



*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



## 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

---

---

---

---

---

---

---

---

---

---

---

---





## 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](http://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.







## 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](http://www.danehansenfoundation.org) and click on the NWKansas Gives logo on the home page, then click on Planned Giving Toolbox on the left.





