Become a...

Easy Steps to Planned Giving Success!

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The Framework

The Usual Approach

- Engage
- Think
- Research
- Ask
- Cultivate
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

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

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Step 2-Engage

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

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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 70th 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
| Type     | __ __ __ |
| Who      | ___________________________ |
| How      | ___________________________ |
| What     | ___________________________ |
| Strengths| ___________________________ |
| Weaknesses| ___________________________ |
| Steps    | ___________________________ |
| Help     | ___________________________ |

*Be yourself. Everyone else is taken.* ~ Oscar Wilde

**Summary**

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

**Recap**
Sharing Best Practices

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/](https://psychcentral.com/personality-test/start.php/)
- **Official Online Test:** ($49.95) [https://www.mbtionline.com/TakeTheMBTI](https://www.mbtionline.com/TakeTheMBTI)