

Invite Constituents To Thank a Donor

By establishing a Thank a Donor page on its website, Calvin College (Grand Rapids, MI) has created an interactive form to engage donors. The tool provides an avenue through which grateful students, parents, alumni and friends can express their gratitude directly to donors. Those wanting to send a thank-you simply complete an online form. Once received at Calvin, the message is passed on to a donor.

Amanda Greenhoe, coordinator of development communications and marketing, explains the process: "When a thank-you comes in, we review it to ensure its appropriateness. The message is then inserted in a custom e-mail template with Calvin branding. The donor is addressed by name and informed that the message is being sent only to him or her. The senders are not given details on who received their note, as we feel it is important to respect our donors' anonymity." Those who fill out the form understand it will be sent to someone who gave to support Calvin College.

"Our hope is to use this tool strategically," Greenhoe adds. She offers several tips to accomplish this:

- **Be program specific.** Match a thank-you that mentions a specific program to a donor who supported that cause.
- **Encourage new donors.** Send one of these thank-yous after a first gift is received, reminding donors their gift matters and encouraging future giving.
- **Utilize versatility for targeting.** This tool can work for any institution. Once received, messages can be targeted to individuals or businesses, as appropriate.

The thank-you form can be viewed at www.calvin.edu/support/annual-fund/thank-a-donor.html. While Calvin hopes to use this page intentionally, Greenhoe notes that, ultimately, "We are grateful for this opportunity to connect the grateful heart of a student or parent to a donor."

Source: Amanda Greenhoe, Coordinator of Development, Communications and Marketing, Calvin College, Grand Rapids, MI. Phone (616) 526-7638. E-mail: alg29@calvin.edu. Website: www.calvin.edu

Learn to Navigate Planned Giving With a Small Staff

By Kerry Nenn

Often viewed as beyond the reach of smaller shops, a vibrant planned giving program is in fact very doable. How? Experts in this arena answer the crucial question: If you were offering planned giving advice to a smaller nonprofit with a small, maybe even one-person development staff, what type of planned giving efforts would you suggest they focus on to achieve the highest success?

"Don't be afraid of planned giving," encourages Brian Sagrestano, CEO of Gift Planning Development (New Hartford, NY). From his extensive experience helping small nonprofits, Sagrestano reveals: "So many organizations don't pursue planned giving because they feel it's too technical. But it's not. You don't have to be an expert to do planned giving," he states. "Remember, it's okay to say, 'I don't know, but I will find out.'" Sagrestano advises starting with mission and long-term goals. "Build relationships with donors to encourage interests in these goals. All the technical stuff comes later," Sagrestano offers.

From a prospect research perspective, Helen Brown, The Helen Brown Group (Watertown, MA), advises: "Take time to identify the best group to reach out to. A little bit of effort mining your database for the right prospects will save time, money and aggravation." She suggests looking at long-standing loyal donors, focusing especially on anyone who has gradually increased their giving over the years.

Joe Tumolo of Gift Planning Development (Ambler, PA), suggests starting a Legacy Society, creating a platform to generate excitement. His next step is to execute a membership drive. "Set a goal with a timeline and make it public," he recommends. "Next, become a part of the society yourself. The request is then an invitation to join a common cause." Last, Tumolo advises showing donors how easy it can be. "Planned giving does not have to be extremely technical. Keep the approach simple, such as making the charity a will or retirement plan beneficiary."

Barlow Mann, COO of Sharpe Group (Memphis, TN), warns, "The trick with the small development shop is determining not only what you should do, but more importantly, what you should not do. With limited time and resources, you must be careful not to overextend. Do not think of planned giving as a separate program. Include a planned gift ad in your newsletter, content on your website or a booklet that goes out to major gift donors or with all gift acknowledgments."

"The bottom line," Mann concludes, "is planned giving can easily be incorporated into your existing fundraising activities, but it must be done on an ongoing basis in order to achieve the best results."

Sources: Helen E. Brown, President, The Helen Brown Group LLC, Watertown, MA. Phone (617) 393-1983. E-mail: helen@helenbrowngroup.com. Website: www.helenbrowngroup.com

Barlow Mann, COO, Sharpe Group, Memphis, TN. Phone (901) 680-5300. E-mail: barlow.mann@sharpenet.com. Website: <http://llsharpenet.com>

Brian M. Sagrestano, JD, CFRE, CEO, Gift Planning Development, New Hartford, NY. Phone (315) 292-1335. E-mail: brian@giftplanningdevelopment.com.

Joe Tumolo, CEO, Gift Planning Development, Ambler, PA. Phone (610) 653-7906. E-mail: joe@giftplanningdevelopment.com. Website: www.joetumolo.com

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Contact jbsub@wiley.com.