel Painter's Cane Society**

**Who was Gamaliel Painter?**

Gamaliel Painter was one of Middlebury College's founding fathers, a tireless advocate of the College in its earliest years and a vital benefactor. Upon his death in 1819, Painter's generosity carried on in the form of a bequest which literally saved the fledgling school from financial turmoil. Painter bequeathed more than his money to the College. In his will, Gamaliel Painter also left his cane, a sturdy walking stick with a deep blue ribbon and a steel tip. Throughout Middlebury's history, the cane has stood as a reminder of Painter's legacy of leadership and support. Today, each student receives a replica of Painter's Cane upon graduation from Middlebury.

**What is the Cane Society?**

In the fall of 1989, the Trustees of Middlebury College voted to establish Gamaliel Painter's Cane Society to recognize Middlebury alumni and friends who support the College through life income gifts and estate intentions. Over the past decade, this group has grown significantly. Today, we have more than 1,300 members.

All alumni, parents and friends of Middlebury are invited to be recognized as members of Gamaliel Painter's Cane Society by establishing a life income gift or by providing for the College upon their death. Cane Society members receive a special pin which recognizes these gifts and/or estate intentions. They also receive newsletters about what is happening at the College and are invited to an annual gathering Reunion Weekend featuring President Liebowitz.

The College wishes to express its deepest appreciation to members of the Society for their commitment to Middlebury and for carrying on the legacy of Gamaliel Painter.

|  |  |
| --- | --- |
| Gamaliel Painter's Cane | *When Gamliel Painter died, he was Middlebury’s pride,*  *A sturdy pioneer without a stain;*  *And he left his all by will, to the college on the hill,*  *And included in his codicil a cane.*  *Oh, it's rap, rap, rap, And it's tap, tap, tap, If you listen you can hear it sounding plain; For a helper true and tried, As the generations glide, There is nothing like Gamaliel Painter's Cane.*  *--Gamaliel Painter's Cane* |

*Bringing Tradition to Life*

Today Gamaliel Painter's cane serves as the mace (“ceremonial object”) of the college:

* It is passed around at Convocation so each first year student can touch it.
* The story is told at Convocation, so all entering students learn the significance of the cane and how it came to be the mace of the college.
* The song is taught at Convocation and sung regularly at ceremonial events.
* Each graduate touches the cane again as they depart.
* Each graduate is given a replica of the cane to bring to class reunions.
* At reunion, they sing the Gamaliel Painter’s Cane song.
* Members of Gamaliel Painter’s Cane Society each receive a white ribbon to attach to their cane to mark their membership in the society.

Every student who graduates from Middlebury knows about Gamaliel Painter and his cane. Not only do they know the story, they also know what a **will codicil** is and the importance that **bequests** have in the College’s history. When asked to join the Cane Society, *they have no doubt about its purpose*.

While your charity may not have a story quite like this *now*, think about ways that you can **develop such a story** around one of your bequests. Most charities have had a loyal benefactor who has made an estate gift that has had a lasting difference. Use that story to name the Society and then tell the story every chance you get.

You will use the story in both your membership roster and your society brochure. Even if people do not remember the story *now*, over time you can create **institutional memory** and a **brand** around the story, assuring the significance of your society.

* An appropriate symbol or mark for your society will make it more recognizable faster. Be sure to create this symbol incorporating your existing brand along with coordinated colors, look and feel, and design.

*Be creative with the symbol for your society. One charity established a new society for a recently deceased donor who left a large bequest. The donor was known around town because he did not own a car and instead* ***rode his bike*** *from place to place. When they created the society symbol (which they reproduced as a pin), it depicted – you guessed it –* ***a bicycle****. Everyone who sees it knows who and what it represents*.

PROJECTS

**Project 8: Develop a Name, Brand and Story for Your Recognition Society**

Project 8 asks you to develop a name, brand and story for your recognition society. There is **no template for this** – each charity will have its own story and will need to develop its own brand. Once you find a name and story that is memorable, write down the story.

Make sure that the story emphasizes the **outcomes** from the gift. In the Middlebury example, the entire future of the college is the outcome. But in your case, it might be *a building, a program, or stories of real people served* due to this generous gift.

* Remember, it is always better to tell a story about the impact on a real person than to share a bunch of statistics. **People remember stories, not numbers.**

If you are having trouble finding a story, enlist the help of the volunteer committee you created previously. They may have good ideas and longer institutional memory than you do. They also will know if you have come upon a good story or a bad one.

Resources are all around you. Look for effective examples among other nonprofits in your sector. What works for them? Keeping abreast of what others have done can ramp up your own creativity.

With the story in hand, **create a symbol and brand** around it so it is recognizable and begin to share the story.

*Welcome Letter and Membership Form*

All individuals who inform your charity about a legacy gift should be *automatically* included in your legacy society (unless they opt out). However, just because you put them in the society does not mean that you do not want to *know more* about **their legacy gift**. Sending them a welcome letter and membership form will provide a way to encourage new members to share more information about themselves and their legacy gift in a non-threatening way.

**Project 9: Create Your Welcome Letter and Information Sheet**

Download the welcome letter and information sheet template at [www.PlannedGivinginaBox.Com/PGB3-1201](http://www.plannedgivinginabox.com/PGB3-1201). Revise the template to fill in information specific to your charity, including information about **your mission** and the **name of your society**.

Be prepared! When you get your first members, you will appreciate having the letter and the membership form ready to send to them. Plus your finance people will appreciate any and all information you will gather about your planned giving donors on this form.

*Membership Roster*

One of the *key elements* of effective recognition is the **creation of a membership roster** for the legacy society.

* It says to your donors that their gifts are important and you are telling the world that their gifts are important.

But remember that charities can create membership rosters in many different ways. Some have patio pavers with the names of all current and deceased members. Others use a donor wall in a prominent location at the charity. As with so many things, to determine what works best for your donors is to **ask them**.

A few **phone calls** by your volunteer planned giving committee to past planned giving donors about recognition will tell you a great deal about what members want in recognition and how to use recognition to appeal to potential legacy donors. If you are not comfortable having the committee make the calls, you can either *make them yourself* or simply ask the committee for *their opinions* on the issue.

Keep in mind that some donors will want *no recognition* and others will want to remain *anonymous*. Unless you have a large percentage of these types of donors, *ignore those responses* and create the roster based on the response of those individuals who want to be recognized.

**Project 10: Create Your Membership Roster**

Download the membership roster template at [www.PlannedGivinginaBox.Com/PGB3-1202](http://www.PlannedGivinginaBox.Com/PGB3-1202). This document supplies suggested organization and content for an effective membership roster. Customize the template with your society name and contact info. Highlight your mission, tell the society story, and populate it with any names you might have of deceased planned gift donors as well as living ones.

With a little digging, you might find that you have **more than you think**.

DOCUMENT PGB3-1201

Welcome Letter and Info Sheet Template

**[DATE]**

**[PERSONALIZED ADDRESS & SALUTATION]**

Dear **[NAME]**,

Thank you for sharing the wonderful news that you have planned for the future of **[YOUR CHARITY]** by including us in your plans. We are most grateful to you for thinking of **[YOUR CHARITY]** in this special way and investing in our mission.  
  
We are pleased to welcome you as a member of the **[NAME OF YOUR LEGACY SOCIETY]**. We created the Society in **[YEAR SOCIETY CREATED]** to recognize those individuals who have created an endowment or named **[YOUR CHARITY]** as the beneficiary of a will, living trust, life insurance policy, payable-on-death account, donor advised fund or life-income gift. These special gifts ensure that **[YOUR CHARITY]** can pursue its mission of **[INSERT MISSION HERE]** for the long-term. Some of our most important initiatives, including **[INSERT INFORMATION ABOUT PROGRAMS, BUILDINGS, ETC. FUNDED BY PLANNED GIFTS]** would not have been possible without this type of generous support.  
  
As a new member of the **[NAME OF YOUR LEGACY SOCIETY]**, you will receive a special Society pin and membership certificate at our annual luncheon, to be held **[DATE, TIME AND LOCATION OF NEXT LUNCHEON]** to commemorate your commitment. The pin identifies you as someone who cares about and has planned for the future of **[YOUR CHARITY]**. We hope you will wear it proudly, particularly to our events. Additional benefits of your membership include special invitations to our other recognition events, mention in our recognition publications, **[INSERT OTHER BENEFITS OF MEMBERSHIP YOU OFFER]**, and the satisfaction of knowing you have made a meaningful difference for **[YOUR CHARITY]**.

Enclosed you will find a **[NAME OF LEGACY SOCIETY]** membership form along with a postage paid envelope. Please fill in as much information as you are comfortable sharing and return the form to us at your earliest convenience. It ensures that we list your name appropriately in our recognition materials or provide you with anonymity if you so desire.  
  
Thank you for all that you have done, as well as what you intend to do for **[YOUR CHARITY]**. You have our sincerest appreciation.

With our thanks,

**[YOUR NAME]**

**[YOUR CONTACT INFORMATION INCLUDING WEBSITE URL]**

**[NAME OF SOCIETY] Membership Form**

**[FILL IN INFORMATION BELOW BEFORE SENDING IF YOU HAVE IT]**

Name:

Address:

Phone Number:

E-mail Address:

❑ I/We wish to be referred to as\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in any   
  
donor recognition materials. Date of Birth\_\_\_\_\_\_\_\_\_\_\_\_\_

❑ Include my spouse\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as a member.

Date of Birth\_\_\_\_\_\_\_\_\_\_\_\_\_

❑ I prefer to remain anonymous and do not wish to be recognized publicly at this time.

**Optional information to help us plan for the future:**

*I/We are pleased to acknowledge that I/we have named* **[YOUR CHARITY]** *as a beneficiary in my/our:*

❑ Will/Living Trust ❑ Retirement Plan

❑ Life Insurance Policy ❑ Payable on Death Account

❑ Donor Advised Fund ❑ Charitable Remainder Trust

❑ Charitable Gift Annuity ❑ Pooled Income Fund

❑ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*My gift is:*

❑ Unrestricted

❑ Designated specifically for: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

❑ Not yet determined. Please contact me to discuss options.

*The estimated value of my gift is:*

❑ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

❑ \_\_\_\_\_\_\_\_\_\_\_ % of my estate, currently valued at $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ for **[YOUR CHARITY]**

❑ \_\_\_\_\_\_\_\_\_\_\_ % of my retirement plan/life insurance, currently valued at $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ for **[YOUR CHARITY]**