

SCNCPG
Minutes
November 16, 2007

Present: Allison, Angle, Beyeler, Grimes, Deitrick, Duncan, Greene, Hershberger, Hickman, Hobbs, Larson, Marrinan, Dollinger, Matthies, Neely, Spors, Moormann, Pickarski, Roberts, Schwartz, Strawn, Swaney, Martin, Evans, Bridgeman, Koumoutsos, Zimmann

Motion: SCNCPG will sponsor the LEAVE A LEGACY® program in 2008 in four (4) counties: Clark, Greene, Logan & West Central Ohio.

Hershberger / Strawn passed unanimously

2008 Program

Chairs Pickarski & Grimes consented to be the co-program chairs for 2008.

IRA Charitable

Rollover A new IRA bill was passed in the House & sent to the Senate extending the IRA Charitable Rollover for another year. Prospects of becoming a law are good.

NCPG

Conference Hershberger reported on the 2007 Planned Giving Conference. He made two conference documents available for the membership: "Almost Everything Gift Planners Need to Know About Income Taxes" & Lessons Learned From Charitable IRA Rollover"

LEAVE A LEGACY

Tabloid was published on Nov. 2 in the News & Sun. 33,000 copies were distributed. 5000 place mats are being distributed to local restaurants.

No forms have been received from NCPG to register the program or license Partners. In past years this process had to be completed by January 1st.

Treasurers

Report Currently there are 37 paid up members. Account balances are: \$9693 > Council, \$871 > LAL, for a total of \$10,564.

Seminar had income of \$ 3,665 and expenses totaling \$2,660; for a net of \$1005.

Program: "Using the Internet to obtain Charitable Gifts" presented by Loehrer & Sterzenbach.

Internet companies have the ability to track individual's habits to include: interest, where they come from, length of stay, pages visited and pay preferences.

There are four major reason companies (charities) utilize the internet to conduct business. 1. Marketing benefit: New client base, reduce administrative costs, increase revenue, increase awareness of organization and cross sell. (Go on line to make a contribution to ARC because of a catastrophe.) 2. Accept Donations: Need third party solution i.e. Pay Pal, Google Check Out. (Too costly to do oneself.) Pros: quick set up, inexpensive, dependable. Cons. Individual must set up account, difficult to navigate soft ware (people give up). Security concerns of user. {Organization could set up site to do marketing and receive donation, expensive to start,, need merchant account and secure web site. Often referred to as integrated solution} 3. Convert Visitor to Donor: Make "case" and create a funnel to drive traffic to you programs. Establish credibility & assurances of your viability; 800 numbers, physical address on web page. Use proactive marketing to optimize traffic. 4. Bring People Back to Site: Data capture, Thank You when a contribution is received. Send donor newsletters and frequent updates (e-blasts) on their interests.

Next meeting: January 25, 2008