Major Gifts + Planned Gifts
Winning Equation for Blended Gifts

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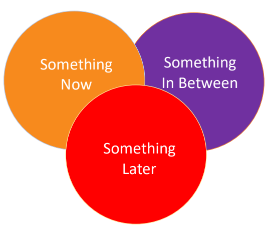
1

What is a blended gift?



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Blended Gift Combinations Broken Down

Something Now	Something in Between	Something in Later
Cash Securities Real Estate Art & Collectibles Personal Property	Gift Annuities Charitable Remainder Trusts Bargain Sale Retained Life	Will | Trust IRA | Retirement Plan Life Insurance Other Beneficiary Designations

3

Tell us about you. Poll Questions:

How big is your fundraising shop?

A) 1-5 employees
B) 5-10 employees
C) 11-25 employees
D) 25+ employees

Have you ever made a blended gift ask to a donor?

1. Yes
2. No
3. Not sure

4

This session will…

1

Empower

You to secure blended gifts as you work to strengthen the future of your nonprofit

2

Equip

You to use blended asks to have deeper donor conversations, ask more strategic questions, and close larger gifts

3

Enable

You to better maneuver organizational challenges as your make blended gifts part of your ongoing practices with donors

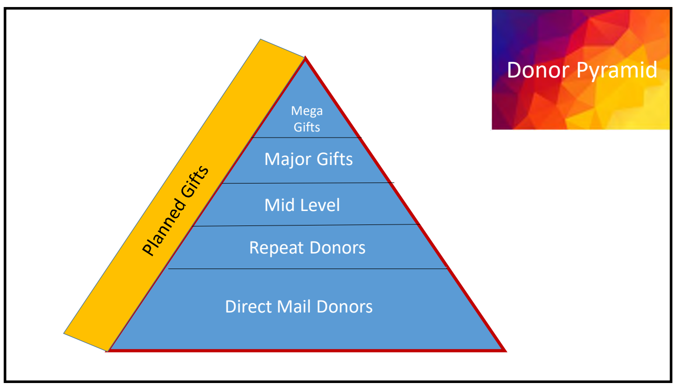
5

We Will Give Answers & Resources to the Following Questions

1. How can blended gifts help you engage more donors?
2. How to determine when your fundraising program is ready to secure more blended gifts?
3. How to increase collaboration among major gift and planned giving staff?
4. How to develop a donor plan leading to a blended gift?

6

7



8

Let's Talk About It

Are major gift donors good planned giving donors?

Why?
Why not?

9

Let's Talk About It

Are planned giving donors good major gift donors?

Why?
Why not?

10

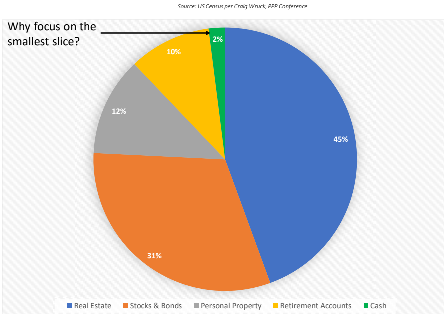
How can donors make the most impact?

We should be asking PG donors about considering a gift now:	We should be asking MG donors about considering a PG gift:
Retirement accounts (QCD from IRA)	Bequest
Stocks	Charitable Gift Annuity
Cash	CRUT
Life insurance	Real Estate
Art | Collectibles | Personal Property	More complex gifts (trusts)
Donor Advised Funds	Donor Advised Funds

11

Donor Wealth Profile

Source: US Census per Craig Wruck, PPP Conference



12

Blended Gifts Enable Donors To:

- Give beyond an annual cash gift
- Make gifts that are sensitive to their current cash flow needs
- Address financial, tax, and estate planning needs
- Provide for family and charity
- Make a meaningful impact to your organization

13

Blended Gifts Enable Donors To:

- Benefit from long-term recognition of their generosity
- Engage family in planning and philanthropy
- Make larger gifts
- Leave a legacy

14

Is Your Program Ready?

Collaboration Among MG & PG Staff

15

- Do you have a major gift program?
  - Do you have staff assigned to working specifically with large contributors?
- Do you have a planned giving program?
  - Do you have staff assigned to working on securing legacy gifts?
- How do you make the most of all those relationships?

1. Evaluate where you are

16

What?

Why?

Who?

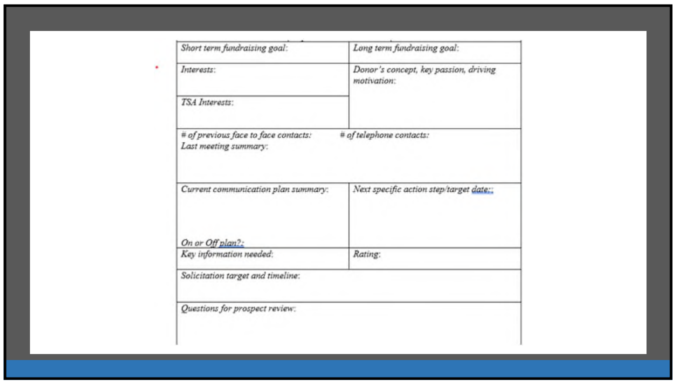
2. Prospect Reviews

17

[Donor Name]

Family info:	*Address, phone*:	*Employment/Business*:
Assigned to: *ID number*:	*First gift date*: *Most recent gift & date*: *Highest gift & date*: *Cumulative $* *# of gifts:* *Planned gifts*:	
Income and asset level:	*Planned giving inquiries*:	*Linkages to TSA*:
Short term fundraising goal:	*Long term fundraising goal*:	

18



Short term fundraising goal:	*Long term fundraising goal:*
Interests:	*Donor's concept, key passion, driving motivation:*
TSA Interests:	
# of previous face to face contacts: *# of telephone contacts:* *Last meeting summary:*	
Current communication plan summary: *On or Off plan?:*	*Next specific action step/target date::*
Key information needed:	*Rating:*
Solicitation target and timeline:	
Questions for prospect review:	

19

- Where do you start?
- One donor?
- Many donors?
- Hire staff?

3. Make a Plan

20

- Start the conversation
- Provide options
- Share what other have done

Now, let's look at some conversation starters with donors…

4. Talk with Donors

21

Questions to Explore Philanthropy

- What inspires you?
- What are your philanthropic goals?
- What role do your advisors play?
- How do you give most of your gifts?
- What the most meaningful gift you've given to a charity?
- Tell me about your recent meaningful charitable gifts.

22

Questions to Explore Financial Planning & Assets

- What is your investment philosophy?
- How has the market treated you?
- Do you invest in real estate?
- Tell me the story of your business.
- Do you have an estate plan?
- What would excite you about giving?

23

Questions to Explore Family & Estate Planning

- How do you define success for your family?
- Do you and your partner make charitable giving decisions together?
- Why have you been so generous to us?
- Would you consider naming our organization as beneficiary?
- Would you like to hear about endowing your annual gift for perpetuity?

24

Explore Donor Concerns that Blended Gifts Can Address

- I am worried I'll outlive my money.
- Health care costs keep rising. How will I afford the bills?
- I want to provide for my children and grandchildren.

25

Explore Donor Concerns that Blended Gifts Can Address

- I'd like to help my grandkids attend college.
- I do not have much cash available, but I have property and an art collection I no longer need.
- I inherited a commercial property I don't want.
- I want to support the capital campaign, but I'm worried about giving cash.

26

Develop a Plan Leading to Blended Gifts

27

Your Checklist for Blended Gifts

- ❑ Determine what types of gift to "count" or "not count" at your organization (revocable and irrevocable)
- ❑ Document estate intentions with bequest intention forms
- ❑ Identify top blended gift prospects
- ❑ Listen for donor interests and obstacles for support
- ❑ Have prospect review sessions regularly
- ❑ Track blended gifts
- ❑ Promote success stories

28

Scenario I

Endowing an annual gift with a bequest

Judy and Jim

Something Now- An Annual Gift

Something Later- A Bequest

29

Scenario II

Making a significant capital gift

Sue

Something Now

Something In Between

Something Later

30

Complex Scenarios

- Ask for help
- Retain a lawyer
- Work with the donor's financial planner

<u>You don't have to know it all!</u>

31

Questions

32

Contact Details

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33

Major and Planned Gifts

Prospect Review Meeting
Sample Agenda

1. The prospect review meeting harnesses the collective wisdom and experience of senior staff and provides:

   - A forced, scheduled session requiring senior development staff from different disciplines to meet collectively to review top level donors and prospects of the Division.
   - A collective look at communications and strategy for individual donors/prospects
   - Avoidance of pigeonholing donors/prospects within one giving modality
   - A determination of roles and assignments regarding donors/prospects
   - A peer review of action vs. plan for key donors/prospects
   - Through minutes of meetings, a tracking of progress and status for review by supervising headquarters
   - A sharing of successes

2. The meeting should be scheduled monthly (and occasionally more often) for two hours with required attendance of senior development staff:

   - Development Director chairs the meeting
   - Major gift staff
   - Planned giving staff
   - Senior annual giving staff
   - Research professional
   - Secretary to take minutes

3. The meeting is not a general staff meeting. It is a session to review donor/prospect cases, strategy, and results. Individual constituent cases are presented by the assigned development officer (or as directed by the development director for new, unassigned constituents). Typical time allocation for the meeting might be:

   - Major gift cases 40%
   - Planned gift cases 40%
   - Annual fund cases 10%
   - New cases/from research/other 10%

4. The time allocation per case should be 5-10 minutes per case. To make this work the assigned development officer must prepare in advance a one page “snapshot” of each constituent to be reviewed. This would include:

    - Name, address, phone,
    - Age
    - ID number
    - Assigned development officer (s)
    - Spouse, family
    - Occupation, company
    - Income and asset level
    - Giving stats: Origination date, MRC (most recent contribution) and date, HPC (highest previous contribution) and date, ITD (cumulative) dollars and number of gifts; planned gifts
    - Planned giving inquiries
    - Linkages to your organizaton
    - Interests—Army and other
    - Donor’s concept, key passion, driving motivation
    - Last meeting summary
    - Current communication plan summary (on or off plan?)
    - Next action step
    - Key information needed
    - Rating
    - Solicitation target and timeline
    - Questions for prospect review

    This information should be provided by the assigned development professional to all other attendees at least 24 hours in advance of the meeting.

5. At the meeting--in two minutes the assigned development officer should present a summary of the above (concentrating on the most salient points), proposed communication plan and next step then open the floor for questions, comments, and suggestions. Group participation is expected, and positive and critical inputs are both appropriate.

6. Chair will call for conclusion of each review and statement of the determined conclusion. Conclusions may include endorsement of current plan, modification of plans, or reassignment of the constituent. The conclusion should include a next step which should be noted in the minutes.

7. Each development officer with assigned donors will present in each session with most time allocated for major and planned giving staffs.

8. Constituents chosen for review should include a mixture of those with highest giving potential and those where most immediate input is necessary.

9. Minutes of each meeting will be provided to all participants, any absent members, and organizational leadership, as appropriate. Minutes shall contain date, those in attendance, those absent, the conclusion reached for each constituent and summary of issues or concerns for the constituent. The “snapshot” page for each constituent should be attached to the minutes. The minutes should include a development director’s meeting assessment and sign off.

10. After three months, constituents reviewed previously may be scheduled again for review based on need and high potential. Before each meeting each development officer shall submit proposed constituents for review to the development director who may determine priority, placement on the agenda, or deferral. As chair, the development director can always add constituents to be reviewed.

11. Each meeting will result in a review of approximately 10 to 15 constituents. And some constituents will be reviewed more than once. Key constituents may warrant more detailed discussion. Thus, not every assigned donor will be reviewed. Quality and interaction are more important than volume of names covered.

Sample Summary Sheet Attached

[Donor Name]

<table>
<tr><td>Family info:</td><td colspan="3">Address, phone:</td><td>Employment/Business:</td></tr>
<tr><td>Assigned to:</td><td colspan="4" rowspan="2">First gift date:
Most recent gift & date:
Highest gift & date:
Cumulative $, # of gifts:
Planned gifts:</td></tr>
<tr><td>ID number:</td></tr>
<tr><td>Income and asset level:</td><td colspan="2">Planned giving inquiries:</td><td colspan="2">Linkages to your organization:</td></tr>
<tr><td colspan="2">Short term fundraising goal:</td><td colspan="3">Long term fundraising goal:</td></tr>
<tr><td colspan="2">Interests:</td><td colspan="3" rowspan="2">Donor’s concept, key passion, driving motivation:</td></tr>
<tr><td colspan="2">Interests in your organization:</td></tr>
<tr><td colspan="5"># of previous face to face contacts: # of telephone contacts:
Last meeting summary:</td></tr>
<tr><td colspan="2">Current communication plan summary:

On or Off Plan?:</td><td colspan="3">Next specific action step/target date:</td></tr>
<tr><td colspan="2">Key information needed:</td><td colspan="3">Rating:</td></tr>
<tr><td colspan="5">Solicitation target and timeline:</td></tr>
<tr><td colspan="5">Questions for prospect review:</td></tr>
</table>

PRACTICAL PLANNED GIVING CONFERENCE
SPEAKER EVALUATION

Date: ___________________ **Speaker:** ____

Name (optional): ____

Please rate the following:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1

Were your major objectives for this session met? Was the content of the session vital, timely, substantive?
Comments:____
____
____

II. RELEVANCE	5	4	3	2	1

Was the subject matter directly related to the requirements of your job?
Comments:____
____
____

III. VALUE	5	4	3	2	1

Do you believe the benefits of this session were worth the time, effort and cost?
Comments:____
____
____

IV. SPEAKER	5	4	3	2	1

How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?
Comments:____
____
____

V. MATERIALS	5	4	3	2	1

Were the materials clear and organized and appropriately helpful for the session?
Comments:____
____
____

Vi. What did you like the most about the session?

____
____

VI. Any suggestions to improve future sessions?

____
____

XII. How many years of gift planning experience do you have? _______