

Building donor relationships



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**FORMS**

Planned Giving Leadership Questionnaire

PGB2-0303

WEEKS 3-4

Getting Your Board on Board

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| **BACKGROUND** | Purpose of the Planned Giving Case |
|  | Intended Audience |
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|  | Goal |
|  | Focus |
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| **PROJECTS** | Draft Your Own Internal Case |
|  | Board Member Visits |
| **DOCUMENTS** | PGB2-0301 – Sample Internal Case |
|  | PGB2-0302 – Internal Case for Planned Giving Template |
|  | PGB2-0303 – Planned Giving Leadership Questionnaire |

**Time required:** 2 hours

**What it covers:** *Making the Case* with an internal document stating why your organization is investing in a planned giving program; and *Engaging Your Board* in the planned giving process with a leadership questionnaire and effective visit techniques.

**Why:** Most charities start and stop their planned giving programs because they lack a firm commitment to this type of fundraising. The internal case ensures that present and future staff and volunteer leadership remain committed to planned giving.

BACKGROUND

***The Internal, Donor-Centered Planned Giving Case for Long-Term Support***

An organizational case adopting a donor-centered, planned giving approach for long-term support is a critically important component to ensuring your organization’s commitment to long-term goals and objectives.

Note the case targets an *internal* audience rather than an external audience.

* **Purpose of the Planned Giving Case**
  1. Invoke the highest purpose of the organization’s existence — its mission — and demonstrate how the fulfillment of your long-term mission will be strengthened through planned and endowment gifts;
  2. Focus on the needs of your donors:
     + How planned and endowment gifts can be used to assure your donors that their support will enhance the part of your mission that is most important to them.
     + How donors can establish a meaningful and permanent legacy that meets your needs while also meeting their needs.
  3. Provide the rationale behind the request for planned and endowment gifts;
  4. Identify a range of long-term resource needs and objectives; and
  5. Serve as the springboard for creating a variety of communication and marketing efforts in support of your planned and endowment giving program.
* **Intended Audience** – The case is focused on your internal audience, particularly your volunteer board and staff, to help change the organizational perspective on giving. It is impossible to win over your external audiences if your board and staff leadership have not adopted and endorsed this approach. Once your organization adopts this approach*, the case serves as a constant reminder and educational tool* to ensure you stay on this path. Many charities lose their focus when board members change or a new executive director is hired. An internal case, with buy-in from the existing executive director and board, will ensure that the culture shift you create will last.
* **Content** – The planned giving case has ten core elements, including:

1. Description of the long-term mission and historic significance of your organization
2. Definitions of planned and endowment gifts
3. Stories of donors who have made significant planned and endowment gifts in the past that are supporting your organization today, including the impact those gifts have had on those you serve and the long-term outcomes those gifts have created for your organization
4. How planned and endowment gifts will help your donors create their own legacies with your organization to ensure your long-term future
5. How planned and endowment gifts will fit with your donors’ overall plans for the present and future generations of their families, to ensure a meaningful legacy beyond your charity
6. Your organization’s values and philosophy about long-term resource management, including legacy and endowment policies
7. Information about specific tools that will help donors achieve their long-term objectives for the charity, for themselves, and their families
8. Information about donor recognition and stewardship, to ensure that the charity maintains the legacy for all time
9. The name and position of the person at the charity who will coordinate the effort to encourage future and endowment gifts, and
10. A clear commitment to donor-centered service and confidentiality

* **Goal** – The goal articulated by the planned giving case *is not a dollar goal*. Instead, it is a goal of sustainability using this approach, even during difficult times. The true measure of success for the case is how effective the organization becomes in **engaging donors in the long-term mission** and their desire to support the charity not for just today, but in perpetuity.
* **Focus** – The focus of the planned giving case is to encourage a culture at your charity that supports and encourages donor-centered relationships that lead to planned and endowment gifts. The relationships are not between individual donors and fundraisers, but relationships among individual donors, their families, their advisors and your charity’s mission. **Donors who are tied to your mission become your long-term supporters.** By engaging their families in the process, you ensure that their legacies will be carried out, and may even find a new generation of potential donors. A true donor-centered approach also invites all of the advisors working with your donors to participate in process. A strong case will focus on why these kinds of gifts are important to your charity, to ensure this approach and culture is supported by proper resources now and in the future.
* **Uses** – The planned giving case statement has six main uses:
  1. *Change the culture* – The case statement reminds your volunteer Board and staff how a donor-centered planned giving approach enhances your charity’s mission today and tomorrow.
  2. *Tell the story* – Volunteers and staff need to be reminded of the impact and outcomes from gifts. The stories of matured future and endowment gifts are rich fodder to show impact and outcomes. Not just the immediate impact a gift has when it matures, for example, to build a building. But the impact it has later, when that building is used to care for sick animals which are then adopted by loving families, or whatever your mission might be. The reach of these gifts is long-term, if you tell some of the really long-term stories, it demonstrates the power of these gifts to fulfill your mission.
  3. *Obtain feedback* – Volunteers and staff often have reasons not to support future and endowment gifts. Sharing the case allows you to hear those thoughts and build consensus on the importance of long-term support.
  4. *Form the basis for communications materials* – The stories outlined in the case statement often can be reworked to show donors and prospects the long-term outcomes created by planned gifts.
  5. *Test the market* – Even though you have already determined that your organization is ready for planned giving, the case statement provides you with an additional tool to determine this. If you face significant opposition to adopting a well-articulated case, you need to spend more time educating volunteers and staff about the importance of these approaches. However, feedback will help you to refine your message so that it “hits the target.”
     + When your case is strong, it is easily reworked to become the basis of communications materials.
     + When your case is not compelling, it will fail with insiders and potential donors alike.
  6. *Recruit volunteer leadership* – The case statement shares your philosophy with prospective volunteer leaders. If they do not agree with the case, it gives you an opportunity to educate them or to avoid putting them on your Board.

PROJECTS

**Project 5: Draft Your Own Internal Case**

To get started, download and review the sample case at: [www.PlannedGivinginaBox.Com/PGB2-0301](http://www.plannedgivinginabox.com/PGB2-0301). It will help you to understand how you might format a case, illustrate how to tell impact and outcome stories, and provides a sample to follow when drafting your own version of the case.

Next, download the case template at [www.PlannedGivinginaBox.Com/PGB2-0302](http://www.plannedgivinginabox.com/PGB2-0302). Use the template to draft your own case, inserting your own information where it is required.

Once the draft case is completed, pass it by others on the staff to get their feedback, particularly the CEO. You will gather valuable information from your colleagues. With these changes complete, send it to your volunteer planned giving committee for their review. You will find that they can help you to stay on point and may have ideas for improving the content of the case. Once you have their feedback, you can finalize the case. You want the case to be strong for the next step in the process, sharing it with your Board.

**Project 6: Board Member Visits**

With your completed case in hand, the next step is to schedule meetings with your Board members so you can share and explain the case (and other materials as you develop them) and engage the Board in planned giving. Each Board member visit gives you the opportunity to share your progress in building your planned giving program and create buy-in for the effort.

Assuming a typically-sized board, just two visits per month should help you to accomplish your goal of meeting everyone to discuss planned giving during the year you implement Planned Giving in a Box. To assist in this process, download the Leadership Questionnaire at [www.PlannedGivinginaBox.Com/PGB2-0303](http://www.plannedgivinginabox.com/PGB2-0303). It includes the key questions you want to ask to learn about your Board members and engage them in the planned giving program.

Note that these visits are not meant to ask for a planned gift, they are for information sharing. However, you will find that many Board members will inform you of previously created planned gifts or want to ask about creating their own planned gifts. *This is a great result* and one you should encourage.

* Planning Your Board Member Visits

1. Schedule the meeting – Ask for approximately 30-45 minutes. Note that the later into the Planned Giving in a Box program that the meeting takes place, the longer the meeting will be so that you can review what you have done so far and what you plan to do going forward.
2. Send confirmation letter/e-mail/note – Include with your confirmation ***draft*** copies of materials, to the extent that they have already been developed in the Planned Giving in a Box program:
   * Internal case
   * Gift acceptance policies
   * Gift agreement templates
   * Number of identified gift planning prospects and ranking system
   * Marketing materials
   * Stewardship society materials
   * Sample bequest/beneficiary designation language
   * Operating plan for next year
3. Items to bring to the meeting
   * Copies of materials sent with confirmation letter
   * Leadership questionnaire
4. Agenda for the meeting
   * Thank the Board member for his/her time and participation
   * Review agenda
   * Reminder that all information shared is to help build and enhance the program
   * Describe the goals and objectives of Planned Giving in a Box
   * Review the internal case
   * Review other documents (if any)
   * Use leadership questionnaire to ask board member about your program and his/her thoughts. Please note that Questions 7, 8, 9 and 10 in PGB2-0303 may be optional depending on circumstances. You should familiarize yourself with them beforehand. Be sure to record the information on the questionnaire, it is your “call report” for the visit
   * Ask Board member to consider becoming a (charter) member of the stewardship society if the visit presents an opportunity to do so
   * Identify next steps (regarding his/her own gift) and set a time frame for follow-up
   * Thank the Board member and end the meeting in a timely way
5. After the meeting – Send a thank you note and confirm the next steps and time frame

*Some tips for a successful meeting: relax and be yourself; LISTEN as much as you talk; be sensitive to body language, facial expressions and voice inflection; express your enthusiasm and commitment in promoting planned gifts; be honest at all times – if you do not know the answer to a question, admit it and offer to get back to him/her with an answer.*

As you complete each Board member visit, be sure to record your results in the Planned Giving Activity Tracking Report each month.

DOCUMENT PGB2-0303

Planned Giving Leadership Questionnaire

**Planned Giving Leadership Questionnaire**

**Board Member Name** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Contact Information**

**Date and Location of Interview** \_\_\_\_\_\_\_\_\_\_\_\_

1. If there was one thing about our organization that you consider to be invaluable, what would it be? What about our mission moves you?
2. What organizations do you support philanthropically? Among those that are most important to you, where does **[YOUR CHARITY]** rank?
3. As you know, we are beginning the process of developing our planned giving program. What are your impressions of planned giving? Do you think it is a good idea for **[YOUR CHARITY]**?
4. What are your greatest concerns about our starting a planned giving program?
5. Have you had an opportunity to review the Internal Case for Planned Giving that I sent to you prior to this meeting? If so, what did you think? Was the mission clearly articulated in the case? Were the donor stories effective? After reading the case, did you feel differently about having a planned giving program than you did prior to reading it? If so, why?
6. Do you think we are ready to pursue planned gifts now? If so, why? If not, why not?

***(If the Board member has given negative responses to the preceding questions, conclude the questionnaire here.)***

1. Have you reviewed the additional materials I provided with the Case (if any)? If so, what are your impressions? How can they be enhanced?
2. What role could you see yourself playing to help promote the planned giving program, if any? Would you be willing to promote the program to other board members? To our broader constituency? Make planned giving asks? Help identify other planned giving prospects? Assist with the stewardship society?
3. The best way to promote planned gifts is to tell your own story. Have you considered adding to your generous support by including **[YOUR CHARITY]** in your long-term plans?
4. Do you have any questions or suggestions as I move forward with our program?