

AFP Central PA Chapter
VIGNETTES: FUNDRAISING PRINCIPLES ILLUSTRATED
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Principle: Fundraising offices should include a planned giving component to their program. And, the largest gifts most organizations receive will come thru planned gifts.

Vignette:

Messiah Village is a retirement community with all levels of living. Many residents come to campus as residential living residents, move thru the levels of living, ending in nursing care. Messiah is a faith-based facility and has a tradition of providing care to all residents regardless of their ability to pay for their care. If a resident depletes their financial resources and receives benevolent or subsidized care, they still have a home at the Village. This is possible because of fundraising efforts to maintain a health endowment fund.

In November our President told me he received a letter from the Brethren In Christ Foundation indicating a twenty year Charitable Remainder Unitrust had matured and Messiah Village would be receiving 75% of the proceeds. This amounted to a gift of over \$860,000 – the largest gift the Village has ever received. What was perhaps a bigger surprise was the donor. Norman Asper was a quiet, humble, and frugal former resident. He lived in the smallest apartment, he and his wife routinely grew a garden, froze and canned that produce, bought their clothing at the used clothing drive on campus, drove only used vehicles. You all know these kinds of folks – “the millionaire next door.”

During his lifetime, Norman supported missions and other church related organizations. When he sold the farm, he established a charitable unitrust and his family received income for twenty years. Now, at the end of the twenty years two charities received a total over \$1 million. As his daughter said, “Dad doubled the gift – gave away nearly a million dollars two times.”

As we shared the news about this gift, many residents told of their “impressions” of Norman Asper; they thought he was probably receiving benevolent care, a quiet man who was always volunteering and helping others. One neighbor told me she saw Norman return from his garden one afternoon, shoes muddy, but hands full of produce. He proudly announced with these beans they would now have food for the winter. The resident further went on to say she considering giving Norman some money to make ends meet! Imagine her surprise when she learned this man left over \$1 million for charity.

Lesson:

Staffing your organization to include a planned giving piece is vital. Donors often leave larger gifts in their estate than they give during their lifetimes. These donors are often anonymous and have lived a lifestyle non-indicative of their wealth. As professional fundraisers, we need to respect all our donors and remember to ask them about their estate plans. A very wise fundraiser planned this gift for Norman twenty years ago. And today my office and organization benefit greatly. I only hope my legacy as a fundraiser is doing as much good twenty years from now.