


Slide 1

 Greater Manhattan Community Foundation *Growing to Serve the Community*

Engaging the Community in the Conversation of Philanthropy

Kathryn W. Miree & Associates, Inc.

Slide 2

An Overview

- The Greater Manhattan Community Foundation has the opportunity to put permanent resources in place that will change the face of the community for generations.
- You must have a vision -
- And you must engage the community in that vision.

Slide 3

An Overview

- It's easier when you know your role.
- It's easier when you know how to have the conversation.
- Each of you has many contacts.
- Tap into that network, focus the community, and you will be amazed at what you can accomplish.

Slide 4



The Opportunities for the Greater Manhattan Community Foundation


Slide 5



The GROW II Opportunity

- Immediate Benefits
 - New donor relationships
 - New funds for the Foundation
 - Increased visibility
 - New community partnerships
 - Increased visibility of community needs
 - Educated donors

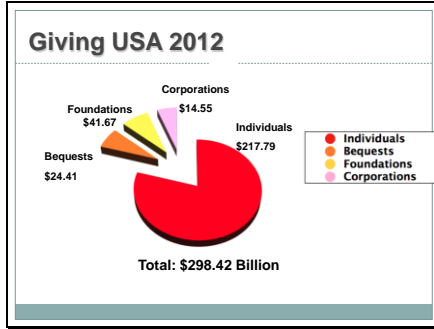
Slide 6



The GROW II Opportunity

- Long-term Benefits
 - Increasing funds for the community - a growing community endowment
 - Higher level of interest in and discussion about charitable solutions
 - Engagement of the community - and engagement of donor assets
 - Increasing number of gifts to other charities directly and through the Foundation
 - Increasing stability for quality of life charitable services for the community.

Slide 7



Slide 8

Recipients of Charitable Gifts Giving USA 2012

Sector	Amount in Billions	Percentage of Total
Religion	\$95.88	32%
Education	\$38.87	13%
Human Services	\$35.39	12%
Health	\$24.75	8%
International Affairs	\$22.68	8%
Public Society/Benefit	\$21.37	7%
Arts, Culture, and Humanities	\$13.12	4%
Environment/Animals	\$7.81	3%

Slide 9

Planned Giving Opens the Door to the Wealth Transfer

► Donors give generously from income

	Number of Returns	Number Who Itemized	Number who Took Charitable Deductions	Total Dollar Value of Deductions
Kansas	1,308,115	408,893 (31.26% of all who filed)	332,852 (81.4% of all who itemized)	\$1.66 Billion
United States	144,002,309	47,247,942 (32.81% of all who filed)	38,391,990 (81.26% of all who itemized)	\$170.23 Billion

Slide 10

Boston College Social Welfare Institute - Transfer of Wealth

- o Estimate of the transfer of wealth from 1998 - 2052
- o Transfer of assets from one generation to the next: \$41 trillion to \$136 trillion
- o Transfer of assets to charity: \$6 trillion to \$25 trillion

39

Slide 11

Bank of America High Net Worth Study

- o 2006 study focusing on high net worth donors
- o Incomes more than \$200,000, assets exceeding \$1 million
- o Group represents 3.1% of all U. S. households, 2/3's of U.S. philanthropy
- o 98% of all high net worth households give to charity

Slide 12

Center on Philanthropy Bequest Study: Bequests in Place

	<i>Bequest Study</i>	<i>HNW Study</i>
30-40	8.9%	1.4%
40-50	28.1%	9.4%
50-60	21.9%	19.3%
60-70	20.6%	27.5%
70-80	11%	25.1%
80+	8.9%	17.3%

Slide 13

Center on Philanthropy Bequest Study:
Would Consider Bequest


	<i>Bequest Study</i>	<i>HNW Study</i>
30-40	18%	18.2%
40-50	28%	28.8%
50-60	24%	18.3%
60-70	5%	10.9%
70-80	3%	7.8%
80+	1%	3.7%

Slide 14

Center on Philanthropy Bequest Study:
Potential by Income


	Bequest in Place	Would Consider Bequest
<\$25,000	6.6%	28.4%
\$25,000 - \$49,999	7%	34.6%
\$50,000 - \$74,999	7.6%	28.8%
\$75,000 - \$99,999	6.5%	25.99%
\$100,000+	10%	35.63%

Slide 15



The Role of the Greater
Manhattan Community
Foundation and its Board


Slide 16



The Unique Role of Community Foundations

- Ensuring donor intent
- Inspiring and encouraging philanthropy
- Identifying critical community needs
- Encouraging Collaboration to meet needs
 - Creating a community "endowment" for philanthropy


Slide 17



Your Advantages

- A neutral platform
- Visibility, credibility, and accountability
- Access to resources
- The ability to convene common interests
- The ability to identify - and fund - critical needs
- The promise of continuity and flexibility when needed
- The ability to help donors be more effective

Slide 18



The Role of the Board

- Set the vision for the community and the role of the Foundation
- Becoming fluent in the language of the Foundation
 - Flexible platform
 - Accountability
 - Continuity
 - Support for philanthropy


Slide 19



The Role of the Board

- Serve as ambassadors in the community
- Open the door and beginning conversations with prospects
- Ensure solid policies
 - Gift acceptance
 - Gift purposes
 - Gift administration


Slide 20



The Role of the Board

- Lead the way with a personal gift
- Support stewardship
- Celebrate success

Slide 21



How to Have the Conversation with Donors

Slide 22

Start with the Right Prospects

- Avoid the pitfalls
- Chasing individuals with high net worth
- Focusing all your attention on individuals who have made "big" gifts
- Assuming donors who make small gifts are not capable of making larger or estate gifts

Slide 23

Identify Those Active in the Community

- Individuals who actively give to one or more schools, healthcare organizations, human services orgs, arts orgs, or religious orgs
- Active volunteers
- Civil leaders
- Company leaders
- Faithful givers at any dollar level
- Nonprofit leaders

Slide 24

Ask Questions The Help You Understand the Donor's Interests

- As a long-term member of this community, what are your favorite charities?
- Why are these important?
- Do you fund one charity or more?
- How do you make decision about your gifts?
- As you think back, what was the first charitable gift you made in this community? Tell me the story

Slide 25

Ask Questions The Help You Understand the Donor's Interests

- o What was the "best" gift you ever made?
- o Have you included any charities in your will or estate plan?
- o You have been part of this committee for many years - what are its greatest needs?
- o Would you be interested in joining with other donors to solve problems?

Slide 26

Follow Through

- o Always look for the follow up
- o Do they need more information?
- o Do they want to meet others interested in the same objectives?
- o Do they need a gift illustration?
- o Be patient!

Slide 27

Questions and Answers
