

# FIELD NOTES

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Leadership Without a Map

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Research indicates that literally trillions of dollars will be transferred from one generation to the next in the coming decade.

## Successful Planned Giving

As America's population ages, the impending transfer of wealth could have a huge impact on not-for-profit organizations that have prepared. A little work now can support your mission long into the future. However many not-for-profit organizations do not even have the most basic planned giving program in place.

*The good news is that getting an endowment development program started (or reactivated) is not rocket science. It is something a nonprofit leader can easily implement in just months!*

### A PROGRAM, NOT A CAMPAIGN

An approach to endowment development that can work effectively for many not-for-profits is one that is more like an ongoing program and not like an annual or capital campaign. Rather than a formal start and end date, an endowment development program involves a series of yearly action steps that continue annually. *In order to be successful, this program approach to endowment development needs to be active throughout the year - and throughout the years!*

### AN INVITATION, NOT A SOLICITATION

"Asking for money" is often an uncomfortable activity for volunteers and staff. However, *endowment development programs never require anyone to ask for money. Instead they*

provide the structure for volunteers/staff to have remarkable conversations with their organization's closest friends, and to eventually invite them to consider becoming a member of their legacy organization (Heritage Club, President's Circle, etc). The conversations and relationships that develop become very gratifying and enjoyable for all.

### DONOR-CENTERED

Endowment development conversations are most effective when the word "need" is taken out of the conversation as it relates to the organization, and instead is focused on the interests and priorities of the donor. The ideal outcome occurs when the donor realizes that they can make estate-related decisions that are in their best interest and that also benefit their favorite charities.

### THE KEY TO SUCCESS

As the value of real estate is defined by location, location, location... effective endowment programs are defined and activated by personal visits, personal visits, personal visits. Although there are other important elements of an effective endowment development program, very little progress is made until there are personal visits with your organization's best friends.

### BOARD AND CEO LEADERSHIP

Endowment development programs succeed when an organization's board incorporates endowment development into their strategic plan and when it is part of a comprehensive financial development plan. The commitment of the organization's board and CEO is critical to success.

### GETTING STARTED

Starting an endowment development program involves five easy steps:

- Obtain Board approval.
- Form an endowment development committee.
- Form an endowment activation plan.
- Visit with your organization's friends.
- Celebrate your progress at your first legacy organization's gathering.

Many not-for-profit leaders say that endowment development is one of the most enjoyable and fulfilling aspects of their career!

For more info or to learn how Donor by Design Group can help start or reignite your Endowment-Planned Giving Program, e-mail

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