

February 23, 2010

Hello Planned Giving Seekers,

We have been truly excited by the number of individuals who have been seeking information about Planned Giving recently. It would seem most logical that they are discovering the true power and opportunities of Planned Giving as a tool within fund raising.

One of the primary roles we have with the Susquehanna Valley Planned Giving Council is to supply relevant and timely information for these seekers. We, of course, would prefer to share information with just those that support the Council with their memberships.

We trust in sharing this newsletter through our web site, and through providing the opportunity to hear and experience speakers like the one we offered this month, individuals will respond like the many that have already with their support. This is easy to do by going on-line at www.svpgc.org and clicking on the membership link. Scroll down and select the category you want and click on the link. Remember, your organization can also become a banner sponsor of our web site and help to get your name out to the SVPGC professionals while supporting our enhanced web effort.

Educational Presentation

This month's speaker alone was worth the total cost of membership for the year. Sam Caldwell is an internationally known speaker with 16 years of front-line fundraising and charitable gift planning experience. He is the founder and President of The Planned Giving Company, a full-service provider of planned giving marketing and consulting services to non-profit organizations nationwide, and co-founder of Virtual Giving, Inc., a provider of planned giving websites.

His straightforward and practical presentation focused on Seven (7) Tips for being successful in acquiring Planned Gifts for your organization. We are not going to cover his entire presentation here in any level of detail. What we will try to do is cover some of the highlights in order to share the value of attending our meetings.

His first tip covers the most basic principle of Planned Giving, to "focus on bequests." He laid out a strong case based on the numbers to prove the value of bequests over any other form of Planned Giving. The next two tips focused on what is necessary to focus on bequests, the realization that Planned Giving is not about techniques or knowing specific facts but about relationships and loyalty. To build relationships you must visit; Planned Giving is a "sales" business. Sam provided some great techniques and ideas about getting visits and how to conduct visits that will pay dividends.

Tips four and five have to do with the human nature of individuals and what motivates them. He talked about giving societies and recognize programs that are useful in this motivation process, and why they work.

His Tip six was so logical and straightforward that almost everyone in the audience sat there scratching their heads about why they had not been doing it. Simply stated it is verify and quantify. Awareness of gifts and reporting this knowledge helps to both gain resources and support to do a better job and raise the general awareness of the giving.

Finally, Tip six was a logical argument for outsourcing your planned giving marketing. His perspective is that your valuable time is so much better spent on soliciting or building relationships.

Vision and Values

We shared a brief story with the group at this month's SVPGC Meeting to illustrate the strong link between Vision and Values.

Former dean of Walt Disney University and Director of Creative Services for Disney tells the story about the death of Walt Disney. He passed away in a hospital in Southern California in 1966. Prior to his death a journalist, knowing that Walt was seriously ill, persisted in getting an interview with Walt. Walt at that point could not sit up in bed or talk above a whisper. He instructed the journalist to lie next to him in his bed so that he could whisper in his ear.

For the next 30 minutes, as the story goes, Walt referred to an imaginary map of Walt Disney World on the ceiling above his bed. He pointed out where he planned the various attractions and buildings. He talked about the transportation network and hotels and restaurants, and many other parts of his vision that would not be open to the public for another six years.

This is an extraordinary story about how a man lay dying in a hospital was able to still describe his vision for the future and the role it would play for generations to come. It is a model for us who share in the lives of others who are trying to share their visions and values. It is up to us to make sure that those we work with do not wait until their death beds to share their values and visions. We have an essential role to play.

Next SVPGC Meeting

Our next meeting will be April 16 at WITF. Our program will feature Francis Shodowski and Jan Edwards from Millersville University talking about the role of a Planned Giving officer within the structure of a larger development program. An important program note is that future meetings will start the program earlier and have our General Membership Meeting happen after the speaker. We will start our sessions at 8:00 AM with coffee and networking and have introductions of the speaker occur as close to 8:30 AM as possible. Our GMM will then start about 10:00 AM.

The intent of this change is to provide an opportunity for those that need to leave early to hear as much of the program as possible. Most of the material covered within the GMM can be communicated through our web site and this newsletter.

Central Pa AFP Conference

SVPGC has again been asked to conduct sessions on Planned Giving at their annual conference held in the Fall. The difference this year is that we have been asked to provide programming for an entire track of the conference. This is in recognition of the popularity of the programs we have been providing each of the last several years, and the excellent evaluations received.

Do you have a program you would be interested in offering, or a topic that you feel would be of great interest? We will be seeking both topics and presenters over the next several months. Our goal will be to provide the best topics and presenters possible. Our ultimate goal is to convince the local AFP Chapter of the value of presenting a joint SVPGC and AFP Conference, like those held in Philadelphia and Pittsburg, within the next few years.

SVPGC Membership

We have been asked by PPP (our parent organization) about the "value" of membership and what they might do to help meet needs. They have also asked if we are promoting PPP membership and how we are doing so.

With very tight budgets and greater demands upon our resources I believe that the answer to these questions become very complicated. Each of us has to assess the value of any expenditure we make based upon some level of ROI or return on investment. This has been a key topic of consideration at our local SVPGC Board meetings, ensuring that we are doing all we can to provide real value for the dollars each of our members invest. The last Membership Meeting is a good example, as well as some of our efforts to bring greater efficiency to our Leave-A-Legacy program and to create better networking opportunities.

There is no question that PPP has provided, and continues to provide, some real value. Their efforts, for example, in documenting the impact of contributions from IRA Rollovers are commendable.

Unlike other organizations you have a choice. You can join both PPP and your local chapter for the total cost of \$160. You can join just PPP for \$160. Or you can join just the Susquehanna valley Planned Giving Council (SVPGC) for \$60.

We will continue to do everything we can to provide real value through our meetings, networking, and marketing efforts. We pledge to make sure presenters, for example, at our programs are not just giving you "hour-long commercials" for their businesses and that you leave each program with practical information you can use immediately. We encourage you to join, if you are not yet a member, the organization that best meets your needs and provides real value for the dollars invested.

Robert Price, President