

SHARPE

THE *gratitude* ISSUE

INSIGHTS

A look at how we are helping nonprofits raise large gifts

2025, Issue 10

DON'T YOU Forget About Me

When you think about it, a person who makes a planned gift commitment is treating your organization like a dear friend or close family member, so they deserve to be treated as such. One way to show ongoing appreciation is by having a planned gift recognition society. This allows you to keep in touch with this special group while strengthening your long-term relationship with them.

Having a planned gift recognition society (many are called "Legacy Societies") provides opportunities for you to meet with these donors and get to know them better one on one. Findings from the Sharpe Knowledgebase™ show that bequests received from donors who informed charities in advance of their bequests are often **two or more times larger** than bequests received from those who do not.

However, if your organization is inattentive to planned giving donors due to complacency, staff turnover, poor record keeping, insufficient or incorrect data or other factors, you run the risk of alienating them and perhaps losing their gifts altogether. Since many planned gifts are revocable, they can be easily changed during the donor's lifetime.

Yet another compelling reason to have a recognition society is this: A planned gift recognition society can be key to managing the natural "downgrading" and inevitable lapse of many older donors. Planned gift donors are often reaching the age at which their current giving may be decreasing because they are living on a limited, fixed income or their healthcare/living expenses have dramatically increased.

A recognition society can also provide a natural way to acknowledge a donor's past and future involvement. You may even see more planned gift commitments from prospective donors when they see that those who have made a planned gift—not just current gifts—are being recognized.

Manage expectations

Keep in mind, though, that no matter how many "benefits" you offer through membership, few people will face mortality, change their estate plans and incur a legal fee just to make a gift that "earns" them an invitation to join. In fact, many planned gift donors will never tell you of their gift during their lifetime, and a percentage of others who do inform you will wish to remain anonymous and not want to participate at all.

While your recognition society may honor only a relatively small group of donors, this type of relationship building is critical because it can lead to significant additional gift income in the future. ■

There's Still Time!

Order by Nov. 17
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INSIDE:



The Do's and Don'ts of
Thanking Donors



Put It in Writing: Crafting
Perfect Correspondence

SHARPE GROUP®

Helping Nonprofits Raise Large Gifts



JANUARY
12-14, 2026

ORLANDO

- Online or in person.
- Identify planned giving prospects.
- Get up to date on tax law changes.
- Real-life case studies.
- Optional half-days for newbies and individual coaching with Sharpe consultants!
- Early-bird rate until Dec. 1.

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The Do's and Don'ts OF THANKING DONORS

Do acknowledge all gifts promptly. While gifts of larger amounts usually require a personal visit in addition to a handwritten note and/or phone call, gifts of any size merit an appropriate and timely thank you.

Don't assume a small gift indicates small interest. Treat all donors—even those of modest amounts—with the respect they deserve and thank them accordingly. Older, long-term donors who may be living on a fixed income may be in the process of “downgrading” their giving. (Sharpe Group recommends appending age information to your donor file and modifying your gift acknowledgment process in a way that considers this important factor.)

Do respect requests for privacy. Creating a planned gift donor recognition society—for those who have made planned gifts such as bequests, life income plans or other gifts from long-range estate and financial plans—can be an effective way to maintain ongoing relationships.

Some donors will wish to remain anonymous for religious and other personal reasons, so make sure your gift acknowledgment system is designed to preserve anonymity. Remember, however, that just because some do not want their names published does not mean they do not need to be thanked.

Don't make a recognition society difficult to join. Membership should be as inclusive as possible. By asking donors to provide “proof,” such as a photocopy of a page in their will or of a beneficiary form, you may not be returning the respect and trust they have placed in you. Many planned gifts are revocable. Even if “proof” is provided, your organization can easily be taken out of a donor’s will later.

One exception is in the context of a capital campaign where recognition is being given for the gift and/or the institution will rely on the commitment when planning for future spending or a matching gift campaign. In these instances, donors will naturally understand the need for documentation.

Do share news with your donors. Send your donors a planned giving newsletter and other information about how their gift will make a difference in furthering your mission. Invite them to special events where possible. Ask if they would be willing to be interviewed for a story about their generosity.

Don't forget that any amount that is given to charity could have been spent, saved or given to a non-charitable beneficiary instead. Maintaining a close relationship with donors by expressing your gratitude sincerely and appropriately can go a long way toward growing the regular or occasional donor into a loyal major and/or planned giver. ■

PUT IT IN WRITING: Crafting Perfect Correspondence

In this digital age, email communication is convenient, quick and efficient. However, for most planned and major gift donors, there's still something special about receiving a well-thought-out card, note or letter in the mail.

What's in a name

The appropriate salutation depends on how well you know the donor. If you are writing a thank-you note to a donor you know on a first-name basis, "Dear Harriet" is appropriate. However, if you are writing to a donor you have never met or do not know well, address your correspondence to "Mrs. Jones." A good rule of thumb is to continue to address older donors formally until they request that you call them by their first names.

Remember to always double-check the spelling of the donor's name and to use the correct title when appropriate. Medical doctors, PhDs, JDs, clergy, married women, single women, etc., may have titles and/or suffixes they expect to see. Be especially wary of the use of the "Ms." salutation with senior women as some will still prefer "Miss."

After you determine your donors' preferences, be sure your donor data reflects this.

Who's it from?

If you won't be writing the letter, a testimonial from a volunteer or an actual donor can be compelling. There is nothing quite as moving as the personal story of a donor's affiliation with the organization told in their own words.

Another alternative is to ask your CEO or board chair to write certain letters, such as a thank-you for significant gifts or an annual appeal mailing. And a letter from a person who has benefited from the organization or institution is a wonderful way to show how gifts are being used.

The eyes have it

Whether it is a letter for a mass mailing or a handwritten thank-you note, any correspondence should be printed or written neatly so it is easy to read. In the case of printed letters, consider the font size and ink color. Is the font large enough and dark enough for older readers to read comfortably? Larger type (at least 12 point) is a must for older eyes.

Handwritten notes can have a powerful impact because they are seen as personal and not another mass communication. Get-well, anniversary, sympathy, holiday, birthday and other cards that are signed and hand addressed will stand out.

Emily Post would approve

Carefully thought-out correspondence to donors is more than just a matter of etiquette or good manners. The cards, notes and letters you send show donors that you care about what you do and the impression you make. And when they know you care, they are more likely to care as a result. ■

SHARPE SOLUTIONS

For every planned giving "problem," we have a solution.

How Do I Find Planned Giving Prospects in My Database?

Sharpe Solution: Comprehensive Data Services

- **Data Integrity** (Identifies missing data)
- **Data Update** (Appends important demographic information)
- **Sharpe Age- and Wealth-Based Matrix** (Customizes a relationship plan)



Learn more.





My favorite things about Thanksgiving are...

Food and the Egg Bowl. –Bob Mims

Being with family and friends. –Cindy Hatler

The gratitude, dredging up old family recipes, football on TV and the adorable way my Midwestern wife calls Thanksgiving dressing "stuffing." –Grant Miller

Turkey and dressing leftovers ... and the good night's sleep I get from the tryptophan. –Barlow Mann

Being with family and friends, sitting around a beautiful table heavily laden with special foods, thanking God for all our blessings since the last Thanksgiving gathering. –Jim Ross

All the conversations and hugs, and hearing what everyone is grateful for. –Debbie Graham

Enjoying good conversations and quality time with people I love the most (especially when we enforce the "no politics" rule)! –Teri Sullivan

An early-morning Turkey Trot followed by fantastic food and drinks, afternoon football and a week's worth of leftovers! –Ashley McHugh

Tips for **THANKING THE DONOR YOU DON'T KNOW**

In addition to teaching the mechanics of gift planning, we are frequently asked about the best ways to thank donors who have made bequest commitments—especially when the notification comes from someone who does not have a long-term relationship with the charity.

Who should say "thank you"?

The person chosen to thank a donor for a bequest commitment will not necessarily be the same person each time. It will usually be the planned giving or development officer, but in other cases, a retired staff member such as a former CEO or a key volunteer may be the best choice to express appreciation.

Call or write?

If others on staff don't know the donor personally or have no prior interaction, a letter prior to a call may be more appropriate.

(If in doubt, write before calling.) If practical, plan a personal visit, but take your cue from the donor and respect their wishes if they decline.

Working with "blind" notifications

Sometimes a donor will choose to notify you of a bequest intention through their attorney. If the donor takes this route, they may wish to remain anonymous while still letting you know the gift will eventually be received.

In these cases, thank their attorney for the notification and then write an appropriate letter of thanks to the donor and ask the attorney to pass it along if they think their client would be receptive. ■

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