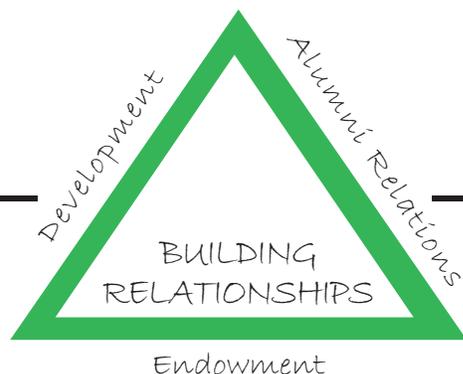


Advancement Services

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December 2006



Tip of the Month



Make sure you promote the ***Pension Protection Act of 2006*** to all donors and prospects who are 70½ and older before the end of the tax year! Questions? Contact Rich Goode at rgoode@archchicago.org.

Remind, Reinforce, Reiterate The Key to Bequests

If you hope to receive gifts from wills and estate plans, the need for effective, consistent and compelling communication is enormously important.

The keynote presentation on Planned Giving, at the November **Archdiocesan Development Council** meeting, by Rich Goode, Director of Planned Giving for the Archdiocese, offered tremendous guidance and encouragement for efforts in this area. The following information is taken from this presentation, with particular emphasis on wills/bequests, as that is where the majority of planned giving revenue resides. Keep the planned giving message simple – continually remind your constituents to “remember St. Cecilia School” in their wills and educate them about the basic bequest options again and again...and again and again.

Bequest Options

Amount:

The donor designates a certain dollar amount that is contributed to your school.

Percentage:

The donor arranges for a specific percentage of the estate’s total value to be directed to your school. This is often a better gift than a specific amount as most donors underestimate the total estate value.

Contingent Beneficiary:

The school will receive a portion of the estate if other beneficiaries are not available to receive their estate gifts.

Rest, Residue and Remainder:

Once all percentage and/or amount bequests have been fulfilled, the remaining estate assets are given to your school. Like percentage bequests, this is often a very pleasant surprise, for when individuals underestimate the value of their estates, the “rest” can be quite substantial.

Education and Communication

It is important to promote planned giving to all your constituents – not just major donors – because most of these gifts will come from people you’ve never met. Since the majority of donors will not indicate their bequest intentions to you, it is vital that prospects for such gifts are reminded early and often.

Include, on all your solicitation reply devices and newsletter update forms, space for

___ I have included St. Cecilia School in my will.

___ Please send me information about including St. Cecilia School in my will.



The **Advancement Services Newsletter** should be distributed to staff, volunteers and board members involved in your institutional advancement efforts. Please copy and forward as necessary. If you would like to submit a question to our Q & A column, post a position announcement or arrange for others to receive this newsletter, please contact foleymaryj@aol.com.

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Remind, Reinforce, Reiterate

Make reference to planned giving and bequests at all events. The easiest way to do this is as a thank you to a donor or the family of a donor who made a bequest to your school. Tell the story of how this gift will benefit the children in your school and how, as a result, this donor will be forever remembered.

Include articles about planned giving in all publications. Explain the key decisions that should be made before meeting with an estate planning attorney.

Invite your major donor society and your planned giving society members to a joint event in order to cross fertilize – the majors will be more inclined to consider a bequest, the bequest donors may rethink the possibility of major gifts while they are alive.

Never let an opportunity or contact pass without mentioning the unparalleled advantages of bequest giving.

Constantly brainstorm with staff and volunteers how to best communicate planned giving and then implement the best ideas.

Your efforts in this arena will...

- enhance the likelihood of bequest income to your school (while 90% of Americans give to charities, only 5% make bequests),
- increase your chance of sharing in the intergenerational transfer of wealth predicted for the next few decades,
- raise awareness about the need for a will, and
- prompt you, a reader of this article, to MAKE A WILL NOW if you don't have one. And, of course, consider a bequest to the schools you and your children have attended.



Question and Answer...

Q: Last month, you provided a series of sample Mass intentions about stewardship in general. Do you have any that specifically address the offertory collection?

A: Yes, consider rotating the prayers below over each five week period.

That the gifts we are about to give to the offertory collection truly reflect a meaningful expression of our gratitude to God for His blessings in our lives, we pray to the Lord.

That the contributions we are about to share with our family of faith demonstrate an appropriate measure of appreciation for all the goodness in our lives, we pray to the Lord.

That like the gifts that we bring to the altar, may those we collect in our offertory baskets represent the finest expression of sacrifice we can give, we pray to the Lord.

May God look favorably upon our use of all the gifts He has given us as we share them with our worship community, we pray to the Lord.

And as our offertory is taken up, may the contributions included in this week's collection reflect our desire to truly share thoughtful and proportionate gifts in response to the many blessings God has so generously and consistently bestowed upon us, we pray to the Lord.

Q: Our school can't afford to hire development staff, but we know that our fund raising and marketing programs need to get more attention. How can we best use volunteers in these areas?

A: Many schools will adopt a "Development by Committee" approach to keep their efforts focused and make sure that the right hand knows what the left is doing. Start by determining what initiatives will generate the greatest outcome and break them down into specific strategies or steps. This will help you identify the tasks you want to assign to volunteers.

Once you've identified the needs, recruit volunteers with these jobs in mind, matching their talents and interests with your projects wherever possible. After you've determined who's doing what and when, make sure all the volunteers receive the proper orientation and training so that they feel comfortable in their roles. Finally, continually express your gratitude for their efforts, recognize the benefit their work has generated with a particular emphasis on how it affects the students, and encourage their ongoing involvement.

For more detailed ideas on volunteer management, watch the next newsletter for the start of a four-part series on this topic.

