

Become a...

**NONPROFIT
HERO**

*Easy Steps
to Planned
Giving
Success!*

Presented by Valerie M. Jones, CFRE and Beth Delaney, MSW, MS

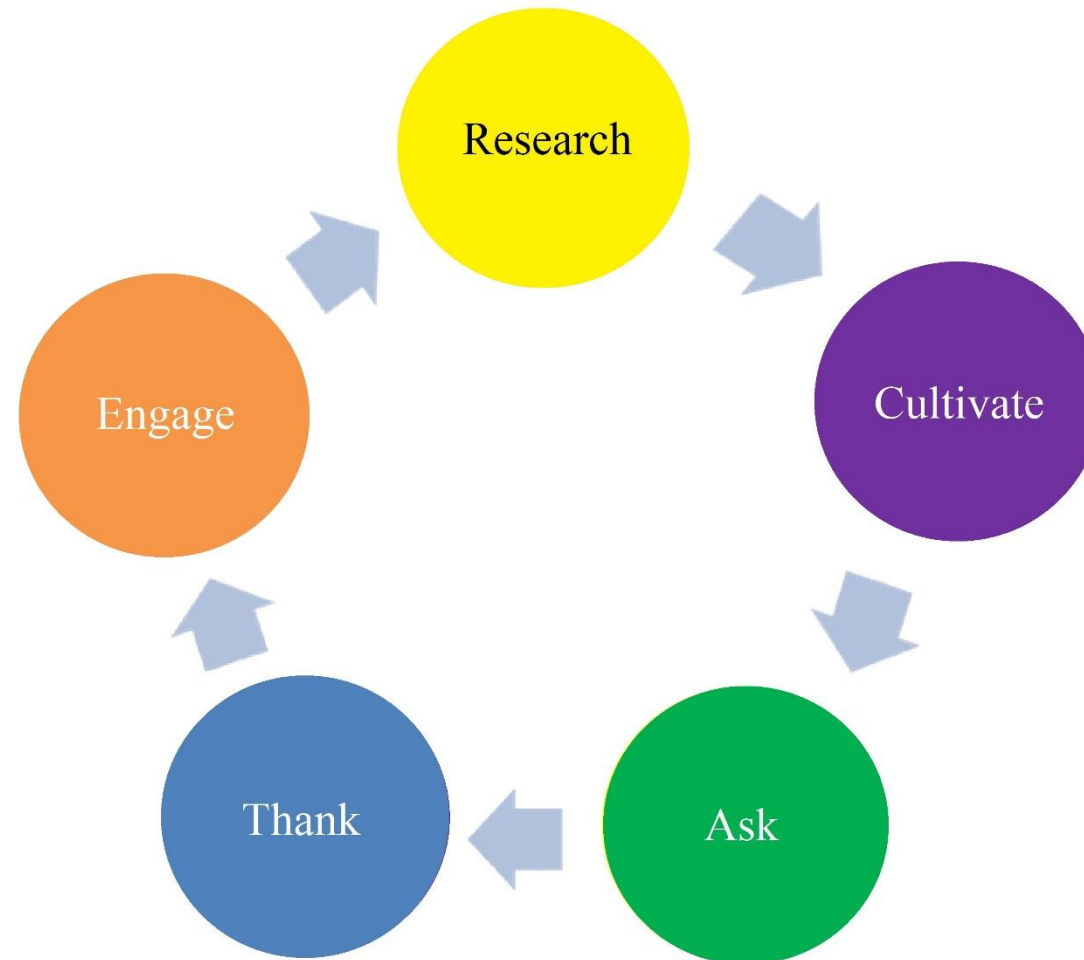
Central Pennsylvania AFP & Susquehanna Valley Council of CGP

October 1, 2019

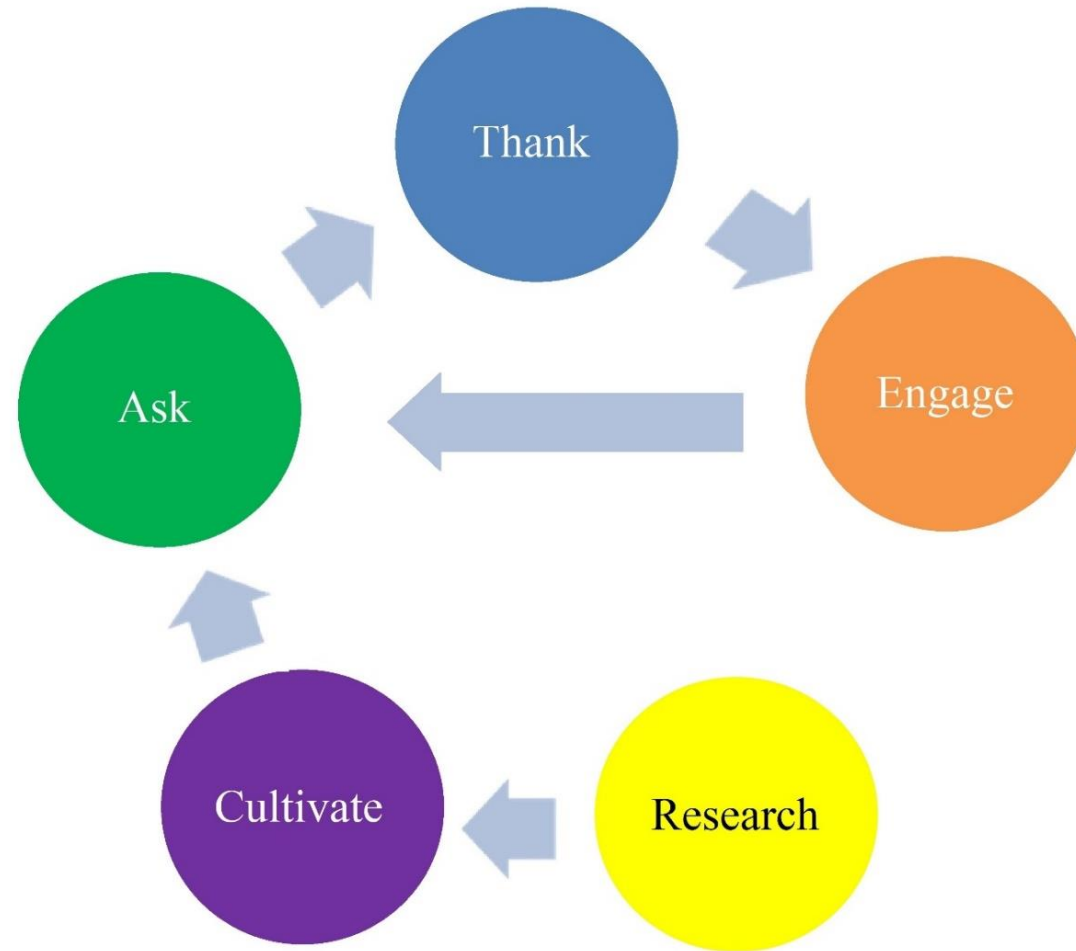
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The Framework

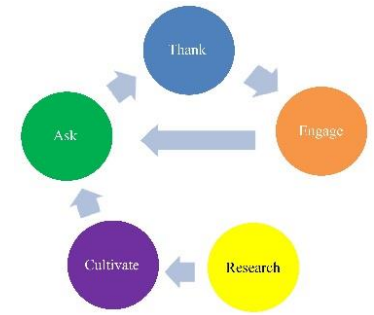
The Usual Approach



The Five Step Framework

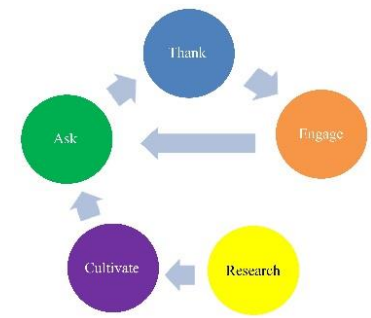


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Why start with thanking?

- It's fun
- It's easy
- They're already donors
- It increases donor retention



Why start with donors?

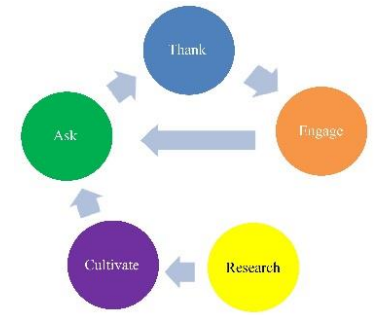
Avg. NPO loses 55% of donors each year.

19% Not thanked for last gift

16% Not asked to donate again

14% Not told how funds were use

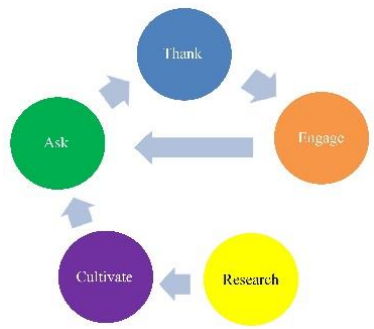
5% Dissatisfied with use of last gift



ID Your BEST PG Prospects

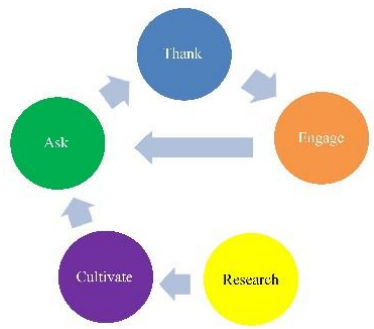
Easy to identify:

- Current donors
- Board & committee members
- Engaged volunteers



Why planned gifts?

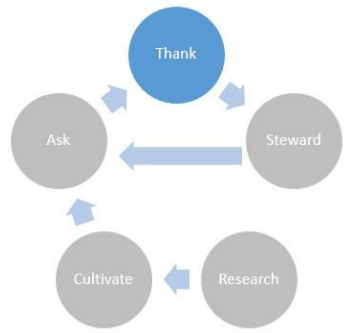
- They're already happy donors (both/and)
- The Big Secret is....
- Combines personal & philanthropic goals
- Once in the will, likely to remain in the will
- Transformational gift (10x annual gift)



Why planned gifts?

- Helps donors integrate charitable giving into financial, tax & estate plans
 - Assets (versus checkbook)
 - Structure
 - Timing
- Achieve Operating + Campaign Goals (\$\$ + engagement #s)

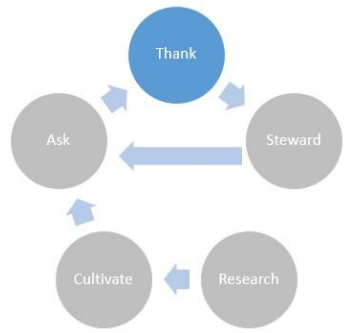
The Five Steps



Step 1-Thank

- Saying:** Everyone can thank
- Trait:** Grateful
- Case Study:** She'd rather talk to plants
- Action:** Assign thankers to new donors

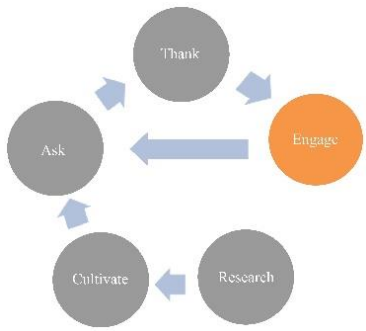
“Gratitude is the memory of the heart.” ~ French Proverb



Step 1- Thank

**Donor Retention-PG donors often
DOUBLE their annual gift**

- Thank more than ask
- In-person stewardship visits
- Events & meetings
- Communications



Step 2-Engage

Saying: Catch them coming & going

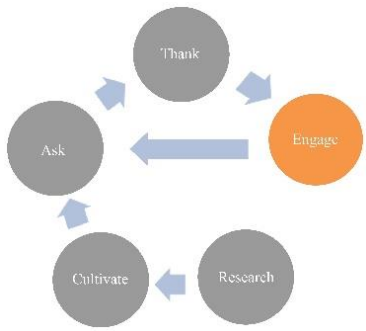
Trait: Receptive

Case Study: What I learned saying good-bye

Action: Station “farewellers” at exits

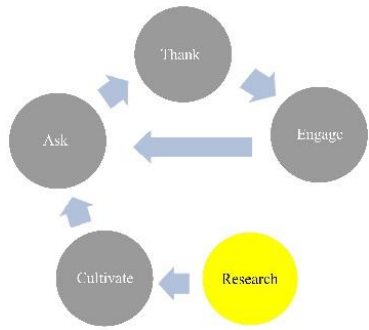
“Man is the only animal that laughs and weeps, for he is the only one... struck by the difference between what things are and what they ought to be.”

~ William Hazlitt



Step 2-Engage

- Maximize events
- Appreciative Inquiry
- Create customized,
mission-focused messaging



Step 3-Research

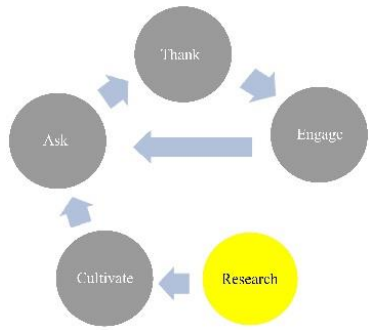
Saying: Hidden in plain sight

Trait: Curious

Case Study: The fond grandfather

Action: Review lists... often!

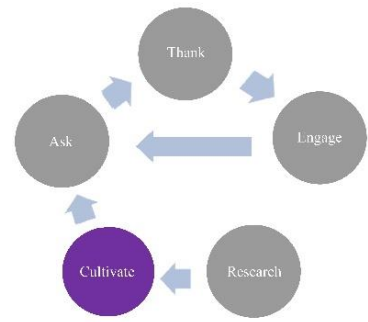
“The cure for boredom is curiosity. There is no cure for curiosity.” ~ Dorothy Parker



Step 3-Research

Resources

- **Internal** (data, board, staff, surveys)
- **External** (Zillow, publicly held stock, contributions, LinkedIn, news)
- **Vendors** (WealthX, Pentera, Stelter)



Step 4-Cultivate

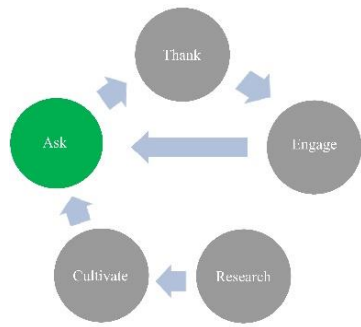
Saying: Nothing sells the Zoo like the Zoo

Trait: Vibrant

Case Study: The Boa in the Boardroom

Action: Set experiential as well as \$ goals

“May you live all the days of your life.” ~ Jonathan Swift



Step 5-Ask

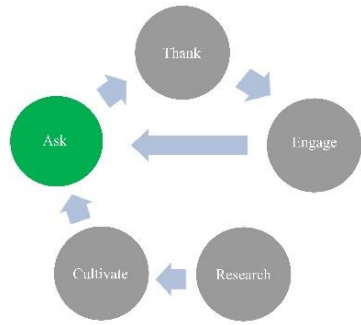
Saying: Be prepared

Trait: Resourceful

Case Study: Pitching *thirtysomething*

Action: Have 3 ideas for each prospect

“I am prepared to meet my Maker. Whether my Maker is prepared for the great ordeal of meeting me is another matter.” ~ Sir Winston Churchill, on the eve of his 75th birthday



Step 5-Ask

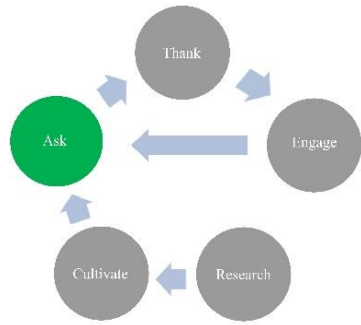
Saying: Shut up and listen

Trait: Attentive

Case Study: Lady summering in Maine

Action: Wait 3 beats before speaking

“We need silence to touch souls.” ~ Mother Teresa



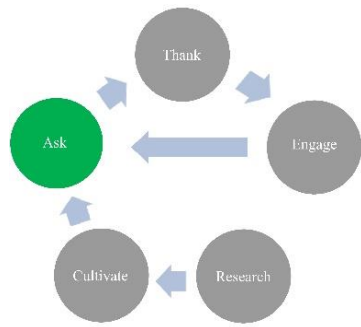
Step 5-Ask

Listen more!

- Ask why they made a gift
- Let them tell their whole story
- Thank them again
- Ask specifically then...

Stop talking and listen!

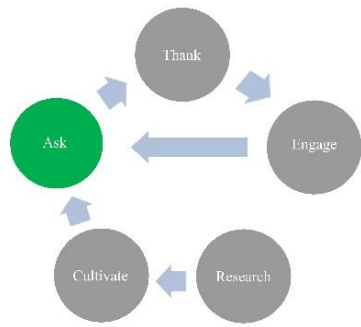
Asking for Planned Gifts



Easy Planned Gifts

To make and receive

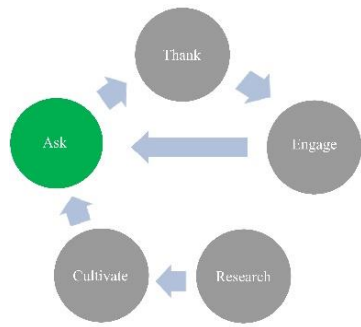
- Bequest
- Beneficiary designation-Life ins, IRAs, etc.
- Outside Charitable Remainder Trust
- IRA Charitable Rollover
- Donor Advised Funds



Ask about Asset Selection

Outright gifts

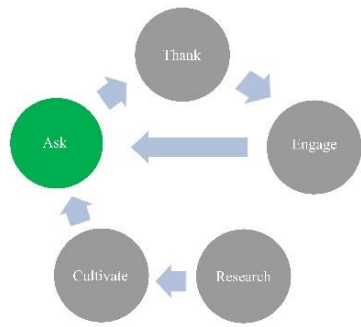
- Cash
- Appreciated securities
- Real estate
- Donor Advised Funds
- IRA Charitable Rollover (QCD)



A Smarter Way to Give

IRA Charitable Rollover

- Donor age 70.5
- Up to \$100,000 annually
- Qualifies for Required Minimum Distribution (RMD)
- Avoids taxable income for donors... *Receipt specifies NO charitable deduction, no goods or services*

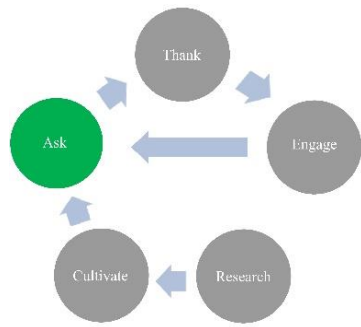


Ask about Asset Selection

Deferred Gifts

- Bequest
- Beneficiary designation
- IRA beneficiary (no tax to spouse, taxed to children & non-charitable beneficiaries)
- Life Income Gifts (CGA, CRT)

Strengths-Based Asking

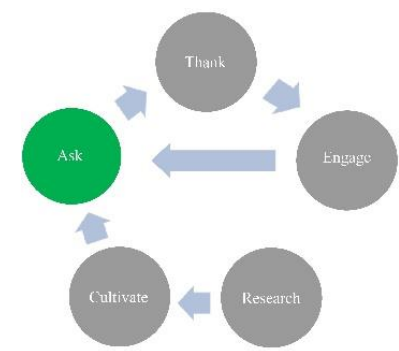


Your Asking Personality

Preference, not destiny-16 asking profiles based on Myers-Briggs Type Indicators' four continuums:

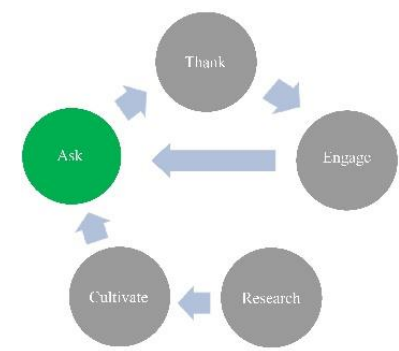
- Extraverted (E) or Introverted (I)
- Sensing (S) or iNtuiting (N)
- Thinking (T) or Feeling (F)
- Judging (J) or Perceiving (P)

“The world’s a stage, but the play is badly cast.” ~ Oscar Wilde



Who, How, Why Ask?

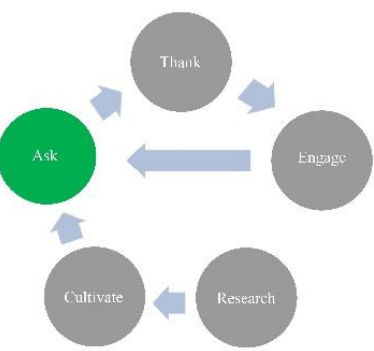
<p>ISTJ</p> <ul style="list-style-type: none"> • Quiet donors • Ask on-site • Logical needs 	<p>ISFJ</p> <ul style="list-style-type: none"> • Current donors • Ask with a partner • Improvements 	<p>INFJ</p> <ul style="list-style-type: none"> • Likely donors • Active listening • Motivating needs 	<p>INTJ</p> <ul style="list-style-type: none"> • Ask institutions • Have a plan • Strategic projects
<p>ISTP</p> <ul style="list-style-type: none"> • Ask pragmatists • Show don't tell • Concrete projects 	<p>ISFP</p> <ul style="list-style-type: none"> • Current donors • Ask on-site • Aesthetic projects 	<p>INFP</p> <ul style="list-style-type: none"> • Intuit who to ask • Express passion • Inspiring projects 	<p>INTP</p> <ul style="list-style-type: none"> • Ask institutions • Help write grants • Innovative ideas
<p>ESTP</p> <ul style="list-style-type: none"> • High-achievers • Big picture • Exciting projects 	<p>ESFP</p> <ul style="list-style-type: none"> • Ask new people • Ask socially • New opportunities 	<p>ENFP</p> <ul style="list-style-type: none"> • Reserved donors • Share your vision • Outreach needs 	<p>ENTP</p> <ul style="list-style-type: none"> • Ask intellectuals • Reveal new ideas • Take on challenges
<p>ESTJ</p> <ul style="list-style-type: none"> • Leading citizens • Solid finances • Concrete projects 	<p>ESFJ</p> <ul style="list-style-type: none"> • Ask peer donors • Seek win-win gifts • Delicate situations 	<p>ENFJ</p> <ul style="list-style-type: none"> • Ask big donors • Seek win-win gifts • Transformative 	<p>ENTJ</p> <ul style="list-style-type: none"> • Decision-makers • Challenge grants • Lead gifts as chair



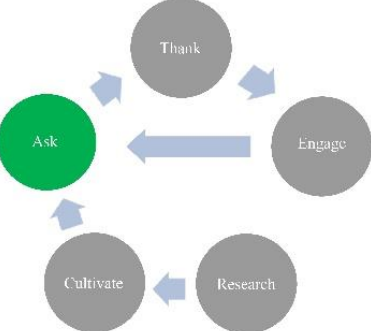
Strengths & Weaknesses

ISTJ ↑ Careful, honest ↓ May prep, not ask	ISFJ ↑ Attentive, focused ↓ May not ask at all	INFJ ↑ Guide wise giving ↓ May not ask at all	INTJ ↑ Grasp shared goals ↓ May go own way
ISTP ↑ Vivid experiences ↓ Facts over feelings	ISFP ↑ Attuned to donors ↓ Overly sensitive	INFP ↑ Giver over gift ↓ May give up easily	INTP ↑ Adept w/ideas ↓ Ideas over feelings
ESTP ↑ Ultimate persuader ↓ May over-promise	ESFP ↑ Warm, enthusiastic ↓ Overly sensitive	ENFP ↑ Empathic catalyst ↓ Needs to be liked	ENTP ↑ Loves challenges ↓ Ideas over feelings
ESTJ ↑ Inspires trust ↓ Can get stuck	ESFJ ↑ Prepared, sensitive ↓ Conflict adverse	ENFJ ↑ Lucid & inspiring ↓ Conflict adverse	ENTJ ↑ Compelling speaker ↓ Can intimidate

Preferred Steps



ISTJ ❖ Engage ❖ Thank	ISFJ ❖ Thank ❖ Engage	INFJ ❖ Ask ❖ Cultivate	INTJ ❖ Research ❖ Ask
ISTP ❖ Research ❖ Engage	ISFP ❖ Engage ❖ Thank	INFP ❖ Ask ❖ Cultivate	INTP ❖ Research ❖ Cultivate
ESTP ❖ Cultivate ❖ Ask	ESFP ❖ Cultivate ❖ Thank	ENFP ❖ Cultivate ❖ Ask	ENTP ❖ Research ❖ Ask ❖
ESTJ ❖ Cultivate ❖ Engage	ESFJ ❖ Engage ❖ Ask	ENFJ ❖ Cultivate ❖ Engage	ENTJ ❖ Ask ❖ Research



Putting it Together

Type

Who

How

What

Strengths

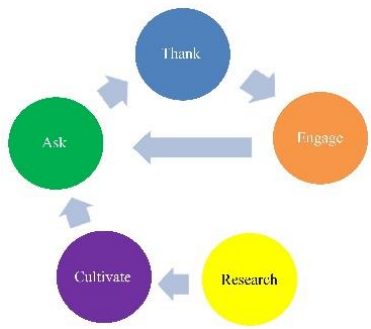
Weaknesses

Steps

Help

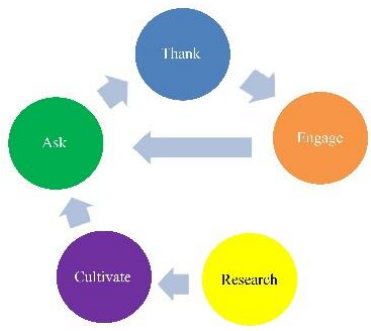
“Be yourself. Everyone else is taken.” ~ Oscar Wilde

Summary

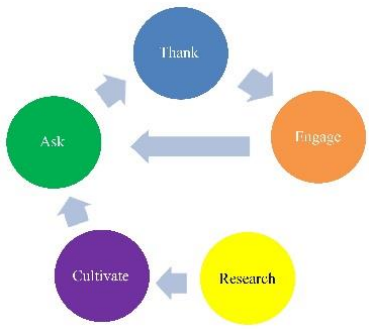


Recap

- **Framework**
- **Five Steps**
- **Asking for Planned Gifts**
- **Strengths-Based Asking**



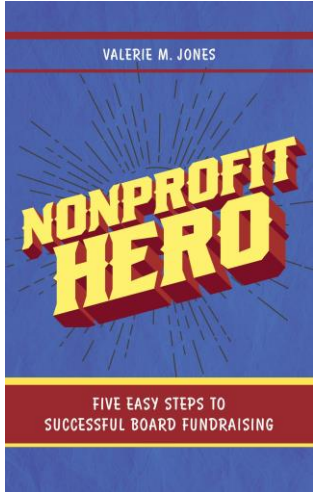
Sharing Best Practices



Q & A

Thank you!

Resources from Val



Book: Amazon, or free from your library

Your Asking Personality: Send your Myers-Briggs Type Indicator (MBTI) to val@vmja.com and I'll send your free, in-depth asking personality analysis

Discover your MBTI:

- **Free:** <https://psychcentral.com/personality-test/start.php/>
- **Official Online Test:** (\$49.95)
<https://www.mbtionline.com/TaketheMBTI>