No Benefits Attached: Fundraising Strategies Beyond Membership
Additional Resources

Society Specific Pin Vendor – Pinmart.com
$2.10 each, includes design set-up and shipping
In this order we had them design three pins: Legacy (Q.100, Freedom & Unity (Q.100, and our 1838 Society(Q.500)

Circle Recognition and Privileges

Legacy Circle
When you commit to a planned gift, you become a part of the VHS planned giving society, the Legacy Circle. You will be among the first to learn about new exhibitions, programs, and events at the Museum and will be invited to VIP events and donor receptions. With documentation of your gift intention—revocable or irrevocable—you also will be recognized as a donor to our Legacy Circle, which recognizes those committed to preserving Vermont's shared legacy for future generations.

Recognition Summary
- Public recognition on the Legacy Circle donor panel at the Museum in Montpelier and the History Center in Barre, as well as listing in the annual report.
- Personal behind-the-scenes tours for family and friends plus opportunities to meet with visiting historians, authors, and lecturers.
- Invitations to exclusive events such as the Freedom & Unity Luncheon
- Subscription to the semi-annual Vermont History Journal, “History Connections” newsletter, and monthly e-newsletter, “History Happenings.”
- A Vermont Historical Society Legacy Circle pin.

1838 Society - Lifetime Giving Circle
The Vermont Historical Society's 1838 Circle, named in honor of the organizations founding year, recognizes loyal donors who contribute each year. Individuals, families, and organizations become members based on their outright, cumulative giving of over $5,000 to the Vermont Historical Society. Cumulative giving is calculated based on gifts received through the fiscal year ending June 30, and totals include employer matching gifts.

Qualifying gifts include: cash, securities, certain real estate and gifts-in-kind, as well as irrevocable deferred gifts.

Members of the 1838 Circle are among a timeless cadre of philanthropists who envision a future of infinite opportunity for the Historical Society. The 1838 Circle recognizes the generous individuals, families, and organizations who continue to carry forward the community effort that created VHS.
1838 Society Levels:
$100,000 +  Maple  $10,000 - $24,999  Ash
$50,000 - $99,999  Oak  $5,000 - $9,999  Beech
$25,000 - $49,999  Birch

Recognition Summary

- An opportunity to support a vital cultural resource and to preserve Vermont history now and for future generations.
- Permanent public recognition on the 1838 Society donor panel at the Museum in Montpelier and the History Center in Barre, as well as listing in the annual report.
- Personal behind-the-scenes tours for family and friends plus opportunities to meet with visiting historians, authors, and lecturers.
- Invitations to exclusive events such as the Freedom & Unity Luncheon.
- Welcome Package
- Society-specific lapel pin

Freedom & Unity Circle - Leadership Giving Society
The Freedom & Unity Circle celebrates and recognizes the commitment and generosity of individuals, families, and organizations who contribute at a leadership level. Membership in the Freedom & Unity Circle begins with an unrestricted pledge or cash contribution of $1,000 or more and brings with it a full year of recognition. These gifts provide critical immediate-use funds for the Museum’s access programs, educational initiatives, exhibit support, and areas of greatest need.

Freedom & Unity Circle Levels
$25,000 +  Visionary of Vermont History
$10,000 - $24,999  Steward of Vermont History
$5,000 - $9,999  Ambassador of Vermont History
$2,500 - $4,999  Curator of Vermont History
$1,000 - $2,499  Preservationist of Vermont History

Recognition Summary:

- An opportunity to support a vital cultural resource and to preserve Vermont history now and for future generations.
- Complimentary Principal membership privileges
- Year-long public recognition on the Freedom & Unity Circle donor panel at the Museum in Montpelier and the History Center in Barre, as well as listing in the annual report.
- Personal behind-the-scenes tours for family and friends plus opportunities to meet with visiting historians, authors, and lecturers.
- Invitations to exclusive events such as the Freedom & Unity Luncheon.
- Society-specific lapel pin
Dear «Salutation»,

As a close friend of the Vermont Historical Society, thank you for investing in our work to engage both Vermonters and “Vermonters at heart” in an exploration of our state’s rich history. In appreciation of your commitment to the Vermont Historical Society, I am writing to inform you of our new donor circle, the 1838 Society. Named in honor of the organization’s founding year, the 1838 Society recognizes loyal individuals, families, and organizations based on their lifetime giving of $5,000 or more to the Vermont Historical Society.

Our records show that you have given a total of «Lifetime_Giving» over the course of your lifetime to the Vermont Historical Society, which qualifies for recognition at the «M_1838_Society_Level» level of the 1838 Society.

As an 1838 Society member, you will receive:
- Permanent public recognition on the 1838 Society donor panel at the Museum in Montpelier, as well as listing in the annual report.
- Personal behind-the-scenes tours for family and friends, plus opportunities to meet with visiting historians, authors, and lecturers.
- Invitations to exclusive events, such as the Freedom & Unity Luncheon.
- Society-specific lapel pin

Thanks to you, we can continue to preserve the past, inform the present, and promote Vermont’s shared legacy for future generations. Please fill out and return the enclosed form indicating how you would like to be listed in the 1838 Society. If you have any questions, feel free to contact me at (802) 479-8525 or kate.olney@vermonthistory.org.

Warmest Regards,

Kate Olney
Director of Development & Community Relations

P.S. Save the date for Friday, October 25, 2019 and join us for a special unveiling of the 1838 Society donor panel at the Vermont History Museum! We’ll celebrate your lifelong commitment to the Vermont Historical Society, welcome Ceres II into her new exhibit space, and enjoy new content and interactives in the Museum’s permanent exhibit, Freedom & Unity: One Ideal, Many Stories.
1838 Society Recognition Form

Name __________________________________________  Date _________________________
Address _______________________________________________________________________
City, State, Zip________________________________________________________________
Phone __________________________________  Email ________________________________

Donor Recognition Choices:

□ I/we wish to remain anonymous and do not want to be acknowledged in public.
□ I/we would like to be acknowledged as a member of the 1838 Society with the following wording:
Name of Individual(s) or Family Name_______________________________________________

Signature ____________________________________________  Date _____________________

Please return this form to Kate Olney:   Vermont Historical Society
Office of Development
60 Washington St Ste 1
Barre, Vermont 05641-4209

Legacy Circle Letter

Dear Mr. and Mrs. Doe,

Because you are a close friend of the Vermont Historical Society, I would like to thank you for helping us to engage both Vermonters and “Vermonters at heart” in the exploration of our state’s rich heritage. We have been preserving Vermont’s heritage since 1838 and plan to do so for several hundred more years.

Our records show that, at one point, you demonstrated your dedication to Vermont by naming the Vermont Historical Society in your will or estate plan. We would like to honor your commitment by including you in the Vermont Historical Society Legacy Circle, if you wish.
As a Legacy Circle member, you’ll receive:

- Public recognition on the Legacy Circle donor panel at the Museum in Montpelier and the History Center in Barre, as well as listing in the annual report.
- Personal behind-the-scenes tours for family and friends plus opportunities to meet with visiting historians, authors, and lecturers.
- Invitations to exclusive events such as the Freedom & Unity Luncheon
- Subscription to the semi-annual *Vermont History Journal*, “History Connections” newsletter, and monthly e-newsletter, “History Happenings.”
- A Vermont Historical Society Legacy Circle pin.

If you are still planning to make a planned gift provision to VHS, thank you! Your legacy will live on, through the traditions, values and wisdom of generations of Vermonters. Please fill out and return the enclosed Letter of Intent form indicating how you would like to be listed in the Legacy Circle.

If your estate plans have changed, please contact Kate Olney, Director of Development at (802) 479-8525 or kate.olney@vermonthistory.org. Please consult with your attorney or financial advisor to ensure that the option you choose is the best for you.

Sincerely,

Steve Perkins
Executive Director

P.S. Thank you for investing in the future of Vermont’s past.

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**Legacy Letter of Intent Form**

- □ Yes! I have included the Vermont Historical Society in my estate plans.

  Name _____________________________ Date __________________

  Address ______________________________________________________________________

  City, State Zip __________________________________________________________________

  Phone ___________________________ Email _______________________________

**Type of gift:**

- □ Will / Living Trust
- □ IRA / Retirement Account
- □ Bank, Brokerage, or Other Financial Account
☐ Charitable Trust
☐ Other (please specify)
___________________________________________________________

My future gift:

☐ Is a percentage of my estate and is worth approximately: $______________
☐ Is in the specific amount of: $ ______________
☐ I wish to keep the value of my future gift confidential.
☐ My future gift is designated to support:
  o Where it is most needed at the discretion of VHS Executive Leadership
  o The Endowment Fund
  o Specific Program (please specify)
___________________________________________________________

Donor Recognition choices:

☐ I/we wish to remain anonymous and do not want this gift acknowledged in public.
☐ I/we would like to be acknowledged as a member of the Legacy Circle with the following wording:
Name of Individual(s) or family name
_____________________________________________________
Signature ____________________________________________  Date ____________________

Please return this form to Kate Olney: Vermont Historical Society
60 Washington Street, Suite 1
Barre, Vermont 05641