



**Dowager Countess of Grantham's
Guide to Stewarding Legacy Donors**



Introductions



Introducing. . . Legacy Society?

Create plan

- Legacy Society
- Stewardship Plan

Discovery

- General Mailing
- Board members and volunteers
- Surveys
- Buck slips in acknowledgment letters



Welcome



Welcome to the Club

- Phone call
- Letter from president
- Welcome packet
- Board member note or call
- Ask for confirmation
- Membership Benefits




Keep in Touch



Keep In Touch

- Update letters
- Annual Event
- Personal notes
- Visits
- Tours
- Holiday or Birthday cards
- Annual phone call




Heritage Society Stewardship Plan (Based Upon Annual Gift)

	January	February	March	April	May	July	September	October	December	Annual Birthday
50k - 25k		Tax Year Update Newsletter	Chair CD Meeting, Personal Invitations to Spring Athletics Event	Alumni Weekend Event Personal Invitation	Student Thank You Letter	End of Fiscal Year Thank You Phone Call	Personal Invitation to Fall Athletics Event	Homecoming Weekend Event Personal Invitation	Planned Giving Annual Report, Holiday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO	Birthday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO
25k -		Tax Year Update Newsletter	Chair CD Meeting, Personal Invitations to Spring Athletics Event	Alumni Weekend Event Personal Invitation	Student Thank You Video	End of Fiscal Year Thank You Phone Call	Personal Invitation to Fall Athletics Event	Homecoming Weekend Event Personal Invitation	Planned Giving Annual Report, Holiday Phone Call from PG Director, Director and AJP, Chairman, Director and Concert Ticket Offering MAGO	Birthday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO
Charitable Gift Annuity	Yearly Account Update Letter	Tax Year Update Newsletter	Chair CD Meeting, Personal Invitations to Spring Athletics Event	Alumni Weekend Event Personal Invitation	Student Thank You Letter	End of Fiscal Year Thank You Phone Call	Personal Invitation to Fall Athletics Event	Homecoming Weekend Event Personal Invitation	Planned Giving Annual Report, Holiday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO	Birthday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO
CR/CD/CRAT	Annual Account Update Letter	Tax Year Update Newsletter	Chair CD Meeting, Personal Invitations to Spring Athletics Event	Alumni Weekend Event Personal Invitation	Student Thank You Video	End of Fiscal Year Thank You Phone Call	Personal Invitation to Fall Athletics Event	Homecoming Weekend Event Personal Invitation	Planned Giving Annual Report, Holiday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO	Birthday Phone Call from PG Director, Director and MAGS, Holiday CR, MAGO



New Heritage Society Membership Stewardship Guidelines (Based on Annual Gift Received)

Annual Gift	Stewardship Activities	Events	Invitations	Personal	Phone	Letter	Form	Long Term/Other
\$500 - \$1000	Phone call from PG Director/Executive Officer and	Letter from President	Thank you letter	Invitation to membership list or class	Thank you phone call from PG Director	Annual Meeting PG Report, Thank You Letter, Personal Invitation to Spring Athletics Event	Long Term Report, PG Director	Heritage Stewardship Plan
\$1,000 - \$2,500	Phone call from PG Director and Director and MAGO and	Letter from President/Chair and Director and MAGO	Thank you letter	Invitation to membership list or class	Thank you phone call from PG Director	Annual Meeting PG Report, Thank You Letter, Personal Invitation to Spring Athletics Event	Long Term Report, PG Director	Heritage Stewardship Plan
\$25,000 - \$50,000	Phone call from PG Director and Director and MAGO and	Letter from President/Chair and Director and MAGO	Thank you video	Invitation to membership list or class	Thank you phone call from PG Director	Annual Meeting PG Report, Thank You Letter, Personal Invitation to Spring Athletics Event	Long Term Report, PG Director	Heritage Stewardship Plan
\$50,000 - \$100,000	Phone call from PG Director and Director and AJP and	Letter from President/Chair and Director and AJP	Thank you video	Invitation to membership list or class	Thank you phone call from PG Director	Annual Meeting PG Report, Thank You Letter, Personal Invitation to Spring Athletics Event	Long Term Report, PG Director	Heritage Stewardship Plan
\$100,000 - \$250,000	Phone call from PG Director and Director and AJP and	Letter from President/Chair and Director and AJP	Thank you video	Invitation to membership list or class	Thank you phone call from PG Director	Annual Meeting PG Report, Thank You Letter, Personal Invitation to Spring Athletics Event	Long Term Report, PG Director	Heritage Stewardship Plan



Recognition




Thank You, Thank You, Thank You

- Annual Report
- Website donor list
- TV/Monitor thank you in lobby
- Pin, pen or other gift
- Certificate
- Newsletter list of new members

