

An Invitation to Join...  
**The Heritage Society  
of the  
Michigan Historic Preservation Network**



**Heritage Society Information and Pledge Packet**

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**Executive Director: Nancy Finegood**

**September 2011**

# The Heritage Society

## Purpose

The Heritage Society of the Michigan Historic Preservation Network (MHPN) recognizes donors who provide the organization with regular financial support. Established on November 19, 1999 the “inaugural” group of donors has grown over the years. Their support is essential to our not-for-profit organization because it can be designated for anything from basic operational support – i.e. salaries, rent, etc., to gifts for specific programs – i.e. the annual statewide preservation conference or the fall benefit.

## Recognition levels

The MHPN invites you to consider making a three-year pledge with the following giving levels in mind:

|            |                              |   |
|------------|------------------------------|---|
| Copper -   | \$3,000-7,499 total pledge   | \$1,000-2,499 paid in each of 3 years   |
| Bronze -   | \$7,500-14,999 total pledge  | \$2,500-4,999 paid in each of 3 years   |
| Crystal -  | \$15,000-29,999 total pledge | \$5,000-9,999 paid in each of 3 years   |
| Silver -   | \$30,000-44,999 total pledge | \$10,000-14,999 paid in each of 3 years |
| Gold -     | \$45,000-59,999 total pledge | \$15,000-19,999 paid in each of 3 years |
| Diamond -  | \$60,000-74,999 total pledge | \$20,000-24,999 paid in each of 3 years |
| Platinum - | \$75,000-99,999 total pledge | \$25,000-33,333 paid in each of 3 years |
| Emerald -  | \$100,000 total pledge       | \$33,334 paid in each of 3 years        |

## Your Gift

Your gift to the MHPN can take several forms. Each must be a current gift, however, rather than one realized in the future through your estate plans. (For comprehensive information about giving to the MHPN, please see the guides titled “Ways of Giving” and “Making a Charitable Bequest.”) Four of the most common ways to make a current gift to fulfill a Heritage Society commitment include:

- Cash – We always are appreciative of cash gifts for the undesignated use of the MHPN. Though often put to unglamorous uses – i.e. buying a new fax machine – such gifts are our mainstay. However, we appreciate cash gifts designated for specific uses – i.e. support of the annual conference. We also wish to clarify that you cash gifts may be designated for investment in the MHPN’s endowments, the interest of which supports our activities.
- In-kind and purchased goods and services are welcome when the goods and services have a “related use” for the MHPN. In-kind goods and services are those you provide through your own work, business, or profession. The value you assign to them must be the same as for any other consumer and be documented for the MHPN on your letterhead or with a receipt that makes clear you are giving them as a donation.

Purchased goods and services, on the other hand, are those you buy for the MHPN, their value documented with purchase receipts.

- **Marketable securities** – The transfer of marketable securities to the MHPN makes it possible to provide an important gift with tax benefits for you. Your gift generally qualifies for the income tax deduction associated with charitable gifts. And when appreciated securities are given to the MHPN, you not only likely will qualify for the income tax deduction, but there is no tax on your gain even though your “profit” is counted as part of your charitable deduction. There are three methods of making your stock donation to the MHPN: by hand, by mail, and by electronic wire transfer.
  - If you deliver stock by hand to the MHPN, you must sign a separate stock power to indicate your release of the stock. Your signature on the stock power form must be exactly as it is recorded on the stock certificate.
  - Or, if delivering stock to the MHPN by mail, send the stock certificates and stock powers in separate envelopes; the stock certificates should be sent by registered or certified mail, return receipt requested. A separate stock power is needed for each individual stock certificate, with each stock power signed exactly as the name reads on the certificate.
  - Or, finally, you can make a wire transfer of securities to the MHPN’s account at EdwardJones in Brighton, Michigan: DTC #0057, Account #330-09611-1-1, Michigan Historic Preservation Network Federal Tax ID #38-2878515. Transfers should indicate they are “For the credit of the account of the Michigan Historic Preservation Network.” If your broker has a question, have him or her call EdwardJones at (810) 225-1362 and ask for William E. Gartley in the Brighton Office.

#### Choosing the Designation of Your Gift:

The MHPN currently has ten areas toward which you may indicate your Heritage Society commitment should be applied. You may indicate how you would like your gift distributed to one, or more than one, of the following designations. Designations and amounts can be noted on the pledge form included at the end of this guide.

#### *Annual Statewide Preservation Conference –*

The first Annual Statewide Preservation Conference took place in 1981, constituting the organizational meeting of the MHPN in the year it was founded. The conference has grown to be the largest gathering each year of Michigan

preservationists. A benefit of being a donor is that you get to choose to what component of the conference you would like your name assigned. To accommodate a changing array of educational, social, celebration, and networking activities at each year's conference, you will be asked by conference organizers to choose a designation from that year's giving opportunities list. More than 15,000 conference brochures are distributed each year and include recognition of our contributors. The brochure's information, if not its entire text, is picked up on the MHPN website and on the websites and listservs of our partners. The conference is an excellent means by which your support can be recognized broadly around Michigan.

#### *Annual Fall Benefit –*

The first Fall Benefit was held in 1995 and since then has evolved into a gala evening held each year at a location of architectural interest and excellence. A benefit of being a donor is that you get to choose to what component of the Benefit you would like your name assigned. To accommodate a changing array of activities at each Benefit, you will be asked by benefit organizers to choose a designation from that year's giving opportunities list. More than 5,000 benefit invitations are distributed each year and include recognition of the event's donors; website and listserv coverage by the MHPN and our partners is extensive. The Benefit provides an excellent means of recognizing your support.

#### *Partners for Sacred Places in Michigan –*

As a donor, you are invited to consider supporting the MHPN's New Dollars/New Partners program. The MHPN is collaborating with the Michigan Council for Arts and Cultural Affairs, the Lilly Foundation, the Kellogg Foundation, The Richard H. Driehaus Foundation, and many others on this Partners program to help Michigan's religious congregations preserve and maintain their historic houses of worship. Your gift can support anything from training to hands-on experiences for participants.

#### *A. Phillip Randolph Career and Technical Center Program -*

Based at Historic Fort Wayne, the Randolph Center Program provides Detroit area high school students hands-on training in traditional building techniques important in the conservation of historic properties. The Program offers skills that are in demand as developers as well as individual property owners seek to restore and reuse the historic architecture that makes Michigan's older urban and suburban areas unique, economically viable, and marketable. As a donor you can provide underwriting for the program, pay skilled instructors, provide work supplies, or offer scholarships that allow the students to participate in programs that complement their vocational training. Other such programs are getting established in Michigan. If the concept interests you, ask about them as you look at this giving opportunity.

### *Advocacy and Outreach –*

The MHPN hired its first Field Representative in 2006 and, in 2008, added a second field position. Both are co-funded with the National Trust for Historic Preservation, with the original representative focused on preservation activities in Southeast Michigan, and the more recently hired professional focused on Greater Michigan. Both are tremendous assets to the MHPN. From working one-on-one with communities facing preservation challenges, to staffing regional offices and handling questions, to testifying at public hearings, to producing a constant stream of written communications – i.e. press releases, newsletter articles, web content, award nominations and scripts – both Field Representatives strengthen preservation in Michigan. Your financial support will be designated to keep their advocacy and outreach available. In the future, it may help support additional Field Representatives.

### *Revolving Fund -*

The MHPN Revolving Fund is a new 2010 program designed to provide much-needed dollars to small projects. Simply put, a revolving fund is seeded with dollars, disperses those dollars for carefully defined uses such as the rehabilitation of historic properties, and then has those dollars returned after projects are complete, ideally with sufficient interest to allow the fund to keep up with inflation. The beauty is that the terms of financing provided by revolving funds are generous, meant more to foster success of its projects than to fulfill some prescribed rate of growth. Your gift to the Revolving Fund will assure that it becomes a successful means by which small preservation projects in Michigan can be assisted.

### *Endowment Support –*

The establishment of the first endowment fund in 1991 marked a turning point in the development of the MHPN. Having the fund made the clear statement that after uninterrupted service since 1981, the MHPN was taking steps to assure its own future with a dependable source of funding that was under its control and invested wisely. As a donor, you can support the MHPN's endowment fundraising, the interest from which may now be used to fund anything from operations, to scholarships, to programming.

### *Annual Year-End Gift Appeal –*

The MHPN carried out its first Annual Year-End Gift Appeal in 1991 and has continued the tradition since then. The dollars received are like holiday presents, allowing the Network to close out the old calendar year and begin the new in a solid financial position.

### *Special Activities and Projects –*

The MHPN maintains a list of changing giving opportunities, one of which may appeal to you. It might be a one-time gift needed to hire a person who archives our records and transfers them to our designated repository at the University of Michigan's Bentley Historical Library. It might be a donation to cover a recurring expense to have a full audit of the MHPN's financial condition so we are able to approach corporations and foundations for grants. It may be a contribution to address the significant expense associated with preparing a statewide analysis of the economic impact of historic preservation, or the smaller fees associated with getting our website regularly updated or an issue of our hardcopy newsletter printed and mailed. If you can see from these examples or anticipate a need you would like to address, please talk with us.

### *And not to be forgotten: General Operational Support –*

The goal all our earliest fundraising efforts in the 1990s was to call upon those closest to the organization to provide support to assure its ongoing operational health. While giving to operations is little celebrated – there is not a round of applause when a new piece of software is purchased – those who are close to a not-for-profit well know it is hard to be welcoming or creative when basic needs are left unmet. Please do not overlook the possibility of giving to operations.

### Additional Benefits for Society Members

In addition to the specific benefits that accrue to gifts designated to the opportunities discussed above, Heritage Society members all receive the following:

- Network membership as an individual, organization, or in the Historic Resource Council.
- A personal copy of the Annual Report detailing the accomplishments of the MHPN for the year, and including specific recognition of Heritage Society membership.
- Listing in the annual resource directory of the Historic Resource Council, if desired.
- Two complimentary tickets to the Annual Fall Benefit, whether or not your gift is designated to that opportunity.

### Questions

For questions about the Michigan Historic Preservation Network's Heritage Society, contact us at [info@mhpn.org](mailto:info@mhpn.org) or call 517-371-8080.

# HERITAGE SOCIETY PLEDGE

Please fill in sections A, B, and C to complete your pledge:

A. I/We pledge at the following Society level, agreeing that at least the minimum amount shown in **bold** below will be paid in the three consecutive years of \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_:

|                |                              |   |
|----------------|------------------------------|---|
| ___ Copper -   | \$3,000-7,499 total pledge   | <b>\$1,000</b> -2,499 paid in each of 3 years   |
| ___ Bronze -   | \$7,500-14,999 total pledge  | <b>\$2,500</b> -4,999 paid in each of 3 years   |
| ___ Crystal -  | \$15,000-29,999 total pledge | <b>\$5,000</b> -9,999 paid in each of 3 years   |
| ___ Silver -   | \$30,000-44,999 total pledge | <b>\$10,000</b> -14,999 paid in each of 3 years |
| ___ Gold -     | \$45,000-59,999 total pledge | <b>\$15,000</b> -19,999 paid in each of 3 years |
| ___ Diamond -  | \$60,000-74,999 total pledge | <b>\$20,000</b> -24,999 paid in each of 3 years |
| ___ Platinum - | \$75,000-99,999 total pledge | <b>\$25,000</b> -33,333 paid in each of 3 years |
| ___ Emerald -  | \$100,000 total pledge       | <b>\$33,334</b> paid in each of 3 years         |

Note: For your convenience, pledge reminders will be sent annually on the anniversary of this signed commitment unless you choose an alternate payment schedule noted here: \_\_\_\_\_.

B. \_\_\_ I/We have chosen these Heritage Society Giving Opportunities:

\_\_\_\_\_

C. Signature \_\_\_\_\_  
Name(printed) \_\_\_\_\_ Date: \_\_\_\_\_  
Company Name \_\_\_\_\_  
Street Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
E-Mail \_\_\_\_\_ Website \_\_\_\_\_

Name for publication \_\_\_\_\_

Please mail this pledge form and, if appropriate, your check made payable to:  
The Michigan Historic Preservation Network  
107 East Grand River Avenue / Lansing, Michigan 48906

The MHPN accepts the following; check yours : VISA \_\_\_ MasterCard \_\_\_ Discover \_\_\_  
Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ CVV \_\_\_\_\_  
Signature \_\_\_\_\_  
Name as it appears on the card \_\_\_\_\_

All gifts to the Michigan Historic Preservation Network, a 501 (c)(3) organization,  
are tax-deductible to the extent provided by law.  
Gifts will be acknowledged for your records.

*THANK YOU FOR YOUR SUPPORT*