

CATHOLIC DEVELOPMENT + QUARTERLY +

An informational DIGEST to guide development personnel in the emerging field of development.

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MEMORIAL GIVING

Development programs in many Catholic institutional environments must almost be dual personality in nature. The same people in the same organization will tell you to "Raise more dollars..." for programs and operations at the same time telling you that "We're always asking people for money!"

One of the best ways in which to educate people how to give is through a Memorial Giving Program. Memorials are perfect types of gifts because they provide for a need to recognize people -- both living and deceased. It can also get people in the habit of giving, lead to endowed gifts and ultimately to large planned gifts.

MOTIVATION AND MARKETING

Think of Memorial Gifts as a special "Gift Option" (see CATHOLIC DEVELOPMENT +*QUARTERLY*+, November, 1987, on "Gift Options") for donors and prospective donors. Memorial gifts would be over and above all other giving programs. Previously, we have advocated educating and allowing people to give in about five or six ways -- not five or six times on the same weekend! Listed below are these five or six ways:

- **REGULARLY** (applies to parishes): Sacrificial giving or offertory.
- **ANNUALLY**: Annual fund, diocesan appeal, alumni phonathon, etc.
- **CAMPAIGN**: Large gifts pledged over three to five years usually for capital needs or endowment.
- **SPECIAL GIFTS**.
- **MEMORIALS**: Gift options, special projects, donor designated gifts or funds, scholarships/tuition assistance, wish lists, etc.
- **CHRISTMAS AND YEAR END GIFTS**: "Season of Giving." (40% of all charitable giving occurs in November and December every year.)
- **PLANNED GIFTS**: Gifts through wills, bequests, income producing gifts for donors, life insurance, etc. The largest, single gift your Catholic institution will ever receive will be a planned gift -- in all likelihood a bequest from a will.

Remember, Stewardship is lifestyle not a method of collection. Many parishes get hung up in defining stewardship.

Memorials represent an opportunity for people to demonstrate their love or devotion to others or to recognize someone special. The majority of Memorial Gifts to your institution will be in honor of someone who has died. You can also promote memorial gifts to less frequent types of recognition: anniversaries, birthdays, first communions, confirmations and weddings.

Memorials, particularly ones that honor or recognize deceased loved ones, are also a means to minister to people who may be grieving over a recent passing. They also provide opportunities to recognize people who have been deceased for months or even years. Memorials represent a classic marketing opportunity because they address a specific need people have to give to recognize those they love or admire.

STEPS TO ESTABLISH A MEMORIAL GIVING PROGRAM

Many Catholic institutions must improve on what might be called a typical Memorial Giving program whereby memorial cards and envelopes are printed and distributed to area funeral homes and that might be the extent of the Memorial Giving program. It is really only the beginning. An effective Memorial Giving program starts with a card design and envelope, but builds upon it. Following these initial steps can make the program successful:

- Request Memorial Giving cards and/or envelopes from other schools, churches and charities to review for ideas and format.
- Design or request a high quality Memorial Giving card/envelope for your institution from your printing company.
- Create a "matching set" of donor/family acknowledgments that are similar in design to the memorial cards so that gifts are acknowledged to both the donor and family members of the deceased.
- Family members want to be made aware of donors who give directly to your Catholic institution, in memory of a loved one, so that they can also send their own thank you notes.
- Visit area funeral homes to personally deliver memorial cards/envelopes and personally visit the directors to seek their input and advice.

Essentially, four specific strategies should be deployed when embarking or enhancing a Memorial Giving program.

STEP/STRATEGY I: TRADITIONAL MEMORIALS.

November is traditionally the month that the Church remembers those that have died, with particular emphasis on All Saints Day and All Souls Day. During the month of October, send your memorial card/envelope with a cover letter explaining the memorial program to your donor base. The cover letter would describe the memorial giving program, ask them to make a gift in tribute to a loved one.

Those receiving the information should also be encouraged to hold on to the memorial card/envelope if they do not plan to use it immediately. The memorial cards and envelopes can be handy and convenient if they do make it a point to file them where they can be easily accessed.

Your cover letter, which is enclosed with a memorial card/envelope, should remind people that they should hold onto the card/envelope to send gifts in memory of the anniversary of loved one's deaths or more importantly and most conveniently to send memorial gifts if they are out of town or unable to attend a funeral for a friend, acquaintance or relative of a friend.

When they send a memorial gift, they are making a direct statement that they either 1) want family members of the deceased to know the care or 2) want to salute your Catholic institution through a memorial gift.

NEWSLETTER.

You should periodically publish in your development newsletter a listing of the names of donors and the names of the deceased (names of donors should be listed following the name of the deceased).

Publish the Memorial Listing when you have a fairly lengthy list that will fairly well dominate the space of one entire page of your newsletter -- much like an annual report would have pages of donor names, so too, would your newsletter have periodic lists of donors and deceased related to memorials.

List the names of the deceased in large, bold letters in the newsletter. Below the name of the deceased, you would list the names of the donors.

Occasionally, include a memorial card/envelope as an enclosure with your newsletter as well as an accompanying article on Memorial Giving. Upon publication of the newsletter, send a copy to the family with a cover letter thanking them for designating your Catholic institution as the beneficiary of gifts in memory of the deceased.

STEP/STRATEGY II: ENDOWED MEMORIAL.

The previous Step/Strategy for Memorial Gifts begins the process of leading donors to larger gifts towards endowment and planned gifts

Perhaps, six to eight months following the publication, prepare a one to two page proposal for the family regarding an "Endowed Memorial" in the name of the deceased loved. Schedule a meeting with the family to present the proposal. Suggest that the earned income (interest) be earmarked for a certain program, department or ministry. Have two or three "back up" concepts in case the first is not appealing to the donor (s). Develop a "naming policy" for endowed memorial gifts with a minimum of \$5,000 for naming a gift. These gifts can be pledged over a period of time and more than one family member can be asked to contribute.

Publicize the gift in your newsletter and other public relations vehicles. You may wish to publicize the gift on the same page or adjoining page with your periodic list of memorial gifts.

The Endowed Memorial would be financially managed with the rest of your endowment, if it exists. Pool the funds for management purposes, but account for Endowed Memorials separately. The \$5,000 minimum greatly assists the management, accounting and tracking of individual Endowed Memorials within your larger endowment.

STEP/STRATEGY III: ANNUAL GIFT TO ENDOWED MEMORIAL.

After and during the time that the initial gift is made to establish an Endowed Memorial, the donors should be reported to on a regular basis and in a face to face format as frequently as possible.

The family members should be invited to make gifts annually to support their Endowed Memorial to encourage its growth and to keep pace with inflation. Their gifts should be acknowledged and highlighted in newsletters, diocesan newspaper, annual report booklet, etc. Use the publicity to motivate others to establish an Endowed Memorial by explaining the process of how an Endowed Memorial can be established in the actual publicity.

ENDOWED MEMORIAL POLICY.

Draft a policy statement on the establishment of Endowed Memorials listing out the process and sequence. The policy statement will actually serve as a proposal and marketing tool for donors in their initial contemplation for the gift.

STEP/STRATEGY III: PLANNED GIFTS TO THE ENDOWED MEMORIAL.

As the donors continue to support and invest in the Endowed Memorial over the years, encourage them to make provision for a large Planned Gift in the future which will be directed toward the Endowed Memorial. A large Planned Gift in the form of a bequest, trust, gift annuity or life insurance can fund the Endowed Memorial substantially.

Use the philanthropic idea of a large charitable foundation as a marketing message -- not many of will have our own foundation, but an endowment/Endowed Memorial in the donor's name or family name can still have the same feeling or impact for the donor. Memorials can be a highly effective tool in attracting large gifts.

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