

## Legacy Consulting Services for WACOSA – 2021

CODE*	A	B	C	D	Total
Hours	476	278	88	60	902
%	53%	31%	10%	6%	

### \*Fund Raising Consulting – Task Codes

A=Donor Research/Cultivation/Solicitation

B=Planned Giving Organizational Work Product

C=Board/Committee Work Product

D=Training/Orientation/Staff Transition

While Planned Giving (PG) is a long-term investment, WACOSA reaped huge financial benefits this past year from Legacy Consulting services:

- An immediate financial return of nearly 3:1, and an 8:1 return when counting new estate gift intentions
- 7 new legacy society members, with two members indicating six-figure gifts
- 24 donors indicated an interest in including WACOSA as a charitable beneficiary in their estate plans
- Secured over \$100,000 in new endowment gifts when zero dollars were budgeted for 2021
- Established first Named Endowment Fund
- Created protocols and instructions for managing the Endowment Fund
- Completed a thorough PG Analysis and Assessment
- Ranked donors so time and effort can be focused on the best PG prospects
- Conducted a donor survey that had an excellent return rate of 20% and self-identification of new PG prospects
- Created PG organizational work product and templates
- Created PG content that was woven into existing outreach marketing materials, with little to no additional cost
- Launched a QCD (Qualified Charitable Distribution) information campaign
- Completed a PG Case Statement (similar to a prospectus for an investor)
- Increased awareness of PG and a more focused approach to fund raising, translated into 100% giving by board members, as well as larger annual gifts from donors.