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# TAGlines

News for the most passionate in Education,  
Healthcare, and Community Building

[www.TheAngelettiGroup.com](http://www.TheAngelettiGroup.com)

## Partner Highlights

### Meridian Health to Launch Integrative Medicine Program with \$10 Million Gift



[Riverview Medical Center Foundation](#) of Meridian Health System received two substantial gifts, totaling \$10 million, to launch an integrative medicine program. Integrative medicine is the combination of

conventional medicine and complementary and alternative treatments. The System has been conducting research, investigating modalities, and planning for the right opportunity to roll out this innovative and more personalized approach to consumer health and wellness. One of the unique aspects of Meridian's program will be the focus on educating physicians, as well as members of the community, on the importance of a holistic approach to staying healthy. [Read more.](#)

### Cazenovia College Exceeds Campaign Goal

In June, [Cazenovia College](#) completed their first-ever comprehensive campaign, *Building Futures One At A Time: The Campaign for Cazenovia College*. The College exceeded its \$10 million goal, raising over \$11 million. One of the campaign's lead gifts was a gift of \$1 million from the Jephson Educational Trusts for the naming of South Campus. Congratulations, Caz!




### Woodlawn Conservancy Announces Cutting-Edge Partnership with World Monuments Fund

[Woodlawn Conservancy](#) is partnering with [World Monuments Fund \(WMF\)](#) to establish The Woodlawn Cemetery Preservation Training Program. This two-year pilot program created by the Conservancy and WMF in collaboration with the International Masonry Institute, and funded by the [Heckscher](#)



Summer 2015

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Share your news with us and you may see it in the next issue of TAGlines! Don't forget, follow us for your weekly dose of #TAGthoughts and #FactsonFridays!

The Angeletti Group is proud to be your resource for all things philanthropy and we appreciate your support.

New Partnerships

[Foundation for Children](#) and WMF, will provide training in stone preservation techniques under the tutelage of a resident craftsman. Twelve interns ages 18 to 24 will receive the technical and safety training they need to begin their careers in stone preservation, as well as a certificate documenting their training, support to transition from training to employment through youth career counselors from [Opportunities for a Better Tomorrow](#), and job placement opportunities through apprenticeships at the Cemetery, the International Masonry Institute, and with private contractor employers.



## Gundersen Medical Foundation Leader Humbly Retires



Phil Schumacher, Executive Director of Development at [Gundersen Medical Foundation](#), retired this month after more than 20 years of service to the medical center and the LaCrosse community. Schumacher is recognized for his leadership during the 2002 Home for Hope capital campaign, which raised \$11 million to

build a new cancer center at Gundersen, and the \$45 million crusade for the System's new behavioral health facility and hospital, which began serving patients last year. With a penchant for putting donors first, saying thank you--and meaning it, and building relationships with the community, Schumacher leaves a lasting legacy at Gundersen Lutheran and in the LaCrosse community. The Angeletti Group is privileged to have worked with Schumacher for many years during the System's recent campaign, and we wish him all the best in retirement. Read more about Schumacher's leadership [here](#).

## JRF Celebrates Late Jackie Robinson's Birthday and Hosts Mentoring and Leadership Conference



On January 15, 2015, the [Jackie Robinson Foundation \(JRF\)](#) celebrated what would be Jackie Robinson's 96th birthday on January 31, 2015, with a special event that paid tribute to three organizations that have promoted the

values embodied in the life and legacy of Jackie Robinson. At the celebration, JRF Founder Rachel Robinson, JRF's Chairman of the Board Gregg Gonsalves, and JRF President and CEO Della Britton Baeza honored Joe Torre's Safe At Home Foundation, CC and Amber Sabathia's PitCCh In Foundation, and Derek Jeter's Turn 2 Foundation, touting the profound impact that each of these non-profit organizations have had on the community. "This event would surely have made Jackie proud," said Rachel Robinson.

We are pleased to partner with the following:

- *Connecticut Center for Child Development, Inc.*
- *Geisinger Health System*
- *Jefferson Community College Foundation*
- *Miss Porter's School*
- *Newark Academy*
- *Stevens Institute of Technology*
- *Tri-County Scholarship Fund*

## Opportunities

Connecticut Center for Child Development:  
[Director of Development](#)

Miss Porter's School:  
[Leadership Gifts Officer](#)  
[Principal Gifts Officer](#)

Stevens Institute of Technology: [Asst. VP for Alumni Engagement/Annual Giving & ED of the Stevens Alumni Association](#)

**New opportunities are added often - click [here](#)!**

## TAG Goes Global



The Angeletti Group is proud to sponsor the La Tebaida Soccer Club in

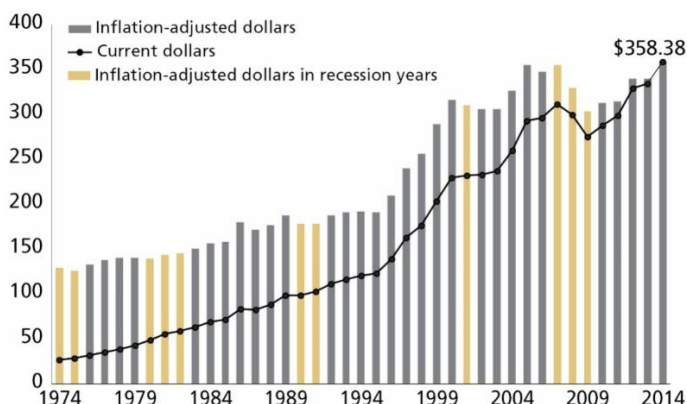
In March, JRF hosted its 2015 Mentoring and Leadership Conference in March at the Marriott Marquis Times Square in New York City. More than 200 Scholars and 100 JRF alumni attended workshops, plenary sessions, and the Annual Awards Dinner. JRF Scholars explored the impact of SMART technology and the way in which it interfaces with managing relationships, conducting business, and positively impacting the world.

Quindio, Colombia!

## Philanthropy News

### Charitable Giving Tops Record Level: Findings from Giving USA

The newly released [Giving USA](#) report found that charitable giving reached a record \$358.4 billion last year, topping the record giving figure achieved in 2007, just before the recession started to affect donation figures. As the economy grew, philanthropy grew even faster. The recovery period was the shortest on record in the past 40 years -- far faster than experts had predicted.



Key findings of the 2015 report include:

- Individual contributions totaled \$258.5 billion last year, still shy of 2007, when they provided the highest ever donated at \$266.1 billion.
- Giving by living individuals, family foundations, and bequests represented 87% of total giving.
- Corporate and foundation giving is healthy, growing by 12% and 6%, respectively.
- 2014 marked the fifth year in a row where giving increased; the average annual increase was 5.5 percent in current dollars (3.4 percent when inflation-adjusted).

Interestingly, Americans increased their contributions to foundations by just 0.1% percent. The report suggests that perhaps an increasing number of people steered their money to fast-growing [donor-advised funds](#) instead.

### What You Need to Know About Donor-Advised Funds

Charitable giving reached its all-time high last year, and with that came innovative ways for donors to support causes and organizations they care about. Today the fastest growing vehicles for giving are donor-advised funds (DAFs). These accounts, historically a minor part of philanthropy, have grown in popularity and visibility significantly over the last few years. Here, we have compiled four key facts and tips you need to know about DAFs:

**1. A donor-advised fund is a philanthropic vehicle that allows donors to make a charitable contribution, receive an immediate tax benefit, and then recommend grants from the fund over time.**

Essentially functioning like a "savings account" for charitable contributions, DAFs offer incentives to increase the extent and value of giving. For example, donors can claim a tax deduction for a gift of cash (or appreciated stock or the value of art work) for a year when their income and tax liability is high and slowly parcel out donations over time.

**2. The growth in contributions to and grants from DAFs is tremendous - and is expected to continue.**

Donors poured more than \$17 billion into donor-advised funds in 2013, up 24% from 2012. Today, there are more than 200,000 DAFs totaling more than \$45 billion in contributions and

grants (National Philanthropic Trust).

### **3. DAFs represent an opportunity for your organization.**

DAFs represent a unique opportunity to further engage your supporters. Not only do they simplify charitable giving, but a DAF allows donors to easily make annual or recurring grants to your organization. They can also be a great vehicle for planned giving, allowing donors to create a legacy of philanthropy without establishing a private foundation.

### **4. Understanding DAF-friendly fundraising is key to success.**

Know how to manage supporters who chose DAFs. Don't ask them for pledges - DAF grants cannot be made to fulfill a pledge according to IRS regulations. Be sure to recognize your DAF donors the same way as outright donors, such as in annual reports and through naming opportunities. Although the actual donation is coming from the sponsoring organization, it is important to thank the donation advisor for their personal support. To be sure, establish a system for tracking donors who have a DAF, allowing you to credit them appropriately and even target them with specific solicitations.

For more information about working with DAFs, contact The Angeletti Group [here](#).

## *Join Us for a Complimentary Webinar*

**"Beyond The Numbers: Setting Goals and Thinking Big with a Metrics-Driven Major Gifts Program"**  
**September 25, 2015**  
**1 p.m. EST**

Clearly stated, goals for major gift programs and officers are essential if you are to realize your organization's potential. This September, review portfolios and set goals for the fiscal year ahead.

Join Jay Angeletti and Phil Beekman of The Angeletti Group as they address the anatomy of a metrics-driven major gifts program.

- What makes a successful gift officer?
- What metrics should be used to measure success?
- How can we maximize productivity - and do so in a way that celebrates both individual and collective successes?

We will outline a metrics-driven moves management program that rewards accomplishment, serves as a management tool to encourage organizational investment, and cultivates an empowered team! Learn ways to develop a program that relies on goals and guidelines, yet offers the flexibility from which transformational gifts are born and nurtured.

This event is free, [register today](#).

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