

PG Tip from Leave A Legacy® - Happy 2012!

Dear Leave A Legacy® Partner:

Hopefully, everyone is enjoying a fun and fast start to 2012! Fundraising is hard work. But it's also important work. Thank you for everything you're doing to help strengthen our community.

Even with January 1st behind us, there is still time to consider something that will improve our professional efforts – New Year's resolutions. The tradition of the New Year's Resolutions dates at least back to 153 B.C., when a mythical king of Rome, Janus, was placed at the beginning of the calendar. Possessing two faces, Janus could look back on past events and forward into the future. Janus also informs 'January' as the first month of the year, a time of new beginning.

A year ago, if you had perfect foresight into the coming 12 months – are there things you might have done differently? Hindsight is always 20/20, of course, but considering the question can be helpful.

It's also important to note that planned gift fundraising is typically the easiest set of responsibilities to push into next week, next month...or next year. Resolutions can help you stay focused on your most important work, not simply the things that appear most urgent in the moment.

Here are a few PG resolutions to consider:

1. Add a check-off box to all direct mail coupons, reply envelopes, etc, so people can indicate their interest in a planned gift, or tell you they've made one. When do you reorder these materials? Is it time to update their design?
2. Talk to one person every month about a planned gift. Even if it's asking a simple question like, "Could I send you a brochure that talks about remembering non-profit organizations (or your organization, specifically) in your estate plan?" Schedule it in your planner. Write it down on the 1st of every month. Keep track of how many times you mention it to someone and notice as it becomes easier, more second-nature.
3. Place a PG article in each issue of your newsletter. Use the Leave A Legacy® materials we provide. Even if it's a few simple sentences in a shaded box, consistently remind people of this option. What is your newsletter's production schedule? Add it to your calendar.
4. Attend more CPGR events. Quite simply, there is no better PG resource you will find. The Brown Bag luncheons are great educational opportunities for those newer to planned giving, while the Quarterly Programs typically (but not always) provide more technical information. The Summer Symposium is the best regional conference in the country. Attend and network with others – we're all somewhere on the PG learning curve. Please visit the CPGR website at www.cpgr.org and add these dates to your calendar.
5. Finally, relax about planned giving. It's got its complicated parts, for sure, but in the end it's just another way for people who care to make a significant gift. Since most donors cannot make large lifetime gifts (who can predict future financial needs?), planned gifts allow for a significant gift AND financial protection along the way.

Hopefully, one or more of these 'suggestions' will be worthy of becoming a 'resolution' for you. In the meantime, thank you again for all of your work, and please accept our very best wishes for a wonderful 2012!

Cheers,

Leave A Legacy® - Colorado Planned Giving Roundtable

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