

Create a Jewish Legacy
Summary of Bagels & Legacy Panel Discussion
“How our Donors Like (and don’t like) to be Thanked”
Facilitated by Gail Littman, Endowment Director – San Diego Jewish Community Foundation
Panelists: Joe Dorison, Peg Epstein, Seymour Frankel, Susan Goldman, Carol Katz
February 14, 2011 – Springfield Jewish Community Center

Below is a “Cliff Notes” version of a wonderful discussion among our Bagels & Legacy panelists. You will see that, while we didn’t always achieve consensus, there was a strong feeling that the way an organization thanks and recognizes donors has to be an appropriate fit with its culture and style.

Thank you notes

Do:

- Send sincere, handwritten notes with tailored wording that shows you know who the donor is and what the donor did.
- If several notes go to various family members who were part of a joint commitment, word those notes differently.
- Make this a shared task among your Legacy team, Board, and/or committee

OK:

- There was some feeling that an email message is fine if it is sincere and individualized. One point was that you should know the style of communication that works best for the donor. Another suggestion was to include photos, links to multimedia related to Legacy, etc. – if you’re going to use email, make it apparent that it was chosen for a reason, not just to take the “quick” route

Don’t:

- Misspell names
- Thank on a Facebook wall (although this may be appropriate for younger donors)
- Forget to change appropriate sections of a letter being used as a template. For example, forget to change a “Thank you, Charlie, for your ongoing support” to “Thank you, Sue...”

Gifts -To give or not to give:

- There’s a real split on this issue – probably 50/50.
- Whether to give depends on the style and culture of the organization. A small synagogue team said that donors would be offended by a gift. At the nursing home, a nice gift is part of the philanthropic culture.
- The key is to have a standard for your organization that is appropriate to your philanthropic culture, yet flexible based on donors.

Frequency of contact - How do you go about long-term thinking? How many “touches” should organizations seek to have?

Do:

- Thank at least once a year, perhaps on the anniversary of the gift.
- Provide information about the organization and how it is moving forward.

- Make it a “good quality” touch. Consider how you offer to keep donor engaged.
- A personal holiday card is a good opportunity to reflect and connect – sometimes to reconnect. Birthday cards were also suggested.
- Always add a personal note in a computer-generated letter – even just to say “Thank you” or “Nice to see you at _____”

OK:

- To have multiple signers to a letter (but don’t have multiple letters go out at the same time if different people have a role in thanking).
- Sometimes those doing the thanking are volunteers. Realize that time can be an issue

Don’t:

- Overdo or space contacts too closely.

Question: A question was asked about whether organizations clearly doing life-saving work are better positioned than other organizations to secure legacy pledges. The answer was that all the organizations are engaged in very important work – as spiritual or educational “homes” of sorts, and all have the potential to reach out to loyal donors for legacy commitments.

Recognition:

Do:

- Use the legacy incentive check to promote the program. For example, one synagogue sponsored a Kiddush for the entire congregation and featured the legacy donors.
- At a larger event, have a pre-reception for legacy donors. If there’s a distinguished speaker, invite them to meet the speaker before the event.
- Engage donors in an activity in your organization. Invite them to take part in a staff recognition event, to read books to children, to take part in a Shabbat service, etc.
- If children are among the recipients of a donor’s present or future philanthropy, involve them in the thank you. For example, they can make “thank you” cards.
- Make personal visits as appropriate.
- Consider the donors to be an ongoing group.

Don’t:

- As a rule, do not limit events to legacy donors. It’s a missed opportunity to highlight the program and engage new constituents.

Outstanding question – new topic: We need to do more work to figure out how best to engage and thank younger donors (20’s and 30’s) who may not open envelopes, listen to voicemail or pay attention to email. What do we need to know in order to ensure that appropriate thank yous are communicated to younger generations?