

The Remarkable Story of Leave A Legacy™

BY CRAIG C. WRUCK

A movement is spreading across North America and it is changing society and creating a new social norm for responsible citizenship. Most remarkably, it is doing so without the benefit of multi-million-dollar advertising budgets, and without celebrity endorsements or speeches from politicians. Yet you can see the "Leave A Legacy" message on buses, billboards, campaign-style signs, movie screens, grocery bags, utility bill inserts, bookmarks (and, of course, newspapers, magazines, newsletters, brochures and web sites) throughout the United States and Canada.

The National Committee on Planned Giving now counts more than 110 Leave A Legacy programs in the U.S. and Canada. All of this activity just a few years after the first Leave A Legacy program was piloted in Columbus, Ohio, is a tribute to the boundless enthusiasm of thousands of volunteer organizers across the continent.

Simple Message

The Leave A Legacy message is simple: It is entirely right and appropriate for each of us to use our Last Will and Testament to leave behind a powerful message about the ideals, values and organizations that were important to us during our lifetimes.

It is a pure and powerful appeal and charitable organizations, professional advisors and financial institutions of all sorts are finding that the community gains if they join forces to educate the public and to promote the simple notion that each of us has a duty to provide generously for those who come after us. "In today's society where everyone is focused on individual agendas, what better message can we as the leaders of not-for-profits send to our donors than that we truly care about making the world a better, safer place?" says Sheila Dwyer Schwartz, a Leave A Legacy volunteer in Adrian, Michigan.

And, in fact, one of the main benefits of Leave A Legacy may be the way it fosters cooperation among and between nonprofits, large and small, and the for-profits in the community. The key to success is, "to involve as many diverse and representative people and organizations as quickly as possible," says Marcie Mancuso of the Delaware Planned Giving Council. "It takes a lot of time and patience to establish a good program."

Organizers in the Los Angeles area have found that Leave A Legacy has been a real benefit to smaller and medium-sized nonprofits, some of which have found support and encouragement to start planned giving programs. Communities have shared the experience of organizers in Boise, Idaho, who found that the Leave A Legacy organizing committee was a great opportunity for dialog and collaboration among all those involved in planned giving.

By design, Leave A Legacy is focused on local community organization. There is no one form or structure, and each Leave A Legacy program takes on the character of its commu-

nity. In the San Francisco Bay area, Leave A Legacy includes eight counties and more than 480 nonprofit organizations. In Minnesota, organizers initially envisioned a program serving a defined metropolitan area but soon learned that Leave A Legacy programs were growing in rural communities throughout the state.

In the Detroit area, Leave A Legacy covers a seven-county area with a population of 5 million-plus, more than 2,700 nonprofits and involving almost 400 volunteers. In Los Angeles, organizers decided to deal with the area's geography by launching a region-wide public relations effort this spring.

The central message of Leave A Legacy is carried via different themes around the country. In Dayton, Ohio, the theme of "Ring in a New Era of Philanthropy" was literally rung in with a public event in a local park with carillon plus area church bells ringing concurrently. In Southern California, the theme of "Ordinary People are Doing Extraordinary Things in our Community" is brought home by a group of art students who have created canvases of what the world might look like if more people supported nonprofits. Their works in oil, watercolor, pen and ink tell the powerful story of Leave A Legacy.

Death of Bequests

We Americans are a generous lot. About 70 percent of us make charitable gifts each year for a total of \$150 billion or so. And yet when it comes to the ultimate act of generosity — sharing from our estates — only about 5 percent actually make a charitable bequest. Leave A Legacy began in part because so few people make charitable bequests.

So what accounts for the 65 percent gap between annual and end-of-life giving? Why is it that three out of four of us give generously during our lifetimes and yet only one in 20 of us chooses to make a testamentary gift to express our values and dreams?

Several Leave A Legacy programs are conducting serious research to get at the roots of this question. In Dutchess County, NY, organizers recruited RSVP (Senior Corps) to investigate 10 years of probate records. They found that about one in 10 included a charitable bequest, and that a small number of attorneys were involved in writing most of the wills containing charitable bequests.

In Minnesota, Leave A Legacy negotiated with the state demographer to survey citizens about their charitable giving and plans to survey again in three years to measure progress toward a goal of doubling the number of charitable bequests.

No doubt the reasons why we fail to make charitable bequests are many and varied. We think that making a charitable bequest is complicated and expensive. It usually involves hiring a lawyer, maybe for the first time in your life. It requires seriously contemplating your own mortality, and seriously thinking about the fact that there will be a time when you are no longer here. And a surprising number of people

just don't know what they can do — which is most remarkable given the vast amount of effort devoted to promoting charitable bequests each year.

Public Awareness

Leave A Legacy's answer is a broad public awareness program and a vigorous grass-roots educational effort. And the numbers involved are impressive. In Miami-Dade County, Florida, more than 350 professionals, nonprofits and donors attended the kick-off meeting. Birmingham, Alabama, saw 139 charities attend the launch meeting. In San Francisco, 480 nonprofits have signed up and the Leave A Legacy web site has had more than 4,058 visitors.

The education and communications strategies of Leave A Legacy have been varied as well. Leave A Legacy ads in the New Orleans area have appeared in regional editions of Newsweek, U.S. News and World Report, Sports Illustrated, Time and Bon Appétit. In Minnesota, an eight-page, full-color insert reached more than 75,000 subscribers to a regional magazine and a half-hour special has aired on cable television networks throughout the state.

In Detroit, the emphasis is on making certain that each citizen gets a Leave A Legacy message from three sources: their favorite charity, professional advisors and the public media. Professional advisors in Miami have agreed to place LAL brochures in their offices and a large LAL banner greeted motorists as they enter the city.

So why is it working? "An opportunity to give is actually an opportunity to be involved and to make a difference," says Mohammad Zaidi, co-chair of LAL/NY. That's the key! Leave A Legacy is about becoming involved in your community. It really is about creating a new social norm. And it is happening one community at a time.

Half a century ago, Albert Einstein summed it up nicely:

"A person first starts to live when he can live outside himself, when he can have as much regard for his fellow man as he does himself. We are here to do good. It is the responsibility of every human being to aspire to do something worthwhile, to make this world a better place than the one he found. Life is a gift, and if we agree to accept it, we must contribute in return. When we fail to contribute, we fail to adequately answer why we are here."

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The Bridge Builder

An old man, going a lone highway,
Came at evening, cold and gray,
To a chasm, vast and deep and wide,
Through which was flowing a sullen tide.

The old man crossed in the twilight dim -
The sullen stream held no fears for him;
But he turned when he reached the other side,
And built a bridge to span the tide.

"Old man," said a fellow pilgrim near,
"You are wasting your strength in building here.
Your journey will end with the ending day;
You never again must pass this way.
You have crossed the chasm, deep and wide,
Why build you the bridge at the eventide?"

The builder tilted his old gray head.
"Good friend, in the path I have come," he said,
"There followeth after me today
A youth whose feet must pass this way.
This chasm that has been naught to me
To that fair-haired youth may a pitfall be.
He, too, must cross in the twilight dim;
Good friend, I am building the bridge for him."

— A. Dromgoole

Note: This poem is a favorite of Clinton A. Schroeder, co-chair of LAL-Minnesota.