



# Fast Fundraising Facts & Other Essentials

## Leave A Legacy—Is Planned Giving a Part of YOUR Plan?

“To live, to love, to learn, to leave a legacy.”

Per Stephen R. Covey, these are the four needs of people that must be met in order for them to feel fulfilled. Winston Churchill said, “You make a living by what you get, but you make a life by what you give.”

While a legacy can be anything from a name or reputation to what a person leaves to his family upon death, the **Leave a Legacy** program promotes the idea of leaving something to charity. Faced with the reality that it is very difficult for any one non-profit organization to single-handedly reach the public at large, the need for a collaborative effort has emerged. The resulting campaign is **Leave A Legacy**, a multi-year, collaborative public awareness and education campaign that unites nonprofit organizations, professional advisors and other community leaders to promote public interest in charitable giving.

Many states now have **Leave A Legacy** chapters whose mission is to encourage all people, no matter their financial situation, to support their favorite charities. Their message is that (1) you do not have to be rich to support a cause you believe in and (2) estate planning is not just for the rich. Every person needs a will, no matter how simple, to ensure that when they die, their assets and children will be taken care of according to their wishes.

**Leave A Legacy** promotes the development of financial resources for a variety of non-profit organizations by encouraging more people from all walks of life to leave gifts from their estates to causes they care about. **Leave A Legacy** also educates the public about ways in which they might maintain their support of their favorite charities. With financial support from community and private foundations, corporate giving programs, professional firms and associations and non-profit organizations, **Leave A Legacy** programs are reaching out to individuals through various mass media and through already-established media outlets of local non-profit organizations and professional associations.

Obviously, nonprofit organizations play a vital

role in our communities by funding countless worthwhile causes. Americans know that charities depend on public donations to operate programs and deliver services. Each year, millions of dollars are donated to various charities and causes. In fact, *The Non-Profit Times* estimates that over 70% of all households nationwide contribute to a charity each year. This extraordinary generosity, however, is not being expressed in terms of bequest giving with just 5.71% of households surveyed planning a charitable bequest. In 1996, 82% of the nearly 80,000 estate tax forms required for estates in excess of \$600,000 left nothing to charities. In addition, the IRS tells us that charity is receiving a decreasing share of the money in these wealthiest estates, from 21.9% in 1976 to 6.3% in 1992.

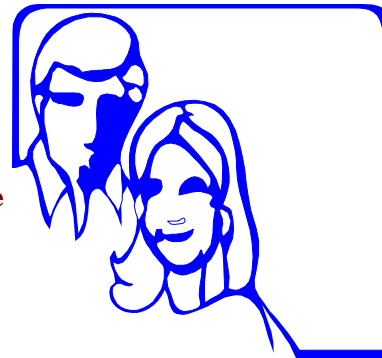
The non-profit community is well aware of the window of opportunity that lies ahead with the projected wealth transfer among baby-boomers. Further, charitable organizations struggle with the continuing loss of public dollars and government cutbacks. It is imperative that

we develop a way to reach the general public with the message: “There has never been a better time to give back to the community a portion of that accumulated wealth.”

To learn more about **Leave A Legacy** and discover whether there is a chapter in your area, contact Mara Kaiser Maudlin, Interim Director of Leave A Legacy, National Committee on Planned Giving, 233 McCrea St., Suite 400, Indianapolis, IN 46225. Her phone number is 317-269-6274, extension 28. Her email is [mkmaudlin@ncpg.org](mailto:mkmaudlin@ncpg.org). The organization has prepared materials that will be helpful as you begin or strengthen your planned giving programs.

*This cover article was written by Rhonda G. Williams, Chairman of Leave A Legacy New Mexico.*

*Some of the information in this article was used with the permission of the Leave a Legacy organizations of Arizona, Baton Rouge, and Acadiana (Louisiana).*



# How To Get Started on Planned Giving

Of course you know that your organization's development plan should include diverse funding sources and strategies, including short and long term giving. You should be employing fundraising techniques such as special events, direct solicitation, mail solicitation, grants, sponsorships and underwriting, and planned giving to support current and future needs. If you do not include planned giving in your development program, you are leaving money on the table!

So, how do you get started on a planned giving program for your organization or agency? It isn't as hard as you may think. There are numerous professionals in your area who deal in the intricacies of planned giving every day. Check to see if there is a local Planned Giving organization in your area and contact them for help and referrals.

I recommend that you build a Planned Giving Committee. Appoint a member of the Board to lead the committee and recruit community professionals to advise the committee. You'll want to include a CPA, trust officer, wills and estates attorney, financial planner and insurance broker, at least. These professionals can help you design materials to explain the opportunities of planned giving to your donors, volunteers, members or clients. And don't forget to check out what is available through the **Leave A Legacy** program

nationally and in your local community.

And, have you thought about...

- \* Sponsoring community-wide seminars on planned giving, led by the professionals on your Planned Giving Committee?
- \* Sponsoring planned giving seminars for your own donors, volunteers, clients or members?
- \* Holding an annual seminar on planned giving for your Board?
- \* Regular articles in your newsletters about different types of planned giving opportunities?
- \* Including planned giving in your major gifts program?
- \* Funding the endowment through planned giving?

Clearly, there are many opportunities to include planned giving in your diverse development plan. Whether you build a sophisticated program or merely open the door to the opportunities of current and future support through planned giving, don't omit this important opportunity!

## The Board's Role In Planned Giving

**One of Jean's 10 Rules for Fundraising Success is:**

***"You Can't Ask Others to Do What You Haven't Done."***

This is certainly true as you develop your Planned Giving program. Many Board members have never even thought about the opportunities that planned giving offer to provide current and future support to your program. And what about former Board members and volunteers? And the families of those you serve?

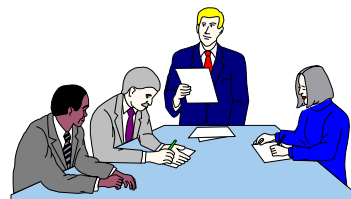
So, begin close to home when you start your Planned Giving program. Hold an annual planned giving seminar for your Board of Directors to acquaint them with the numerous opportunities for their own giving. Help them understand the current and long term effects they can have on your organization through a planned gift.

Then, help the Board identify others for whom a planned gift to your organization would be attractive.

Ask Board members to make introductions and lead off a discussion about how their own support has included a planned gift.

Critical to your Board's concept of planned giving is that they understand the breadth of opportunities available through wills, bequests, insurance policies, trusts, and the like.

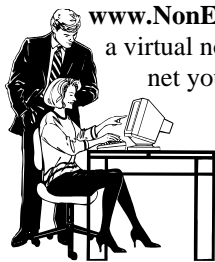
You don't have to be a large nonprofit with a professional development staff person who has all the answers. Build that Planned Giving Advisory Committee and rely on their professional expertise to help your Board understand planned giving opportunities.



## Internet Resources For Nonprofits

I have to promote a new service my webmaster and I have made available to your nonprofit. Visit

[www.NonEvents.com](http://www.NonEvents.com) to see how easy it is to hold a virtual nonevent. The cost is minimal and can net your organization a nice cash return.



And speaking of web sites, is yours giving you real benefit? Your site designer doesn't have to live down the street since this is a virtual world now!

Visit [www.ABQweb.com](http://www.ABQweb.com) to learn what Sheldon Liebman has to offer. With Shelly, you hire a web designer and get a marketing pro, as well. He designs sites that look good, load fast and work well. His sites don't bog your visitors down with unnecessary features. Instead, he uses his

knowledge of **MARKETING** to design sites that work for both you and your visitors.

Most nonprofits have a "look and feel" to their printed material. Shelly embraces your existing logo, letterhead, literature and other materials. He concentrates on the content to ensure that people who visit your site can find what they need, when they need it. And best of all, he does it at prices that work for nonprofits.

**With ABQweb, you can start small and grow over time.**

For more information, see the last page of this newsletter, which describes many of the services Shelly offers and also has a partial list of his non-profit clients. Or, go directly to his web site and see how ABQweb can start working for you and your organization.

TWO GREAT BOOKS AVAILABLE NOW:

### ***THE ABCs OF BUILDING BETTER BOARDS and FAST FUNDRAISING FACTS FOR FAME & FORTUNE***

Now you can add two great books to your agency library. **The ABCs of Building Better Boards** is just what you need to improve your Board's potential. It includes ideas for recruitment, retention and recognition and has some great forms for you to copy and use.

Learn how to deal with unproductive Board members and how to better define the roles of staff and Board. There is a chapter on financial and fiduciary facts, one on simple parliamentary procedure and much, much more.

Discover how Board Job Descriptions and annual Commitment Letters will dramatically improve your Board's effectiveness. See how a truly effective Nominating Committee will lead to a better Board.

Get good ideas for more efficient Board management and administration, including how to set up and manage effective committees.

**It's only \$24.95 plus shipping and handling. Take advantage of a volume discount of up to 20% and give this book to all new Board members as part of their orientation.**

**Fast Fundraising Facts for Fame & Fortune** is full of ideas to improve your fundraising, including how to ask effectively, special events essentials and new ideas for fundraising.

Help volunteers get over the fear of asking for money and in-kind resources for your organization. Learn how marketing principles will make fundraising easier.

Learn about **Jean's Ten Rules for Fundraising Success** and apply them to your organization immediately. This book puts the **FUN** into **FUND**raising and gives good examples and ideas that really work, rather than using hard to follow formulas and theories.

At only \$19.95 plus shipping and handling, it's a Must Have for your fundraising committee members!

Email me at [Jean@jblockinc.com](mailto:Jean@jblockinc.com) to discuss volume discounts for staff or volunteers.

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## HOW CAN I HELP YOU? TAKE THIS QUICKIE QUIZ

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| Is your Board of Directors functioning at its highest level?    | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| How successful is your current fundraising?                     | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Do volunteers need help asking for money and in-kind resources? | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Does your organization have a dynamic strategic plan?           | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Are you having fun?   | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

**Please give me a call if you want to turn any NO into a YES.** I can help with:

- turning your Board into a dynamic group of volunteers,
- facilitating a strategic planning session,
- analyzing your current fundraising and suggesting some new ideas, and
- training volunteers and staff in becoming more effective fundraisers.

**Here is what people have said about my training and facilitation:**

"Jean Block is a powerhouse in the Non-Profit world. You don't move about these circles long before her name is prominent in the conversation. Her commitment to training, fundraising, motivating, and cultivation is unsurpassed. To say she is an influence is to miss the point. She gives new meaning to the word enthusiasm! You don't know Jean, you experience her! She is a force unlike any other I have every met."

**Randy Gleason**  
*UNM Children's Hospital*

"I attended the Corporate Sponsorship Workshop - WOW! You were amazing! What an OPPORTUNITY for me! Your presentation style was EXCELLENT. By far the best workshop I've been to in a long time (content and style both!)."

**Vicki Kopplin**  
*Epilepsy Foundation of Minnesota*

"I attended your workshop in St. Louis and left there feeling so uplifted by your motivation. Your training - to make us all savvy marketers - has paid off. Even in this economy, our underwriting is up and our auction donations have blown away everyone in town! We simply feel empowered to ask anyone and everyone AND to tell them WHY we are their market. It's working! Thank you!"

**Kirsten Wagmeister**  
*Junior League of Evansville*

"Thank you for the awesome training sessions...As someone (who) would normally walk over hot coals before asking for \$, I was amazed by your session. I actually feel fired up at fundraising. I went right home and called two friends with ideas for their non-profits. I hope to give a presentation to my Board encouraging them to have you train us."

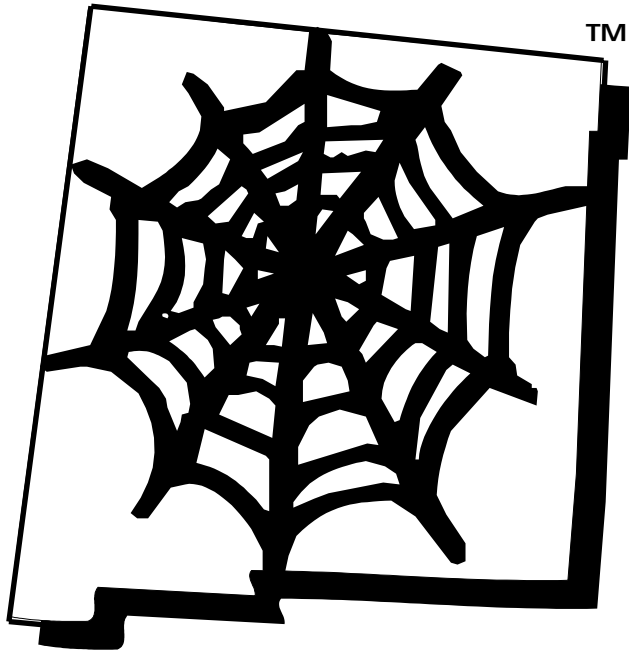
**Heather Harden, Finance Council Director**  
*Junior League of Champaign-Urbana*

"I just have to tell you that you made such an incredible impact when you spoke to our Board. I can't begin to tell you how many times your words of wisdom have been brought up at our Executive, Board and Committee meetings. In fact, just today, in two different conversations I was having, your ideas were quoted by others. Thank you for inspiring us to think in a new direction."

**Kim Erdel**  
*Junior League of Springfield, Missouri*

"Jean conducted an extremely well organized and productive [Board] retreat, one that I can say with confidence that our members count as the finest ever conducted for us. Jean's follow-up report was in-depth and meaty, and both Board and staff have referred to it time and again. The knowledge of boardmanship the members took with them has made a remarkable difference in their levels of commitment and support."

**Eileen Cook, Executive Director**  
*Casa Esperanza*



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- New Mexico Mortgage Lenders Association
- New Mexico Society of Hazardous Materials Managers
- NM Chapter - Society for Healthcare Strategy and Market Development
- Solomon Schechter Day School
- Southwest Communication Resources
- United Way of Central New Mexico
- Wildlife West Nature Park

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