

Peanuts cartoonist Charles Schulz is the chairman of the \$8 million National D-Day Memorial Campaign. Schulz a WWII veteran, gave \$1 million to the campaign in October. The memorial of the Allied forces' invasion of Normandy will be at a 90-acre site in Bedford, Va.

Widening the circle Legacy societies provide vehicle to expand philanthropy

Sometimes called heritage societies, these groups also raise awareness about estate planning — an exercise not reserved only for the rich and famous.

By LESLIE WAUGH

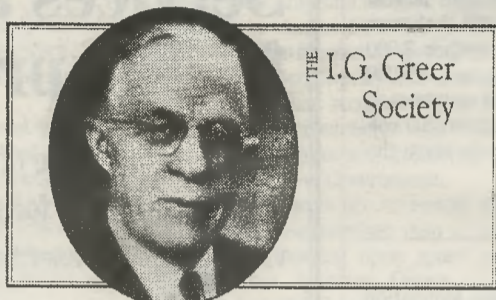
With awareness about planned giving blooming among smaller nonprofit organizations, estate planning is becoming a fairly simple way to introduce potential donors and nonprofit managers to the world of deferred giving.

The most popular kind of planned or deferred gift is a bequest, a gift made through a last will and testament. As smaller nonprofit organizations and foundations become more savvy about planned giving, they are establishing formal ways both to recognize and encourage bequests.

Legacy societies are a vehicle to honor donors who name a charity as a beneficiary in their estate plans. Also called heritage societies or named for a significant benefactor of an organization, these groups are both a practical and symbolic way to honor donors who have included charitable institutions in their wills.

"People who make those gifts are genuinely philanthropic," says John Farmer, planned giving specialist at the Community Foundation of Greater Greensboro. "That decision requires a bit of thought and work. Changing a will is harder than just writing a check."

Legacy societies and other vehicles to recognize levels of giving have been common at institutions with dedicated



The I.G. Greer Society is named for the man who led Baptist Children's Homes during the Depression.

fundraising departments, such as colleges and universities.

Planned giving at the University of North Carolina at Chapel Hill dates to 1797, when Major Charles Gerrard left the school a large tract of land that he had received for his service in the Revolutionary War.

Now, the Charles Gerrard Society recognizes donors who make planned gifts to the university. The university invites alumni to join the society by making a documented planned gift. In return, the donor gets a closer association with the university, says June Steel, director of planned giving and regional gifts for the school.

"More than anything else, it provides name recognition associated with the university," she says. And over time, she says, planned gifts tend to be the largest gifts the school receives.

J. Warren Steen, director of development for Baptist Children's Homes of North Carolina, says heritage societies

are important because people often make their single largest gift in their last will and testament.

Peace College, a small, all-women's school in Raleigh, received \$400,000 in 1996 from an alumna who died, a relatively large amount for a single gift, says Eugenia Leggett, director of development. Peace's Heritage Society recognizes alumnae and other donors who name Peace in a will, trust, insurance policy or gift annuity. Once a year, they are invited to a dinner reception in their honor.

Many societies do not set a minimum amount on gifts to be included as a member, but some do. The Winston-Salem Foundation created its Legacy Society two years ago to recognize donors who contribute or make estate plans to contribute endowed funds of at least \$10,000. In return, members have access to the foundation's donor services.

Legacy societies recognize both living and deceased donors, but they also serve as a vehicle to recruit potential donors while they are still alive.

"We don't really get a chance to thank people who left us in their wills," says Brenda Penney, director of donor services at the foundation. "We decided to create the society to thank them while they're still around."

Baptist Children's Homes created the I.G. Greer Society a decade ago for similar reasons. Named for the well-known children's advocate who led the organization in the 1930s and '40s, the society now has 306 members who have included Baptist Children's Homes in their estate plans. In

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Smart Start figures questioned

Gifts to Smart Start, Gov. Hunt's early childhood initiative, have been significantly overstated, according to an audit by the state.

In sharp contrast to the \$7.8 million the North Carolina Partnership for Children announced it had raised in fiscal year 1996, a review by the State Auditor's office found only \$2.8 million should have been counted as donations by the nonprofit, which runs Smart Start.

Cash collections of \$515,000 were deemed ineligible because they were received after the fiscal year end. The largest disparity was in the accounting for in-kind gifts. According to the audit, only \$320,000 of the \$4.8 million the partnership claimed could actually be considered contributions. Donations the partnership counted were considered by the state to be gifts to other charitable institutions.

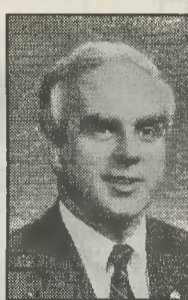
Gerry Cobb, director of development for the partnership, attributed the discrepancy to "confusion over accounting definitions." The organization faces a fine of up to \$3.1 million for failing to meet its fundraising goal of \$5.8 million for 1996.

The controversy does not seem to have stemmed the tide of donations to Smart Start. In December, Guilford Mills contributed \$500,000 to the program which has expanded to all of North Carolina's 100 counties.

Solicitations questioned Fayetteville mayor under scrutiny

Fayetteville

Mayor J.L. Dawkins raised nearly \$350,000 for the Fayetteville Urban Ministry between March 1995 and October 1997. But those he was soliciting didn't know



J.L. Dawkins

Dawkins was receiving a significant portion of those donations — nearly \$50,000.

According to North Carolina state law, fundraisers must inform potential donors if they are being paid for solicitation work, a stipulation with which Dawkins says he was not familiar.

In addition, The Associated Press reports, both Dawkins and the Urban Ministry failed to register their fundraising work with state regulators, although the law requires that individuals who solicit contributions for charitable organizations obtain a \$200 state license and nonprofits to obtain a license if they receive more than \$25,000 a year in donations.

"Of course I am going to raise money whether I get paid for it or not," says Dawkins, who also serves as a member of Urban Ministry's board of directors. "I was mainly trying to help the less fortunate."

Rusty Long, Urban Ministry's director of six months, says he is glad the controversy over Dawkins' fundraising has surfaced. He believes the revelation will force him to make the administration more professional. In the long run, he says, "this is something that can and should make our organization stronger."

The organization and Dawkins are under investigation by the Charitable Solicitation branch of the state Department of Human Services. They face fines of up to \$1,000 per donation if convicted.

In November, running unopposed, Dawkins won a sixth term as Fayetteville mayor.

Symphony prepares for campaign

The North Carolina Symphony has hired the Winston-Salem fundraising firm Winslow-Considine to help develop a fundraising strategy and plan. The symphony hopes to raise \$12 million to \$16 million.

Of the total to be raised, \$4 million would help pay for the expansion of Memorial Auditorium in downtown Raleigh — a project that also will receive \$16.5 million in public funds and another \$5 million that is being raised privately in addition to the funds being raised by the symphony.

The remainder of the funds that the symphony hopes to raise — \$8 million to \$12 million — would build the organization's endowment, which now totals \$6 million.

The fundraising plan is scheduled to be completed in February. An endowment campaign could begin soon after that.

The symphony also has hired public relations firm Ruder-Finn in Raleigh to conduct a communications and market assessment and to develop a communications plan for three projects. They include preparation for a new performing arts center at Memorial Auditorium that the symphony will occupy on its completion in 2000; the fundraising and endowment campaign; and a long-range planning document the symphony recently adopted.

Call (919) 733-2750, ext. 226.

UNC-CH names special fundraiser

Veteran fundraiser Priscilla Bratcher, senior counsel for Raleigh fundraising firm Capital Consortium, has been named director of special campaigns in the office of university development at the University of North Carolina at Chapel Hill. She begins work Jan. 5.

Bratcher will be responsible for coordinating campaigns for UNC-CH units that are university-wide priorities but don't already have assigned fundraisers. For example, she'll assist in the campaign to raise \$7.5 million for the Black Cultural Center that already has raised \$3.5 million.

Bratcher formerly was vice president for development at the American Social Health Association and before that was director of development and community relations at the UNC Center for Public Television. She recently received the annual outstanding fundraising executive award from the Triangle Chapter of the National Association of Fund Raising Council.

BRIEFLY

Environmental group teams with dining club

RiverLink, an Asheville environmental group that promotes the French Broad River, has joined forces with a dining club to raise money. The group will collect 40 percent of sales of new memberships it receives to Discover Dining, a two-for-one dining and entertainment program. Memberships are \$59. Call (800) 763-1458.

Boxing champ gives \$100,000 to Shaw

World heavyweight champion Evander Holyfield pledged to give \$100,000 to Shaw University, which presented him with an honorary doctorate of humane letters in November. Holyfield said he hoped the gift would enable others to take advantage of the educational opportunity he had not been able to afford.

Duke events to raise \$4 million for kids

Duke Children's Hospital & Health Center has kicked off a marketing campaign, "Miracles for Kids," to promote three of its major fundraisers: the Children's Classic, the Children's Miracle Network broadcast and the MIX 101.5 radiothon. The events, scheduled to begin late May, are expected to raise more than \$4 million.

Barton College has best campaign ever

Barton College in Wilson completed its most successful fundraising campaign ever in September, having collected more than \$12.5 million in gifts and pledges. More than \$4.2 million went to the endowment, \$5.8 million to enhance facilities and \$2.5 million to the annual fund.

Avery Health Care names campaign chair

Alan T. Dickson, chairman of the Charlotte-based Ruddick Corporation, has been named chairman of the \$17 million capital campaign for Avery Health Care System in Newland. The funds will be used to build a 70-bed facility in Linville. The campaign has collected \$13.5 million, including \$500,000 from the Dickson Foundation.

Gala to benefit historic building

A gala event to raise money for preservation of the former Briggs Hardware building in downtown Raleigh will be held Jan. 10. Preservation North Carolina aims to raise \$525,000 by the end of 2000 for the project. The group already has secured commitments of more than \$165,000. Call (919) 832-3652.