



Making it All Work Seamlessly

How to Integrate Legacy Giving with your Capital Campaign

Clients often mention, “We’re doing a capital campaign. Should we include legacy giving?” And our answer? “Absolutely.”

A capital campaign can be a great way to maximize the moment and your organization’s long-term vision for an estate gift. **It should be as comprehensive as possible: enhancing all funding sources, including planned giving or legacy giving.**



HERE ARE THREE IMPORTANT REASONS WHY

- 1** Most of your donors’ assets are *not* in the form of cash
- 2** Legacy gifts are potentially the largest gifts your organization will receive
- 3** Legacy gifts allow for greater donor participation

A campaign ask is an opportunity to encourage your donor to look beyond their income and checkbook to the stewardship and management of their God-entrusted assets. For various reasons, not everyone is able to gift a portion of their assets during their lifetime, so a gift in their will or estate plan may be their best or *only* way to participate meaningfully in your campaign. Not offering them another way to think about their giving could be a missed opportunity.

HOW TO GET STARTED

Here are the decisions you need to make:

1. Determine what portion of your campaign goal is dependent on current commitments (cash) and what portion may be funded through future expectations. Non-cash giving can include completed deferred gifts, legacy gifts received from estates and future bequest commitments made during the campaign. It’s important to note that approximately 70 million Americans will pass the age of 65 during the next 20 years. This represents about 65% of the U.S. population, therefore legacy gifts can play a key part of any campaign.

2. Set a planned giving target for the campaign and have a plan for including planned gift requests in your interactions with donors.

3. Determine how to account for and steward legacy gifts within the campaign. What percentage of the gift will be counted toward the current campaign? How will the donor’s age affect the percentage of the gift that is counted?

CAMPAIGN INTEGRATION STRATEGIES

You can easily fold legacy giving into your capital campaign. Here are four strategies to consider:

1. Personal contact

Once the capital campaign gift commitment is made, you have an opportunity to see if the donor is interested in going further with a legacy gift (which can potentially upgrade the call by \$50-\$100K).

Here's a sample phone call script: *"We really appreciate your financial commitment to the campaign, Mrs. Smith. You know, a growing number of our supporters have decided they'd like to extend their impact with our organization by including **Organization Name** in their Will, Trust or Beneficiary plan. Is that something you would like to consider?"*

2. Campaign reply devices and commitment cards

Yes! I'd like to extend my impact with **Organization Name**

I would consider including **Organization Name** in my Will, Trust or Beneficiary plan

I have already included **Organization Name** in my Will, Trust or Beneficiary plan

3. Mail dialogue integration

The Money for Ministry mail dialogue program is a great way to carry the legacy gift conversation throughout the duration of your campaign. Your Money for Ministry account manager would be happy to discuss strategies to help you integrate campaign language into your surveys, check-in letters, and cover letters.

4. Website Integration

Capital Campaign Webpage

We recommend including a button on your campaign webpage that links to your Christian Will site. Suggested language: "Learn how you can extend your impact through legacy giving."



ASKING FOR DETAILS REGARDING A LEGACY GIFT

An additional reason to include legacy giving is sometimes in the context of a campaign, the vision you're communicating creates a compelling impetus for your donors to either accelerate their estate gift (give some of it now), or for the purposes of planning, provide your organization with an estimated gift amount. Many organizations wonder whether it's appropriate to ask about the details of a gift or aren't sure how to go about it.

Organizations typically use Disclosure forms (or Legacy Giving Intent forms) that ask for a specific amount with their campaign when leadership wants to "count" estate gift values. There is limited value in going this route for two reasons:

1. Very few of your estate gift donors want to disclose the amount (it's challenging enough to get people to simply notify you of the gift)
2. Your donor's estimate is of little practical value (many give a percentage, which is difficult to determine today or in the future). If you do choose to send a disclosure form, consider including a space for the donor to write any information they feel led to share, rather than requesting a specific amount.

E.g. "Notes about your gift (optional): _____"

At Money for Ministry, we use your historical average estate gift amount (or our average \$50,000 if you don't have one) in our estimations. This allows more of your donors to engage in the process and provides a fuller, more accurate picture of what your estate gift pipeline looks like in terms of number of donors and the dollar value moving through it.

REPORTING ON YOUR CAPITAL CAMPAIGN

We want your campaigns to be as effective as possible, so we'll help you compile data and results. You'll have a clear picture of how your efforts are materializing through quarterly reports on your planned giving growth that can be integrated into a campaign report for your board, donors, and partners.



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