


  
LEAVE A LEGACY  
ARIZONA


**A “side” of Endowment**  
**Summer Forum**  
**2013**  
**Presented by: Beth Salazar**

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LEAVE A LEGACY  
ARIZONA

**A “side” of Endowment**

- Endowment Development efforts on a part time basis
- Endowment Development on a “shoestring” budget
- Overview on using Leave A Legacy Materials

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LEAVE A LEGACY  
ARIZONA

  
**LEAVE A LEGACY®**  
**Arizona**  
*An Initiative of the Planned Giving Round Table of Arizona*

 **MAKE A DIFFERENCE IN THE LIVES THAT FOLLOW**

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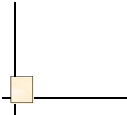
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## MISSION

- To increase the awareness of planned charitable gifts and bequest opportunities that will benefit individuals, families and communities.




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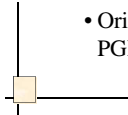
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## HISTORY

- NCPG National Program
- Initiative in AZ is now in Year Fifteen
- Charities, Allied Professionals, both the Lodestar & Arizona Community Foundations Support the Program
- Originally open to partners now to all PGRT members




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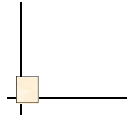
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## IS...

- A volunteer driven initiative
- A Statewide effort
- A Partnership among nonprofits, professional advisors & donors
- A coordinated marketing effort




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LEAVE A LEGACY  
ARIZONA

**IS NOT...**

- A Foundation
- An organization seeking planned gifts for itself
- A planned giving officer for your organization

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LEAVE A LEGACY  
ARIZONA

**WHAT CAN LEAVE A LEGACY  
ARIZONA DO FOR YOUR AGENCY?**

- Help you Start a Bequest program
- Enhance an Existing Program
- Create Community Awareness
- Provide Information on Giving Vehicles
- Provide Marketing Tools
- Provide Networking

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LEAVE A LEGACY  
ARIZONA

**WHY LEAVE A LEGACY®?**

- 70% make annual gifts
- 40% have a will
- 10% leave something to charity
- Cultivated donors give three times as much

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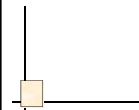
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### WHY DO ONLY 10% MAKE BEQUESTS?

#1 reason people do not include charity in estate plans

*NOBODY ASKED THEM*



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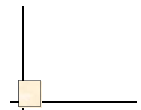
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### TRANSFER OF WEALTH UPPER ESTIMATE

- 20 years – 18 trillion total to transfer
- 2.7 trillion in Charitable Bequests



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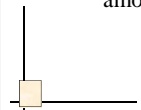
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### WHAT DOES IT MEAN?

- U.S. foundations have \$140 billion a year in assets
- Low estimate is 12 times foundation amounts is available to transfer



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# WHAT IT MEANS FOR YOUR ORGANIZATION...

- 2500 annual donors
- 1000 have estate plans
- 200 will leave gifts to charity

Have you asked them to include your organization?




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# MARKETING STRATEGY




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# Overview

- Why do Marketing & Communications
- Macro and Micro Marketing & Communications
- Step by Step Plan
- Write A Will Clinics
- Questions & Answers




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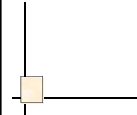
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## The Mission



- To Increase awareness of planned charitable gifts and bequest opportunities that will benefit individuals, families and communities.



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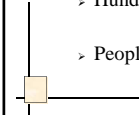
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## The Power



- Is **Leverage**
  - “A rising tide lifts all ships”
  - Now a Member benefit through PGRT
  - Hundreds of Thousands of Constituents
  - People rarely give to just one charity



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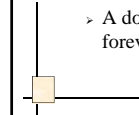
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## Why Communicate?



- *Your constituents may not know...*
  - Your organization can and would like to accept bequests – you need to plant those seeds!
  - A planned gift can be left in a variety of ways
  - Individuals can specify how their gift will be used in order to leave their legacy.
  - A donor giving \$100 a year can continue forever with a \$2000 endowment gift.



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What LEAVE A LEGACY Does?



- **Macro-External Audiences**
- Media Blitz – March/April  
September/October
- › Radio
- › Television
- › \*\* Total Impressions: 5,000,000+
- › Write a Will Workshop Marketing & Presentation Materials (available through PGRT)




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Using LEGACY tools



- **Micro – Your Communications Plan**
- › Letters and Brochures
- › Newsletters
- › Testimonials
- › Write a Will Workshops
- › Incorporate Bequest Message in all Agency Materials: website, letterhead, regular donor & volunteer communications




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Endowment Development  
Step by Step Plan



- Implement Policies & Procedures
- Develop Materials and/or adapt LAL tools
- Communicate Plan
- Prospect Identification & Cultivation-from current Annual donors and others
- Plant Seeds through hosting Write A will workshops
- Create Giving Society / Recognition plan




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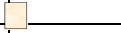
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## Prospect Identification



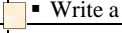
- Board & Board Alumni
- Senior Staff
- Long Term Donors
- Volunteers
- Members
- Service or Program recipients
- Who else?



## LEGACY Materials



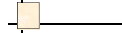
- LALAZ turnkey materials on CD
- Posters
- Testimonials
- Letters
- Newsletter Articles
- Return Cards
- Brochure
- Write a Will Workshop



## Communications Plan



- Inside Out Strategy
  - Board Staff Orientation
  - Letters
  - Newsletters
  - Special Planned Giving Mailings
  - One on Ones
  - Integrate Message on All Materials



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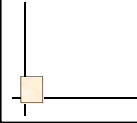
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## Planning & Executing Effective Wills Workshops



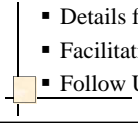
- What it is?
  - Turn Key PowerPoint presentation on the Basics of Estate Planning
  - Easy to follow, general information designed to help your audience understand how they can create their “Legacy”



## Steps to Plan Your Workshop



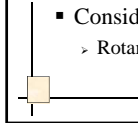
- Identify Target Audience
- Identify & Recruit your Attorney
- Set Your Date and Location
- Identify Your Promotion Materials
- RSVPs
- Details for Event Day
- Facilitation and Evaluation of Workshop
- Follow Up



## Identify Target Audience



- Program Participants, families
- Members
- Board Members
- Donors
- Loyal Donors
- Consider Possible Collaborator/Partnerships
  - Rotary, Lions, other agency, MCBA, MCBF



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### Contacting Target Audience



- Personal letter or postcard
- Direct Mail to larger general audience, large group? Target by age 40-45+
- Agency Bulletin boards, Newsletters
- Radio Spots
- Web site, Email blasts
- Press Releases (Public Service)
- Sponsors

### Identify & Recruit Attorney



- Locate prospective attorney
  - Current board members, board alumni, planned giving committee member
  - Program participant or family member who is an attorney
  - Local law firms looking to give back to community
  - Maricopa County Bar Association

### Orient Your Presenter



- Share Write A Will PowerPoint, Handouts
- Ask them to cover PowerPoint information then add additional information via Questions and Answers at end.
- Review your expectations – information first, not self promotion of their services

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## Confirm Your Date & Location



- Where will your Target Audience be comfortable?
  - Date, Time & location should match your audience (March & October dates will piggy backs on Leave a Legacy marketing efforts)
  - At your Organization Conference room
  - Hotel or Conference center
  - Community Room (Rec center, Y, Boy Scouts)

## RSVPs



- Identify specific phone and person
- By email
- Expect questions & calls
- Older audience needs
  - Accessibility
  - Special Needs – “First Touch”

## Details One Week Out



- Reconfirm space, tables, chairs
- Projector, screen or white wall
- Follow-up reminder to presenter, directions, cell # numbers
- Make handout copies

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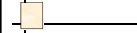
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### Details for Event Day



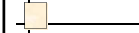
- Provide refreshments – Keep it Simple
- Match your food to the time slot/sponsorship
- Sign IN Sheet – Greet and assist with sign in
- Handout Materials and Write A Will Workbooks as they sign in, pens
- Display business cards, organization info
- Collect Program Evaluations at end



### Facilitation of Workshop



- Introduce Self and Welcome attendees
- Do a brief organization overview & why you are providing educational workshop, Importance of Leave A Legacy in your community
- Welcome Attorney and Introduce with Bio



### Workshop Follow up



- Review Evaluations
- Send Thank you to presenter
- Identify Prospects from Workshop Attendees
  - Create follow up plan (letters, phone calls, personal meetings as appropriate)
  - Add Attendee to database for future events, donor or agency newsletter



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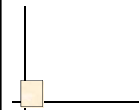
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## Training



- Continue to learn through Planned Giving Round Table meetings and Summer Forum
- Use LALAZ materials (available to PGRT members via request)



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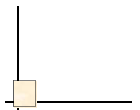
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## •50 Ways to Leave Your Legacy

•To the tune of Paul Simons' Fifty Ways to Leave your Lover



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- The problem is all inside your estate, they said to me.
- The answer is easy if you take it logically.
- We'd like to help you in your struggle to be tax-free –
- There must be fifty ways to leave your legacy.
- They said it's really not our habit to intrude;
- Furthermore, we hope our advice won't be lost or misconstrued.
- So we'll repeat ourselves, at the risk of being rude –
- There must be fifty ways to leave your legacy, fifty ways to leave your legacy.



### •Chorus:

- Just slip out the cash, Nash! Make an estate plan, Stan!
- Don't need to be cheap, Pete, just listen to me!
- Hop on the train, Janie, you don't need a big
- Nash be a trustee, Lee, and get yourself tax-free!
- Just leave a bequest, Wes! Rewrite your will, Bill!
- Transfer your stock, Doc, just listen to me!
- Designate your IRA, Ray! Don't wait till payday!
- Just open a trust, Russ, leave the rest to us!



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Questions?

*Thank You!*

*Beth Salazar*

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