

Getting comfortable with acknowledging memorial gifts

Presented by Virginia Davidson of Little Green Light



About the presenter



Virginia Davidson is a member of LGL's support team and brings her own experiences as a fundraiser to this role. She loves sharing practical ways for fundraisers to be more efficient and effective in their work.

Little Green Light is a cloud-based donor management and fundraising software solution for small to mid-sized nonprofits. Try it free at www.littlegreenlight.com/tryfree



Learning Objectives:

- Understand what makes memorial gift acknowledgments unique from typical acknowledgments
- Know the difference between a memorial gift acknowledgment and a notification letter
- Be able to create a template for each



Two components to acknowledging memorial gifts:

- Acknowledgment letter to the **donor**
- Notification letter to the **family/loved one of the deceased**

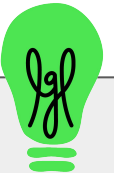


The power of acknowledgments

Building trust

Setting expectations

Laying a foundation



Acknowledgments and memorial gift acknowledgments - how are they different?

Acknowledgments

- Record for the donor
- Fulfills organization's obligation to the IRS

Memorial Gift Acknowledgments

- Same information, but also make sure you recognize this was a memorial gift, and include the name of the deceased.



July 18, 2023

Virginia Davidson

Dear Virginia,

On behalf of the staff, Board of Directors, and everyone at [redacted] thank you for making a [redacted].00 on July 17, 2023. [redacted] dramatic impact on the health and well being of our organization. Please know

for support and for being a part of the [redacted]

*Thank you,
Virginia!*



Example of Memorial Gift Acknowledgment

What to include in the acknowledgment:

- Same details as a typical financial gift, such as gift date and gift amount, in your acknowledgment letter to the donor.
- Include some basic language specifying that the gift is made in memory of someone.

Dear X,

Thank you so much for your donation of \$50 to the Ocean Point Land Trust, dated June 15, 2023. Your contribution in memory of Sarah Jennings will carry Sarah's legacy forward and help protect open space in our community. Thank you for this meaningful gift.

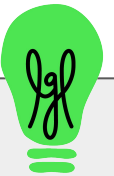
Sincerely, X

No goods or services were received in exchange for this contribution.

Ocean Point Land Trust is a 501(c)(3) non-profit organization, Federal Tax ID: 12-3456789, and your gift is tax-deductible to the extent allowed by law. Please retain this receipt for your records.



Notification letter



Example of Notification Letter

What to include (and not include) in the notification letter:

- When possible, include the contact information of the donor(s)
- Clarify the process for the family so they understand that these gifts have been acknowledged by your organization, and let them know you'll keep them informed of subsequent gifts
- Notification letters to family members should not include gift amounts

Dear X,

Please accept our condolences on the loss of your wife, Sarah. We feel privileged to be able to honor Sarah's memory, and her commitment to land conservation, thanks to donations received in her memory. To date, we have received the following gifts in her memory:

Ernie Villareal Street, City, State, Zip

Louise Douglas Street, City, State, Zip

We have thanked these generous donors on behalf of Ocean Point Land Trust. We are sharing their addresses in case you wish to contact them directly. We will send you additional donor names and addresses periodically, as gifts are received.

Sincerely, X



How to know who should receive the notification?

- Donor may tell you (if you have an online gift form, or a remittance envelope, include fields for them to give you name and address)
- Family/loved ones may notify you to expect memorial gift
- Your organization may have a long-standing relationship with the deceased and their family
- Check the obituary



Best practice suggestion

- Create a generic memorial gift acknowledgment template and a generic notification template
- Label them clearly
- Keep your original templates clean so you can refer back to them



Memorial Gifts - the big picture

- As you set up your process for acknowledging memorial gifts, you may feel intimidated about writing to people who are grieving. It might help to think of your role this way: Your job isn't to console. Instead, you are sharing that their loved one is being remembered in a meaningful, thoughtful way. This is an opportunity to play a positive role in carrying forward someone's legacy and extending kindness to their family and friends during a difficult time.
- One of the most important things to remember when setting up your process is that you typically need to send two different letters after your organization receives a memorial gift: **An acknowledgment letter** to the donor and **a notification letter** to the family of the deceased.



Key Take-aways

- When it comes to memorial gifts, the acknowledgment letter and the notification letter serve two different functions. Both are important.
- Preparing generic templates in advance will save you time and stress as gifts are rolling in
- Sending memorial gift acknowledgements is a tool for donor stewardship and donor retention



Additional resources:

- [Little Green Light's blog](#)
 - For fundraising tips and best practices
- [Little Green Light's Guide to Acknowledging Gifts](#)
 - Best practices for acknowledging financial gifts, in-kind gifts, pledges, soft credits including gifts from donor-advised funds, memorial or honorary gifts, and sponsorships

