



SUSTAINING YOUR LEGACY GIVING PROGRAM: MAKING LEGACY GIVING A PART OF YOUR ORGANIZATION'S CULTURE

MAY 6, 2014



KATHRYN W. MIREE & ASSOCIATES, INC.
PHILANTHROPIC ADVISORY SERVICES

Kathryn W. Miree
Kathryn W. Miree & Associates, Inc.
P. O. Box 130846
Birmingham, Alabama 35213
205-939-0003
205-939-3781 (fax)
kwmiree@kathrynmireeandassociates.com
www.kathrynmireeandassociates.com



KATHRYN W. MIREE & ASSOCIATES, INC.
PHILANTHROPIC ADVISORY SERVICES

ABOUT THE PRESENTER

KATHRYN W. MIREE
PRESIDENT
KATHRYN W. MIREE & ASSOCIATES, INC.

Kathryn W. Miree is President and primary consultant for Kathryn W. Miree & Associates, Inc., a consulting firm that for seventeen years has worked with boards and staff of nonprofits and foundations to develop or fine tune planned giving programs and endowments. She received her undergraduate degree from Emory University and her law degree from The University of Alabama School of Law. She spent 15 years in various positions in the Trust Division of a large southeastern bank before joining a regional brokerage firm to established its trust company and serve as its initial President & CEO. In 1997 she established Kathryn W. Miree & Associates, Inc.

Ms. Miree is a past president of the National Committee on Planned Giving, a past president of the Alabama Planned Giving Council, a past President of the Estate Planning Council of Birmingham, and past President of the Alabama Bankers Association Trust Division. She is a members of the Alabama Bar Association.

She currently serves on the Editorial Advisory Boards of *Planned Giving Today* and *Planned Giving Design Center* and on the Board of the Community Foundation of Greater Birmingham. Ms. Miree is a frequent lecturer, co-author of *The Family Foundation Handbook* (CCH Publishers 2014) and author of *The Professional Advisor's Guide to Planned Giving* (CCH Publishers, 2006). Her clients include a variety of nonprofits and foundations across the country. She has worked extensively with Jewish Federations and Create a Jewish Legacy programs across the country.

Sustaining Your Legacy Giving Program: Making Legacy Giving a Part of Your Organization's Culture

I. The Goals of Create a Jewish Legacy

A. Build Long-Term Resources

Endowments, which in the past were a luxury seen primarily at universities and hospitals, are now an essential element at most charity's long-term plans. The first decade of 2000 has made this point in as environmental factors have place extraordinary demands on nonprofits, including:

- Dramatic fluctuations in investment returns;
- The lowest interest rates in decades;
- The highest oil and gas prices in history;
- Diminishing government grants; and
- High unemployment, leading to lower resources among donors and higher demands for services.

Endowments play an essential role by providing:

- Essential funds during times in which fundraising revenue fluctuates;
- Revenue to start new programs to address emerging program needs;
- Resources to take advantage of opportunities - to acquire property, to build a new facility, or to merge with another organization;
- Permanent resources to ensure quality - such as a leadership chair for the Executive Director, a fund to provide ongoing training for staff, and scholarships for children in programs or a school; or
- Unrestricted funds to address the charity's greatest needs each year.

B. Maximize Donor Relationships

Each charity spends considerable time and energy to bring a donor into partnership with the charity and to maintain that donor in a year over year giving relationship. Legacy giving allows the charity to expand the relationship with that donor to extend to a gift through their estate plan. These "insiders" are already connected and understand the charity's mission - why not move them into a long-term relationship?

C. Engage Generations of Donors

Every charity should be sensitive to the demographics of the fundraising database. The biggest challenge is always how to build the base of the fundraising pyramid by bringing younger generations into a cycle of engagement and support. Your current donors represent a perfect point of access for new donors. The goal should be to get older generations to think about the impact they will have on the generations that follow, and challenge those donors to help you engage those lower generations in the work of the charity.

D. Gain a Long-Term Planning Perspective

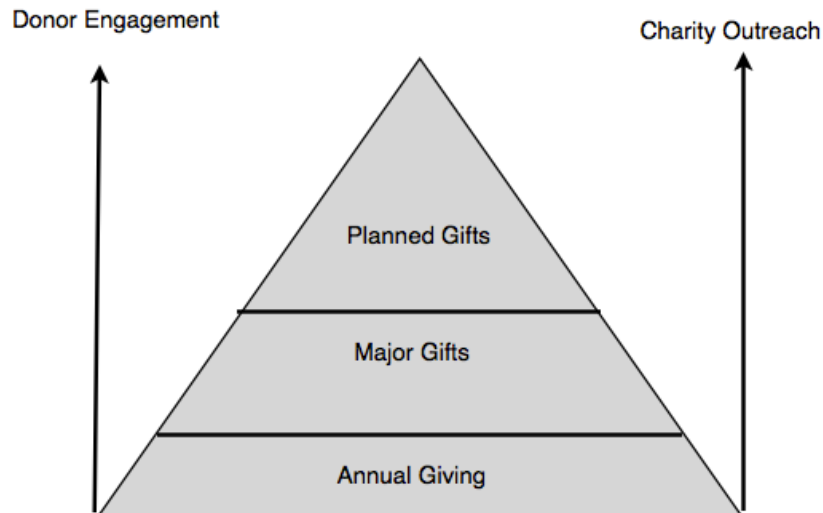
The current economic climate, and the downturn in fundraising, sends most charities into a short-term budgeting cycle. All the resources of the organization become focused on month-to-month revenue. The charge to fundraisers is to make sure they make the annual fund and membership goals. That short-term perspective begins anew with the following year. Effective charities have a long-term perspective focusing on not only the short-term goals but creating the long term resources they need.

II. Why the Legacy Concept is So Important

A. Legacy Gifts Expand Donor Relationships

The donor pyramid puts the donor relationship and the fundraising strategies in perspective, as shown in Table 1.

TABLE 1
THE DONOR PYRAMID



1. Annual Giving

Most charities use annual giving build its base of donors and annual operating revenue. These may include annual alumni campaigns, annual community campaigns, special appeals, direct mail, and special events. For some, membership campaigns may be a part of the mix. These activities are designed to engage as many donors as possible, with as little human contact as possible and as a result are generally transactional in nature. Very little donor loyalty is required to respond, and without human contact, it is difficult to engage the donor.

2. Major Giving

Major giving also gets significant attention from nonprofits due to the size of the potential gifts. Major giving, which takes the donors to the next level of interest and involvement in the nonprofit, may be a part of a capital, endowment or annual campaign. The solicitation of a major gift requires a great deal of planning and preparation. The solicitor must conduct research on the donor, the donor's family, the donor's goals and the donor's case history. And finally, the development officer and calling volunteer make a personal visit to ask for the gift.

Major gift solicitations represent an efficient way of raising large sums of money and identifying new donors. Many nonprofits now staff a major gift position within the development office, or assign responsibility for major gift development to an existing position.

3. Planned Giving

Planned giving is often the last element of the development plan, although it is rapidly taking its place as an “essential” part of the overall fund-raising effort. Churches, schools and hospitals have led the nonprofit sector in developing planned giving programs. Community foundations have also begun to focus on planned gifts as an essential way of building the foundation’s core endowment.

Planned gifts are generally the result of an ongoing relationship between the nonprofit and the donor. Donors that invest in the future of the charity through a planned gift must have confidence that the mission is important, that the organization will continue to meet that mission in the future, and that the donor’s gift is critical to the ability of the organization to discharge that mission. Where a major gift requires confidence in present leadership, a planned gift requires confidence in future leadership.

4. The Early Days of Fundraising - It’s All About Transactions

Every fundraising program must start somewhere, and most start with the basic annual fund programs such as those below:

- *Annual fundraising.* Annual fundraising is the basic fundraising platform. The goal is to raise funds, acquire new donors, raise the visibility of the organization and spread the mission. These are generally transactional activities, meaning you begin anew each year to raise the allotted goal.
- *Special events.* Special events - such as dinners, balls, or similar events - take annual fundraising one step further and actually moves you closer to many donors. These events may revolve around special needs of the organizations, may celebrate major donors or volunteers, and allow the organization’s staff and board to interact with donors and the community. These events have the potential to build repeat attendees - if you focus on that result.
- *Foundation grants.* Foundation grants - by nature a transactional occurrence since most foundations do not provide annual funding - may also be added to the mix if the nonprofit has an experienced grant writer. Foundation grants are often for specific projects which fit a foundation’s funding objectives.
- *State and federal grants.* Many nonprofits attract significant grants, especially where the organization performs services that governments might otherwise provide. However, grants can disappear as quickly as they appear, especially in the current environment in which drops in tax revenue have cut funds available for grants.

B. Legacy Gifts Engage Donors as Your Partners in the Organization’s Vision

One of the key functions of planning is to develop, articulate, and position the nonprofit’s vision. The vision should project the long-term results the organization is working towards in pursuing its mission. Ask yourself these questions:

- What is your organization’s vision?
- Is it current, clear, exciting, and compelling?
- Does every staff member in your organization hold this vision?
- Is it clearly positioned for donors?
- Do you make it clear that donor participation is essential in achieving the vision?

The answers to these questions impact the opportunity you have to engage donors in Legacy giving. The more effectively you answer the questions above, the greater the impact of your vision.

C. Legacy Gifts Should Increase the Donor's Current Commitment and Giving

One of the clear patterns evident with organizations that consistently and effectively advance Legacy giving (and provide strong stewardship to donors who buy into that long-term vision with their estate gifts) is increased, consistent annual giving. If your organization is effective in making the ask, commitment to donors, and stewardship of donors, you should find that donors who have made a bequest commitment give at a higher amount than donors who have not made that commitment, and are more consistent donors than those who have not made a bequest commitment. There was some evidence of this pattern in the 2007 Bequest Study¹ conducted by the Center on Philanthropy, as shown in Tables 2 and 3.

TABLE 2
ANNUAL CHARITABLE GIFTS FROM BEQUEST SURVEY PARTICIPANTS:
"DO YOU HAVE A BEQUEST TO CHARITY UNDER YOUR WILL?"²

<i>Do You Have a Bequest to Charity Under Your Will</i>	<i>Average Annual \$\$ to Charity</i>
Yes	\$4,489.93
No	\$2,043.21

TABLE 3
ANNUAL CHARITABLE GIFTS FROM BEQUEST SURVEY PARTICIPANTS:
"WOULD YOU CONSIDER A BEQUEST TO CHARITY UNDER YOUR WILL?"³

<i>Would You Consider a Bequest to Charity Under Your Will</i>	<i>Average Annual \$\$ to Charity</i>
Yes	\$2,526.03
No	\$2,003.52

III. Stay Focused on the Opportunity

A. Giving USA 2013

On June 16, 2013, Giving USA Foundation released *Giving USA 2013* reporting charitable gifts of \$316.23 billion in 2012, and increase of 3.5% over 2012. As in years past, individuals accounted for most (79%) of the gifts. In fact, Giving USA 2013 reported that the largest single influence on increased giving was an addition \$8.67 billion in gifts made by individuals. Table 4 shows the sources of 2012 charitable gifts, while Table 5 shows the charitable sectors who were the largest recipients of funds.

¹ Center on Philanthropy Indiana University, "Bequest Donors: Demographics and Motivations of Potential and Actual Donors," 2007.

² *Bequest Study*, Figure 3.

³ *Id.*

**TABLE 4
SOURCES OF CHARITABLE GIVING, *GIVING USA 2013***

<i>Source</i>	<i>Amount in Billions</i>	<i>Percentage of Total</i>
Individuals	\$228.93	72%
Foundations	\$45.74	15%
Bequests	\$23.41	7%
Corporations	\$18.15	6%
Total	\$316.23	100%

**TABLE 5
RECIPIENTS OF CHARITABLE GIFTS, *GIVING USA 2013***

<i>Sector</i>	<i>Amount in Billions</i>	<i>Percentage of Total</i>
Religion	\$101.54	32%
Education	\$41.33	13%
Human Services	\$40.4	13%
Foundations	\$30.58	10%
Health	\$28.12	9%
International Affairs	\$19.11	6%
Public Society/Benefit	\$21.63	7%
Arts, Culture, and Humanities	\$14.14	5%
Environment/Animals	\$8.3	3%

B. The Transfer of Wealth

Researchers at the Boston College Social Welfare Research Institute published a study projecting the intergenerational transfer of wealth expected to occur between 1998 and 2052.⁴ That study estimates the transfer will range from a low of \$41 trillion to a high of \$136 trillion, figures substantially higher than the frequently used \$10.4 trillion figure developed in the 1990's by Robert Avery and Michael Rendall of Cornell.

C. The Donor's Willingness to Invest

Overall, 7.5% of the *Bequest Study* respondents reported a gift to charity under will, slightly lower than the 8% reported in the 2000 NCPG survey and substantially lower than the 41.2% found among the

⁴ A summary of the study can be found at <www.bc.edu/bc_org/avp/gsas/swri/> in the article entitled "Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy."

*High Net Worth Study*⁵ respondents. The biggest surprise was the age of the donors who had made bequest commitments. Individuals age 40-50 reported the highest frequency of bequest commitments (28.1%) followed by individuals age 50-60 (21.9%) and age 60-70 (20.6%). By comparison, only 11% of the 70-80-year-old group and 8.9% of the 80+-year-old group reported a bequest under will.

When the same question was put to the respondents in the High Net Worth Study group (a 2006 study involving individuals with assets of more than \$1 million, and income more than \$200,000), individuals reporting bequests were more likely to be older, with the greatest concentration in the 50+ age group.⁶ Both findings direct gift planners to younger donors than traditionally targeted by bequest programs which generally focus on donors age 65 and older. Results for the *Bequest Study* and the *High Net Worth Study* are reported and compared in Table 6

TABLE 6
BEQUEST COMMITMENTS IN PLACE, BEQUEST STUDY AND HIGH NET WORTH PHILANTHROPY STUDY

	<i>Bequest Study (March 2007)</i>	<i>High Net Worth Philanthropy Study (October 2006)</i>
30-40	8.9%	1.4%
40-50	28.1%	9.4%
50-60	21.9%	19.3%
60-70	20.6%	27.5%
70-80	11.0%	25.1%
80+	8.9%	17.3%

One of the greatest opportunities for charities is the large percentage of the survey group - 31% - who would be willing to consider a bequest. The largest concentrations of these potential bequest donors are ages 40-50 (28%) and 50-60 (24%), as shown in Table 7. The data again suggests bequest marketing and solicitation will be more effective when focused on younger donors.

TABLE 7
INDIVIDUALS WHO WOULD CONSIDER NAMING A CHARITY UNDER WILL

<i>Age Band</i>	<i>Bequest Study</i>	<i>Percentage of Sample</i>
30-40	18%	18.2%
40-50	28%	28.8%
50-60	24%	18.3%
60-70	5%	10.9%
70-80	3%	7.8%
80+	1%	3.7%

Finally, the study analyzed the likelihood of a bequest inclusion or consideration of a bequest inclusion by income level. The researchers found bequest giving – and the potential for new bequests – was strong across all income levels reminding gift planners bequest giving is not exclusive to major gift

⁵ http://www.philanthropy.iupui.edu/Research/giving_volunteering_research.aspx.

⁶ Bank of America Study of High Net Worth Philanthropy, Initial Report, http://newsroom.bankofamerica.com/index.php?s=press_kit&item=63. This group, which comprises 3.1% of the population, is estimated give 2/3's of all household gifts in the United States.

donors and is not driven by taxes alone. Table 8 reflects incidences of bequest intentions, and the potential for bequest creation among five income levels.

**TABLE 8
BEQUEST INTENTIONS AND POTENTIAL FOR BEQUESTS AMONG VARIOUS INCOME LEVELS⁷**

	<\$25,000	\$25,000 - \$49,999	\$50,000 - \$74,999	\$75,000 - \$99,000	\$100,000+
Bequest in place	6.6%	7%	7.6%	6.5%	10%
Would consider bequest	28.4%	34.6%	28.8%	25.99%	35.63%

IV. The Biggest Obstacles to Integrating Legacy in the Giving Culture

A. The Cash Crunch - We Need the Money Today!

As noted earlier, in times of economic crisis, the focus on cash rearranges organizational priorities. Financial officers, who lead the budget process, focus on the cash needed for current operations. This focus tends to prioritize activities that have current cash returns and bring needed funds in the door. Legacy giving can get lost in this short-term focus.

B. Lack of Willingness to Commit Resources (Where's the ROI?)

A corollary to a "cash today" perspective is the unwillingness to commitment funds to fundraising activities that do not have a clear return on investment (ROI) in the current budget cycle. Fundraising activities such as Legacy Giving that have current costs but do not generate returns for five, seven, or even ten years, may seem unimportant or a waste of necessary funds. Yet, if you do not invest in Legacy gifts today, those returns will always be five to ten years away.

C. Lack of Understanding - and Concern Legacy Gifts Will Erode Current Giving

The most common fear among organizations new to Legacy Giving is that the fear that Legacy solicitation is a competitive, zero-sum exercise. In other words, the concern is that raising Legacy gifts will decrease that donor's current gifts, depriving the organization of critical operating cash. This is a reflection of a transactional - rather than relational - fundraising culture. A transactional culture - in which donors are seen as a single transaction and all transactions begin anew on the first day of the new fiscal year - is the most difficult environment for charities. A relational culture, in which charities build recurring, expanding fundraising relationships with donors, is critical to building successful, sustained, Legacy relationships.

D. Failure to Appreciate Data

A weak donor database, or a great unused database, often stands in the way of successful Legacy prospecting, stewardship, and success. Why?

- *The donor database often holds the internal case for Legacy Giving.* For example, the nonprofit may find that a large percentage of its revenue is associated with donors age 77 or older (a group that has reached life expectancy) - this revenue will need to be replaced over the

⁷ *Bequest Study*, Figure 6.

short-term. If this group perpetuates its giving through a Legacy gift, that task will be easier to accomplish.

- *The data base may reveal donors who have a multi-year giving and/or membership relationship with the charity.* These multi-year givers, at any dollar giving level, have the greatest potential for multi-year gifts.
- *The areas of specific donor interest may point the way to a pool of donors with a common long-term interest.* You may be able to pull this group together to focus on common long-term goals.
- *Your database should hold information about Legacy commitments that show you the results for the future.* This information should be a constant reminder of the return you've achieved on your investment.

E. Fear of Donors!

Without experience, it is often frightening to consider talking to donors about gifts to your nonprofit through their estates. It is scary because it implies it is necessary to talk to donors and prospects about death, dying, and wills. The conversation is nothing like that, of course, but never forget how important it is to keep the staff and volunteer team trained on how to have the conversation. Remember the basics:

- *Focus on the donors, and why the donor is involved in your charity.* When did they first get involved?
- *Focus on why the organization does or provides to the Jewish community that is so important to that donor.* How do they use those services? Does their family use those services? What is the most important, unique role the charity serves in the community?

F. Donor Objections

Let's discuss the following roadblocks were identified in a recent survey sent to CJL partners:

1. One donor "figured" the Synagogue had gotten along without a problem for 100 years without a formal legacy campaign, so why start now? The future will take care of itself.
2. Sometimes donors leave you hanging. They will not respond or commit one way or the other. If they could bring themselves to say that this isn't a good time, or they are not interested, we could move on.
3. We have a senior who said he will not do anything until there are a lot of others doing something. He claims he has done his part, and it is time for others to do their part. he has capacity - he is just not willing to engage.

V. How to Ensure Legacy Is an Ongoing Part of the Donor Experience

A. Expand Your Thinking in Planning

Make sure your organization maintains that long-term strategic perspective, always looking ahead to identify the 3-5 year goals. Ensure you have a current clear vision that reflects the organization's mission goals. Use this vision to drive Legacy giving. Strategic planning may be one of those exercises that your board dreads and takes on only when absolutely necessary. In truth, strategic planning keeps the organization focused on the future, and provides the organization the luxury of charting its path

among a wide range of choices. This long-term planning - and the discipline the organization has in planning - is essential if you plan to ask donors to invest in that future.

B. Set Metrics and Goals that Measure Short-Term and Long-Term Impact

1. What Does Your Income Look Like Now?

Where are you? Use Table 9 to identify your organization’s fundraising trends.

**TABLE 9
TEN YEAR REVENUE ANALYSIS BY TYPE OF REVENUE**

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Annual Fund:										
- DM										
- Online										
Major Gifts (\$5,000 - \$24,999)										
Major Gifts (\$25,000 - \$99,999)										
Major Gifts (\$100,000+)										
Capital Campaign Revenue										
Realized Testamentary Gifts										
Realized Irrevocable Life Income Gifts (New)										
Realized Irrevocable Life Income Gifts (Remainders)										
Special Events										
Foundations										
State/Federal Grants										
Other										

Once you identify the patterns of the past, think about where you want to be. Are your annual fundraising efforts allowing you to meet your goals, or do you need to develop a more mature relationship-based fundraising program? Relationship-based fundraising introduces two basic elements to the fundraising mix:

- *Major gifts.* Major gifts come from donors who believe in what you do and want to invest in your success. These are not transactional - they are insiders, not outsiders. And they tend to repeat their gifts so long as they remain engaged with your organization and its work.
- *Planned gifts.* Planned gifts are also generally relationship-based. While every charity as the story of the anonymous donor that leaves a large gift, or a small donor with whom no one had a relationship who leaves a gift, successful planned giving programs are the result of careful cultivation and long-term engagement.

2. Donor Demographics

Many of the key indicators for planned giving are found in the organization’s demographic data: multi-year donors, event attendees, multi-year members, and specific age groups. Finding these indicators is only possible if the organization is focused on gathering and retaining information on its donors.

Another important analysis is the dispersion of your donors by age (Table 10) and the amount in annual revenue generated by each ten-year donor band as shown in Table 11. It is important to be aware of the skew of donor ages for several reasons:

- 1) *Some organizations have largely aging donor populations and must focus on building strength among younger donors.* While these organizations may have special opportunities in planned giving, the crisis will come when their donor pool ages out of existence.
- 2) *Some organizations have largely youth-oriented donor populations, and must focus on retaining donors and building maturity in their donor pool.* A largely youth oriented donor pool may not be ready for estate planning messages, and more importantly, even if they respond they will not produce revenue for many years.
- 3) *Ages impact marketing and outreach.* Each age band engages with your organization in a different way, and for different reasons. If you want to effectively engage those donors, you will need a strategy for each segment.

**TABLE 10
DONOR COUNTS BY AGE**

	20-29	30-39	40-49	50-59	60-69	70-79	80-89	90+
All donors								
Active donors								

Likewise, it is important to monitor the annual revenue tied to each age bad. Current life expectancy in the United States is 77.8 years.⁸ Therefore, pay particular attention to donors in the 70-79, 80-89, and 90+ age groups. This is revenue that is at greatest risk and will need to be replaced short-term since these donors are rapidly approaching - or have exceeded - life expectancy. This is often one of the most effective cases you can make to management about the need for a planned giving program. This is a snapshot looking at prior year income. If for some reason the last year was an anomaly, expand the revenue to three years and average the result.

**TABLE 11
ONE-YEAR REVENUE TIED TO EACH TEN-YEAR AGE BAND**

⁸ See press release at <http://www.cdc.gov/media/pressrel/2010/r101209.html>. This figure is based on 2008 data.

	20-29	30-39	40-49	50-59	60-69	70-79	80-89	90+
# of donors								
\$\$ contributed								

3. Track the Donor Relationships: Continuity and Impact

Measure your own organization's correlation between bequest commitments and annual giving. Table 12 provides a sample results format to measure donor retention rates, and Table 13 provides a sample results format for measuring the impact of bequest commitments on annual giving.

**TABLE 12
DONOR RETENTION RATES 2005 - 2011**

	2005	2006	2007	2008	2009	2010	2011
All donors, first year							
All donors, 2+ years of giving							
Major gift donors, first year							
Major gift donors, 2+ years of giving							
Deferred gift donors							

**TABLE 13
CORRELATION BETWEEN REVOCABLE GIFT COMMITMENTS AND ANNUAL GIVING**

	<i>Average Annual Gift Size</i>	<i>Average Number of Years of Giving</i>	<i>Retention Rate from Prior Year</i>
Donors who have made a known revocable gift commitment			
Donors who have not made a known revocable gift commitment			

3. Track the Legacy Revenue and Commitments

One of the most critical milestones and metrics in every charity is cash flow. This is valuable for several reasons.

- It makes the case for the value of the program.
- It shows you the gifts of greatest interest to your donor base.
- It can reflect the results of long-term marketing.
- It reflects trends, responses to economic downturns, and similar insights.

Unless there is a real focus on tracking planned gift revenue on a year over year basis, you may find the revenue disappears into the “cash” column of the organization’s revenue stream. Here are some of the problems I’ve seen without a strong working relationship between the gift planning team and the finance/accounting team:

- Revenue is inconsistently classified so that it cannot be tracked year over year.
- Estate expectancies cannot be tracked as “received” if portions of the estate revenue end up in other lines of revenue, leaving apparent outstanding expectancies.
- All planned gift revenue is lumped into a single line item, making it difficult to track revenue by type of gift.
- The gift goes directly to accounting without being recorded in the donor data system.

**TABLE 14
TEN YEARS REALIZED PLANNED GIFTS**

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Realized Bequests under Wills										
Realized Testamentary Gifts - Revocable Trusts										
Realized Testamentary Gifts - Other Trust Distributions										
Retirement plan or IRA Beneficiary Distributions										
New charitable gift annuities										
New charitable remainder annuity trusts (irrevocable beneficiary, trustee)										
New Charitable remainder unitrusts (irrevocable beneficiary, trustee)										
Charitable remainder trust remainders - annuity and unitrust, outside trustee										
Insurance beneficiary										
Retained life estates										
Bargain sales										
Other										
Total										

C. Audit and Improve Your Messaging and Marketing

If you had to make a list of your five key messages you wanted donors and potential donors to know, what would those be? And what pipelines are you using to deliver those messages? How consistent is your messaging? Use the checklist in Table 15 to identify and rank your top messages, and analyze how effectively you deliver those messages.

**TABLE 15
WORKSHEET TO ANALYZE MESSAGING**

<i>Message</i>	<i>Annual Report</i>	<i>Website</i>	<i>Internet Communications</i>	<i>Professional Advisor Communications</i>	<i>Annual Letter/ Other</i>	<i>Annual Meeting</i>
ORGANIZATION AND COMMUNITY NEEDS						
Clear call for support: “The xyz charity needs your support and cannot meet demands and achieve visions without you.”						
Financial and program information on current and future needs in the community.						
The nonprofit’s current strategic plan and information on what has been achieved, what is in progress, and what is outstanding.						
USE AND IMPACT OF FUNDS						
Basic financial information: balance sheet, cash flow statement, comparative data for prior years						
Detail on fundraising revenue and costs, including sources of revenue (individuals, corporate, foundation partners, etc.)						
Detail on long-term holdings, including fund balance (and comparative data from prior years), investment performance, amounts distributed, detail on impact of distributions						
RECOGNITION OF DONORS						
Recognition of as many donors as possible (annual contributions, major gift donors, multi-year donors, corporate sponsors, foundation donors, etc.)						
Recognition of donors who have made planned gift commitments						
Recognition of volunteers						
EASE OF GIVING						

Clear communication that gifts at all levels are welcome, and there are many ways to give to make it possible for all donors to make a significant current and/or deferred gift						
Easy to find information on ways to give and how to give						
Easy to find contact information linking potential donors to staff members who can provide support						
Easy to access information for professional advisors relating to gift policies, standard gift agreements, standard endowment agreements, transfer information, legal name, etc.						

VI. Don't Forget the Resources All Around You

The Jewish Federation of Greater Washington and the Create a Jewish Legacy team provide essential resources for your efforts. The two year program you have completed provides the platform, as well as insights, technical support, and management. The pool of organizations who are part of this program are also valuable resources - use the network!

VII. Questions and Answers