

planned giving tomorrow

NEW! SPECIAL **PRODUCTIVITY ISSUE** FOR FUNDRAISERS.

Workus Interruptus

Article not for the faint of heart.

Viken Mikaelian



Endless texts, tweets, emails, calls, chats, IMs, Facebook updates... What do all these things have in common?

They're all uncontrolled by you and *letting others* control your time. All buzzing and vibrating and stealing your attention from what you should be doing. Not to mention co-workers at your door. "Got a minute?" "What are you doing for lunch?" "You did hear about Nancy and Bob...?"

This issue is about peak productivity. Turn off your smartphone, ignore email, dive in. There's good stuff here.

But caution: this article is not for the faint of heart or politically correct.

Work interruptions cost us 6 hours a day.

It's amazing how many ways we can find to thwart productivity. We have excuses for every intrusion. Did you know that each interruption costs you 5-15 minutes to refocus? For IT folks, it's worse. The phone rings and gets more attention than a car alarm. Even at home people run dripping out of the shower, jump up from the dinner table, and even interrupt sex (a disturbing disorder we call "coitus interruptus") just to answer the phone.

I used to be stuck in this inferno (except for the last one). Here is how I resolved to fix my situation of endless interruptions:

- 1 **Begin work early.**
Very few reach me at this hour.
- 2 **Ditch the office.**
Sometimes I do not come in to the office at all and instead work from a

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3 Time Management Lessons From Mr. Brown

People are the best time investment you can make.

Julie Morgenstern



The most common goal of executives who hire me for time management coaching is to free up time to invest in their teams and to spend with

their families. Intuitively, they know that time spent with people forms crucial bonds, enables personal development and reduces fire drills. Yet, daily urgencies frequently preempt time reserved for weekly 1:1's, for "walking the halls" to stay visible and getting home in time for dinner.

Reactive to proactive

Protecting time from others requires a willful shift from being reactive (to every distraction and mini-emergency) to being proactive about long-term priorities.

Is it easy? No.

Is it worth it? Yes.

To inspire us all, I can think of no better role model than my beloved elementary school principal, Martin K. Brown.

A defining moment in 6th grade

I met Mr. Brown on my first day of 6th grade. My family had just moved to Center City, Philadelphia, and I was nervous about entering a new school where all the kids had been friends since kindergarten.

Wearing my coolest pleather jumper and a burgundy pullover, I took a deep breath and walked in the front door of Greenfield Elementary School. And there, waiting at the top of the steps, was Mr. Brown, my new principal.

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Raise Your Hand If You Like Leftovers

For the really big gifts, ask for the residue.

Jim Friedman



It was the kind of gift we all dream about. Our organization received notification from an attorney that we were to be the recipient of a \$100,000

bequest from a woman whose name we did not recognize.

We did a little research in our database and discovered this woman (let's call her Doris) had been a loyal annual donor for \$500. Digging back further, we found that she had done a relatively small gift annuity many years earlier. Doris passed away at

age 94. Her husband had predeceased her, and she had no children.

When we received the check, we also received a list of the other distributions from Doris's estate. The \$100,000 gift to our organization was significantly more than gifts to any other designees. However, there was another charity named to receive whatever was left over in her estate—in this case, \$8.2 million.

Please pass the leftovers.

As gift planners, we often neglect to ask for the residual. But, as Doris reminds us,

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Ask Brian

Got a question itching for an answer? Ask Brian M. Sagrestano at plannedgiving.com/brian. Bashful? You can ask to remain anonymous. Check online at plannedgiving.com/answers for replies that don't fit here and a lot more.

I Am Too Busy To Visit Donors

Brian M. Sagrestano, JD, CFRE

Q How can I get out and complete my visits when I also have to run the marketing program, sustain the back office infrastructure, and ensure my donors are being properly stewarded?

A With this issue's focus on productivity, I thought I would answer a question that comes up over and over again when I am training gift planning folks on how to get out of the office. Making visits is the most important thing you do, because prospective donors are most likely to make gifts when you visit with them.

If you work in a local or regional nonprofit, you need to schedule time each week to make a group of visit calls. That time must be blocked out on your calendar and sacrosanct. Don't allow anything to deter you from those calls or you won't end up making visits. If you dedicate an hour each week to scheduling visits, you will have a robust calendar where you won't be trying to squeeze in the calls between meetings and other responsibilities.

If you work for a national charity, set up your travel schedule for the entire year on the first day of the fiscal year. Based the number of days in each city on the number of prospective donors you need to visit, assuming approximately three visits per day. (You'd like to do more, but three is for planning purposes.)

For example, if I know I need to do 18 visits in Kansas City, I plan six days there. I might plan two days in the fall, two in the winter and two in the spring. When I start making calls to schedule my fall visits, if the prospective donor is not available, I can offer the winter dates and the spring dates. If the prospective donor is not available for any of my three trips, it is pretty likely that this person simply does not want me to visit. Remove them from the prospect list, and move on to other names. Not only will this clear names from the prospect list, it will also fill your calendar for the trips later in the year. After all, some of these folks really are just booked on your first travel date. When you suggest the winter or spring dates, they will say yes. This simple technique will help you to fill in your visits for all three trips to Kansas City with one set of scheduling phone calls, instead of having to make those calls three different times, in preparation for each individual trip.

Imagine the time savings if you expanded this effort to your entire visit schedule for the year!

Besides writing this column and consulting for PlannedGiving.com, Brian Sagrestano is President and CEO of Gift Planning Development, LLC, and a principal in Constellation Advancement, LLC. He co-authored The Philanthropic Planning Companion, which has everything a gift planning officer needs to know. Here you've got a direct pipeline to the author. Ask Brian your questions at PlannedGiving.com/Brian.

Get Rid Of Your CGA Program

Says the panicked board member... until you show him a better way to lower risk.

Thomas Dieters



Has this ever happened to you? A board member or finance officer who is unfamiliar with gift annuities sees a big liability on the books and panics. "Why are we doing this?" they ask.

Their concern is understandable. A charity normally pays a donor around 40 to 60 percent of the original gift in interest. For someone who isn't familiar with gift annuities, that seems like a very bad way to raise money.

Unfortunately, the knee-jerk reaction is all too often to pull the plug. Stop issuing CGAs and let the existing pool run its course.

There couldn't be a riskier solution.

Without newer contracts coming in at lower payout rates, it is an actuarial certainty that the program will eventually run

out of funds. Then the generous gifts your donors made will be all for naught.

Reinsuring does nothing to offload risk.

Non-profit organizations often receive the advice to purchase a commercial annuity or reinsure their CGA contracts through a life insurance company. But in reality, this does nothing to shift the risk to a third party. The liability still remains with the charity.

Is your bank a beneficiary of your CGA?

If your CGA program is not growing and the assets are shrinking, essentially your bank has become one of your CGA income beneficiaries. But don't worry. There's a better alternative than reinsuring or opting out.

If your organization has CGA contracts already written, but is considering the idea of letting the pool run out and not writing any new contracts, there are some options. Consider finding a third party organization that would assume all of the liabilities and assets of your current CGA pool. This can be done by writing a simple bridge agreement allowing you, with donor approval, to move the program elsewhere. As long as the other organization agrees to send back to you 100 percent of the remainder value of the contract at the death of your donor, it is a win-win situation. ●

Dr. Thomas E. Dieters is the Founding Partner of Thomas Mitchell & Associates and has 25 years of experience in planned giving and working with CGAs. He enjoys connecting nonprofits with organizations willing to assume CGA contracts. tdieters@thomasmitchellassociates.com

How To Be Massively Productive

The single most important thing to do to get more stuff done.

Chelsea Dinsmore



What is the single biggest excuse people use to not do things they say they want to do?

Wait for it... (No pun intended.)

“I don’t have time.”

We’re about to blow that excuse away. But first, a question:

Why is being productive important in the first place?

- 1 You take the reins of your life.**
When you are in the driver’s seat of your own life, you stop being a victim and start being a victor of your life.
- 2 Finding ease in the chaos.**
Stressing about your to-do list simply stops you from doing what you have to do.
- 3 The more you do, the more you give.**
The more time you spend doing things that make you who you are, the more you give to yourself and to the world.

Stop complaining.

The number one thing you need to do to manage your life is to stop complaining. The moment you stop complaining, you take responsibility. And the more you take responsibility, the more you own what you do. There’s a major difference in thinking you have to do something versus thinking you choose to do something.

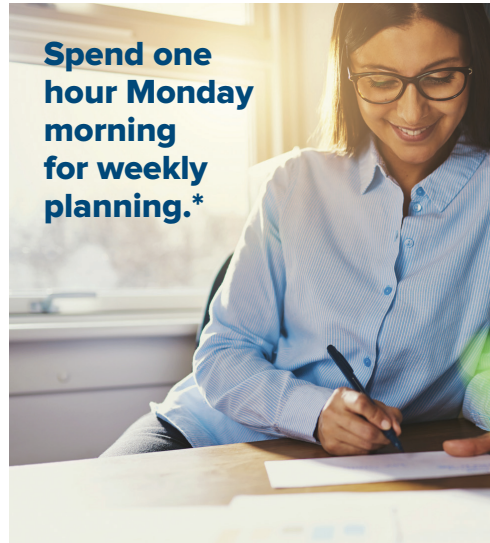
You have three simple choices in any given situation:

- 1 Complain:**
Staying in a situation and complaining is actually the easiest thing to do. It’s also often a permanent and painful option.
- 2 Change:**
Change involves leaving a situation altogether or reworking where you currently are in that situation. It can either be a permanent and joyful change or temporarily joyful if you continue to rely on external factors for happiness and fulfillment.
- 3 Align:**
Aligning with a situation requires reworking your mind, beliefs, meanings and associations about a particular

thing to take ownership for what you’re doing.

So, it’s pretty simple. If you want to do more, stop complaining and start doing.

Once you’ve decided to do the most important thing and quit complaining, you can move on to these 10 practical tips to maximize your productivity:



- 1 Check the right boxes.**
Being productive is not simply a matter of checking boxes, but checking the right ones.
- 2 Eliminate distractions.**
These days we’re trained to think we’re being more productive the more we multitask. Wrong! Focus on the task at hand and eliminate distractions. Here are a few starting points.
 - Avoid checking notifications, email or phone
 - Delete **all** push notifications
 - Be present, not virtually somewhere else
 - Single-task, rather than multi-task
 - Find music that focuses you
 - Do something that matters
- 3 Prioritize a few important items.**
Spend one hour Monday morning for weekly planning.*
- 4 Schedule activities.**
Rely on the power of scheduling something to make it happen.
- 5 Schedule space.**
Schedule extra space in case tasks or

projects take longer than expected.

- 6 Measure and adjust.**
Evaluate old schedules or habits and make appropriate adjustments.
- 7 Implement efficiency.**
Focus on your strengths and solicit help with your weaknesses.
- 8 Stay accountable.**
Join a group or make a commitment to make you more accountable.
- 9 Celebrate the small things!**
Shift your focus from what needs to be done to what has already been done.
- 10 Balance rather than burn out.**
Think about all the different areas of your life that matter and balance accordingly.

Just be.

One last thought. In our quest to be productive, let’s not get so caught up in the doing that we forget about the being. Because it’s the moments that we stop, notice, and appreciate that bring long-term fulfillment to the precious time we have on this planet. ●

Chelsea Dinsmore is the Chief Inspiration Officer of Live Your Legend, a movement that’s dedicated to changing the world by helping people to find and do work they love and surround themselves with the people who make it possible. This article originally appeared as a two-part blog series on liveyourlegend.net.

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*I would argue. Prioritize all important items and do it Sunday morning. —Viken

Do You Know This Magic Key Question?

It's not just for PG professionals.

Brent A. Hafele, M.A.



My colleague was at her wits' end with a donor we'll call Philip. Everything about Philip screamed *major donor of the highest level!* He had all three As of a great donor prospect:

- 1 Affinity:**
Philip was a dedicated user of the fitness center, sometimes coming twice a day.
- 2 Affiliation:**
He enjoyed the friendship of many fitness center members and staff members.
- 3 Ability:**
Wealth screening scores as well as interviews with Philip and others who knew him indicated that he had capacity to give a substantial leadership gift.

Adding to the puzzle, Philip frequently shared that he "had a lot of money." I don't know too many donors who are that bold!

In spite of his triple-A rating and his claim to wealth, we did not get a substantial leadership gift from Philip. Instead, he gave another \$5,000 gift, stating that he wished he could give more.

The Magic Key Question

At my colleague's request, I paid a visit to Philip. Again, he shared his frustration that he couldn't give more. Finally, I asked Philip this Magic Key Question (MKQ):

If there were a way to help you give a more generous gift to the fitness center while helping you save taxes and accomplish your financial goals, would you be interested in exploring that?

An open door at last!

Philip thought for a moment and then accepted. His acceptance granted me permission to ask a series of very personal questions that would typically be uncomfortable in other circumstances. But once he understood the purpose, the questions were easy to ask. I asked in detail about his assets, plans for each asset, income, age and financial goals. Philip's answers to these questions gave us the information to return with a proposal.

Anyone can ask the MKQ.

The great thing about the MKQ is that

anyone can ask it. You don't have to be a planned giving expert. All you need is a trusting relationship with the donor. The best time to ask the MKQ is when you know that donor is passionate about your mission and has significant trust in you and your agency. When donors know your goals are aligned with theirs, they can relax. This becomes a win-win-win for all involved.



What happens after you ask the MKQ?

So you did it. You asked the MKQ, and your donor accepted. Now what?

If you are not comfortable discussing planned giving options, you can simply respond by saying, "Wonderful! Thank you. Let me connect you with one of our gift planning colleagues who can help you explore the options." This person could be your in-house planned giving professional, a contracted estate attorney, or someone from your local community foundation. Regardless, you have opened the door to the conversation.

If you are well versed in planned giving, go for it. You've got an open door and a ready donor right in front of you!

Back to Philip...

Philip responded to our proposal with a generous gift of \$206,000 over a period of four years. More importantly, he was thrilled! He was so proud to know his investment made the fitness center even better for him and his community. ●

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Raise Your Hand If You Like Leftovers

Continued from page 1

we should! It's an easy ask, it gives the donor a lot of flexibility, and it's likely to be far more than any specific designation.

It's an easy ask.

I say something like this: "After you've considered how much you'd like to leave each of your heirs, would you consider leaving us whatever might be left over?"

It gives the donor flexibility.

You've heard this objection to giving before, haven't you? "I don't know what expenses might come up. What if I get sick? Or my kids need help?" You can set your donor's mind at ease by asking for a gift of the leftovers."

Many people who have substantial wealth don't want to leave too much to their children. They may decide, for ex-

"After you've considered how much you'd like to leave each of your heirs, would you consider leaving us whatever might be left over?"

ample, \$1 million for each child is plenty. A residual gift to charity can be an easy way for a person like that to ensure their children won't receive too much and the rest, whatever it may be, will go to a cause they care about.

I say something like this: "All we're talking about is the what's left. Spend everything you need during your life, take care of yourself and your loved ones. You don't know what you're going to need, so by all means, save! All I'm talking about is what's left. Would you consider leaving that to us?"

It's likely to be a bigger gift.

In some cases, the residual won't be as big as a specific designation. But more often than not it will be significantly larger—like Doris's leftover gift of \$8.2 million! ●

Jim Friedman is Director of Planned Giving and Endowments for the Jewish Federation of Cincinnati. Jim's family has been in Cincinnati for five generations and takes great pride in the prominent role Jews have played in the local community. jfriedman@jfedcin.org

3 Time Management Lessons From Mr. Brown

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“Hello Julie,” he said. “Welcome to your first day!”

The warmth of that greeting is emblazoned on my memory. I was stunned; not only was the Principal stationed at the entrance, but he knew my name! I felt safe, I felt important, and I felt that I belonged. My time at Greenfield ended up being the most formative of my life—a defining era that even now, I can go to in my mind to connect to my most authentic, capable self.

A Facebook sensation

Not long ago, Mr. Brown surfaced alive and well on Facebook. His profile became a super-magnet to students from around the globe. Within months, hundreds descended upon Philadelphia for an elementary school reunion.

As I reconnected with friends who looked exactly the same as when we were ten years old (I swear), and alumni from across the decades, one thing was apparent: *Mr. Brown had made a similar lifelong impression on every single student who passed through that school.* The accolades revealed that it wasn't just because Mr. Brown was such a wonderful, wise person... it was because of how you felt in his presence.

“When Mr. Brown was around, you just knew everything was going to be alright.”

“He created an environment that allowed us to soar.”

“Mr. Brown represented high ideals, and inspired us to do our best.”

Mr. Brown's secret

I sat down with Mr. Brown recently, and asked him how he approached his job, to see what we could learn from him. His primary goal, he said, was to create a positive environment—a place kids (and parents) would remember and feel good about. To make that happen, he spent his time and attention in three particular ways.

1 He invested time getting to know each student personally.

He learned our interests, personalities, strengths and dreams. And because our leader recognized us, we felt we could be ourselves. Even 40 years later, at the reunion, we marveled that he not only knew each of us by name, he remembered the names of our siblings and parents. He made us feel like we mattered.

2 He organized his day around “being there.”

No matter what else was on his plate, Mr. Brown did not want students to see him only when they got into trouble. He stopped by classrooms and made sure we saw him in the hallways and lunchroom and at recess. We felt

safe, seen and taken care of, because someone was visible and present.

3 He promptly resolved issues with love.

Because he had taken the time to establish a good rapport, when kids acted out, he didn't need to yell or threaten. Instead, he'd say (with a glint in his eye), “I know you can do better.” He meant it, and we listened. Conflicts were resolved quickly, with everyone's dignity intact.

The best investment you can make

Certainly, Mr. Brown had a rare gift for understanding human behavior and what people need. But his vision and grace translates to three concrete behaviors we can all practice, whether we are leaders, managers, parents or friends. No matter how demanding our jobs, it's important to remember that devoting time and attention to people is the best investment you can make. It inspires everyone to be the greatest version of themselves, and leaves a lasting legacy. ●

Julie Morgenstern is an internationally renowned organizing and time management expert, New York Times best-selling author, consultant and speaker. Her workplace productivity and work-life balance tome, Never Check Email in the Morning, is the basis of a training program for the Fortune 500 and businesses worldwide. www.juliemorgenstern.com

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Tell Your Heart Surgeon To Go Away

Money has a way of showing up when people see the need for it.

Viken Mikaelian



In my entire career in the planned giving business, I have consistently heard, “But my budget has been cut back this year.” It’s the same

story every year, no matter what the economy is doing.

It’s sad, because when planned giving budgets are cut, the long-term growth of the organization suffers. The key word here is “long-term.” You get it, but most do not. Perhaps they get it on an intellectual level but don’t internalize it.

But budget cuts are also your fault.

If your administration does not realize the importance of planned giving, your job is to make sure they do. And it’s quite easy.

Believe me, the money is there—and it shows up when people understand the need. For example, would you ever tell

your heart surgeon that his fee is not in your budget?

Here are a few tips to loosen the purse strings. A colleague of mine followed this advice and his budget went from \$12,000 to \$60,000 a year. Another client got \$75,000 approved for consulting fees for the foundation, when there were supposedly “zero dollars” in the budget.

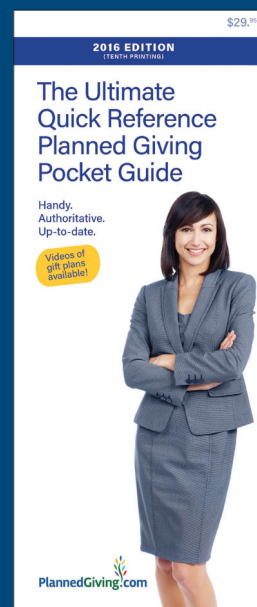
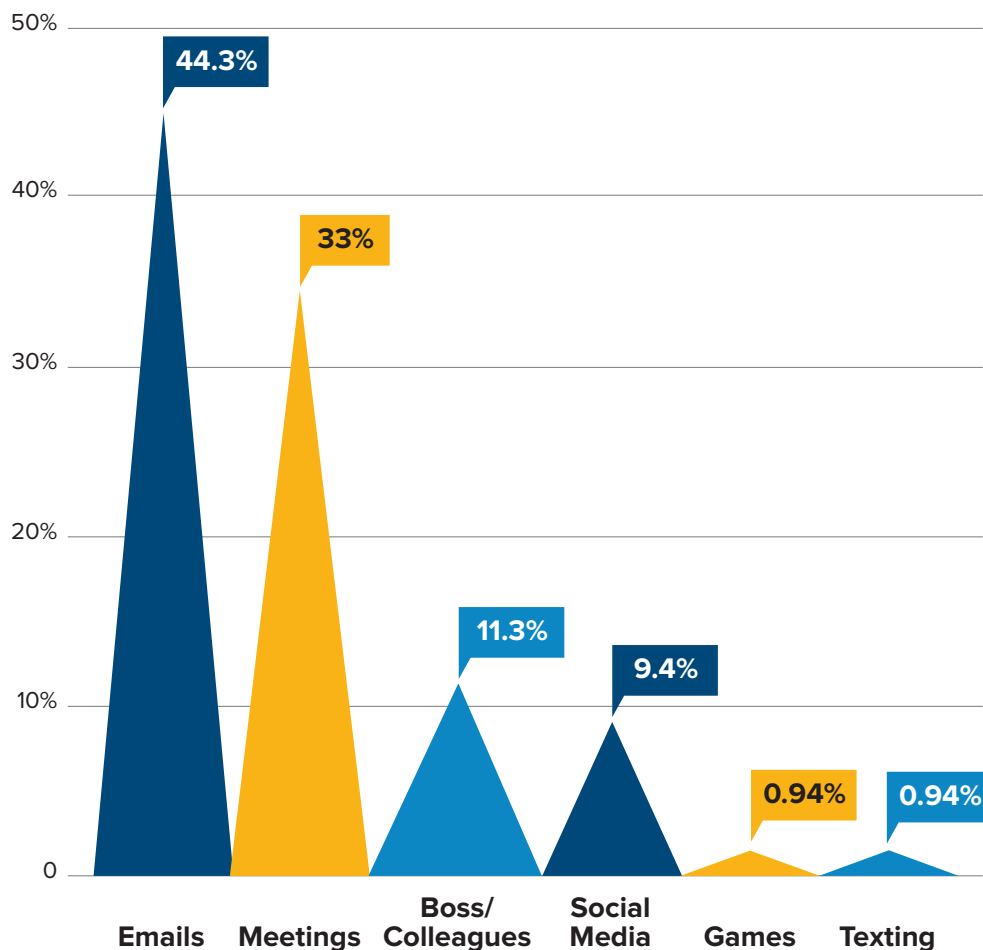
- 1 **Go in there with an outside professional** and make a compelling case for your planned giving budget needs. Courtrooms and businesses always have professionals contributing to boost their case. *Why not you?*
- 2 **Showcase to your boss and board how successful peer organizations are outpacing your organization.** Do this right, and you *may find yourself getting a raise.*

- 3 **Get a copy of our Pocket Guide** and read a three-minute chapter *a night* for the next 21 days. One, it’ll cure your insomnia. Two, it’ll increase your knowledge to help the average person “get” planned giving. Third, you’ll be the go-to guy when your boss has a question.
- 4 **Overspend your budget.** Yes, you heard us right. If you met or came in below your budget last year, your administration will assume they gave you more than you needed, and you’re likely to get a smaller budget next year.

Scolded for overspending? Borrow this from Keith Davis, former board chairman of a hospital in Australia: “We didn’t actually overspend our budget. The allocation simply fell short of our expenditure.” ●

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IRA Qualified Charitable Distributions

Understand the benefits and increase your value to donors.

Greg Pierce, MBA, MHA

First let's clarify some confusion in nomenclature. Often the IRA Qualified Charitable Distribution is referred to as an IRA Rollover gift. This is somewhat a misleading term, because an IRA Rollover is another distinct process. Although it has been accepted to use “rollover” for marketing purposes, in this column, I will use the technically correct term IRA Qualified Charitable Distribution (QCD).

The mechanics of the IRA QCD gifting technique are straightforward: People who are 70 ½ or older can transfer gifts of up to \$100,000 annually directly from their IRA to a church or 501(c)3 charity. These gifts count towards the donor's Required Minimum Distribution but do not increase the donor's income. The QCD cannot go towards a charitable gift annuity, a donor advised fund, a foundation or a supporting organization.

There are three distinct strategic benefits for your donors who use the IRA QCD.

- 1 People who take the standard deduction receive no benefit from their charitable gift. In effect, they pay taxes on their gifts. The IRA QCD fixes this.
- 2 Generous donors who itemize can reduce their taxable income and may further benefit by switching to the standard deduction.
- 3 Making an IRA Qualified Charitable Distribution may reduce the donor's provisional income. Provisional income is a measure used by the IRS to determine whether or not recipients of Social Security are required to pay taxes on their benefits. It is calculated by adding up a recipient's gross income, tax-free interest, and 50% of Social Security benefits.

The third benefit is complicated because it involves the formula for taxation of Social Security and certain trigger points where up to 85% of Social Security can be taxable.

Some people have to pay federal income taxes on their Social Security benefits. This usually happens only if they have other substantial income in addition to their benefits (such as wages, self-employment, interest, dividends and other taxable income that must be reported on your tax return).

Few people do their taxes on paper so they don't understand that their Required Minimum Distribution can push more of their Social Security benefits into the taxable range. Effectively your RMD may cause a double taxation effect. Someone in a 25% tax bracket may pay 46% tax because of their RMD. As a development professional, you can suggest that donors ask their tax advisors how charitable gifts may improve their income tax burden.

What if the donor has a 401K, 403B, or Keogh instead of an IRA?

Suggest your donors consult their financial advisors about creating a new IRA as a vehicle for charitable giving. Then they can transfer their desired gifting amount into the new IRA and use this account to make QCDs.

In a future issue I will explain the incredible benefits of the IRA rollover for higher income families—entirely different, but equally important. ●



*Greg is a development professional experienced in capital campaigns, planned giving and major gifts for churches, libraries, colleges and a faith-based retirement community. Analytical and tax averse, he enjoys discovering charitable solutions for donors' tax problems.
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Kill Your Print Marketing Campaign

10 common blunders guaranteed to do the trick.

Tom Roan



Direct mail is king. But kings can be dethroned. Well-intentioned organizations do it all the time. Avoid these *common mistakes* to ensure your direct mail campaign is as kingly as it should be.

10 Reinvent the wheel.

There's a reason many of the best sales and advertising techniques haven't changed in decades. Because they work! Don't waste time and money trying to reinvent the wheel. Trust the marketing experts and go with what works.

9 Fret about the length.

The word count of your direct mail piece is not nearly as important as the content. It could be two lines on a postcard or a four-page letter. If the heart, the pain and the appeal are well written and addressed, and if it's mailed to the right people, the length doesn't matter.

8 Apologize for typos.

If you catch a typo after your mailing went out, do not—I repeat do not—send a follow-up to correct it. I bet your mistake wasn't as bad as this one, and look how good it turned out for this perceived disaster at PlannedGiving.com/ouch.

7 Write the copy yourself.

Outsource, outsource, outsource. Unless you happen to be a professional writer, do not waste your time. Even if you are a good writer, your time is valuable and better spent on other things.

6 Over-analyze and over-edit your print pieces.

Activities like switching out that photo (again) or debating whether or not to use the word 'that' have a terrible R.O.I. Do not waste your time. Your donors do not pay that close attention, nor do they care.

5 Use a bad list.

This seems obvious, but we see many organizations make this mistake. Your print mail campaign will only be as good as your mailing list. If you're promoting CGAs to deceased people or women in their 30s juggling career and family, or non-loyals, don't expect a response.

4 Use address labels.

So impersonal. So sloppy. (Think about

it—are they ever really on straight?) Stay away from labels and instead use laser printing. Or even better—handwritten addresses on the envelopes. You can recruit volunteers to write the addresses. It's a great way to encourage donor engagement, add a special extra touch to your mailing, and vastly increase the chances that envelope gets opened. *Oh, also use a live stamp. It makes a difference.*

3 Make your appeal institutional.

No one wants to read a letter from an institution. People want to read letters from people. Your direct mail should sound as if you are writing to your favorite aunt or old college roommate. Write with energy. Include anecdotes. Let your personality come through. Consider having your piece come from the point of view of a volunteer, board member or donor. Some of the most successful solicitation letters and donor stories we've written for non-profit organizations were ones where we interviewed a donor and wrote the letter in *their* tone, telling *their* story.

2 Get as many opinions as possible.

Too many cooks in the kitchen spoil the broth. It's true. Even if they're all good cooks. If you hire a marketing expert to craft your direct mail piece, do not solicit opinions on it from your board, boss, legal advisor and friend who taught English in college. Of course you may need to get approval from some of those folks, but ask for their approval, *not* their opinion. If you incorporate everyone's tweaks and changes, you'll end up with a watered-down, ineffective piece. Spoiled broth.

10 Include technical details.

This is the most common mistake we see—probably because most planned giving marketing vendors are led by attorneys. Really, who would buy an iPhone if the ads were full of technical specs? Win your prospects' attention and pique their interest. Then, later you (more likely, their attorney or advisor) can go over details. ●

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Energize Your Career

Planned giving earns more.

Viken Mikaelian



Two surveys of ours indicate that those who even dabble in planned giving do better in their careers than those who do not.

Don't trust us? Think about it logically. Planned giving is a proactive field. It involves foresight and thoughtful long-term planning. This is different from annual giving, which is more about addressing urgency. And in almost any industry, those in charge of long-term planning are compensated far better than those serving immediate needs.

Here are some tips to energize your career. Don't just read them. Pick at least two to put into action straight away.

- **Set daily goals.** I prefer to write them down by hand. Writing by hand forces nerve endings in your fingers to light up your brain. It's true.
- **Recognize the difference between busyness and productivity.** Picking up your dry cleaning should be done after work.
- **Skip seminars on planned giving calculators and the generation skipping tax.** Polish up on people skills instead. Dale Carnegie courses are a great start.

Success is a mindset—along with a killer strategy.

- **Relieve yourself from back-office work.** In other words, farm out the busy work. If your boss objects by telling you it's not in the budget, explain how and why opportunity costs are far more expensive.
- **Do not multitask unless one project is on hold.** It's not efficient. Do not fight me on this one. Don't believe me? Take the test on page 9.
- **Link and relate everything you do back to your goals and your plan.** *Read this twice.*
- **For premium work, turn off text, email and phones.** Technology is a blessing as well as a curse. One distraction can set you back 15 minutes.

In many environments, average employee productivity is below 20 percent. This group is always noticed from higher ups and are first ones to go, or merely survive on nominal raises. Do you want to be part of that group? ●

Email me your best productivity tip.
viken@plannedgiving.com

The Planned Giving Productivity Quiz

We've all got the same 24 hours a day.
How are you using yours?

Karen Martin

You have the opportunity to take an online course. Which of the following topics would you choose?

- A** The Best Online Gift Calculators
- B** Tax Planning Essentials
- C** 21 Questions to Get Donors Talking

You have a 12-minute block of time between meetings. You:

- A** Check Facebook.
- B** Resume my search for the perfect header image for the e-newsletter I'm working on.
- C** Jot a thank you note to the next donor on the ongoing list I keep.

Do you send out a planned giving newsletter?

- A** Not yet. But I'd like to.
- B** Yes.
- C** No. It's a waste of time.

Do you have clearly defined goals for your personal and professional life?

- A** I always mean to do that. Maybe they're written down somewhere around here...
- B** No. I prefer to take on problems and opportunities as they come.
- C** Yes! I have daily, weekly, quarterly and lifelong goals.

You're staring at an unpleasant task on your to-do list. How do you approach it?

- A** Stop staring, look at something else and ignore it as long as possible.
- B** Let it sit for a few hours so I can think about the perfect way to resolve it.
- C** Tackle it first thing to get it out of the way.

So... How'd you do?

Mostly As: Procrastination Station

You did not need this quiz to tell you that you're wasting time. Stop it! Make the call, have the conversation, sell the vision. Your donors are not sitting around waiting for you. They're making decisions about their charitable giving and estate plans (including gifts to other nonprofits) while you're refreshing your email ... again.

Mostly Bs: Perfection Infection

Have you heard the saying, "Done beats perfect"? Write it down and post it near your computer. Farm out writing and design work to people who can do it faster and better than you. Your time is too valuable to be messing around resizing photos for a newsletter. Call a donor. Take a prospect out to lunch. Listen to a webinar that will hone your people skills. A hastily written thank you note is 1,000 times better than the perfect one you're planning but never find time for.

Mostly Cs: Productivity Champ

You get it. You're investing time in people because you know planned giving is a people business. Keep up the good work. Check out Julie's article on page 1 for some inspiration about the payoff when you put time into the right things. And for some technological tools to help already productive you be even more productive, see the roundup on page 11. ●



Karen Martin used to write quizzes for teen magazines—like this one, but with more references to celebrity crushes and what your nail polish color says about your personality. Now she writes exclusively for businesses and nonprofits, including *PlannedGiving.com* and our valued clients. karen@plannedgiving.com



Multitasking Hurts

Take this two-minute test and you'll see why.

So you think you're good at multitasking? You can talk on the phone, write an email and schedule a dentist appointment online all at once, can you?

Stop it.

Many people like to boast about their multitasking skills, which is odd since it is more efficient and produces better quality to focus on one thing at a time.

Don't believe it? Try this exercise.

Equipment you'll need:

- pen or pencil
- piece of paper
- a timer or stopwatch
- your brain

Step 1

Set a timer and write the letters of the alphabet, in order, as fast as you can. Then write the numbers 1-26 in order as fast as you can. Stop the timer and take note of how long it took you.

Step 2

Set a timer and write the letters of the alphabet and numbers 1-26 again, this time using a different pattern. Write the letter A, and underneath it write the number 1. Next, write the letter B, and underneath it write the number 2. Continue this pattern with all the numbers and letters until you get to Z and 26. Stop the timer and take note of how long it took you.

How'd you do? Step 1 went way faster didn't it? Of course. The brain can't efficiently switch between tasks, so multitasking actually costs you time—time for your brain to recognize new things and time to fix the mistakes you made because you were distracted.

Now, just one final step...

Step 3

Stop multitasking. ●

Workus Interruptus

Continued from page 1

“secret” location. One of my favorites is the coffee shop in the lobby of Sheraton Valley Forge where I plan. (There goes my secret.)

- 3 Shut off electronic notifications.**
I just periodically check messages. As an exercise, count the number of times electronic beeps interrupt you in one day. Sorry, make that an hour.
- 4 Ignore “disasters.”**
Nothing is as bad or as good as it initially appears. Not even love at first sight. The simple act of waiting resolves many so-called disasters.
- 5 Avoid meetingitis.**
Do you *really* need that next meeting? Can it be done standing up? Can you skip the refreshments? Perhaps start at 4:45. Everyone just wants to go home so they’ll think twice before launching into an endless discussion. Besides, the people who will stay late are the ones you need.
- 6 Tame colleagues.**
Is someone interrupting you every hour with an “idea” or “concern”? Ask him to gather notes and meet you at 4:45 PM the next day. You may find he doesn’t have much to share and has solved or forgotten his problems already.
- 7 Cut close ties with socialites.**
You have a career to build. To move up the ladder of success, you need to tame socialization at work—especially with subordinates.
- 8 Create deliberate quiet time.**
Quiet means quiet. Absolutely quiet. No interruptions whatsoever. This is not as easy as it sounds. It takes effort but it’s worth it. For example, I am editing this article at 6:15 AM Sunday next to a pond near my home. I live in Skip-pack, PA, by the way. Google it—it’s a cute town.

It’s amazing how little value people place on their time.

Everyone’s heard the expression “time is money.” But how many really get it? Look at the long line of people squandering their lunch break to get their daily Venti-Soy-Quadruple-Shot-Latte-Half-Sweet-Non-Fat-Caramel-Macchiato-With-No-Foam. It’s amazing how Starbucks, like our healthcare system, has trained the masses to stand like sheep in a long line made longer by the comatose kid behind the



“It keeps me from looking at my phone every two seconds.”

counter we call a Barista and the ordering of abstruse drinks even a Harvard chemist couldn’t decipher by people who eventually reach the front of the line and somehow after 20 minutes of waiting *still do not know what to order* and rummage for their credit card buried in a two-gallon purse.

Phew.

Ranting makes me tired. I need a latte.

Peak productivity enemy number 1:

You know where I’m going here. Yes, I’m going to say it.

Your smartphone is enemy number one.

Listen to these words of hope: Not answering your phone, ignoring a text, or not looking at who is calling, will not end your career.

As an aside, did you know that Americans have spent over \$24 billion in smartphone repairs over the past 7 years? To put that in perspective, the U.S. currently allocates \$3.1 billion in foreign aid to Israel and \$2.3 billion to Afghanistan. If your smartphone was really smart, it would deploy a parachute as it fell out of your pocket and land safely so it doesn’t shatter when it hits the floor while you’re waiting at Starbucks for your latte.

Lately I’ve begun noticing men talking on the phone at urinals or conducting a conference call from the stall next to me. (Do women do this, too? Those of you who frequent female restrooms: I would like to hear from you.) Do they really think they’re saving time? How about the time spent cleaning up after an accident? And the repair or replacement cost if your phone falls in you know where? Sorry, I need to pee in peace.

And how about the loud dingbat cell phone talker? And the one with *two* cell phones? Airports should have special glass rooms for

them. I much prefer to be sitting next to a quiet person who smokes like a fish. It’s a hazard when you can’t hear your flight being called over the gabbers and have to hurdle over people to catch it.

Okay, rant over. Thanks for hanging with me. If you read this far without reacting to an alert of some kind, congratulations. You’re doing better than most.

Now, let’s produce. Close your computer, turn off your smartphone notifications, and dive into this issue on productivity. ●

Viken Mikaelian is in the business of revolutionizing planned giving by making it as simple as possible. Contact him with any ideas and productivity tips.
viken@plannedgiving.com

* Study by Square Trade

Add Hours Back Into Your Week

A technology round-up to help you increase productivity.

Rebecca Langley



If your idea of increasing productivity is petitioning the universe to add a few hours to the day, take heart.

There are less cosmically improbable ways. Let's glance at how technology can work in your favor and add hours back into your week.

Tame the email beast.

Just one or two of these should be enough to make you master of your inbox.

- Use filters and automatic folders if your email provider offers them.
- **Boomerang** for Gmail allows you to archive messages and return them to your inbox when they become pertinent. It also allows you to schedule messages to be sent at a later time.
- **ActiveInbox** has similar features, but also facilitates scheduling, coordinates your email with your to-do list, and allows you to attach notes-to-self to message threads.
- Don't use Gmail? **SaneBox** has intuitive filters, "response tracking" (reminds you to follow up!), and lets you hit "snooze" on emails you'd rather look at later.
- **Organizer** (by Other Inbox) has some great intuitive sorting features.
- **FollowUpThen** and **RememberTheMilk** connect your email with your task lists and keep you on track (and your inbox clean and clear).

- **Unroll.Me** scans your email for all subscriptions (including spam) and, well, un-enrolls you. Super fast.

Typing is so out.

If you're still typing everything the old-fashioned way—that is, by typing it—**text expander apps** are about to change your life. If you're always writing the same emails, or even copy-pasting them, running a text expansion app on your device

**Don't count time.
Make time count.**



enables keystroke shortcuts for anything you want. You might, for example, set "EM" to be the shortcut for your email address. Or you might have "prop1" generate a 400-word proposal email that you usually copy-paste from a file or re-generate every time you make that particular

plea. There are many text expander apps for all operating systems and devices.

You can't change what you can't measure.

RescueTime syncs all your devices and tracks how you spend your time, including applications and websites, and sends you a weekly report. For many of us, that report is a painful reality check! To lower your ratio of distracting to productive time, consider adding **Pocket**, which tucks away things you'd like to read later and—*better yet*—also removes the sidebars of click bait.

Automate your life.

If you do a lot with social media, try **Buffer**, which lets you create content once and posts to several platforms at once. Attracting a lot of potential prospects? Try **Schedule Once** to automate the scheduling and communication process. Or sync several apps using master hubs like **Zapier** and **Workflow**. When working with a team, collaborative software platforms like **Redbooth**, **Asana**, and **Trello** help keep everyone on track and organized (and keep email inboxes clear). ●

Rebecca is an editor, organizer, mother, and all around do-everything-er. She loves helping people streamline their lives. msrebeccalangley@gmail.com

The Law Can Get Complicated... But Planned Giving Marketing Isn't Law.



"Don't let an attorney lead your marketing team. Your goal is to over-simplify your message. Inspire your donors with concise, compelling reasons to give. Attorneys do exactly the opposite. We're trained to understand the complexities of issues and use language that covers every detail and contingency. That's why the planned giving marketing agencies run by attorneys miss the mark when it comes to **marketing**. At PlannedGiving.com your message gets the creativity of a marketing team with the security of language approved by attorneys—not written by them."

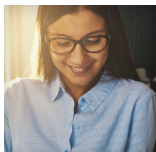
— Camilyn K. Leone, JD, Legal Advisor, PlannedGiving.com

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Get more stuff done.

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It's not just for PG professionals.

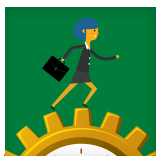
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Discipline

The magic power that makes you unstoppable.

Viken Mikaelian



I remember when my dad passed away, without a will, where I was inundated with massive amounts of paperwork, caring for a very ill mom, while running my business, and dealing with a delusional firm that was stealing our content and reputation and confusing the marketplace.

And yet, I was up early every morning, writing copy for this publication and fine tuning content for my clients—even up to five hours before I had to announce my father's death to the public.

You can misinterpret this, and I understand. It's not that I'm devoid of emotion or barren of tender feelings, and I'm also not a workaholic. But I've learned from my mistakes that regimen, ritual, commitment and discipline have a direct relationship with achievement and success.

Perhaps I'm extreme in proceeding with my work no matter what it takes. But most people are extreme in their willingness to set aside their work in exchange for distractions. Over and over I watch as the inefficient ones are the first to lose their jobs or *merely* get by with nominal raises, if any. That's not my plan.

Left to my natural inclinations, I am lazy. But I discipline myself to do the stuff I do because I like the outcome of success more than I like being lazy. *Read my article on page 8 to energize your career.*

Here's a small secret. If you want to succeed, look at what everyone else is doing and do just the opposite. The majority is nearly always wrong. It's really that simple.

Act up. As Tony Robbins says, success leaves clues. *And people do notice.* ●

The majority is
nearly always
wrong.