

Media notebook

Compiled by Todd Cohen

Jewish charities hope merger will heal split

The United Jewish Appeal and the Council of Jewish Federations hope their planned merger will help ease tension within the Jewish community and help raise more charitable dollars, *The New York Times* reported Aug. 9.

The two groups each raise more than \$1 billion a year, but they "now struggle to persuade Jews — younger ones, especially — that the organizations are as relevant today as they were during the Holocaust or Israel's pioneer days," the *Times* said.

In July, the U.J.A. and the federations that make up the council agreed to merge. The deal would "shift power over spending abroad to the grass roots," with local donors having "more say over where the dollars sent to Israel should be spent and whether a bigger share of funds should go to Jewish community-building at home and abroad."

AMA paying Sunbeam \$9.9 million

The American Medical Association has agreed to pay Sunbeam Corp. \$9.9 million after pulling out of a deal to endorse the company's humidifiers, blood-pressure monitors and other products, the Associated Press reported Aug. 2.

The AMA backed out of the endorsement deal after being criticized because it had no plans to test the products.

Cuban exile lied about financial support

A Cuban exile who conducted violent operations against the Cuban government says he misinformed *The New York Times* in telling the newspaper that leaders of a foundation that is the most influential exile organization in the U.S. had provided him

with financial support, the *Times* reported Aug. 4. Based on a series of interviews with Luis Posada Carriles, the *Times* previously had reported that the exile had received money from the chairman of the Cuban-American National Foundation.

More active oversight in works

Proposed new Internal Revenue Service regulations should prompt some trustees and other officials of public charities to take more active roles, tax advisers told *The Wall Street Journal* in a story reported Aug. 5.

The IRS issued the new rules because of a 1996 law designed to help the agency "punish charities that award excessive pay and perks to insiders," the *Journal* said. "The proposed rules authorize the IRS to fine officials who receive excessive benefits, as well as those who authorize the payments. Previously, the IRS's only weapon was to revoke a group's exempt status."

Final rules are not expected to be issued until next year.

Carnegie Hall board the place to be

If you're a power broker at the high end of the U.S. food chain, the board of Carnegie Hall in New York is the place to be, *The Wall Street Journal* reported July 30.

"The chance to rub elbows with fellow titans, and launch a few deals between arpeggios, is just one of the features that makes a seat on the Carnegie board one of the hottest in the country," the *Journal* reported. "Other factors: unmatched perks for the musically inclined and unparalleled snob appeal for just about anyone. A Carnegie board membership is so prestigious that even corporate executives eagerly audition on lesser committees just to win the chance at one of the 65 coveted slots."

LEGACY

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This program encourages prospective donors to work with development officers of charities they already support, or the estate planning advisers with whom they are already involved to make a charitable bequest or other planned gift.

The Leave A Legacy programs in the state are scattered and in different stages of planning. There are at least three programs, including those in Asheville, Charlotte and the Triad area.

"It's a snowballing effort," says Gallo. "I would imagine as time goes on there will be more, not fewer programs in the state. Currently there are about 90 in the nation."

The Triad chapter has been in the planning stages since early 1997, and should be launched next spring. It will combine the efforts of 300 to 500 charities in an educational campaign.

Asheville and Charlotte will announce their programs this month, which also should be up and running next year. A program in Greenville has been discussed, but is not organized.

Most charities individually don't have room in their budgets to sponsor such work, but when hundreds of nonprofits get together, the task is manageable and universally beneficial, organizers say.

"We have more than 100 nonprofits and a number of professional estate planning people involved in our local Leave A Legacy project," says Jan Harrow, director of planned gifts for UNC-Asheville. "We'll be doing a blitz to educate people about planned giving."

The program, to be officially announced Sept. 11, will involve nonprofits in Buncombe and Henderson counties.

"The idea is that it trickles down — if we educate everyone in a nonpartisan way, it will get people thinking about philanthropy and about which charity to give to," Harrow says.

Charlotte will be launching its program next year and will begin this month garnering support from local nonprofits and financial planning advisers.

Leave A Legacy was begun in Columbus, Ohio in 1996. Its success spurred the National Committee on Planned Giving to adopt the model to apply to communities around the

nation.

While tracking and tabulating the gifts from the Columbus campaign may take more than a decade, some evidence suggests gifts by bequest are already on the rise. In 1996, the Columbus Foundation received 13 bequests totaling \$10 million. But after instituting Leave A Legacy, the number of bequests to the Columbus Foundation doubled to 26 in 1997, with gifts valued at \$47 million.

Tracking the success of any Leave A Legacy program may be difficult, says Barbara Yeager, staff liaison to the Leave A Legacy program for the National Committee on Planned Giving. "Because of the deferred nature of planned gifts, it's hard to quantify the effect of the Leave A Legacy program," she says.

"In the short term, most Leave A Legacy organizers report that a sense of cooperation among charitable organizations and an increased knowledge base in the adviser community are the biggest benefits of Leave A Legacy," says Yeager.

LINKS

The National Committee on Planned Giving distributes a Leave A Legacy kit at a cost of \$35, including a video describing the program, and a workbook that walks through the steps for implementation. For information and order forms, e-mail ncpg@iupui.edu.

For more information, contact Barbara Yeager, the staff liaison at the National Committee on Planned Giving, at (317) 269-6276, or e-mail her at byeager@iupui.edu. Visit their Web site at <http://www.ncpg.org/legacy.html>.

To contact local organizers of Leave A Legacy in North Carolina:

Asheville: Jan Harrow, (828) 232-2285.

Charlotte: Robert Morris, (704) 376-9541.

Greenville: Herb Bailey, Jr., (919) 328-6685.

Triad (Winston-Salem, Greensboro, High Point): Vincent Gallo, (910) 765-0122.

conference schedule

7:00 - 9:00 Registration

7:30 - 8:30 Breakfast
Building a Better World
Dr. Billy Wireman
President, Queens College
Charlotte, NC

8:45 - 9:00 Opening Remarks

9:00 - 10:30 Keynote:
**What Does 6,000 Years of
Philanthropy Have To Do With
Getting Today's Big Gift?**
Dr. Ernie Wood, CFRE
President, Ernest W. WOOD & COMPANY
Rough & Ready, CA

10:30 - 11:00 Break - Visiting with Exhibitors

11:00 - 12:30 **The Skill and Art of
Major Gift Fund Raising**
Dr. Ernie Wood, CFRE

Or **Prospect Research
& Technology**
Susan Heileman
Marketing Manager - Specialized Services
Alexander Haas Martin & Partners, Inc.
Atlanta, GA

Or **How to Focus a
Marketing Effort**
James W. Mountjoy
Creative Director and Partner
Loeffler Ketchum Mountjoy
Charlotte, NC

12:30 - 1:30 Lunch and Networking

1:30 - 2:45 **The Skill and Art of
Major Gift Fund Raising (cont.)**
Dr. Ernie Wood, CFRE

Or **So, You Think You Want
to be a Consultant?**
Alan Lee
President, First Counsel - South Atlantic
Charlotte, NC

Or **Reinventing The Wheel - A New
Way to Properly Use Volunteers**
Bill Joyner
Founder, Owner & President,
G. William Joyner, Jr. Consulting, Inc.
Winston-Salem, NC

NSFRE

2:45 - 3:15 Break - Visiting with Exhibitors

3:15 - 4:30 **The Skill and Art of
Major Gift Fund Raising (cont.)**
Dr. Ernie Wood, CFRE

Or **Prospect Research & Technology
(repeat)**
Susan Heileman

Or **Panel Discussion:
When Do You Need
a Consultant?**

Carole Clark
Bill Joyner
Alan Lee
Mary Ellen Shuntich, CFRE,
moderator

7:30 - 8:30 Breakfast Speaker

breakfast speaker
Dr. Billy O. Wireman became President of Queens College in Charlotte in 1978. Since then, total enrollment has increased 300% from 500 to 1,600 and the endowment has grown to \$26 million. Queens has successfully completed a number of capital campaigns including the *McCull Challenge* and *Aim High, Alumni!* campaigns that raised \$30 million.

Breakfast sponsor:
First Counsel, Inc.

event sponsor

Philanthropy News Network
we cover the nonprofit world



registration

For additional applications, please photocopy form and return with payment.

No refunds after September 1.

Confirmations with parking instructions will be mailed September 1.

For more information, call the NSFRE HOTLINE at 704-331-8518.

Make checks payable to NSFRE/Charlotte Chapter and mail to:

Carole Para
10088 Flows Store Road
Midland, NC 28107

	Early Bird Aug. 21	Regular Sept. 8	At the Door Sept. 14
Breakfast with Dr. Billy Wireman	\$10	\$10	Not Available
Senior Forum	\$80	\$95	\$110
Regular Conference Fees			
NSFRE Members	\$80	\$95	\$110
Non-Members	\$120	\$145	\$160

Amount Due: please note fees are per person

Breakfast with Dr. Billy Wireman \$ _____

Senior Forum \$ _____

or

Regular Conference \$ _____

Total Due: \$ _____

Name _____

Nonprofit Agency/Organization _____

Title _____ Are you a Board Member? _____

Address _____

City _____ State/Zip _____

Phone(_____) _____

FAX(_____) _____

E-Mail Address _____

NSFRE Member? _____ If yes, Membership # _____

CFRE Designation? _____ NSFRE Chapter _____

**CONFERENCE SPECIAL - Join us for Fund Raising Day and stay for a free
Planned Giving Seminar sponsored by Foundation For The Carolinas,
Tuesday morning, September 15. Call 704-376-9541 for more information.**