



Martha & Mary and Leave 10 for Kitsap Campaign

We are seeking Board approval for commitment of \$2,500 a year for three years for a countywide initiative to increase legacy giving (10% of estate to charity) and help launch/sustain M&M's planned giving and endowment-building activities.

What is Leave 10 for Kitsap?

The "Leave 10 for Kitsap" initiative organized by Kol Medina, President & CEO, Kitsap Community Foundation (KCF) seeks to join the movement started about 5 years ago by Seattle-area philanthropists, gift planning professionals and professional financial advisors. This effort "aims to build better communities and transform as many people as possible into philanthropists by educating, inspiring and encouraging individuals to aspire to leave at least 10% of their estate to charity Leave 10 (<http://www.leave10.org>)."

Since February 2018, executives from 11 of Kitsap's leading non-profit organizations have met monthly to learn about the Leave 10 for Kitsap program and campaign. This Campaign Council is currently overseeing a transfer of wealth study that will provide essential information and statistics to validate the Leave 10 for Kitsap case for support. The Council has also discussed how Kitsap's professional advisor and non-profit communities will be involved and the plan for implementation and its cost.

Key steps in the **Leave 10 for Kitsap Campaign** include:

- a **Leave 10 for Kitsap Campaign implementation plan and timeline**. The campaign has a simple goal: get as many people as possible to leave at least 10% of their estate to local charities. People can leave 10% as unrestricted gifts, endowments, or a combination of the two.
- the development of **marketing and educational materials** to promote the Leave 10 Kitsap Campaign;
- a **Planned Giving Toolkit** that non-profits can adapt to fit their organizations and missions;
- **training and networking sessions** to help those involved launch and sustain the Leave 10 Kitsap Campaign within their organizations;
- **collaboration among non-profits, financial planners, estate attorneys, CPAs, etc., and local philanthropists** to create an alliance of well-informed professionals committed to the long-term well-being and quality of life in our community, and to helping people throughout our region **experience the joyful and uplifting power and impact of philanthropy**.

What is Being Asked of Martha & Mary: \$2,500 a Year for Three Years

Martha & Mary was invited to participate as a member of the Campaign Council. Paula Rimmer has attended all meetings to date, and Martha & Mary has hosted the group's planning sessions. The Kitsap Community Foundation (KCF) will administer the Campaign, overseen by the Campaign Council. Kol Medina has developed a budget that will meet the cost of the Transfer of Wealth study, design and development of campaign marketing materials, campaign events, and other incidental costs. Total cost of the Campaign is estimated at \$42,500/year. **As a member of the Leave 10 for Kitsap Campaign Council, Martha & Mary has been asked to commit \$2,500 a year for three years. All members of the Council were asked for this commitment. To date nine of the 11 members have committed to this funding (see reverse for Council members).**

Why Should Martha & Mary Make the Leave 10 for Kitsap Commitment

- The M&M Strategic Planning Committee has begun discussions around the impact of planned giving and endowment-building as a means to increase M&M's long-term financial stability. The Leave 10 for Kitsap Campaign is a powerful tool for launching and sustaining M&M's planned giving and endowment program at a modest cost and leverages previous planned giving program investment.
- This is an ideal vehicle for educating M&M's donor base, and the community, on the benefits and impact of legacy giving.
- Through a coordinated, countywide effort, M&M's planned giving efforts will be supported and greatly amplified. We would not have nearly the impact if we were to invest these funds on our own over a three-year period.
- The demographics of the greater Kitsap region correlate strongly to constituencies with high potential for legacy giving if properly cultivated and stewarded. For most individuals, legacy gifts are their most significant opportunity to support the causes they most care about and see their values carried out beyond their lifetimes.
- M&M's participation as a Campaign Council member supports our role as a leading non-profit in our community. This gives us greater visibility and opportunity to advance legacy giving for M&M and region-wide.

Leave 10 for Kitsap

Campaign Council Members

Kol Medina, President & CEO, Kitsap Community Foundation

Admiral Theatre Foundation: Brian Johnson, Executive Director

Bainbridge Community Foundation: Jim Hopper, Executive Director, (Jim is also Board Member of Leave 10 in Seattle)

Bloedel Reserve: Ed Moydell, Executive Director, with Chris Andresen, Director of Philanthropy

Holly Ridge Center: Erica Delma, Development Manager

Kitsap Humane Society: Eric Stevens, Executive Director

Kitsap Regional Library: Jill Jean, Director, with Wendy Kile, Executive Director, Kitsap Regional Library Foundation

Kitsap Rescue Mission, Walter LeCouteur, Associate Director

Martha & Mary: Paula Rimmer, Director of Development

Olympic College Foundation: David Emmons, Executive Director

United Way of Kitsap County: Carl Borg, Executive Director

Other Organizations Consulted About Council Membership and Leave 10 Campaign

Bainbridge Island Museum of Art: Peter Raffa, Director of Development

Great Peninsula Conservancy: Sandra Staples-Bortner, Executive Director

NK Fishline: Mary Nader, Executive Director

Professional Advisors Interested in Leave 10 Kitsap Campaign

Tracy DiGiovanni, attorney, Shiers Law Firm

Dorothy Foster, attorney, Foster Law Group

John Kenney, attorney, John Kenney & Associates

Sherrard McGonagle Tizzano & Lind attorneys, law firm

Chris Cook, accountant, Hearthstone CPA Group

Vicki Finney, accountant, Huddleston, McKenzie & Associates

Dennis Reynolds, accountant, Parker Mooers Cena

David Rhine, accountant, Cox & Lucy

Jessie Nino, financial advisor, Edward Jones

Jay Seaton, financial advisor, Edward Jones