Many ways to give
Karen Plater, Associate Secretary for Stewardship & Planned Giving
Please type in your questions

- Moderator will read them out on your behalf. We’ll also take question breaks during the presentation and again at the end.
Stewardship is not about giving to a budget but responding to the call of God in our lives with all our gifts – time, treasure, talent.
The economos knew the economia of the owner, the over–all plan for the estate; the owner’s deepest intentions and greatest hopes.

Stewardship invite us to live out the will of God, as revealed in the Scriptures and especially in Jesus.
As stewards of God’s gifts, we have a deep responsibility to use them in ways which follow Jesus’ teachings.
Stewardship

- Donors don’t give their money TO your ministry
- They give THROUGH your ministry to touch the lives of other people
- We need to be good stewards of their gifts
We want you to know, brothers and sisters, about the grace of God that has been granted to the churches of Macedonia.

II Corinthians 8:1
charisto
I thank

charis
grace
When *charis* comes from God to us, Bible translators call it *grace*.

When *charis* goes from us to God, translators call it *gratitude*. 
God gives us grace. We give God gratitude.
Giving and Receiving are so closely related that you can use the same word for both
The Joy of Generosity

II Corinthians 9:7
For if the eagerness is there, the gift is acceptable according to what one has – not according to what one does not have.

II Corinthians 8:12
Many ways to give
Many ways to give

Gifts of Cash
- Offering plate
- Pre-authorized remittance (PAR) /automatic debit/monthly donors
- Digital giving

Planned Gifts
Many ways to give

- People are motivated to give by a compelling mission.

- Tax relief can be a factor when determining how much they can give.
Please type in your questions

- Moderator will read them out on your behalf.
Ron Bremner

- Ron grew up in Toronto, son of faithful Presbyterians
- A dermatologist in Saskatoon
- Married to Muriel for 62 years and had two children
- Taught pro bono, 8 hrs/wk for 17 yrs at U of S
- Taught Sunday School and served as an elder at St. Andrew’s, Saskatoon
- Died October 21st, 2011
Wanted to give $1 million
“If I had a million dollars…”

1. $50,000 initial gift
2. $300,000 Donor Advised Fund
3. $500,000 life insurance
4. $150,000 bequest

5. $1,000,000

1. $28,000
2. $168,000
3. $32,680
4. $84,000

5. $312,000 total

Gifts to set up endowment

Net cost after tax credits
Gift of Cash

- Tax credit based on face amount
- 75% of net income reportable in any one year
- Carry forward of an additional 5 years
- Spouses can split donation receipts
Gift of Cash

- Section 118.1 of the Federal Income Tax Act: provides a tax credit for donations made to qualified donees
  - 5% on the first $200 and 29% on donations above that amount for people with income less than $200,000 in 2016.
Gift of Cash

- **Example** A donor in Ontario with taxable income of $70,000 makes a donation of $3,000.

**Federal tax credit**
- $30 (15% on the first $200)
- $812 (29% of $2,800)

**Provincial tax credit**
- $20 (10% on the first $200)
- $588 (21% on the remaining $2,800)

$1,450 is their total tax credit.
$1,550 is the cost of their donation.
Gift of Cash

Amended legislation

- In 2016 subsection 118.1(3) was amended to create a tax credit rate of 33% for donations above the first $200, when an individual's taxable income exceeds the top personal tax bracket of 33%: $200,000 for 2016 and $202,800 for 2017.
Gift of Cash

As a result of this amendment, the credit is calculated as the total of the following:

- 15% on the first $200 of total donations
- 33% on whichever of the following amounts is less:
  - the amount of the donations for the year above the first $200
  - the amount of the taxable income that is over $200,000 (2016) or $202,800 (2017)
- 29% on the total donations for the year above the first $200, which are not eligible for the 33% rate above
Gift of Cash

- **Example** A donor in Ontario with taxable income of $215,000 makes a donation of $20,000.

**Federal charitable donation tax credit**
- $30 (15% on the first $200)
- $4,950 (33% of $15,000) which is the amount by which their taxable income exceeds $200,000 ($15,000)
- $1,392 (29% of $4,800) which is the amount over $200 not eligible for the 33% rate ($19,800 – $15,000)

**Total Federal Tax Credit:** $6,372
Gift of Cash

Provincial tax credit (ON)

• $20 (10% on the first $200)
• $4,158 (21% on the remaining $19,800)
• $4,178 is their total provincial tax credit.

$6,372 + 4,178 = $10,550, the total tax credit for 2016.

Cost of donation is $9,450
Offering Plate
Please type in your questions

- Moderator will read them out on your behalf.
Pre-Authorized Remittance (PAR)

- $0.50/donor/month – max of $45 per congregation
- Easy to set up and cancel
- Administered by United Church of Canada
- https://presbyterian.ca/stewardship/par/
Online Giving

Next services: Sunday, 11am and 5pm at 630 Spadina Ave, Toronto

Food drive begins October 21st

Help stock our shelves! For the first week of our food drive we encourage bringing a shelf-stable breakfast item.

See list of suggested donations and join the team here.
Online Giving

Knox Waterloo Presbyterian Church
A caring Christian fellowship committed to God in worship, growth and service.

Worship Services
Sunday worship service at 10am.
Sunday School Program and Child Care provided

Order of Service
November 11, 2018
November 4, 2018

This week at Knox
November 11 - 17, 2018
November 4 - 10, 2018

Knox Posts
Being Kind in a Time of Rage
Brooke's Generosity Blog

Sunday, November 11th
100 years ago on November 11th at
<table>
<thead>
<tr>
<th>eGiving Solution</th>
<th>Tithe.ly PDF</th>
<th>Push Pay PDF</th>
<th>iATS PDF</th>
<th>Pay Pal PDF</th>
<th>Canada Helps PDF</th>
<th>First Data PDF</th>
<th>Moneris PDF</th>
<th>Square Reader PDF</th>
<th>Stripe PDF</th>
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<td>$9 - Optional Text Service</td>
<td>$99 Includes Text &amp; Premium eChurch Mobile Content App</td>
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<td>$0</td>
<td>$20+</td>
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<td>2.5% +/- + 0.35</td>
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<td>4%</td>
<td>1.65% + 0.35</td>
<td>$2.5% +/- + 0.75 interact</td>
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<td>3-5 days</td>
<td>By 10th for current month</td>
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</tbody>
</table>

The Presbyterian Church in Canada - used with kind permission of the Free Methodist Church in Canada
Canadahelps: Basic account

- **Fees**
  - 4% flat rate on one-time donations
  - 3.5% flat rate on monthly / recurring donations (PAR)
  - No additional admin or other transaction fees
  - 3–5 business days to approve and set up your account
CanadaHelps: Full fundraising account

- Customizable donation form and pages + donate button on your website

- Fees
  - One-time and monthly donations – 3.5%: $50.00 would yield $48.25
  - Peer-to-Peer social fundraising – 4.9%
  - Event/Ticket sales – 4.5%
  - Accept debit bank / credit card information
  - No additional administration or costs per transaction
  - They issue the tax receipt and transfer funds monthly

- 3–5 business days to approve and set up your account
The PCC’s Basic Account

THE PRESBYTERIAN CHURCH IN CANADA

Registered Name: THE PRESBYTERIAN CHURCH IN CANADA

Business Number: 107856619RR0001

Add to my Favourite Charities

Donate Now

The Presbyterian Church in Canada is a national Christian organization representing 150,000 people in over 840 congregations and ministries across Canada. Presbyterian congregations and individuals work together with the national office to develop, equip and support congregations; share in ministries that support Indigenous, refugee and inner-city communities; equip and prepare people to become ministers through...
A Variety of Mission and Ministry Accounts

Presbyterian World Service & Development, the PCC’s relief and development agency, receives gifts to help vulnerable people overcome poverty through sustainable development programs addressing food security, livelihoods, health, human rights, refugees. PWS&D also responds to emergency situations caused by crisis such as earthquake, famine, tsunami and conflict.

Donate To This Charity

Donate Now

Canadian Ministries
International Ministries
Mission Priority Funds
Presbyterian Archives
Presbyterians Sharing
Presbyterian World Service & Development

Include a Message for This Charity

1200 characters remaining

Dedicate This Donation
Give in honour or in memory of someone special
tithe.ly – Basic

- Uses a Tithe.ly page with your congregation’s name prominently featured
- It’s Free and Includes Mobile Tithe.ly App; Kiosk; Website donation button

- Easy to approve and set up – they’ll walk you through

- Credit Card and Visa Debit only (no access to Canadian bank accounts for debit)

- Fees (in Canadian dollars)
  - Special PCC rate of 2.75% + $0.30 per transaction
  - Text Giving is optional for an additional $9 per month (special PCC rate for 3 months – $19 after this period)
tithe.ly – Customized

- Your church name and look is featured
  - Includes complete giving suite: mobile, text, kiosk, web-button, and monthly giving (PAR)
  - Custom branding, layout and design
  - + 12 other features

- Fees for the App (in US Dollars) are
  - $149 to set up the App (one time only)
  - $59 per month

- Fees for giving transactions (in Canadian Dollars) are
  - Special PCC rate of 2.75% + $0.30 per transaction

Full support from Tithe.ly is provided 24/7 with both the customized app and digital giving tools
Please type in your questions

- Moderator will read them out on your behalf.
Planned giving

- Stocks, bonds, property
- Charitable gift annuities
- Estate gifts
- Memorials
1. What would you do if you received an undesignated bequest for $200,000?

2. You need clear policies and procedures for how planned gifts will be received, invested and used to enhance the life and mission of your ministry.
A Basic Rule of Thumb

- **Do not** use planned gifts to “top up” the deficit in your annual budget or just “save for a rainy day”

- Instead, use planned gifts to expand your ministry/mission beyond what could be done through the annual budget or other fundraising appeals.

- Otherwise, planned gifts will undermine the generosity of annual gifts and foster a survival mindset that is concerned at best with maintaining the status quo.
Gifts of Securities

Boike and Dikke Deumer

- Emigrated from Holland after WWII.
- Mr. Deumer established his own steel fabricating company.
- Members of Nassagawaya Church near Campbellville, Ontario.
- Their gift of stock paid for the painting of the sanctuary.
Gift of Securities

- Publicly traded on a recognized stock exchange – the capital gain is taxable to donor unless given directly to a charity
- Tax credit based on closing market value the day the PCC broker receives the stock
- Amount of contribution reportable in one year is 75% of net income
- Carry forward of an additional 5 years
Ms. Smith, wants to gift 1000 shares of ABC stock to her congregation with a market value of $50 a share; she bought them at a cost of $20 a share (they’ve appreciated by $30 per share). Should she sell and donate the shares or donate directly?

<table>
<thead>
<tr>
<th></th>
<th>Sells Shares</th>
<th>Donates Shares</th>
</tr>
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<tbody>
<tr>
<td>1. Value of the shares</td>
<td>$50,000</td>
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<tr>
<td>2. Original purchase price</td>
<td>$20,000</td>
<td>$20,000</td>
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<tr>
<td>3. Capital gain</td>
<td>$30,000</td>
<td>$30,000</td>
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<tr>
<td><strong>4. Taxable gain (line 3 x 50%)</strong></td>
<td><strong>$15,000</strong></td>
<td><strong>$0</strong></td>
</tr>
<tr>
<td>5. Donation receipt</td>
<td>$50,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>6. Donation tax credit (46%)</td>
<td>$23,000</td>
<td>$23,000</td>
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<tr>
<td><strong>7. Tax on capital gain</strong></td>
<td><strong>$6,900</strong></td>
<td><strong>$0</strong></td>
</tr>
<tr>
<td>(4 x 46%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Net tax savings</td>
<td>$16,100</td>
<td>$23,000</td>
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<tr>
<td>(line 6 – line 7)</td>
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<tr>
<td><strong>9. Cost to make the gift</strong></td>
<td><strong>$33,900</strong></td>
<td><strong>$27,000</strong></td>
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<tr>
<td>(line 1-line 8)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Gift of Life Insurance

- Take out a new policy naming the church as the beneficiary and owner.
- Give a policy you presently own to the church by naming it as owner and beneficiary.
- Name the church as one of the beneficiaries of an existing policy.
- Give directly to your congregation
50% of Canadians do not have a legal will.

If you die “intestate” (without a will), the government decides how to distribute the assets God has entrusted to you.
Wills and Bequests

- You can give a specific amount or a percentage of your estate or the residue of your estate

  "I leave to 10% of my estate."

  or

  "I leave the residual amount of my estate"

You can change your present will by adding a clause or **codicil**.
Language is important. Don’t be too restrictive.

Use appreciated securities for tax benefits

Talk to church trustees, professional advisors, heirs & executor about your plans
Annuities

- Giollo Kelly bought an annuity: $10,000 for PCBC in 1994
- When she died fifteen years later, she had received nearly $11,000 in total payments (87% tax-free)
- Left a legacy of nearly $7,500 for PCBC
Annuity Fast Facts

- Minimum gift: $5000
- Minimum age: 60
- Can be Joint (life-long income for you and your spouse or sibling) or Single (income for you as long as you live)
- When you die, residual goes to church
- Charitable tax receipt for minimum of 20% of the total annuity (% increases the older you are when you acquire annuity and the size of the annuity.)
Promoting Annuities

https://presbyterian.ca/plannedgiving/pg-video/
### Sample Quote

**Age 84 Single annuity Female, 2017**

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<tr>
<th>Amount</th>
<th>Receipt</th>
<th>Annual Income</th>
<th>Rate</th>
<th>Tax Status</th>
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<td>$3,550</td>
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<td>7.10%</td>
<td>100% tax-free</td>
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</table>
You don’t have to be rich

✓ The strategies Ron and Muriel Bremner used are available to us all.
✓ By pooling our wealth together for a common purpose we can do so much more and leave a lasting legacy!
Promotion Material

https://presbyterian.ca/plannedgiving/ways-to-give/

What will your legacy be?

We are called to live a generous life, to be faithful stewards of the gifts that God has given to us. Over time, generosity becomes a habit – and then a lifestyle. There are many ways to leave a legacy, including planned gifts.

Over 100 years ago, Sunday School teacher Isabel Walton gifted her farm in Scarborough, ON to The Presbyterian Church in Canada. It grew to become Walton Place, housing Westminster Church, a 104 unit apartment complex and the Isabella Walton Childcare Centre.

A generous bequest to Presbyterians Sharing and Presbyterian World Service & Development from Marion and Bruce Berry of Thornhill Presbyterian Church continues to have a lasting impact in Canada and throughout the world.

Dr. Simon Wing's gift of stock commissioned a communion table for Montreal Chinese Presbyterian Church in memory of his father, James Wing, and the thousands of Chinese immigrants forced to pay the head tax in Canada.

Helen Watson's bequest to St. David's Church in Halifax established the Watson Endowment Fund, which has disbursed over $110,000 for a variety of ministries in Nova Scotia.

We don't have to be millionaires to leave a legacy. A gift of any size, given in faith and entrusted to God, is a seed that grows. Congregations and ministries across our denomination have seen generosity bring life to vital new programs. People have been blessed. Congregations have been strengthened. And seeds of hope have been planted for generations to come.

Planting seeds of hope, for generations to come.

You can give a gift that will change lives today and grow the mission of the church for generations to come!

Planned gifts can be made through:

- Gifts of Cash
- Wills and bequests
- Life insurance
- Gift annuities
- Publicly traded securities
- Gifts of real estate
- Charitable remainder trusts

Planned Gifts:

- Are usually used to fund long-term ministry goals
- Often have tax benefits

To learn how a bequest, gift of stock, gift annuity or other planned gift can leave a lasting legacy, please contact:

Stewardship & Planned Giving
The Presbyterian Church in Canada
50 Wynford Dr.
Toronto, ON M3C 1J7
(416) 441-1111 or 1-800-619-7301
plannedgiving@presbyterian.ca
Promotion Material

- https://presbyterian.ca/plannedgiving/ways-to-give/

**Legacy in Your Will**

*Gifts with Impact*

A *charitable bequest* is a direction in your will that leaves one or more of the assets in your estate to a charity. A gift in your will is a meaningful way to support your congregation or The Presbyterian Church in Canada, while providing your estate with significant tax savings.

**Charitable Gift Annuities**

*Gifts with Impact*

A *charitable gift annuity* is one of the best investments and most impactful gifts you can make. If you are 60 years of age or older, The Presbyterian Church in Canada’s gift annuities allow you to give a significant gift to your congregation or a PCC ministry that is important to you and receive a tax receipt and guaranteed income for life, at a fixed rate.

**Life Insurance**

*Gifts with Impact*

A gift of *Life Insurance* is an easy way to leave a significant gift to a ministry that you care deeply about, for a relatively small financial outlay. It can be a creative way to make a meaningful gift that you didn’t think was possible, through either a new or existing policy.
Promotion Material

- [https://presbyterian.ca/plannedgiving/ways-to-give/](https://presbyterian.ca/plannedgiving/ways-to-give/)

Life Beneficiary Gifts

*Gifts that Leave a Legacy*

By naming your congregation or The Presbyterian Church in Canada as the beneficiary of your Registered Retirement Savings Plan (RRSP), Registered Retirement Income Fund (RRIF), Tax-Free Savings Account (TFSA) or life insurance policy, you can provide a substantial future gift to a ministry important to you, while reducing the taxes payable by your estate.

Publicly Traded Securities

*Gifts with Impact*

When you transfer publicly traded securities—shares, bonds, or mutual funds—to a registered charity, you will not pay tax on the capital gain. Because you also qualify for a charitable tax receipt based on the asset’s fair market value, the net cost of a gift of securities may be less than a gift of an equivalent amount of cash. This is a great way to make a gift to your congregation or The Presbyterian Church in Canada.
Thank-you!
IMPACT OF THANK YOU

People will give 40% more if thanked and acknowledged

Without timely, meaningful and sincere thank yous and detailed information on the impact their donations, charitable organizations lose 60% of annual givings from donors within a one year period. Overtime this drops to 80%-90%.
Thank people for their giving

- Thank you note with statements
- Thank people in a variety of ways – by letter, phone, events
- Acknowledge memorial gifts
- Throw a party to celebrate
- Be positive and encouraging
Give regular feedback

- Report progress toward goals
- Use visual ways of reporting
- Provide regular updates via newsletter or e-news