



PPGC 2024
SAN DIEGO

Strategic Partnership of Blended Gifts

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Assessment of the Strategic Partnership

- GP Opportunity for all Fundraisers (stats from Russell James, PhD)
- Why Organizations Need to Invest in Gift Planning
- Strong Foundation of Gift Planning

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Create Culture of Collaboration

- Gift Processes
- Metrics
- Utilizing Portfolio Meetings






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Training for MGO's

- Ongoing Sharing of GP Examples to Increase Comfort Level
- How to Equip MGO's to Engage Donors




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The Strategy in Our Partnership

- Develop Strategy/Discuss Roles and Timing
- Preparation and Follow Up





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Messaging

- Donor Cues
- Talking Points (for MGO and for GP)
- Questions to Ask





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Personalized Training for MGO's

- Ongoing Sharing of GP examples to Increase Comfort Level
- Continue the Culture for the Strategic Partnership


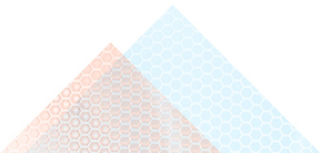


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Q&A

Handout (Checklist for Blended Gifts)



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SPEAKER EVALUATION

COMPLETE THE SURVEY

Please fill out the speaker evaluation by using the QR code.

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The Strategic Partnership of Blended Gifts Checklist

___ Determine what is the Gift Acceptance Policy for Planned Gifts. For example, for a naming gift, what is the percentage that would be acceptable as a planned gift? (for example, the donor would have to be over 75 and only 25% is permitted to be a deferred/planned gift).

___ What is the Gift Acceptance Policy for booking a planned gift? Some organizations book at age 65 (when in a Campaign) and some book at 75+. Consult CASE for these standards.

___ When reviewing portfolios, ask Prospect Research to run the Gift Planning “score”. In Blackbaud, this would be over 700 and could help with the prioritization of identifying prospects for a GP officer and MGO to work together on a few to start with.

___ When discussing the Blended Gift strategy, determine who will be the lead, talk through the approach, messaging, discuss the talking points from the GP officer and the MGO; who will open the meeting and who will close the meeting.

___ Discuss who in advance will recap the meeting with the thank you/ follow up with the email summary and possibly a handwritten thank you note. Also discuss who enters the contact report and next steps.

___ Have a debrief together (GP officer and MGO) within a few hours after the meeting.

___ Discuss next steps, what each “heard” and determine the short-term and long-term strategy for the donor/prospect.