PLANNED GIVING EVENTS MANUAL

5 TO THRIVE

A HOW-TO MANUAL FOR GATHERING EVENTS, ESTATE PLANNING WORKSHOPS, AND PROFESSIONAL ADVISOR WORKSHOPS

NEBRASKA COMMUNITY FOUNDATION

APRIL 2023

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Planned Giving Starts with Education

A survey of Nebraskans proves that we are very generous people. More than 85% of Nebraskans report making charitable gifts during their lifetimes. However, when asked, "Have you included your favorite charitable organization in your estate plan?" only 4% of Nebraskans say yes.

The good news from this survey is that more than 70% of Nebraskans said that if they were educated, motivated and asked to include a gift in their estate plan to benefit their favorite charity they would be willing to consider doing so.

This is a great opportunity for your fund and the reason why planned giving education events are critical. Your friends, neighbors and family want information on ways to make charitable gifts in their estate plans; they want to be shown how their gifts will make a difference and they want to be asked to take action to implement a plan that makes sense to them.

As the survey suggests, planned giving education events are an important part of your fund's overall development program. Before you start holding these events, however, your fund should have developed recognition and momentum in the community. For example, if your fund has successfully completed a challenge grant to build an endowment, raised funds for a specific project or implemented an annual giving program, you can build on those successes by inviting donors to learn how they can further their support with a planned gift. Having a track record of making grants that make a difference in your community is also important to give your fund credibility and visibility.

The three kinds of education events NCF recommends to our funds are:

- Gathering Events
- Estate Planning Workshops
- Professional Advisor Workshops

NCF recommends that funds begin their planned giving campaigns with Gathering Events, starting with their own FAC members, former FAC members, and spouses, and then explore the other options as appropriate for their own situation.

Which Event Should You Have When?

WHAT IS A GATHERING EVENT?

A Gathering Event introduces the various planned giving methods. It is typically the first step toward helping people think about making a planned gift that benefits your fund. It is a casual, social event typically held in someone's home.

During a Gathering Event, someone from your Fund Advisory Committee (FAC) gives an update about the fund including plans for the future. A donor makes a personal testimonial to encourage the attendees to consider what they may be able to do to benefit the fund. An NCF staff person or peer mentor gives a brief overview about various planned giving tools and attendees have the opportunity to ask questions. No actual gift solicitation happens during the event.

WHAT IS AN ESTATE PLANNING WORKSHOP?

An Estate Planning Workshop is a service provided to attendees as a free introduction to estate planning. In partnership with other community organizations or businesses, a fund will host an Estate Planning Workshop as a service to encourage community members to get their affairs in order, including charitable giving.

With community partners, funds will market the event, identify presenters (including NCF gift planning staff) and invite individuals they consider planned giving prospects for the fund to the workshop. The workshop is, often open to the public, with multiple presentations on different topics in estate planning.

NCF will present on charitable giving options, while other professionals will present on their areas of expertise (such as establishing a will or tax planning).

WHAT IS A PROFESSIONAL ADVISOR WORKSHOP?

A Professional Advisor Workshop is an opportunity to connect with, build a network of, and educate professional advisors in your area on resources and opportunities available to their clients so that the advisors can help their clients achieve their philanthropic plans.

Professional advisors may include accountants, bankers, estate planning attorneys, financial planners, insurance agents, investment advisors, realtors, and trust officers.

A Professional Advisor Workshop is typically held during breakfast or lunch. The meal is provided by the fund at no cost to those in attendance.

During a Professional Advisor Workshop, an NCF staff member or peer mentor will present on current topics in charitable gift planning. The workshop is also an opportunity to provide information to the local professional advisors about your fund.

KEYS TO SUCCESS

The keys to success for Planned Giving Education Events are personal invitations and personal follow-up. Successful events take planning and preparation, so call your Affiliated Fund Development Coordinator contact when you are thinking about holding one of these events.

How to Produce a Gathering Event

A Gathering Event is a donor education event that helps your fund introduce the subject of planned giving to people who are familiar with your fund.

The Social Compact

The first step in planning a Gathering Event is to discuss the purpose, planning process and desired outcome at an FAC meeting. A Gathering Event is a joint effort between your fund and Nebraska Community Foundation. It requires both entities to meet certain obligations, so NCF asks you to sign the social compact at the back of this manual that outlines the responsibilities of each.

Where Should a Gathering Event Be Held?

A Gathering Event is typically a small, social gathering hosted in the home of an FAC member or at another friendly venue in your community. It should be a place that affords privacy and encourages conversation. If there is a unique place of interest in the community—a new or restored home, for example— that people want to see, you may want to hold it there as another way to entice people to come.

Who Should Be There?

You should hold your first Gathering Event with FAC members, former FAC members, and their spouses. That way, you will be able to tell invitees to future Gathering Events what to expect and you will have made your own planned gift to benefit your fund.

When your fund is ready to organize additional Gathering Events, develop your invitation list from your list of current friends and donors. Typically, guests are friends of the hosts, have shown a passion for the community or organization and share a concern for its future. If there are concentrations of alumni or former residents living outside your community, you may want to hold a Gathering Event in the community where they live now.

Attendance of 10–15 people is ideal and 20 is maximum. The number of attendees should fit comfortably in the venue and make conversation easy and pleasant.

The hosts should send an invitation to the prospective guests and follow-up with a phone call to confirm attendance. Other FAC members can be recruited to help with follow-up calls. Sample invitations are included at the end of this section.

What Will We Talk About?

The agenda for a Gathering Event includes an update about the activities of your fund. You should talk about your fund's grantmaking and highlight the difference your fund is making in the community. This is the perfect time to talk about your vision for your community and any plans your fund has made for the future.

The agenda should include a personal testimonial from a donor, preferably the hosts, so attendees begin to see what planned giving means and that people they know are making planned gifts. The agenda should also include a brief overview of the various planned giving tools. Attendees will have the opportunity to ask questions.

Direct donor solicitation—asking people for a donation or a planned gift— is NOT a part of a Gathering Event. The event is for information only and designed to get people thinking about planned giving as part of their estate planning. Your follow-up will be key to helping attendees make a planned gift to support their hometown.

Providing your guests with printed material about your fund gives them a reminder of the event. If you have a fund brochure, share it at this event. NCF can provide printed information about planned giving, transfer of wealth and other relevant topics. Consult with NCF to determine what printed material you should have available at the event.

When Should The Event Happen?

Gathering Events can happen any time of day and are often held over lunch, or in the late afternoon or evening. The event should not last more than 1 ½ hours.

Let's Eat!

Since this is a more casual event, a light lunch, wine and cheese, punch and cookies or coffee and dessert are all popular options depending on the time of day and attendees. Do have refreshments but keep them simple.

What Happens After the Event?

Personal follow-up is key to the success of a Gathering Event. Before you hold the event, make assignments for follow-up calls to be made within one week after the event. Ideally, follow-up calls will be made in person. A phone call is also appropriate.

Here is an outline of the conversation you might have during the follow-up call:

- Thank you for attending.
- What interested you most about the event and discussion? (Ask, then be quiet and listen!)
- What questions do you have? Would you like to receive more information about any of the opportunities presented?
- How can you see yourself getting involved with us?
- Who else do you feel should hear this information?

A Gathering Event is just the first step in cultivating a donor for a planned gift. If attendees express interest in making a planned gift, contact NCF's gift planning department to determine follow-up. If they don't show interest right now but have not shut the door to your ideas, continue to engage the donor as appropriate.

Finally, make sure everyone who attends the event is on your fund's mailing list so they'll receive your newsletter, annual report or invitations to any future events.

Gathering Event Checklist and Suggested Timeline

Date of Gathering Event: ________________

6 Weeks (or more) Before Event:
☐ Sign social compact with NCF including commitment to follow-up activities.
☐ Select a venue.
☐ Recruit host or host couple.
☐ Select a date that works for the host, FAC members, potential invitees and NCF staff.
☐ Create the invitation.
With ample notice, NCF's marketing team is happy to support your affiliated fund's promotional needs. Contact Carrie Malek-Madani at cmalek-madani@nebcommfound.org for details.

4 Weeks Before Event:
☐ Create the invitation list.
☐ Decide on refreshments – what to serve, who will prepare, who will pay.
In some cases, the host will assume the cost. This is also an acceptable expense for your fund's general account.
☐ Recruit someone to make a personal testimonial about their decision to make a planned gift to your fund.

3 Weeks Before Event:
☐ Send invitations.

2 Weeks Before Event:
☐ Monitor RSVPs for event.
☐ Create a follow-up plan to execute after the event. Assign follow-up contacts to FAC members who will attend the event. Make sure FAC members know the steps in a follow-up call and practice if necessary.

1 Week Before Event:
☐ Make phone calls to all invitees to confirm attendance. Offer rides if necessary.
☐ Confirm the speaker for personal testimonial.
☐ With help of NCF staff, finalize handouts and make copies.
☐ Notify NCF staff of attendance numbers.

Gathering Event:
☐ Confirm current contact information for all attendees.
☐ Smile!

1 Week After Event:
☐ Execute follow-up plan.

2 Weeks After Event:
☐ Add names and contact information of all attendees to the fund's mailing list so they will receive future communication.

Sample Gathering Event Invitation

The Hometown Community Foundation Fund

cordially invites you to

A Gathering Event

at the home of John and Mary Smith

DAY, MONTH DATE

TIME

ADDRESS

HOMETOWN, NE

Please join us for this special gathering of friends and neighbors. Our event will include refreshments and a short presentation by the Nebraska Community Foundation on creative gift planning. You will learn about gift options that provide tax advantages today, as well as gifts that go on giving forever.

This is not a fundraiser*—it is an opportunity for you to learn about ways you can help build the future of our hometown.*

RSVP for this event to (Name at Phone Number)

Gathering Event Sample Agenda

Topic	Who	Time (minutes)
Get Acquainted and Social Time	All	15–30
Welcome and Introductions	Host	5–10
Fund Update & Plans	FAC Member	10–15
Personal Testimony	Donors	5–10
Intro to Planned Giving and Q & A	NCF Staff/Mentor	15–25
Thank You	Host	3–5
		53–100

How To Produce an Estate Planning Workshop

The Social Compact

After discussing the purpose, planning processes and desired outcome of the Estate Planning Workshop at an FAC meeting, please sign the social compact at the back of this manual that outlines the responsibilities of both your fund and the Nebraska Community Foundation.

Where Should an Estate Planning Workshop Be Held?

As a public-facing educational event, the location will vary based on your community, but may best be held at a community center, community college, hospital, or library. Many individuals will be invited, and the number of registrations you can accept will depend on your venue. It may be wise to partner with an organization that can host such an event.

Who Should Be There?

While you may issue an open invitation to residents in your area, it is important to identify individuals your fund hopes to ask for planned gifts in the future. Your FAC should review its prospect list to identify these loyal donors and volunteers and issue personalized invitations.

What Will We Talk About?

Each professional advisor presenting at the workshop will talk about their individual area of expertise. For example:

- Estate planning attorneys will discuss the basics of an estate plan and establishing a will
- Accountants will talk about income tax and estate tax planning
- Investment advisors will talk about investments
- An extension agent may talk about farm or ranch succession planning
- NCF staff will talk about charitable estate planning

When Should The Event Happen?

Most estate planning workshops are held mid-morning through mid-afternoon, depending on the number of speakers and the length of their presentations. Provide breaks between presentations, including lunch. An abbreviated evening workshop is also an option.

Let's Eat!

Lunch, which may be sponsored by a local business or organization (or your fund), will be served as a break mid-day. An evening meal or dessert is also acceptable.

What Happens After the Estate Planning Workshop?

Personal, individual follow-up is key to the success of an Estate Planning Workshop. Before you hold the event, make assignments for follow-up calls to be made within one week after the event. Here is an outline of the conversation you might have during the follow-up call:

- Thank you for attending.
- What interested you most about the event and discussion? (Ask, then be quiet and listen!)
- What questions do you have? Would you like to receive more information about any of the opportunities presented?
- How can you see yourself getting involved with us?
- Who else do you feel should hear this information?

If attendees express interest in making a planned gift, contact NCF's gift planning department to determine follow-up. If they don't show interest right now but have not shut the door to your ideas, continue to engage the donor as appropriate.

Finally, make sure everyone who attends the event is on your fund's mailing list so they'll receive your newsletter, annual report or invitations to any future events.

Estate Planning Workshop Checklist and Suggested Timeline

Date of Estate Planning Workshop: __________

12 Weeks Before Event:
☐ Sign social compact with NCF including commitment to follow-up activities.
☐ Select a venue.
☐ Recruit a master/mistress of ceremonies (MC).
☐ Identify and invite professional advisors with local ties to your community to present at the workshop.
☐ Select a date that works for the host, FAC members, presenters and NCF staff.

10 Weeks Before Event:
☐ Create the invitation list. Invitees are typically current donors to your fund.
☐ Select the menu. Solicit a meal sponsor to assume the cost of the meal. This may be an acceptable expense for your fund's general account if you do not have a sponsor.
☐ Identify and solicit co-sponsors for the workshop, if any.

8 Weeks Before Event:
☐ Create invitation.
With ample notice, NCF's marketing team is happy to support your affiliated fund's promotional needs. Contact Carrie Malek-Madani at cmalek-madani@nebcommfound.org for details.
☐ Develop public-facing marketing plan, if any.

4 Weeks Before Event:
☐ Send invitations.

2–5 Weeks Before Event:
☐ Monitor RSVPs for event.
☐ Launch public-facing marketing, if any.
☐ Create a follow-up plan to execute after the event. Assign follow-up contacts to FAC members who will attend the event. Make sure FAC members know the steps in a follow-up call and practice if necessary.

1 Week Before Event:
☐ Make phone calls to selected invitees to confirm attendance. Offer rides if necessary.
☐ With help of NCF staff, finalize handouts and make copies.
☐ Notify NCF staff of attendance numbers.

Day of:
☐ Confirm current contact information for all attendees.
☐ Smile!

1 Week After Event:
☐ Execute follow-up plan.

2 Weeks After Event:
☐ Add names and contact information of all attendees to the fund's mailing list so they will receive future communication.

Sample Estate Planning Workshop Invitation

FREE Estate Planning Workshop

Presented by Sponsors and the Name of your Community Fund

Day, Date

Start Time to End Time

Location

Location Details

Complimentary lunch provided by Sponsor Name

PRESENTERS:

- Presenter 1, Organization
- Presenter 2, Organization
- Presenter 3, Organization
- Presenter 4, Organization

To register, contact:

Name | name@emailaddress.com | (xxx) xxx-xxxx

Estate Planning Workshop Sample Agenda

Topic	Who	Time (minutes)
Welcome	Host	5
Presentation 1	Professional Advisor	60
Break	All	5–10
Presentation 2	Professional Advisor	60
Lunch	All	60
Presentation 3	Professional Advisor	60
Break	All	5–10
Presentation 4	NCF Gift Planning Staff Member	60
Thank You		

Presentation order and length depends on time available and number of presenters.

How to Produce a Professional Advisor Workshop

The Social Compact

The first step in planning a Professional Advisor Workshop is to discuss the purpose, planning process and desired outcome at an FAC meeting. A Professional Advisor Workshop is a joint effort between your fund and Nebraska Community Foundation. It requires both entities to meet certain obligations, so NCF asks you to sign the social compact at the back of this manual that outlines the responsibilities of each.

Where Should a Professional Advisor Workshop Be Held?

A professional advisor workshop should be held in a private room at any appropriate local venue that allows or provides catering/food service.

Who Should Be There?

Any identified professional advisors who do work in the community, including FAC members own personal professional advisors.

Professional advisors may include accountants, bankers, estate planning attorneys, financial advisors, financial planners, insurance agents, realtors, and trust officers.

What Will We Talk About?

Current topics related to estate planning of interest to professional advisors. FAC member can introduce/update on the fund. Other co-hosts may do the same.

When Should the Event Happen?

Experience indicates that professional advisor attendance is highest when offered over the breakfast or lunch hour with a meal.

Let's Eat!

Breakfast or lunch, which may be sponsored by a local business or organization (or your fund), will be served at the beginning of the workshop.

What Happens After the Professional Advisor Workshop?

Personal, individual follow-up with each advisor can help build the relationships between your fund and the advisors. Before you hold the event, make assignments for follow-up calls to be made within one week after the event. Ideally, follow-up calls will be made in person. A phone call is also appropriate.

Personalized, hand-written thank you notes are also encouraged. Here is an outline of the conversation you might have during the follow-up call:

- Thank you for attending.
- What interested you most about the event and discussion? (Ask, then be quiet and listen!)
- What questions do you have? Would you like to receive more information about any of the opportunities presented?
- How can you see yourself getting involved with us?
- Who else do you feel should hear this information?

Finally, make sure everyone who attends the event is on your fund's mailing list so they'll receive your newsletter, annual report or invitations to any future events.

NCF will update the NCF constituent database with professional advisors' contact information so they receive regular communication, including NCF's GiftLaw eNewsletter.

Professional Advisor Workshop Checklist and Suggested Timeline

Date of Professional Advisor Workshop: ____________

8 Weeks Before Event:
- ☐ Sign social compact with NCF including commitment to follow-up activities.
- ☐ Select a venue.
- ☐ Recruit a master/mistress of ceremonies (MC).
- ☐ Select a date that works for the host, FAC members, presenters and NCF staff.

7 Weeks Before Event:
- ☐ Create the invitation list based on known local advisors and FAC members' personal advisors.
- ☐ NCF will share current list of professional advisors in the area.
- ☐ Design invitation.
  With ample notice, NCF's marketing team is happy to support your affiliated fund's promotional needs. Contact Carrie Malek-Madani at cmalek-madani@nebcommfound.org for details.
- ☐ Select the menu. Your fund should assume the cost of the meal. This is an acceptable expense for your fund's general account.
- ☐ Identify and solicit co-sponsors, if any.

6 Weeks Before Event:
- ☐ Send invitations. Invitations should be a letter or formal invitation.

2–5 Weeks Before Event:
- ☐ Monitor RSVPs for event.
- ☐ Create a follow-up plan to execute after the event. Assign follow-up contacts to FAC members who will attend the event. Make sure FAC members know the steps in a follow-up call and practice if necessary.

1 Week Before Event:
- ☐ Make phone calls to all advisors of FAC members (by those FAC members) to confirm attendance.
- ☐ With help of NCF staff, finalize handouts and make copies.
- ☐ Notify NCF staff of attendance numbers.

Day of:
- ☐ Confirm current contact information for all attendees.
- ☐ Smile!

1 Week After Event:
- ☐ Execute follow-up plan.
- ☐ Share list of attendees with NCF.

2 Weeks After Event:
- ☐ Add names and contact information of all attendees to the fund's mailing list so they will receive future communication.

Sample Professional Advisor Workshop Invitation

You are cordially invited to be our guest at

THE ART OF CHARITABLE PLANNING WORKSHOP FOR PROFESSIONAL ADVISORS

Guest Speaker: [NCF Gift Planning Staff NAME]

[NCF Gift Planning Staff TITLE]

DAY, DATE

TIME

LOCATION

(Lunch will be provided)

This workshop will inform you about gift planning tools, as well as offer practical ideas to initiate discussions about planning for the benefit of our community and local charitable organizations.

Please RSVP

First Last (xxx) xxx-xxxx or
First Last (xxx) xxx-xxxx or by email to
name@emailaddress.com

This workshop is sponsored by:

[Name of Community Fund] (an affiliated fund of Nebraska Community Foundation) and [names of other sponsoring community organizations].

Professional Advisor Workshop Sample Agenda

Topic	Who	Time (minutes)
Breakfast/Lunch	All	5–10
Introduce Sponsoring Partners & Promote Local Fund(s)	FAC Member	5–10
Planned Giving Presentation and Q & A	NCF Staff/Mentor	40–45
Thank You	FAC Member	
		50–65

Planned Giving Education Event Social Compact

______________________________________ Fund is planning a
☐ Gathering Event ☐ Estate Planning Workshop ☐ Professional Advisor Workshop, and agrees to:

- Organize and host the event, including selecting and paying the cost of the facility, food and beverages to be served
- Develop the invitation list, extend invitations and confirm attendees
- Provide a spokesperson or master of ceremonies, host and someone to give a personal testimonial at the event
- Make personal invitation calls (both in person and telephone) with selected invitees prior to the event
- Make personal follow-up calls (both in person and telephone) with all attendees within a week after the event

NEBRASKA COMMUNITY FOUNDATION AGREES TO:

- Provide guidance on the steps for a successful event
- Provide an NCF staff or mentor to attend and present at the event
- Provide mentoring to the organization or community fund on conducting follow-up contacts
- Provide technical assistance, as needed, to prospective donors and their professional advisors on charitable gift planning

The _______________________________ Fund agrees to take the above steps and fulfill the above responsibilities in order to ensure a successful event.
The event will be held on _______________________ at _________________________ from _______ to ________.
The host(s) for the event is (are) ____ .
The primary contact person for the event is __________________________________ .
who can be contacted at __________________________ (email) or ______________________ (phone).

____ ____________________________
For Fund Date

____ ____________________________
For Nebraska Community Foundation Date

Contact Information

For more information about Planned Giving Events, contact your Affiliated Fund Development Coordinator or NCF's Office of Gift Planning:

Todd Mekelburg
Director of Gift Planning
402.323.7343
tmekelburg@nebcommfound.org

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402.323.7330
info@nebcommfound.org