

FundraisingMatters

We Share Your Passion!

THE WIN-WIN GIFT: REAL ESTATE SOMETHING TO SHARE WITH YOUR DONORS

Making a gift of appreciated property such as real estate offers an alternative to your donors to support your mission. Maximum benefits are realized through an outright contribution of real property. However, there are alternative gift options with real estate, such as converting it to a life income gift or a retained life estate.

When should you consider a charitable gift of real estate?

- When you would like to make a significant gift to a charity without using liquid assets
- When you want to avoid capital-gains tax from selling appreciated real estate
- When you own a rental or commercial property and you are considering selling
- When you own vacation property that is not being used and you are considering selling.

Cleveland Clinic Catalyst – Winter/Spring 2012

PS – Make sure you have real estate gift policies in place. (David Valinsky)

Board Self-Evaluation

Often we are asked about how we invite our board members to evaluate their role on our foundation/development board. Take a look at this form from the Iowa Health Foundation.

Using a 1-5 scale, ask members to rate themselves. It will give you a good overview. (1 being "poor" and 5 being "excellent")

1. Familiarity with the mission, plans, priorities finances and character of the organization. _____
2. Attendance at board meetings. _____
3. Familiarity with agenda items and key issues in advance of meetings. _____
4. Active participation in board meetings. _____
5. Active work on regular board committees _____
6. "Ambassador" – discussing issues with friends, colleagues, being a foundation advocate _____
7. Help with donor cultivation and solicitation. _____
8. Personally contribute to the Foundation's annual fund and special campaigns as appropriate. _____
9. Regularly read the organization's annual report, newsletters, announcements, and try to stay abreast of developments of the Foundation. _____
10. Maintain a good working relationship with the President. _____
11. Overall contributions as a board member _____
12. Overall personal satisfaction as a board member _____

Are tough economic times over? Don't think so. Take a look at some back to basic steps that Jerry F. Smith suggests that may help you stay focused with your donors:

Stay positive and don't pull back on fundraising – Not only should you not retreat, you should become even more focused in your efforts. Look at your lists again, sharpen your case, get more personal, and cultivate, cultivate, cultivate!

Focus on the mission – Donors will continue to respond to bold visions with shared values that transform lives and communities.

Focus on stewardship and build donor loyalty – Follow up with a sincere, prompt and accurate thank you.

Solicit the right individuals – Avoid targeting lower income supporters with asks they cannot afford.

Offer donors more flexibility in making a gift – Let the donor fulfill a pledge over six years instead of five.

Fund-Raising Rules of the Road to Success, by Jerry F. Smith, CFRE



The Northeast Jewish Community Campus is the newest facility of the Jewish Community Center of Greater Columbus. The center is the permanent home of the flourishing JCC Northeast Pre-school and the Columbus Jewish Day School.

Both agencies needed permanent space for growing programs, The JCC raised more than \$3,500,000 for its portion of the project.

GRANT WRITING TIPS

Creative Exercise: Develop a compelling organizational statement

This descriptive statement can be used in grant proposals or any other organizational materials to tell the funder who you are. The goal of the exercise is to create a succinct statement that provides a funder with a solid understanding of the essence of your organization's work. It should be no longer than a paragraph and contain the following information: date organization was established, overview of mission/purpose, who benefits, annual budget.

Find a Grammar Editor: The writer should never be the editor. Identify a co-worker with objective eyes to read and edit your grant proposal for grammar only.

Find a Content Editor: Identify an additional co-worker with objective eyes to read your grant proposal for content only. The task is for the reader to see if the project described is clear and understandable. If the written description of the project is unclear with a staff member, then it probably will not make sense to a grant review committee. For more information, contact lisa@davidvalinsky.com

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Suggestions for Bequest Society Names

The following names are a combination of those we've encountered over the years and our own brainstorming. Perhaps one of them will inspire you.

The Greystone Circle
 The Cornerstone Society
 Benefactor Society
 The Heritage Society
 The Path Finders
 Ner Tamid Society
 The Acorn Group
 Lamplighters Guild
 Seeds of Tomorrow Society
 The Mission Keepers
 Health Investors
 The Gifts for Life Society
 President's Circle
 L'Dor V'Dor
 The Honor Roll
 Dream Builders
 Circle of Hope
 The Legacy of Hope
 Legacy Circle
 The Builders Society
 The Life Line
 Children's Circle
 Founder's Circle
 Legacy Angels
 Linking The Generations
 The Eternal Flame Society
 Brushstrokes Guild
 The Phoenix Circle
 Redeemer Legacy Guild
 Painting the Future Society
 The Mustard Seed Society



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