

# How to Make Trust Services a Contributing Partner in Your School

*Many Adventists and friends of the church find giving to church-operated schools one of their most rewarding choices.*

**M**y wife, Sharon, and I sat on the side of the bed in our tiny hotel room in Nicosia, Cyprus. It was June 26, 2002, and we had just received the most devastating phone call that a parent can imagine.

The call informed us that our 20-year-old daughter, Kari, had been involved in a terrible automobile accident on a rain-slickened highway in Charlotte, North Carolina. The report from the neurosurgeon offered no hope. Kari had suffered major brain injuries, was on life support, and would not survive.

We sat and cried. We were halfway around the world, yet had to begin the unimaginable process of alerting family members, making decisions regarding life support, organ donation, and a funeral, plus trying to get home.

**By Jeffrey K. Wilson**

Only one decision was easy. A few minutes after learning the horrible news, we conceived a fitting memorial to Kari Annette Wilson's short life. We would give and raise money for a music-department endowment fund in her name at her alma mater, Andrews Academy in Berrien Springs, Michigan.

My wife and I are both products of Seventh-day Adventist education. Our parents sacrificed so that neither of us spent a day in public schools. And we have educated our three children in Adventist schools.

Kari had graduated with honors in 2000 from Andrews

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Academy. Her teachers made a major impact on her physical, mental, and spiritual growth. The area that especially blessed her life was the music program. She was a member of the academy band, orchestra, choir, and special choir, and she had taken voice lessons. In the ministry of music, performing with her peers, she had blossomed from a shy little girl into a confident young woman.

Of all the decisions we have had to make since Kari's death, the one to "give back" to Andrews Academy by providing permanent financial assistance to purchase music and instruments, provide scholarships, and make financial grants for other young students from now until Jesus comes has been the easiest and most rewarding one.

In my years of service in the Trust Services ministry of the church, I have been privileged to work with hundreds of donors and scores of schools. In my experience, many Adventists and friends of the church find giving to church-operated schools one of their most rewarding choices.

It's been a joy to help people make eternal investments of millions of dollars into Adventist schools around the world either through outright gifts or through their wills and other estate planning instruments.

The mission statement of the Trust Services department of the Seventh-day Adventist Church reminds us "to encourage members and friends of the Church to continue their support of God's work through Wills, Trusts, Annuities, and special gifts adapted to their local jurisdictions."

Are you aware of the partnership available to you from the Trust Services department of your conference, or mission, union, or division?

One of your greatest untapped resources is the Trust Services personnel in your next higher organization. Trust Services is a part of your staff, a contributing partner that can help bring major donors on board as partners to assist in the ministry of Christian education.

Over the past 30 years, almost U.S.\$1 billion has flowed into God's work through stewardship gifts from church members and friends of our churches and schools. The next few years are critical in securing this kind of long-term support for your school. When people prepare a will or other estate-planning document, they can



Kari Annette Wilson

donate income and assets. They can thus make the largest charitable gift of their entire lives.

In 2 Corinthians 9:11, Paul reminds believers that "you will be made rich in every way so that you can be generous on every occasion, and through us your generosity will result in thanksgiving to God" (NIV).

For many church members and friends of the church around the world, Seventh-day Adventist education has been a major factor in their moving out of poverty and into a well-paying profession. As they think about the generosity of others who made their vocation possible, they can be inspired to "give back" to their alma mater so others can receive the same blessing.

A crucial step for any administration and board is to identify individuals and groups who can be tapped for support. When your board, your staff, and alumni see the community as potential investors in the work of your school, there is a change of attitude. They begin to see fund raising as a powerful way to capitalize on the worth of the school.

How do you find the people who want to see the goals of your school achieved? Start close to home and fan out from there—the school board, faculty and staff, retired faculty

and staff, parents, students, neighbors, local and national business persons, and other friends of the school. As you think and pray, you'll be able to add to this list.

Identifying school loyalty is an important early issue as you look for donors. Remember, it is not your school, but a composite of the experiences, shared with peers and teachers, that molded the students while they were enrolled. People give to *people* more than *projects*. Alumni often view former teachers and schoolmates as having helped them become what they are today. Capitalize on that loyalty, affection, and appreciation. Ask them to be partners with you as volunteers, mentors, and donors.

Here are some areas in which people can become partners and donors with you in the mission of your school:

*Capital Improvements.* These include land, new buildings, renovations, equipment, roofs, carpeting, or air conditioning. Most schools need to continually update technology, farm equipment, industries, etc.

*Worthy Student Endowment Funds.* This area is one where I have found enormous interest among donors. You should have in place several permanent worthy-student endow-

ment accounts (meaning you don't spend the principal, only the earnings from interest). Also, be prepared to set up new accounts in memory or in honor of the donors' loved ones. This was a major factor for Sharon and me in building a permanent Christian education memorial for our daughter.

*Endowed Chairs.* Wouldn't it be nice to have salaries for certain teaching or administrative positions paid from earnings of permanent endowments? How about a dependable income independent of tuition and church subsidies? Many secular schools have endowed chairs, and several Adventist colleges now have them, as well. Let your donors know

what's possible, and you may generate some interest.

Now that we've laid out the opportunities for partnering with Trust Services to secure much-needed resources and allow your best supporters to invest in God's eternal kingdom by giving to your institution, let's look at how to convince them to give:

### **Nine Short Principles for Obtaining Major Planned Gifts From Alumni, Parents, Church, and Community**

1. *One is the loneliest number.* As a school administrator, you must be prepared to start alone with your vision, your

## **Stories About Giving**

Lewis and Della Mae Carson are alumni of Emmanuel Missionary College (now Andrews University) and retired denominational auditors. Teaming with the Trust Services director, an attorney, and their financial planner, they put together an estate plan that provides a tax-free inheritance to their two children while making major gifts (again tax free) to Andrews University and other church entities.

"We are so excited about this special plan," says Della. "We worked for the Lord for so many years. I stayed home when the children were small and we had so very little, but we did as much as we could, and the Lord has richly blessed us."

Lewis adds, "We worked our way through school, and now, we want to help other youth who have to work. God has made it possible through the living trust and irrevocable insurance trust for us to give a lot more now, and even more later, than we ever imagined. We simply can't praise God enough!"

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Audrey Stockton Sniegon spent 40 years as a librarian, half of that in Seventh-day Adventist schools. She and her husband, Fred, are retired in Florida. She says, "Christian education has always been of prime importance in my family. My brother and sisters and I traveled an hour's trip by streetcar and bus across Detroit in all kinds of weather to a little church school. We have no children to inherit our assets. . .[so] there was a nagging sensation that we needed a will or something to give us a sense of security regarding our estate.

"It all seemed too difficult, too mind-boggling to even think about. So we just kept putting it off, hoping for an answer which, of course, never came—until the day we picked up *Legacy* [a Trust Services newsletter]. There we learned that Andrews [University] has an estate-planning department that helps alums like myself navigate through the confusion of estate planning.

"When we discussed our wishes for the ultimate distribution of our assets, we made it clear that God's work was paramount—our church, our favorite Adventist charities, but especially the needs of today's Adventist college students. Among the gifts to be distributed from our estate will be money to establish a permanent endowed scholarship fund in our names. . . .We feel really good about that!

"We now enjoy a peace and security regarding our financial future as well as the economic future of God's work on earth."

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Henry and Betty Egner are retired church members living in Ohio. Because they became Seventh-day Adventists later in life, they never attended our schools. Their only son died in an automobile accident years ago. They have established planned gifts that benefit academies in several states, as well as an Adventist university.

"I like charitable gift annuities," Henry explains, "because that way, my money is already earmarked for what it will go for, we get a very substantial return based on our ages, much better than we would get at a bank, and a good tax deduction."



**Fred and Audrey Sniegon**

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plan, your goals. Remember, successful fund raising begins in the mind of one person who takes the idea to a few more people until finally, a common goal is set and achieved.

You won't be alone for long, however, as you share the vision with your board, your conference/mission president, your Trust Services officer, your teachers, and the donors you already have on board.

Fund raising will help your board think more broadly and look more carefully at the product (the wonderful committed students you baptize and graduate each year) to maintain financial support for the school. Support and enthusiasm build on each other.

This may be a new concept for many Seventh-day Adventist school board members, but it is a fact: School boards have a vital role in fund raising. It's part of their job description. *If they are managing the affairs of a church school, they must have included it in their own current giving and in their wills.*

**T**he best way to break the impasse of having no major donors is to become one yourself! Contact your Trust Services officer, who will put you in touch with an experienced attorney for drafting the necessary legal documents (wills, trusts, etc.). In some countries, the Adventist attorneys who work with the Trust Services department will prepare wills

at no cost for those who remember God's work in their financial planning.

*2. It takes time to change minds.* Expect a period of consciousness raising. For many, this will be a new idea—to give to Adventist education through planned gifts and wills.

Don't expect immediate results, but as you share your own personal testimony, you will plant seeds of change in constituents' minds. Let people warm to the idea of giving through their wills to their school. And when you receive gifts, ask permission to share the story with others. Example is a powerful motivator.

*3. Good times, not crises, raise money.* People like to invest in success. They want a return on their investment—souls for God's kingdom, buildings, programs, and students in your school that wouldn't be possible without their gift. They want their money to make a difference. People give to support excellence, not to repair a leak. This means long-range planning. Start with the school's current situation, then think about where you want it to be tomorrow and how you plan to get from here to there.

*4. Paint the picture by the numbers.* Do your homework before contacting potential donors. Put together a statement that describes your school and its contribution to God's work. Spell out what you will do with major gifts and how their gift will help achieve your goals. Show how essen-



Andrews University's new Howard Performing Arts Center was made possible by a lead gift from community members John and Dede Howard. The center will provide a state-of-the-art venue for the performance of fine music and is intended to be a cultural resource for southwestern Michigan and the adjoining region of Indiana. Its official opening is scheduled for mid-October, 2003.

tial these additional funds are to your mission. Keep it positive.

**T**o build a strong case, be sure to include the following elements: (a) your track record, your school's history, roots, heritage, and accomplishments; (b) a clear statement of current needs and opportunities; (c) information about what has already been done to meet the need. Donors like to make the gift that puts you over the top or meet a challenge grant; (d) a clear description of the solution to your needs; (e) an indication of what others are doing to help; and (f) a clear statement of what is required to reach the goal. In other words, provide a laundry list that includes projects, opportunities, endowments, buildings, and programs—with price tags attached.

5. *Keep your standards high.* The College of the Ozarks is a small church-related college in rural southwest Missouri. It requires every student to be in a work program, and has high standards. "Excessive display of affection in public" is prohibited. Jewelry, long hair, and ponytails on men are barred. The institution accepts only one in every 12 applicants. And there is no tuition. The work philosophy is the backbone of the college and the reason it annually received millions of dollars, primarily through planned gifts in wills and trusts. This keeps the school tuition-free for those who work their way. The school has a \$254 million endowment, contrasted with the average of \$20 million for the average U.S. college its size. (See the *Washington Post*, [April 27, 2003], p. A6.)

6. *Nothing succeeds like success.* Begin by contacting individual donors before assembling a larger group. Talk with your board chair and select board members, the Trust Director, and the conference/mission president before bringing the item to the full board. Begin with those who are already committed to your school—parents, volunteers, faculty and staff, alumni, etc.

7. *Spread the leadership around.* Share responsibility for fund raising with volunteers enlisted from each group you hope to reach. Ask volunteers from the board

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to solicit other board members, to share with others their personal commitment to making your school a beneficiary in their wills, etc. Recruit a volunteer from each alumni class—perhaps the class president, secretary, or other officer—to rally class support for their alma mater. Recruit a local business owner to make a gift, then ask him or her to accompany you as you approach other businesses. Volunteers who donated to the school make the best solicitors. Before people

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can ask others to give, they must first have given themselves.

8. *It takes money to raise money.* Anticipate realistic costs in initiating a fund-raising program. Initial expenses can be controlled by using volunteers, but adequate budget for staff, publications, and programs is essential. You will find lots of free ideas, pictures, ad and brochure copy, and descriptions at the General Conference Trust Services Web site, <http://www.willplan.org>. By the way, if you use this World Wide Web address in your ads, potential donors from all over the world can gain access and respond. We will pass on these inquiries to you through your Trust Director.

9. *If at first you don't succeed, try again.* Don't be discouraged if some people say "No." Expect it, but don't let it get to you. Use the negative comments to refine your approach, and keep going.

**G**od will give you donors who will thank you for giving them the privilege to make the greatest investments of all time—investments in heaven. Your rewards will be in smiling faces coming up out of the baptismal fount, walking up to receive their diplomas, and going out to serve the Lord. Your rewards will also be in hugs you receive around the tree of life from donors and students you brought together by God's grace for eternity!

Remember Jesus' words in the Sermon on the Mount, "Lay not up for yourselves treasures upon earth, where moth and rust doth corrupt, and where thieves break through and steal: but lay up for yourselves treasures in heaven, where neither moth nor rust doth corrupt, and where thieves do not break through nor steal: For where your treasure is, there will your heart be also" (Matthew 6:19-21, KJV).

And finally, one more critically important principle: Say "thank you." When donors make gifts either outright or through wills, find at least seven ways to thank them. When people feel appreciated, they want to give again and again, and they are likely to remember your institution in their estate plan.

Here are a few ways to say thank you: (1) a handwritten note, (2) a formal letter, (3) a phone call, (4) a personal visit, (5) a dinner (in your home or in the cafeteria) or (6) a private tour of the campus, (7) a small gift or memento with the school name or logo, or (8) a special invitation to graduation, the building dedication, or other campus events. You can add many better ideas to this list. Say "Thank you" to at least three donors every day.

Each year, my alma mater invites me to attend a Sunday morning brunch. This includes a delicious meal provided by the school, beautiful music from the school choir, a devotional talk by an alumnus or staff member, and a progress report by the principal. All the above are flavored with "Thank you's" of one kind or another to the

hundreds of donors present, all of whom have made current gifts, and many of whom have remembered the school in their wills.

Some closing thoughts before you contact your Trust Services officer:

- Today, many people are amassing assets of various kinds, including cash, stocks, bonds, real estate, and retirement plans. Develop procedures to help them invest sacrificially in Adventist schools.
- Don't feel reticent about approaching people about their estate gifts: "Many manifest a needless delicacy on this point. They feel that they are stepping upon forbidden ground when they introduce the subject of property to the aged or to invalids in order to learn what disposition they design to make of it. But this duty is just as sacred as the duty to preach the word to save souls.

"Here is a man with God's money or property in his hands. He is about to change his stewardship. Will he place the means which God has lent him to be used in His cause, in the hands of wicked men, just because they are his relatives? Should not Christian men feel interested and anxious for that man's future good as well as for the interest of God's cause, that he shall make a right disposition of his Lord's money, the talents lent him for wise improvement? Will his brethren stand by, and see him losing his hold on this life, and at the same time robbing the treasury of God? This would be a fearful loss to himself and to the cause; for, by placing his talent of means in the hands of those who have no regard for the truth of God, he would, to all intents and purposes, be wrapping it in a napkin and hiding it in the earth" (Ellen G. White, *Counsels on Stewardship*, p. 323).

- A Christian will provides for three things: (1) loved ones, (2) those less fortunate, and (3) the Lord's work. An endowment project such as the one my wife and I set up, the Kari A. Wilson Music Endowment Fund at Andrews Academy, accomplishes all of these goals.

- Think of the future. To be young is to study in Christian schools you did not build. To be mature is to build Christian schools in which you will never study.

In conclusion, I suggest that you consider the mission statement from the Planned Giving and Trust Services department of Andrews University as you establish your own Trust Services department: "Our mission is to provide practical, professional, and spiritual assistance to alumni and friends of Andrews University who wish to benefit the

Lord's work here through planned giving." ✍



**Jeffrey K. Wilson** is Trust Services Director at the General Conference of Seventh-day Adventists in Silver Spring, Maryland. He and his wife, Sharon, established a music endowment fund in honor of their daughter, Kari Annette Wilson, to benefit students at Andrews Academy in Berrien Springs, Michigan.