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# Welcome



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# Approaches for Major and Planned Gifts

- Endowment
- To honor students, community leaders or educators
- To ensure program is supported forever
- Pass Through - annual support of project
- Gifts of Real Estate, Stock or other Assets
- Estate Gifts: End of life planning

# How do I start?

*Legacy*

# How do I start?

Who is our customer?

Who is our beneficiary?



# Know your beneficiary

- + District Priorities
- + Critical Needs
- + Rules of Engagement
- + Internal Champions

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# Know your beneficiary

- Cultivate the Trust
- Innovators
- Big Thinkers

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## Every District Is Different:

Donor Driven vs. District Driven or somewhere in between

- District Directs Foundation to take on project, Foundation board approves it
- Donors come to Foundation with idea, Foundation brokers it
- Foundation raises money for scholarships
- Foundation raises money for competitive or blanket classroom grants

## Every District Is Different:

Donor Driven vs. District Driven or somewhere in between

- Capital projects
- Special Projects
- PTO Support

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# Grand Island and Lincoln

## GIPSF

159 Funds

103 Endowed Scholarship  
and Grant Making Funds

29 Managed Funds

28 Established Pass-Through Funds

## FLPS

400 Funds

College and Career

Beyond the Classroom (specific school funds)

Next Level Learning (community partnerships)

Strong and Stable Families

Teacher Awards

Crowdfunding for classroom needs

# LPS Project Process

Foundation for LPS Project Request Form (insert website)

## Case for Support

- What are the goals of the project?
- Who will benefit? For how long?
- How will success be measured?
- Why is it not covered by District funds?
- Are all the approvals in place?
- How will it be sustained?

# Grand Island Process: Dream it, Fund it!

- What resources are available to fund this project or program?
- Can the Building, Department, or School District fund this project?  
If no, why not?
- Does the Project meet any of the GIPS Foundation Special Interest Grant Criteria?
- Would this project be a good Classroom Grant?  
Does the timeline work?

# Who are your customers and how do you find new ones?

- Teachers
- Volunteers
- Parents
- Business Leaders with a need for talent
- Community Thought Leaders



# Know Your Customers

## Annual Data

- New
- Returning
- Lapsed

## LIA

- How are they linked to your district/school?
- What is their ability/capacity? Rating/Campaign
- What are their Interests?



## Donor Priority Projects

1. Float the concept
  - Curriculum leader
  - Principal
  - Community partner
  - Teacher
  - Program Administrator
2. Gather a team
3. Build a plan
4. Write a proposal
5. Build a Budget
6. Present and close the gift
7. Regular dialog
8. Sustainability
9. Repeat (encourage planned giving)

# Planned Gifts

## Profile of a Planned Giver

- 50-60's
- Demonstrated interest in education
- Repeat gifts even small gifts
- Engaged in program development



# Planned Giving Tool Box

- Befriend an advisor: Board Member, Community Volunteer
- Network with local advisors to know your cause
- Landing page on website: Legal name and EIN
- Find a good go-to (Community Foundation, NE Foundation, Consultant)
- Establish a Legacy Society





# Planned Giving Tool Box



## CONFIDENTIAL

As a supporter of the mission of the Grand Island Public Schools Foundation, I accept membership in The Purple & Gold Legacy Society. I have arranged my estate gift as:

- |  |   |
|--|---|
| <input type="checkbox"/> a bequest in my will or living trust                                | <input type="checkbox"/> a beneficiary in a charitable lead trust                           |
| <input type="checkbox"/> a gift annuity  | <input type="checkbox"/> a beneficiary in a charitable remainder trust                      |
| <input type="checkbox"/> a beneficiary of my life insurance                                  | <input type="checkbox"/> a life estate gift   |
| <input type="checkbox"/> a beneficiary of my IRA, 401(k), bank account or investment account | <input type="checkbox"/> a beneficiary in a remainder interest in residence, farm, or trust |
| <input type="checkbox"/> Other _____   |   |

Designation:  Area of Greatest Need or  Other \_\_\_\_\_

I understand that I will remain a member of The Purple & Gold Legacy Society as long as my gift plan remains in place. I will notify the Grand Island Public Schools Foundation if I change my plans.

The approximate value of this gift is \$ \_\_\_\_\_ (optional)



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Name(s): \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Professional Advisor (e.g., CPA, attorney, broker): \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

I/We would be pleased to be listed as member(s) of The Purple & Gold Legacy Society in GIPS Foundation publications to serve as encouragement for others to give. My/Our name(s) should appear as follows:  
\_\_\_\_\_

I/We would prefer to be listed anonymously.

Signature \_\_\_\_\_ Date \_\_\_\_\_ Birthdate \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_ Birthdate \_\_\_\_\_

Completion of this form is not intended to be legally binding, but a good faith statement of your intent. Please return your confidential response to the Grand Island Public Schools Foundation, P.O. Box 4904, Grand Island, NE 68802-4904. You may also call the GIPS Foundation at 308-385-5900 ext. 1170 or fax to 308-385-5949. Thank you.

The GIPS Foundation is a qualifying 501(c)(3) nonprofit organization. Contributions are deductible as allowed by law. Tax ID #47-073201

# Planned Giving Tool Box

Basic understanding of the Instruments:

- Will
- Annuities
- Life Insurance
- Donor Advised Funds
- Real Estate
- Stock
- IRA Distributions at 72



## Case Studies: Planned Gifts



**Charter Members** of the  
The Purple & Gold  
*Legacy Society*  
GIPSFUNDATION

Anonymous  
Gaylord and Joan Apfel  
W.J. Arrasmith (deceased)  
Lucy Baasch (deceased)  
Sylvia Beck (deceased)  
Maxine A. Bielfeldt (deceased)  
Duane (deceased) and Marjorie Curtin (deceased)  
Danny and Vikki Deuel  
Charles R. (deceased) and Bessie E. Frith  
Ken and Bonnie (deceased) Gnad  
Elsie Hendrickson (deceased)  
Mary Ann Indra (deceased)  
Orville (deceased) and Catherine Indra (deceased)  
Douglas and Cheryl Jensen  
Marie Knickrehm (deceased)

# Case Studies: Major Gift



## Scholarship Funds that Grew



<https://www.youtube.com/watch?v=HtFmuwsZkeA&t=6s>





# District Priority Projects / Campaigns

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# Relationships Make Gifts Happen

- We have the best mission out there!
- Trust your instinct
- Walk with ethics and student focus
- Take your time, don't rush relationships
- It's a marathon not a sprint

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# Relationships Make Gifts Happen

You work for the donor

- Make sure that the donor's wishes can be met by your organization and be willing to recommend another charity if it is a better fit.
- You will never be disappointed.

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**Thank you  
Questions?**



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