



# SMARTER Giving, FOR A *Greater* IMPACT

## April Is Global Volunteer Month

By Patience Boudreaux

I lean into opportunities to embrace joy. For me, joy comes with serving others through volunteerism. I recently learned that in 2020, the Points of Light Foundation declared April as “Global Volunteer Month”, and the thought of more people serving definitely brought me joy.



The Los Angeles Council of Charitable Gift Planners is a volunteer-led organization. When you attend a general meeting and learn from our skillful presenters, a volunteer recruited that presenter and strategized over how she could best meet the needs of our members. When you request a mentor, not only is that mentor a volunteer. The matchmaker who helps partner mentors and mentees is a volunteer. When businesses, who provide such valuable service to our donor/client operations, are approached to be LACGP Partners as a way to keep expenses down for members, it's a volunteer who made that call and identified how LACGP and that Partner company are a good fit for each other. When you attend the [Western Regional Planned Giving Conference](#) (this year, May 25-27, with a series of 5 sessions on the Wednesdays leading up to the conference), every speaker, partner, and attendee is there because volunteers made that experience a reality.

I hope you will take this month to consider how you might volunteer with LACGP. We have some openings on the board. If you don't feel ready for that step, we also welcome people for our committees which is a great way to learn more about how LACGP serves our learning community and the time commitment is flexible and cyclical depending on the role. There's a need for new mentors, and this experience provides a positive (dare I say joyful?) experience for the volunteer and a meaningful way to help others. Though April may be regarded as “Global Volunteer Month”, volunteering can happen throughout the year. If you would like to discuss which volunteer roles are the best fit for your skills, interests, and availability, [please reach out](#) so we can connect with you personally.

# LACGP Mentorship Program Success

## With Aaron Levinson and Todd Mandel

*For many years LACGP has paired up willing participants in its mentorship program to help introduce new members to more people and help them as they dip their toe into the planned giving pool. We asked Aaron Levinson and Todd Mandel to describe their experience in the mentorship program.*

### **Is this your first time being paired in the mentorship program?**

Aaron: When I first joined LACGP (then PPP-LA), I was matched with a mentor, Bill Strickland, who “showed me the ropes” and helped me get oriented with the group. It was a great experience and Bill and I have remained friends. I have also served as a mentor to another new member in the past.

Todd: This is the first time I have been paired in the mentorship program. I was introduced to Aaron, as my mentor, several months after I joined LACGP and began work in Planned Giving at Cedars-Sinai. The formal “container” in which I was able to learn from (while also often laughing with) Aaron and the frequent connections he provided me to other people and resources permitted me to grow and thrive in wonderful ways.

### **What are you looking for when you are paired with someone?**

Aaron: As a mentor, I would like to be matched with someone who is outgoing, friendly and won't get annoyed at my bizarre sense of humor! Seriously, though, it's helpful when the new person is eager to learn, isn't afraid to ask questions, and wants to strengthen the relationship and really form a friendship. For me, this isn't just a year-long prospect. Ideally we should remain in touch for years as friends.

Todd: I quickly found that the LACGP culture was rich in PG-specific wisdom, remarkable humility, and generosity. I was able to turn to a number of members for answers and other guidance with my new planned giving work. I realized however that if I was to continue to grow in this field, I needed someone who could in ways indoctrinate me in the big picture thinking that is Planned Giving at the same time as helping me expand my network of fellow PG and related professionals.

Thanks to Jim Jacobs' mentor program leadership and knack for matching, and Aaron's considerable experience as a practitioner and mentor, I was able to pursue a more methodical learning process, realize some initial successes, and perhaps above all, find meaningful fulfillment with the work.

### **What if you don't “hit it off” with your partner?**

Aaron: Obviously not everyone is going to become great, life-long friends. But I think that anyone who is eager to learn or willing to impart their knowledge and experience can do well in this program. There is a purpose, an end goal. Together with your partner, you can achieve the goals of the program, which is to educate and assist.

Todd: In making the decision to request a mentor, I was betting that personal chemistry and especially the opportunity to grow professionally would outweigh the time invested. I've been so pleased with the results.

### **What have you gained from being in the mentorship program?**

Aaron: When I was paired with Bill, it was nice to have a mentor who was so well connected in the group and in the planned giving community. He introduced me to so many people and was able to answer so many questions about planned giving. It was a tremendous help. Being paired with Todd currently, I enjoy giving advice when he needs it and just talking with him. We share similar ideals and goals and it's great knowing that I am helping him learn about planned giving the way I learned many years ago. And ultimately it helps LACGP as well, which is important to me.

Todd: Aaron has been a remarkable mentor and growing friend. He is there for me when I need him, introduces me to people and resources, and continues to open my mind to the possibilities for success. I look forward to giving back however I can in the years to come.

# Volunteer Opportunities Abound With the LACGP

By Jim Jacobs

As a volunteer-run organization, the Los Angeles Council of Charitable Gift Planners (LACGP) offers a variety of ways to volunteer and to help the Council achieve its goals and mission. Volunteering offers a way to give back to this terrific organization while making new contacts and developing relationships with colleagues from a variety of diverse organizations and businesses.



Members with an interest in volunteering can get involved in several ways.

These include:

1. **Mentors** – Serving as a mentor to a fellow member who is new to the field of planned giving is a wonderful way to share advice on a variety of topics. Mentors are encouraged to have at least three contacts with their mentees throughout the year, either through phone or email contacts or in-person meetings.
2. **Membership Committee** – Members follow-up with guests to encourage them to join, ask for feedback from new members and encourage those whose membership has lapsed to rejoin the LACGP. All of these contacts are made through phone calls and emails.
3. **Program Committee** – Members work to develop creative programming and recruit dynamic speakers for the General Session meetings.
4. **Western Regional Planned Giving Conference and General Session Meetings** – Volunteers are needed to introduce and host session meetings (both virtual and in-person), greet guests at the registration table, serve as table hosts – and in any number of others ways to help make these special events successful.
5. **Service on the Board** – The LACGP Board is comprised of 16 members who serve in a variety of positions and lead several committees including Education, Marketing & Communication, Membership, Sponsorship, and more.
6. **Other Ideas?** While these are the more traditional ways to volunteer, let us know if you have another idea of how you might serve in a volunteer role. We are open to any and all new ideas!

If you have read this far, thank you, as that might mean you have an interest in volunteering with a great group of friends and colleagues.

To learn more, please contact Volunteer and Mentoring Chair Jim Jacobs at 626-665-8604 (cell) or send an email to [jjacob@cmc.edu](mailto:jjacob@cmc.edu).

# Upcoming Events



IN ASSOCIATION WITH  **S T E L T E R**

## LACGP WESTERN REGIONAL **Planned Giving Conference**

# MEETING THE MOMENT: PHILANTHROPY'S ROLE IN HEALING

Wisdom Wednesdays: April 21 - May 19

Full Conference: May 25 - 27

[lacgp.org/wrpgc](http://lacgp.org/wrpgc)

## Our Partners

