

# Thank you and you're great!

Acknowledgment and recognition in stewardship



presentation available at  
[www.emlenassociates.com](http://www.emlenassociates.com)

*good manners. . . ?*

To be assured their gifts will be used for the purposes for which they were given

To receive appropriate acknowledgment and recognition

give regularly  
give to the priorities  
give in usable ways  
give to capacity  
feel recognized  
agree to participate  
spread the message  
bring others along

Move donors to their highest level of philanthropy

*...good business?*

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# Thank you.

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ACKNOWLEDGMENT: perhaps the single most  
important thing you can do to engage a donor

*Certifies donor's investment*

*Creates the philanthropic contract*

*...good business?*

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# Who writes the letter?

WHO SIGNS THE LETTER?

Should the dean write too?

# How many letters are enough?

give regularly  
give to the priorities  
give in usable ways  
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feel recognized  
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## RECEIPTING AND ACKNOWLEDGING GIFTS

*Timely*

*Accurate*

*Appreciative*

*...good business?*

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## CORRESPONDENCE

*Focused on individuals and groups*

*Endorses current behavior*

*Promotes new directions of philanthropy*

*...good business?*

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## RECEIPTING AND ACKNOWLEDGMENT

*Manage close to the source*

*Verify factual information*

*Production management*

*...good business?*

*Important  
stewardship  
responsibility*

give regularly  
give to the priorities  
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## CORRESPONDENCE

*Cross-references donor outcomes*

*Anticipates special occasion*

*Introduces other opportunities*

*Leads to further communication*

*...good business?*

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*Standard language*  
*Well written*  
*Grammatically correct*  
*Salutations by policy*

A receipt. . .

Dear Julia,

Thank you for your contribution of \$75.00 to the Appalachian Mountain Club on June 21, 2004, to the 2004 Trails Fund.

Your generous gift this year provides the funding necessary to support our professional and volunteer trail crews throughout the region. This year, AMC crews are working on trails from the Delaware Water Gap to northern Maine, clearing brush and water bars, building rock steps, and replacing worn and missing trail signs.

Your support of the Trails Fund supports the purchase of the tools and equipment our crews need for the stewardship of our trails.

Thank you!

Andrew J. Fallendar, Executive Director

*The Appalachian Mountain Club did not provide any goods or services in consideration of this contribution.*

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*Standard language*  
*Well written*  
*Grammatically correct*  
*Salutations by policy*

Dear Mary Ann and Jo,

On behalf of the Upper Valley Community Foundation, I am writing to thank you for your generous contribution of \$500 to the Whipple Hill Fund. Your gift was received on October 15, 2004.

We are committed to improving the quality of life in New Hampshire and in the communities in Maine and Vermont served by the Charitable Foundation and its regional divisions through philanthropy, community and leadership. We are honored that you have chosen the Foundation as your partner in charitable giving. Your generosity will make a difference to countless individuals and will leave a legacy for generations to come.

A receipt. . .

This letter serves as your formal acknowledgment for tax purposes, and Federal tax law requires that you maintain this receipt to substantiate your charitable deduction. No goods or services were provided by the Foundation in return for your contribution. We encourage you to consult with your tax advisor regarding the deductibility of this gift.

If you have any questions about your gift, please contact me at 603-225-6641.

Sincerely,

Jessica L. K. Baker, Accountant

Acknowledgment and recognition in stewardship

*Standard language*  
*Well written*  
*Grammatically correct*  
*Salutations by policy*

Correspondence. . .

**Dear Sybil and Harry,**

**Ben just called to tell me of your wonderful gift to support our scholarship program. I'm so pleased that you've made this decision—scholarships make a huge difference in our ability to attract and keep some of the most interesting students I've ever had the pleasure to meet. Thank you for being a part of our very important work here.**

**I'm headed out to see how things are going with the new wing of the library—where many of those students you'll be supporting are going to spend appreciable amounts of time!**

**Do think about a visit to campus. I would appreciate having the chance to thank you in person. And there is so much to see here these days.**

**With warmest regards,**

**Charlene**

**Acknowledgment and recognition in stewardship**

*Standard language*  
*Well written*  
*Grammatically correct*  
*Salutations by policy*

Correspondence. . .

Dear Martin,

Thank you for making a gift to your fifth reunion fund. I understand that your class has decided to allocate the total raised to current-use, unrestricted expenditures of the college. Thank you for your trust in us—I assure you that we will expend the fund wisely.

I expect that this year, in addition to supporting general operations of the college, we will use unrestricted funds for scholarships and for several special initiatives on campus. The library has received some funds to open a multimedia lab for faculty and students to extend the use of technology in the classroom. We've also allocated funds this year for building upkeep and much-needed maintenance.

I look forward to seeing you on campus for your reunion. Throughout the year, I'll keep you informed as well on other projects we are developing.

Sincerely,

Charlene Madison

Acknowledgment and recognition in stewardship

*Standard language*  
*Well written*  
*Grammatically correct*  
*Salutations by policy*

Correspondence. . .

**Dear Mrs. Bilbao,**

**I'm looking at the marvelous gift of silver flatware that you made to the museum last month. I know that you and I reviewed your collection earlier this year, and I marveled at the beauty of the pieces you offered then—I am again smiling as I view them here in the cases set aside for their display. Thank you. Your generosity to us is most appreciated.**

**Let's plan to have lunch next week so that I can show you our current exhibition on early American decorative arts. I'll be in touch.**

**Sincerely,**

**Jerome Fairweather**

**Acknowledgment and recognition in stewardship**

*Standard language*  
*Well written*  
*Grammatically correct*  
*Salutations by policy*

Correspondence...  
and an introduction

Dear Elizabeth and Jim,

Do you mind if I call you Elizabeth and Jim? We have not yet met, but I know that we will be fast friends when we do!

Thank you for your wonderful gift to the internship endowment fund. Having enthusiastic young people here all summer is a boon to all of us, and refreshes our commitment to science in our daily lives.

Your decision to invest in the program's future means a great deal to me personally and to generations to come who as budding activists will use the resources gifts like yours can provide.

Of course your gift qualifies you once again as a member of the Tall Tree Club, and I trust that you will join us at the next members meeting in June, when we'll hear from Daniella Thomas, who writes on forest management issues for the Italian Times.

Sincerely,

Charlene Madison

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PLANNED  
GIVING  
SOCIETY

give regularly  
give to the priorities  
give in usable ways  
give to capacity

**Important  
stewardship  
responsibility**

**Capital  
Giving  
Society**

**Friends of the  
Library/Theater/Etc.  
Giving Society**

spread the message  
bring others along

Annual  
Giving  
Society

Endowment  
Giving  
Society

SOCIETIES

The Association for  
the Advancement of  
the Organization

RECO

*Must reflect the needs of the*  
*Use to leverage increase*

*...good business?*

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Status	Descriptors	Behaviors	Goal	
Integrating	PLANNED GIVING SOCIETY	All behaviors	Capital Giving Society	<ul style="list-style-type: none"> <li>give regularly</li> <li>give to the priorities</li> <li>give in usable ways</li> <li>give to capacity</li> <li>feel recognized</li> <li>agree to participate</li> <li>spread the message</li> <li>bring others along</li> </ul>
Engaging	donors; 1 percent of giving	Endowment Giving Society	reward, recognition, commitment; engaged in the life of the institution; build affiliation	committees, ackn, listings
Connecting	15 percent of donors; 7 percent of giving	Gives often to priorities Friends of the Annual	Strengthen connection; raise sights; build	Group visits; select publications; ackn; listings
Responding	20 percent of donors; 2 percent of giving	Friends of the Giving Society	annual report; publications; ackn; visits	
Organizing	50 percent of donors; 1 percent of giving	Society	Make connection	Reinforce institutional values; ackn; annual report

# Recognition societies: to be or not to be

*Production management means prioritized work*

*Strict chronology of work and work completion*

*Use of technology to reduce labor*

*Annual review of progress against donor behaviors*

*Link with correspondence and other segmentations*

*Evaluate and revise every three to five years*

*Ownership of special gift clubs*

*...good business?*

Thank you.