

FundraisingMatters

We Share Your Passion!

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Taking What Works and Making It Matter (TWWMM)

Leadership Reminder

In working with many generous donors, skilled executives and wonderful volunteers in communities across North America, one of the questions that is most often asked is, "What does it mean to be a leader?" Today, as 75% of our clients are Jewish organizations, that question can be modified to read, "What does it take to be a Jewish Leader?" One excellent response comes from a document prepared for the JCCs of North America Executive Leadership Seminar (2/16) by JCCA Vice President Mark Horowitz. The document highlights seven principles of leadership which I believe also reflect what we are looking for in selecting strong leaders for our capital campaigns.



To review the complete document contact:
Mark Horowitz
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Seven Principles of Leadership (by Rabbi Jonathan Sacks)

1. Leadership begins with taking responsibility.
2. No one can lead alone
3. Leadership is about the future. It is vision driven.
4. Leaders learn.
5. Leadership means believing in the people you lead.
6. Leadership involves a sense of time and pace.
7. Leadership is stressful and emotionally demanding.

PLANNED GIVING TIPS THAT MATTER

As a part of a recent webinar titled Planned Giving Donor Trends presented by the Stelter Company, two very important takeaways were addressed that will help you strengthen your planned giving program when securing a gift through a will. Often Step #2 is overlooked or forgotten.

Step #1 – Meet personally with a donor and securing a commitment to leave a gift in one's will to your organization.

Step #2 – Encourage your donor to execute this step. If possible suggest to your donor to leave the gift in their will through an IRA beneficiary or TOD (Transfer On Death) account and use the will as a backup document. The first two documents often ensure that your organization will receive the gift.

In addition, use your capital campaign to encourage donors to make blended gift-capital and planned to your project. Use this campaign gift to remind your donor to execute and indicate a vehicle and an amount whenever possible of the planned gift.



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Major Gift Conversations

Maybe it's obvious but we have seen many situations where we are not prepared. There are many approaches to take as you prepare for major gift conversations. When you are in campaign mode and have one of those very pivotal conversations be prepared to answer these three questions that will inevitably be asked of you:

1. What are you trying to accomplish? *Be prepared to tell the donor very simply how their gift will make a difference in how your organization serves its community, members, patients, etc.*
2. Where will my money go? *Answer very clearly, directly and thoughtfully.*
3. How can I help? *Be specific as to what you would like them to consider giving. Also indicate that providing their advice, identifying other prospects, opening doors and becoming a strong ambassador are very helpful to the campaign in addition to their gift.*

Three Not so Secret Reminders for Securing Major Gifts

1. Your best prospects are often those who are already donors to your organization.
2. Get a meeting and ask for their opinion and advice.

Would like your response to this article recently posted by fundraising guru Jerry Panas.

The Dreaded P-Word

The very term sends shivers and tremors into the heart of even the strong and fearless.

The term is "pledge card." THE PLEDGE CARD!

Let me set the scene. The presentation was dazzling. The probable donor is very excited about the program. It's obvious he wants to join you in this cause.

You happen to mention a pledge. In no uncertain terms, he says, "I'll give this year, but I absolutely won't sign a Pledge Card.

"I don't know what the world is going to be like in the next couple years. I don't want my estate to have to worry about this. I'm concerned about the future. And my health. My finances."

I've heard it so often, I wondered why I don't do something about it.

Well . . . I did.

I eschewed the dreaded word pledge. I now call it a Gift Card.

Changing the name may seem a trifling difference. (It's the trifling differences that make a big difference!).

(Article continues on next page)



(Article Continued) I make it clear in the Gift Card that it is not legally binding. It only reflects the donor's intention of wanting to do something in the future. The wording goes something like this:

It is my intention over the next three years to make a gift to ABC of \$100,000. If for any reason at all I find I am not able to make a payment following the first year, I will call the Development Office. They will postpone or cancel my gift, at my choice. I understand this Gift of Intention is not legally binding and does not encumber my estate.

I make it clear to the donor that this represents only their intention. "It's not legally binding. It only represents what you would like to do, assuming your health is good, the family is doing well, and business is in good condition. You can cancel at any time you wish."

Your Finance Office will tell you it can't be counted because it isn't irrevocable. And I say, don't let the Finance Office run your campaign. If necessary, they can keep a separate set of books about what they want to count.

The amazing thing is, there is less attrition on Gifts of Intent than there are on legally binding pledges. Tell that to your Finance Office!

Let me know what you think (davidvalinsky@gmail.com)



In closing, this is a message that I received, along with 750,000 other donors, from President Michael Drake, for contributing to The Ohio State University's record breaking \$3B campaign that ended last week:

"Were it not for you, none of this would be possible."

Use it if you like it!

Client Milestones



Asheville JCC, Asheville NC

Final stage of Community Phase

Goal: \$8 million / \$7.4 million raised to date with \$300,000 needed, which will be matched.



Northern Virginia JCC, Fairfax VA

Community Phase Launch

Goal: \$6.5 million / \$5.6 million raised to date



Atrium Medical Center, Middletown, OH

Memories Are Made of This

100th Anniversary Gala. Raised more than \$275,000 to establish a senior friendly ER.

Let us tell you the amazing stories behind these projects!

Thank you

Capital Campaign Masters ~ Institute for Charitable Giving- Stelter Co.



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