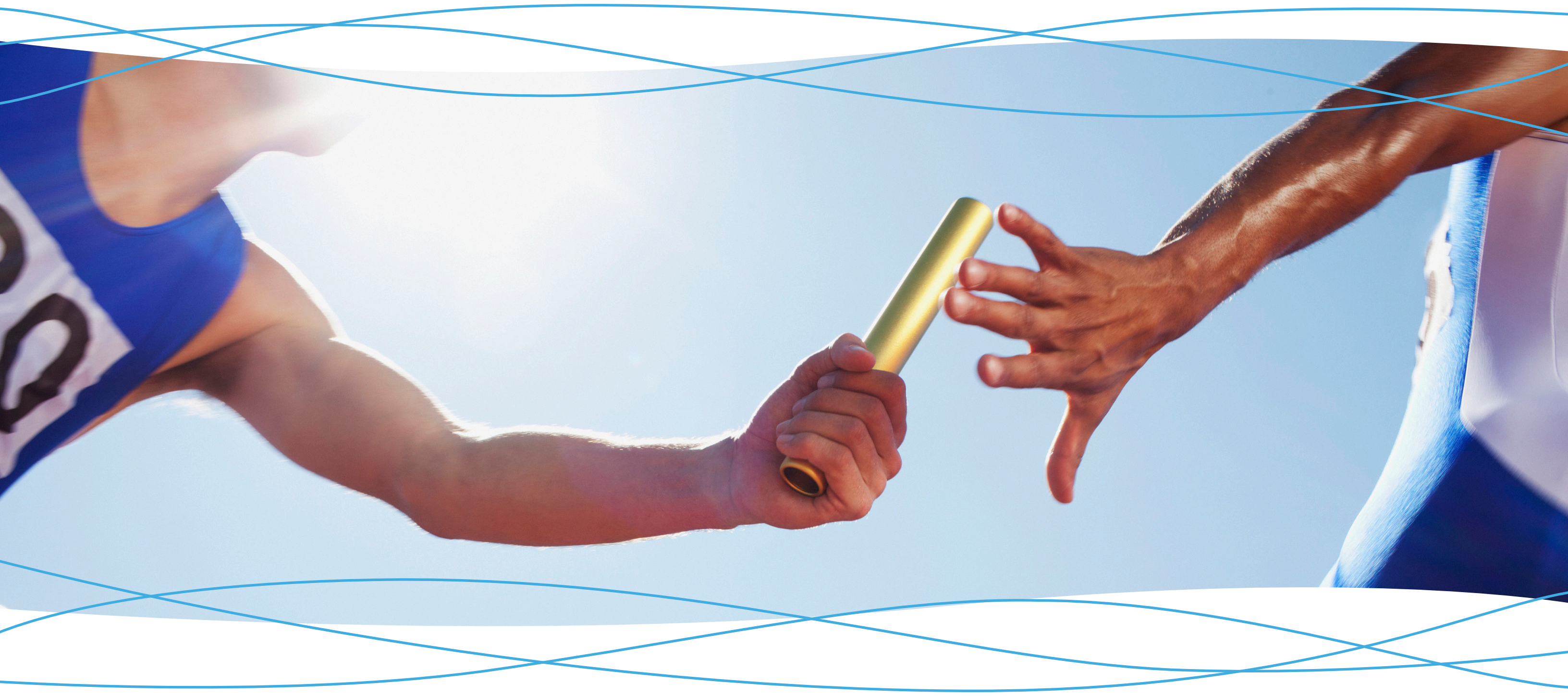

*Life is a race well-run, when we pass the baton,*
*who will be there to take it, and how can we keep*
*the track smooth to ensure their success?*

# Legacy Event Planning Handbook for NW Kansas Community Foundations

## CONTENTS

# Why concentrate on planned giving?

Most people will have something to leave behind when they pass – property, investments, family heirlooms, bonds, retirement accounts, life insurance, etc.  What we do not use in our lifetime is often passed to our children, if we have them, or other family members.  Charities are also the recipient of after-death or planned gifts.

Your community foundation can benefit from educating its donors and other community members about how the community foundation can be the recipient of an after death, planned, or legacy gift.

Our communities are where we grew up, worked, worshiped, raised families, made friends, and grew old. For some, all of those life events happened in the same place. For others, many places may hold a special memory.

Although donors can make gifts to your foundation to benefit particular charities, the community foundation is the only charity that enables a donor to simply leave a legacy gift to his or her hometown, be it where the donor was born, or a town they once or now consider home.

And for most individuals, the ability to make a substantial gift is easier through a legacy gift than a gift made during their lifetimes, because they are never sure what they might need as long as they are living.

Sometimes life is referred to as a race well run.  But another way to look at it is as a relay race, where we have the ability to pass the baton to the next generation.  If we can provide a strong leg on our portion of the race, we can help the next runner to be successful.

## THE BOARD IS THE KEY

A legacy giving program begins with the board of the community foundation. Even foundations with staff members must have strong board support in order to successfully secure legacy gifts.

Educating the board is the first step of a successful legacy giving program.  Board members do not need to become experts on planned giving vehicles such as trusts and wills. They do not need to understand estate tax rules. Board members do need to understand the value of a planned gift to their community, and learn how to comfortably talk about making such a gift with a donor or friend. To get started:

- Schedule a board meeting or retreat where the topic is planned giving and how to establish a legacy giving program.
- Contact your host community foundation (GNWKCF or GSCF) to arrange a time for a representative to attend the meeting and walk your board through the process of starting a legacy giving program.  The Dane G. Hansen Foundation and your host community foundations can help.

**Notes**

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# Tools and support

## VIRGIL SCOTT CONSULTING

The Dane G. Hansen Foundation has contracted with Virgil Scott Consulting (VSC) as a resource for educating board members and donors on legacy giving tools.

VSC will work with community foundation boards to develop a multi-year strategy that fits each foundation with an understanding that many community foundations operate with no or minimal staffing.

VSC can be the expert your board members can turn to with questions or for more information. VSC can also provide the planned giving presentations at donor events.

## ONLINE MARKETING TOOLS

The Hansen Foundation has also developed a tool box with various materials your foundation can use in a legacy giving program. Materials are available for your foundation to simply print and use, or to customize with your information and logos.

Access the toolbox at *www.danehansenfoundation.org* and click on the NWKansas Gives logo on the home page, then click on Planned Giving Toolbox on the left. Be sure to check in frequently, as the toolbox is frequently changing. If you have particular needs and want to see something that is not available, contact Betsy Wearing, Coordinator of Programs, Communications and New Initiatives for the Hansen Foundation at *betsy@danehansenfoundation.org*.

## WHAT'S EXPECTED OF YOUR FOUNDATION

To access these tools, including access to Virgil Scott Consulting, your board must agree to:

- Schedule and attend a training meeting or retreat to learn about planned gifts and the role of the board in a planned giving or legacy giving program.
- Ideally, board members would agree to consider making a legacy gift in their own estate plans, but that is not a requirement to begin a legacy giving program.

## HOST FOUNDATIONS CAN HELP

Be sure to visit with either Greater Salina Community Foundation or Greater Northwest Kansas Community Foundation, whichever is your affiliate host, to see how they can support your planned giving efforts.

# Donor Education Events

Donor education events on planned giving are an important part of your foundation's overall development program. Before you start holding these events, however, your foundation should have developed recognition and momentum in the community.

Participation in the Hansen Foundation's initiatives should have helped pave the way for this next step in your foundation's growth. For example, if your foundation has:

- Promoted grant application opportunities and grant awards from the Hansen Community Funds as well as your foundation's own funds
- Participated in the Hansen matching initiatives to build an unrestricted endowment, and in doing so, created a donor base for endowed giving
- Played a visible role in the Strategic Doing processes in your county, displaying the foundation's role in community/county planning and future success

Your foundation can build on those successes by inviting donors to learn how they can further their support with a planned gift. Having a track record of taking a leadership role and positive approach for the future as well as making grants that make a difference in your community is important to give your foundation credibility and visibility.

Once your board has become educated and decided to pursue a legacy giving program, two kinds of planned giving donor education events are recommended as options to help your foundation take the next steps and begin working with donors: Gathering Events and Legacy Dinners.

Both events are opportunities to introduce the concept of a legacy gift and why it is important to the future of your community foundation. Various planned giving methods can be introduced, with no specific discussion or recommendations for individual donors. The events do NOT include any solicitation of gifts.

## WHAT IS A GATHERING EVENT?

A Gathering Event is a casual, social event typically held in someone's home.

During a Gathering Event, someone from your foundation board or staff gives an update about the foundation, including plans for the future. A donor makes a personal testimonial to encourage the attendees to consider how they may be able to benefit the community through support of the foundation.

Often attendees are asked to share stories or thoughts on why the community is important to them.

A brief overview about various planned giving tools should be presented. Virgil Scott Consulting is available at no charge to your foundation for this portion of the event. Attendees have the opportunity to ask questions. Remember, no gift solicitation happens during the event.

## WHAT IS A LEGACY DINNER?

A Legacy Dinner is a "thank you" to donors with a history of giving to your foundation and an educational event about the most popular planned giving methods. It is designed for existing donors who are prime prospects for a planned gift and is an opportunity to provide more detailed information about the various planned giving tools. A Legacy Dinner is also an opportunity to engage local professional advisors by inviting them to attend and bring a client who may be a top planned giving prospect.

A Legacy Dinner is more formal than a Gathering Event. It is typically a sit-down dinner held at a local restaurant or club and includes a nice meal. The meal is provided by the foundation at no cost to the attendees.

A planned giving professional, such as someone from Virgil Scott Consulting, makes a presentation that provides attendees with information on how to make a planned gift. Attendees will have the opportunity to ask questions. Again, no gift solicitation happens during the event.

The keys to success for both Gathering Events and Legacy Dinners are personal invitations and personal follow-up. Successful events take planning and preparation.

**Notes**

# How to Host a Gathering Event

A Gathering Event is a donor education event that helps your foundation introduce the subject of planned giving to people who are familiar with your foundation.

## WHERE SHOULD A GATHERING EVENT BE HELD?

A Gathering Event is typically a small, social gathering hosted in the home of a foundation board member or at another friendly venue in your community. It should be a place that affords privacy and encourages conversation. If there is a unique place of interest in the community-a new or restored home, for example, that people might want to see, you may want to hold it there as another way to entice people to come.

## WHO SHOULD BE THERE?

Develop your invitation list from your list of current friends and donors. Typically, guests are friends of the hosts, have shown a passion for the community or the foundation, and share a concern for its future. Often, guests are volunteers or donors who are active in other community organizations.

Attendance of 10-12 people is ideal and 20 is maximum. The number of attendees should fit comfortably in the venue and make conversation easy and pleasant.

The hosts should send an invitation to the prospective guests and follow-up with a phone call to confirm attendance. Other board members can be recruited to help with follow-up calls. Sample invitations for a Gathering Event are included in the Legacy Giving tool box on the Dane G. Hansen Foundation website. Access the toolbox at *www.danehansenfoundation.org* and click on the NWKansas Gives logo on the home page, then click on Planned Giving Toolbox on the left.

## WHAT WILL WE TALK ABOUT?

The agenda for a Gathering Event includes an update about the activities of your foundation.

Talk about:

- Your foundation's grantmaking—highlight the difference your foundation is making in the community. If you have participated in Ripple Effects mapping, share the map of your grant successes.
- Projects that are in the planning stages or underway, particularly those initiated through Strategic Doing
- Your foundation's vision for your community and any plans your foundation has made for the future.
- A personal testimonial from a donor who has made a planned gift to the foundation so attendees begin to see what planned giving means and that people they know are making planned gifts.
- A brief overview of the various planned giving tools. Attendees will have the opportunity to ask questions.
- The time-sensitive opportunity of the transfer of wealth
- If your foundation offers additional support for individual donor planning, you can present that information as well.

This is a good time to get feedback regarding your foundation's work in the community and any future plans.

Another idea is to engage attendees by asking them what they love about the community, or a special memory they have about the community.

Direct donor solicitation—asking people for a donation or a planned gift—is NOT a part of a Gathering Event. The event is for information only and designed to get people thinking about charitable giving as part of their estate planning. Your follow-up will be key to keeping a planned gift top-of-mind for attendees.

Providing your guests with printed material about your foundation gives them a take-home reminder of the event. If you have a foundation brochure, share it. The Dane G. Hansen Foundation has created a brochure on the transfer of wealth in NW Kansas, including county-specific data that you can share as well.

## LET'S EAT!

Gathering Events can happen any time of day, such as over lunch, or in the late afternoon or evening. The event should not last more than 1 ½ hours. Consider offering a light lunch, wine and cheese, punch and cookies or coffee and dessert. Refreshments are important, but do not have to be elaborate.

## AFTER THE EVENT

Personal follow-up is key to the success of a Gathering Event. Before you hold the event, make assignments for board members to make follow-up. Calls should be made within one week after the event. Ideally, follow-up calls are made in person. A phone call is also appropriate. Email is NOT an appropriate way to follow up on a Gathering Event.

Here is an outline of the conversation you might have during the follow-up call:

- Thank you for attending.
- What interested you most about the event and discussion? (Ask, then be quiet and listen!)
- What questions do you have? Would you like to receive more information about any of the opportunities presented?
- How can you see yourself getting involved with us?

Following up a phone call or visit with a hand-written note is another way you can leave a positive impression on an attendee. Thank him or her for attending, and if appropriate, for his or her past support of the community and/or foundation.

Make sure you respond promptly to any requests for further information. Remember you can utilize your host foundation or VSC with questions you don't have answers to. It's fine to say you can get information and get back to someone – just be sure to do it!

Finally, make sure everyone who attends the event is on your foundation's mailing list so they'll receive your communications, such as newsletters, annual reports or invitations to any future events.

If a donor has a particular interest in a type of gift, such as property, grain of livestock, there may be an educational brochure on that topic in the online toolbox. Include the brochure with a handwritten note to the donor as a follow-up to the event.

Your host foundation may offer opportunities for interested donors to sit down with a professional about their desire to make a planned gift and how that might fit in their overall planning. Contact GSCF or GNWKCF to see if this is available. Staff at the host foundation can arrange scheduling if appropriate.

**Notes**

## LEGACY DINNER CHECKLIST & TIMELINE

Date of Gathering Event: ______________________________

**8 Weeks (or more) Before Event:**

☐ Select a venue.
☐ Recruit host or host couple.
☐ Select a date that works for the host, foundation board members, potential invitees and VSC or whomever will do the presentation
☐ Create the invitation

**6 Weeks Before Event:**

☐ Create the invitation list.
☐ Decide on refreshments - what to serve, who will prepare, who will pay. In some cases, the host will assume the cost. This is also an acceptable expense for your foundation's general account
☐ Recruit someone to make a personal testimonial about their decision to make a planned gift to your foundation.

**4 Weeks Before Event:**

☐ Send invitations. Invitations can be letter, postcard, or email.

**2 Weeks Before Event:**

☐ Monitor RSVPs for event. If necessary, invite additional people to reach the ideal attendance of 10-12 people.
☐ Create a follow-up plan to execute after the event. Assign follow-up contacts to board members who will attend the event. Make sure board members know the steps in a follow-up call and practice if necessary.

**1 Week Before Event:**

☐ Make phone calls to all invitees to confirm attendance. Offer rides if necessary.
☐ Confirm the speaker for personal testimonial.
☐ Prepare handouts, including foundation brochures and the Transfer of Wealth brochure.

**At the Gathering Event:**

☐ Confirm current contact information for all attendees.
☐ Socialize, listen to donors for feedback

**1 Week After Event:**

☐ Execute follow-up plan.

**2 Weeks After Event:**

☐ Add names and contact information of all attendees to the foundation's mailing list so they will receive future communications.

**Notes**

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## GATHERING EVENT SAMPLE AGENDA

| TOPIC | WHO | TIME |
|---|---|---|
| Get Acquainted & Social Time | All | 20 min. |
| Welcome & Introductions | Host | 5-10 min. |
| Community Memories & Dreams | Host | 10-15 min. |
| Foundation Update | Board member | 10-15 min. |
| Personal Testimony | Donor/board | 5-10 min. |
| Intro to Planned Giving & Q&A | VSC staff | 10-15 min. |
| Thank You | Host | 5 min. |

## THINKING OUTSIDE THE BOX

Because a Gathering Event is a relatively easy function to put together and includes a small number of guests, it can actually be a mobile event.

For example, if there are concentrations of alumni or former residents living outside your community, you may want to consider holding a Gathering Event in the community where they live now. Make sure you take along pictures of your community as it looks today and of the impact your foundation has had through its grantmaking.

Another idea is to hold a Gathering Event in your community around an event that often brings alumni back home, such as a reunion, holiday or festival.

# How to host a Legacy Dinner

Similar to a Gathering Event, the first step in planning a Legacy Dinner is to discuss the purpose, planning process and desired outcome at a board meeting. A Legacy Dinner is a bigger investment in time and money, so make sure your foundation is ready to take on the responsibility of planning and implementing this event.

A Legacy Dinner is focused on current donors to your foundation. You should review your donor list carefully and make sure you have a sufficient number of donors you feel are good prospects to make a planned gift. VSC staff can provide guidelines for you or help you in this review.

## WHERE SHOULD A LEGACY DINNER BE HELD?

The legacy dinner should be held at a local restaurant, club or social hall. The dinner should be in a private room or area where people know they can speak freely and not be overheard by other diners.

If possible, use round tables to allow for maximum interaction. This helps with the interactive presentation that will be part of the program.

The facility should accommodate showing a PowerPoint presentation and provide a sound system and microphones to ensure that everyone can hear.

## WHO SHOULD BE THERE?

Invitees should be current donors to your foundation, or are being referred to you as prospects by their professional advisor -- attorney, accountant, financial planner.

Typically, guests have shown a passion for the community or organization and share a concern for its future. Most often, guests are long-time volunteers in the community, current or former residents and loyal donors to your foundation. The Legacy Dinner is also an opportunity to engage professional advisers and a client they may wish to bring.

Attendance of 20-30 people is ideal and 50 is maximum. The number of attendees should fit comfortably in the venue and make conversation easy and pleasant.

Send an invitation to the prospective guests and follow-up with a phone call to confirm attendance. Sample invitations are included in the Legacy Giving tool box on the Dane G. Hansen Foundation website. Access the toolbox at *www.danehansenfoundation.org* and click on the NWKansas Gives logo on the home page, then click on Planned Giving Toolbox on the left.

## WHAT WILL WE TALK ABOUT?

A Legacy Dinner is a combination donor appreciation event and donor education event so make sure you recognize the fact that people are there because of their past support of your foundation.

The agenda for a Legacy Dinner is similar to a Gathering Event, but with more detail and an emphasis on thanking donors.

**Talk about:**

- Thank attendees for past support.
- Your foundation's grantmaking—highlight the difference your foundation is making in the community. If you have participated in Ripple Effects mapping, share the map of your grant successes. Remember to tie the grant success back to the donors who contributed to your foundation.
- Projects that are in the planning stages or underway, particularly those initiated through Strategic Doing
- Your foundation's vision for your community and any plans your foundation has made for the future.
- A personal testimonial from a donor who has made a planned gift to the foundation so attendees begin to see what planned giving means and that people they know are making planned gifts.
- An overview of why legacy gifts are important to the future of the community and the community foundation. Share any goals for your foundation's legacy giving program.
- The main part of the agenda is a presentation by a planned giving professional, such as a representative from Virgil Scott Consulting. This presentation helps attendees learn about planned giving options for different types of assets. Attendees will have the opportunity to ask questions. The entire program should last no more than two hours.
- The time-sensitive opportunity of the transfer of wealth
- If your foundation offers additional support for individual donor planning, you can present that information as well.

This is a good time to get feedback regarding your foundation's work in the community and any future plans.

Direct donor solicitation—asking people for a donation or a planned gift—is NOT a part of a Legacy Dinner. The event is for information only and designed to get people thinking about planned giving as part of their estate planning. Your follow-up will be key to keeping a planned gift top-of-mind for attendees.

Providing your guests with printed material about your foundation gives them a take-home reminder of the event. If you have a foundation brochure, share it. The Dane G. Hansen Foundation has created a brochure on the transfer of wealth in NW Kansas, including county-specific data that you can share as well.

## LET'S EAT!

Remember, the dinner is provided at no cost to the guests. Think about who has been invited and how this might influence the kind/type of meal you want to serve. Note in the invitation that the meal is hosted by the foundation and ask invitees to share any special dietary needs.

## WHAT HAPPENS AFTER THE LEGACY DINNER?

Personal, individual follow-up is key to the success of a Legacy Dinner. Before you hold the event, make assignments for follow-up calls to be made within one week after the event. Ideally, follow-up calls will be made in person. A phone call is also appropriate. Email is NOT an appropriate way to follow up on a Legacy Dinner. Personalized, hand-written thank you notes are also encouraged.

Here is an outline of the conversation you might have during the follow-up call:

- Thank you for attending.
- What interested you most about the event and discussion? (Ask, then be quiet and listen!)
- What questions do you have? Would you like to receive more information about any of the opportunities presented?
- How can you see yourself getting involved with us?
- Who else do you feel should hear this information?

Make sure you respond promptly to any requests for further information.

By the time your donor is invited to a Legacy Dinner, you should have a good understanding of their relationship with your foundation and how serious a prospect they might be for a planned gift. You should schedule regular follow-up visits or calls with the attendees. If they show interest, more frequent contact at shorter time intervals is appropriate. If they don't show interest right now but have not shut the door to your ideas, contact the donor at least annually.

Finally, make sure everyone who attends the event is on your foundation's mailing list so they'll receive your newsletter, annual report or invitations to any future events.

## LEGACY DINNER CHECKLIST & TIMELINE

Date of Gathering Event: ______________________________

**10 Weeks Before Event:**

☐ Select a venue.
☐ Recruit a master/mistress of ceremonies (MC).
☐ Select a date that works for the host, presenter and, potential invitees.
☐ Create the invitation

**8 Weeks Before Event:**

☐ Create the invitation list. Invitees are typically current donors to your foundation.
☐ Select the menu. Your foundation should assume the cost of the meal. This is an acceptable expense for your foundation's general account.
☐ Recruit someone to make a personal testimonial about their decision to make a planned gift to your foundation.

**6 Weeks Before Event:**

☐ Send invitations. Invitations should be a letter or formal invitation. No email invitations.

**2-5 Weeks Before Event:**

☐ Monitor RSVPs for event. If necessary, invite additional people to reach the ideal attendance of 20-30 people.
☐ Create a follow-up plan to execute after the event. Assign follow-up contacts to board members who will attend the event. Make sure board members know the steps in a follow-up call and practice if necessary.

**1 Week Before Event:**

☐ Make phone calls to all invitees to confirm attendance. Offer rides if necessary.
☐ Confirm the speaker for personal testimonial.
☐ Confirm professional speaker
☐ Finalize handouts and make copies. Gather brochures.

**Legacy Dinner**

☐ Confirm current contact information for all attendees.
☐ Socialize and be sure all guests feel welcome. Listen to feedback and conversation throughout the evening that might be helpful to the foundation

**1 Week After Event:**

☐ Execute follow-up plan.

**2 Weeks After Event:**

☐ Add names and contact information of all attendees to the foundation's mailing list so they will receive future communication.
☐ If a donor has a particular interest in a type of gift, such as property, grain or livestock, there may be an educational brochure on that topic in the online toolbox.  Include the brochure with a handwritten note to the donor as a follow-up to the event.

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## RESOURCES

**Dane G. Hansen Foundation**
Betsy Wearing,
Coordinator of Programs,
Communications and New Initiatives
(785) 452-8888
*betsy@danehansenfoundation.org*
*www.danehansenfoundation.org*

**Online Toolbox**
Access the toolbox at *www.danehansenfoundation.org* and click on the NWKansas Gives logo on the home page, then click on Planned Giving Toolbox on the left.

**Virgil Scott Consulting**
Virgil Scott
(303) 503-6409
*VirgilScottConsulting.com*
*virgil@virgilscottconsulting.com*

**Kansas Association of Community Foundations**
*www.kansascfs.org*

**Keep 5 In Kansas Campaign**
*www.keepfiveinkansas.com*

**Greater Northwest Kansas Community Foundation**
(785) 734-2406
*www.gnwkcf.org*

**Greater Salina Community Foundation**
(785) 823-1800
*www.gscf.org*