

Focus in
this issue:
our present



January 2012

Practical Planned Giving Marketing Ideas for All Fundraisers

Planned Giving tomorrow



Jessica

by
Jack Miller, CFRE

Before she became ill, I used to see Jessica every Sunday night when her parents came to play in the little mixed-couples pickup basketball league at the parish gym. At that time — and this was twenty years ago — Jessica was about one year old. Cute kid. An only child who was barely talking yet.

During the games when I was on the sidelines, I'd try to say hello to her and make friends. Usually, a child will come over and get acquainted with me sooner or later, but not Jessica. No matter what I tried, she wasn't having any part of it. She kept her distance. For some reason, I frightened her.

CONTINUED ON PAGE 10



by
Pamela J. Davidson, JD

It's the Endowment, Stupid! A Commitment to Survival

I often say to my husband of many years, "Honey, you can't achieve a goal unless you have one."

This also applies to gift planning and to raising endowment; an organization won't be successful unless it commits to endowment as a goal and planned gifts are an important way to achieve that goal.

As a consultant, I often see charities that cannot be successful in gift planning and endowment growth because they have never truly committed to that goal — and what it takes to achieve it.

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by
Viken Mikaelian

Happy New Year.

And yes, there's a lot to be happy about.

Most will make their New Year's resolutions ruefully, in jest, and maybe in weak *hope* for better times. *Hope is their life strategy*, so their New Year will unfold pretty much like the Old Year — same grievances, same behaviors, same outcomes. **But not yours.**

2012 will be a great year for you. *Not because circumstances will improve, but because you will choose to improve.*

You will plan. You will strategize. You will act. *You will decide to be above it all.* And you will write down your goals. *Something about writing them down makes them come true.* Whether it's about your career, marriage, or losing weight. Do it! Then give yourself 5 minutes each morning and read them over and recommit to them.

Success is an action noun. It isn't a place you go and pitch your tent. It's a moving target, and you've got to move too. The word *excellence* comes from the verb *to excel*, whose roots literally mean to *hurry out*. So if you want to excel, you can't be content within the pack of fundraisers. You can't be content to be leader of the pack, either.

You have to break out of the pack. Want to succeed? Don't be satisfied with just pushing the envelope. *Take risks. Get motivated. Get energetic. Get going! Tear that envelope.* Then don't look back.

Are You Irresistible?

Making the Money Come to You

You already know “sales” and “marketing” are different things. Sales, or stewardship, is *direct contact*, and the point is to make a sale. Marketing is more about *building awareness* of your brand, your mission and your vision.

Though it creates bonds in less personal ways than sales, marketing enables you to cast a wider net and create a sales funnel that directs revenue your way.

Marketing requires a consistent, systematic approach to your audience through:

- Direct mail,
- Display ads in your publications,
- Strategically-placed links in your organization’s email blasts, and
- Compelling links on your main website that “push” your prospects where you want them to go.

The more you reach qualified prospects on an ongoing, consistent basis, the more money you are going to raise.

Marketing creates the environment where **money is attracted, not pursued.**

Volunteerism: Are These Numbers for Real?

According to the 09/10 *Current Population Survey of the Bureau of Labor Statistics*, for the proportion of those over 16, volunteering was 26.3% for the previous year (unchanged since 09). That’s more than one person in four — or a total of 62.8 million. The Bureau mentions that the people may not all be US citizens, and there’s no measurement of the length of volunteer service.



Ask Brian

Got a question itching for an answer? Ask Brian M. Sagrestano, JD, CFRE at plannedgiving.com/brian. While he can’t promise to answer all questions, you should also check online at plannedgiving.com/answers for replies that don’t fit here. Bashful? You can ask to remain anonymous!

Dear Brian, Do you know what the rate of growth for a planned giving program looks like on a year to year basis? I know that you don’t really see major results until year 3; I’ve also heard that can range up to year 7. Your thoughts? ~Jim

Jim — It is almost impossible to predict the growth of a gift planning program because it is so dependent on how the charity handles its mission message. Put simply, *it is engaged donors who make legacy gifts*. If they believe in the mission, and believe it has a long-term future, they will create legacy gifts to support it. If the charity does not have a following that has been encouraged to believe in the mission, or the leadership has caused donors to question the long-term viability of the charity, then it can take a long time for planned giving to produce results. *I run into this more often than you would expect,*

which is why I wanted to lead with it.

That said, if a charity has a loyal donor base that has been giving on a regular basis, year after year, it should start to see new estate intentions and legacy gifts right away, with some consistency in new commitments within three years. At the same time, annual revenues should go up, *as the typical legacy donor doubles the size of his/her annual gift once the legacy gift is on the books*, because he/she is even more invested in the future of the charity. When legacy gifts mature depends a lot on *the demographics of the donor-base*. If it is older, they are likely to mature sooner. Just keep in mind that most legacy donors tend to get quality medical care and outlive the government’s life expectancy tables. Hence the old adage “If I sign up for a gift annuity, I add five years to my life

expectancy.” While the result is true, it is not a causal relationship.

I suggest that most charities worry not about closed legacy gifts, but the percentage of their identified planned giving pool asked to consider a legacy gift. If a charity is *consistently out meeting with donors* and asking for legacy gifts, the program will grow quickly. *Of donors who are ready, one in three will say yes right away, creating some easy wins*. If a charity has 1,000 planned giving prospects and asks 100 a year, that should be about 30 new legacy commitments per year for ten years. By the time ten years have gone by, there are likely going to be many new additional prospects to ask, plus all of those who did not say yes before, but are likely to be ready now. *So look at your pool, look at how many you can ask, and start asking!* Results will surely follow. *Brian*

“Grandma, can we go to Boca Raton this weekend?”

Know Your Prospect – Or Else. by Viken Mikaelian

The grandmother hearing her granddaughter asking for a \$5,000 weekend vacation actually lived through the Great Depression. When she was her granddaughter’s age, she and her family experienced true hardship. *And she personally knows how it feels when 50 cents for a simple rag doll for Christmas was too much to ask.*

Grandma may be rich now, but that’s not how she feels. Those hard years

have established some deep roots in her thoughts. The granddaughter asking for a Florida vacation simply doesn’t “connect”.

As a fundraiser you can’t afford to be so clueless.

I know an 85-year-old man who, like Grandma, had a difficult early life. Now he’s worth \$15 million cash – and chooses to live below

the poverty line. He still remembers his father counting the family’s cash and saying, “Son, this means happiness and security.”

And You Think You Know Your Prospect?

Who is she? What does she care about? What are her hopes, fears, dreams, wishes? What are her deepest desires?



“Listen, Do You Smell Something?”* Part II

by Joe Tumolo

Last month we discussed how the better we relate to others, the better results we will get from our interactions with them. Whether you're asking them for a donation, looking for a job or whatever: the more closely you can match their communication styles, the better your odds. And we talked about Neuro-Linguistic Programming (NLP) techniques that can enable us to better relate to, and quickly build rapport with, others.

Now, let's dig a little deeper. Did you know that everyone has a dominant sense or preference for how they like to receive and process information? We can break it down into three categories:

Visuals

Visuals are people who are, well, more visual. They tend to wear brighter colors, their facial expressions and gestures tend to be more animated. They can often be quick and impatient people. They like fun, action, adventure! Visuals need to see things in writing or on paper: for them, seeing is believing.

They may use phrases like:

- “Do you see what I am saying?”
- “Let's wait and see what happens.”

When you are dealing with someone who you think is a visual, make sure you show them the messages you are conveying. Put things in writing, print out documents, charts and graphs in full color and hand it to them.

Use phrases like

- “I see what you mean”
- “How does that look to you?”

Auditories

These are folks in whom listening tends to dominate. In fact, they are generally great listeners; they tend not to interrupt people when they are speaking. They love

**The title of this article is a line spoken by Dan Aykroyd in the movie Ghostbusters. What makes the line funny is it combines sensory words that an Auditory and a Kinesthetic each might use – but those words don't go together! This illustrates how correct style focus is key to effective communication.*

conversations. And they may be strong-willed.

Auditories may use phrases like:

- “Sounds good to me.”
- “I hear what you are saying.”
- “Does that ring a bell?”

When dealing with auditories, let them talk, don't interrupt them. Be prepared to have longer conversations with them. They may prefer you to explain something over the phone or in person, rather than in an email.

Kinesthetics

These lovable folks tend to be more “touchy-feely.” They are more sensitive. They will often not speak as much as an auditory or visual.

Kinesthetics will use phrases like:

- “Let's touch base.”
- “How does that feel to you?”
- “That makes sense to me.”

Kinesthetics will respond better when you are sensitive to their needs. It's okay to gently touch them on the arm when greeting them or shaking their hands. Be nurturing. Take your time with them. They love face-to-face visits and meetings.

So, there are 3 styles. While most of us may have attributes of more than one style, we all generally tend to fall into one overall. What style do you think you are? Can you think of ways to use your style to your advantage?

Try this stuff out. And please share your results so we can all benefit from these techniques. Feel free to email me at: Joe@VirtualGiving.Com.

Who You Are vs. What You Do

The further up the income pyramid you go, the more you will be paid for “who you are” rather than “what you do.”

Since “who you are” raises the power of influence, we will be including personal development articles on an ongoing basis in *Planned Giving Tomorrow*.

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*

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* Free to the first 10 people who email us at Success@PlannedGiving.Com

Snappy Answers to Snappy Questions

Can we see who is visiting our planned giving website?

No. Impossible. Read why here:

plannedgiving.com/sitevisit

Hey, Is It Getting Crowded in Here?

According to the **National Center for Charitable Statistics Business Master File** (08/2011), the nonprofit sector consists of 1,574,674 tax-exempt organizations, which break down into:

- 959,689 public charities
- 100,337 private foundations,
- 514,639 other types of nonprofits such as chambers of commerce, fraternal organizations & civic leagues.



Marketing tip

Planning a single mailing? Don't.

Binge marketing is reactive: The fundraiser looks around, sees nothing happening, and panics. Time to send out a mailing!

Wrong.

If you're going to mail only once and stop, stop before you do that mailing. One time mailings do not work. Effective mailings are part of a comprehensive marketing plan – not the end result of a panic attack.

The marketing plan gets the most out of all kinds of marketing – online, direct mail, person-to-person, etc. – by coordinating the proportions and scheduling of its various elements. That's how you maximize synergies and get the best ROI.

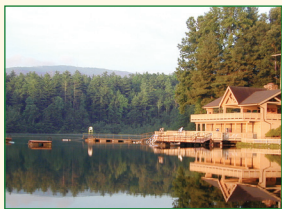
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Developing a Philanthropic Plan

A How-To and Why-To for Donors *by Jessica Terry Bergman*

Successful donor-centered fundraising means you have to think like a donor. This article challenges you to sharpen up your own fundraising practice by looking at philanthropy today from the donors' point of view — see the process through their eyes — so you can do your job better.

If being asked for charitable contributions is not already part of your daily life, it will be soon. Two years ago there were 1.3 million non-profits in the U.S., and that number has been growing ever since. So we are being asked to support various causes more and more often, and in many different ways.

Yet many prospective donors are beginning to doubt the positive impact of their giving, and to find less personal fulfillment in it.

The first step to more meaningful giving is a personal philanthropic plan.

To develop one of your own, begin by asking yourself, and others who share in your philanthropy, about the causes that are most meaningful to you, and **examine your core values and beliefs** related to each. (This exercise is also a great way to involve and connect with your children or grandchildren.)

Next, sharpen your philanthropic goals and cultivate a better understanding of what you intend to support in the future. Let's look at how this might play out:

The next time you are asked to give to a cause you truly care about, first determine if the amount asked fits within your philanthropic budget.

1. If you do not have the ability to give the amount being asked but you truly care about the cause, are you interested in supporting the organization at another level or in other ways?
2. Are you willing or interested in using your social capital to further their mission?
3. Are you willing to reach out to your network to find others who may be able to help their cause either financially or otherwise?

If you do have the ability to give what is being asked and you feel as though this could fit into your philanthropic plan, here are several additional questions to consider before saying "yes."

- Do you feel this organization will be a good steward of your money?
- Do you feel that your gift is an investment that will have

a favorable direct or indirect return?

- Does your family support this gift?
- Will this gift make you feel good?

If your answer to any of the above questions is "no", then saying "no" is most likely what your answer should be. And remember, saying "no" can also mean "no for now."

Asking an organization to **provide additional information** such as a proven record of outcomes or financial stability is a completely acceptable practice. Do not shy away from asking questions that help you understand if this gift makes sense for you and your loved ones.

Even with so many nonprofits competing for your attention, *aligning your time, talent and treasure into a personal philanthropic plan* will maximize its help to others and meaning for you.



Jessica Terry Bergman is a major gifts officer at her alma mater, Union College (Kentucky).

Have you looked at your planned giving website lately?

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The Guerrilla Fundraising® *How-To* by Wilke Nelson

Doing Whatever it Takes

Small charities face seemingly insurmountable odds these days, but Guerrilla Fundraising gives them a fighting chance. Guerrilla Fundraising means ruthlessly challenging all fundraising assumptions. It means you do whatever it takes to achieve success through innovation and personal initiative.

Any charity can use Guerrilla Fundraising — even yours.

Guerrilla Fundraising enables a development program to better utilize the traditional fundraising tactics and strategies for long-term success. Once you get the basics down, it just gets easier.

Critical elements:

- Understanding your non-profit's strengths, weaknesses, market, and competition;
- Not "letting the perfect be the enemy of the good";
- Developing the most basic cases;
- Face-to-face fundraising;
- Learning by doing, *regardless of your experience level*; and
- Understanding that determining your best prospects is a subjective process. The key is simply getting out to see them.

With Guerrilla Fundraising, it is often smaller, thinly staffed charities that have the least to lose and the most to gain. Since it is demonstrably true that in planned giving and major giving, the more personal the relationship with the donor the greater the success, charities that take high level stewardship and cultivation further down the giving tree realize a benefit of decreased

competition the further down they go.

Down the Donor Tree

Imagine the impression a face-to-face visit, phone call or other personal touch makes on a \$50 dollar, loyal donor who has given for years to a better heeled charity that doesn't do as high touch fundraising at that level. That your charity's



"desperation" brought you to that point won't be the focus of the donor — they merely appreciate the personal attention:

When practiced at American Rivers, where I work, there are a number of examples where long time donors, never contacted in person before, were so flattered they wrote \$1,000 checks when their biggest previous gift was less than \$100. One testimonial from an American Rivers' donor was "I have been giving to a number of larger groups for years but they never sent anyone to see me."

Guerrilla Fundraising proposes that your success is directly proportionate to the number of contacts you make — in other words, the more personal and lower down the donor tree, the better.

While many of those you contact may not respond, those

that do respond tend to be your best prospects. Their response tells you how invested they are in your cause.

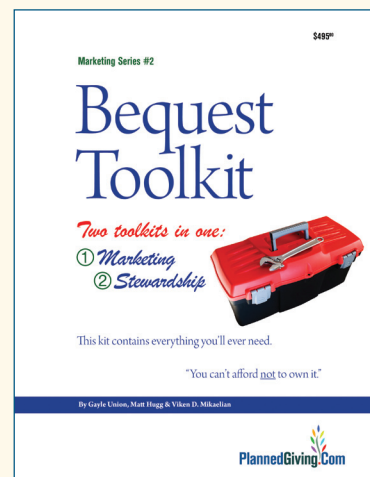
Guerrilla Fundraising start-up steps:

1. Determine a budget for the "sunk cost" to invest in Guerrilla Fundraising over a particular time period;
2. Make a thorough assessment of the charity's market, value proposition, competition, and donor base;
3. Develop a basic case;
4. Provide the assessment and case to charity management;
5. Perform basic research to identify best prospects;
6. Develop prospect lists for key staff;
7. Supply basic "asking" training and support materials;
8. Head off "frozen fundraiser" syndrome (fear of making the ask); and
9. Identify assistance for any complex planned gift leads that may be generated.

Guerrilla Fundraising helps charities get more comfortable with selling and becoming better-known to donors. Then they can deploy more sophisticated fundraising to exploit the beachhead they've established. It's a practical and effective way to succeed.



Wilke Nelson is Deputy Vice President, Development, American Rivers



By Gayle Union, Matt Hugg and Viken Mikaelian

Get started today with this ready-to-go toolkit. From start to finish, here are all the materials you'll need for a successful bequest campaign. And it's two toolkits in one:

1. The **marketing toolkit** will help you promote bequests.
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Why waste months planning, writing and editing all these documents yourself? Save time, money, and back-office hassle by ordering your Bequest Toolkit today. Make your life, and your job, easier.

You need to be talking to your donors about gifts from their wills *right now*, not months from now, and with this toolkit you can do it.

PlannedGiving.Com/bequesttoolkit



This handy collection of documents serves as a powerful and elegant promotional handout

kit that makes networking easy. Includes marketing documents as well.

PlannedGiving.Com/willkit

Why is planned giving so important to smaller nonprofits these days?

{VIKEN} What would your future look like if you did not have a retirement account? Saving for the future is critical. And it's the same with nonprofits. They have to act now to guarantee not just success, but survival. Since less than 5% of this nation's wealth is in cash, and 95% in assets, it's a no-brainer for nonprofits to focus on planned gifts. And not just for the future, because many planned gifts are not deferred. Plus, in many ways bad times are the best times for planned giving.

{BRIAN} In the current down economy, many prospects

one's will, gifts of stock, retirement plans, and paid up life insurance policies, for example, are amazingly simple to make and constitute up to 85% of a typical planned giving shop's revenue. But because charities have been sold the idea that they need to do really complex planned giving, many tend to shy away from it all together.

enhance their planned giving programs. But what about the **one-person shops and volunteer-driven charities**? How do we help them get their piece of that \$41 trillion intergeneration wealth transfer that's up for grabs? That's why Viken and I got together to create a less expensive product, designed for charities on a tight budget. The watchwords would be simplicity and efficacy — maximum ROI based on proven techniques.

{VIKEN} Nonprofits can't afford not to focus on securing greater endowment, but they're too busy already to pursue planned giving the hard way. As Brian said, there are plenty of vendors out there that make their living by complicating a simple process. So we decided to create the easy way that's also the best way. **Planned Giving in a Box** enables nonprofits to start raising more and larger gifts with minimum expenditure of time, money and effort.

What special knowledge or abilities did you bring to the creation of The Box?

{BRIAN} Over my career, I've worked with wide range of charities, and when you spend so much time working on planned giving programs, you start to see the same issues come up over and over again. But what if you could build a new program from scratch with solutions to these issues built in? So I basically



There is an entire industry built around making planned giving complicated. But it's not.

Brian M. Sagrestano, JD, CFRE

do not feel that they have the capacity to make significant gifts which take cash out of their pockets. Planned giving provides a huge comfort for these donors because the gifts they make either 1) don't have to take any money out of their pockets or 2) it allows them to get something back, such as income in retirement. And planned gifts are the largest gifts donors can make.

What prevents smaller nonprofits from taking advantage of planned giving?

{BRIAN} There is an entire industry built around making planned giving complicated. But it's not. Gifts through

{VIKEN} You don't have to be a Harvard lawyer to do planned giving, but you do have to be proactive. And that can be a problem, because many of us are prone to procrastinate. But you have to keep your focus on the future. It's the time and energy we waste putting out everyday fires at the office, tending to the immediate instead of the important, that prevents us from taking really significant steps for our organization, like pursuing planned gifts.

What inspired you to create Planned Giving in a Box?

{BRIAN} Big charities can afford to hire consultants like me to help them begin and



Giving for the Real World }

down? Forecast looking grim?

developed an exciting new product that will cure all of that.

Planned Giving in a Box.

Why smaller nonprofits should be paying attention.

and marketing to effective fundraising. I focus on sound marketing principles, because without them, your nonprofit isn't going anywhere.

What makes Planned Giving in a Box special?

{BRIAN} The beauty of **Planned Giving in a Box** is that there is no "typical case". One non-profit might use it to get their planned giving program get back on track. Another might just buy one module to fix back office or marketing issues. The non-profit which will benefit most is the one that says, "We have a mission that requires long-term support, we have loyal donors who want to support that mission, and we need a program to help those donors to provide us with that long-term support." *And it works for charities with a large staff, a small staff, and no staff at all.* Even a volunteer-driven organization can use **Planned Giving in a Box** because it is simple with step-by-step instructions.



combined the best practices gleaned from my years of experience into a package that is simple to implement, easy to use, and works for virtually all charities.

{VIKEN} I bring twelve years of experience in simplifying planned giving — not dumbing it down, but making it accessible by busting myths and eliminating needless complexity. That approach has helped hundreds of my clients succeed. Also, I emphasize the importance of sales

What is the purpose of its modular architecture?

{BRIAN} **Planned Giving in a Box's** three modules allow charities to design and build their own program on their own timeline according to their own needs. They enable the product to be used flexibly by the greatest number of different charities. The Marketing and Outreach module provides month-by-month instructions and content for compelling outreach. Back Office Operations covers all of the stuff that most programs fail to address when building their planned giving

fundraisers and their careers?

{BRIAN} **Planned Giving in a Box** provides measures of performance for the planned giving function, so that superiors know what to expect from the planned giving program. After all, managing expectations is a big part of a fundraiser's job. In today's environment, with so many charities seeking to increase revenue, a fundraiser who can say that he/she built a planned giving program and can point to the results will have a much broader range of career opportunities. Those who can't, won't, because they're leaving real money on the table.

{VIKEN} Fundraisers are evaluated on their performance. **Planned Giving in a Box** enables them to reach more donors and close *more* gifts because they are not behind a desk, figuring out how to raise *larger* gifts. They follow the steps and build the program an hour at



Planned Giving in a Box enables fundraisers to reach more donors and close larger gifts.

Viken D. Mikaelian, CEO, PlannedGiving.Com

programs, and that comes back to hurt them later. And Building Donor Relationships provides valuable information, tools and techniques for communicating personally, one-on-one with donors. After all, the best planned giving is done face to face.

It's clear how Planned Giving in a Box helps smaller nonprofits, but how can it help

a time. This leaves more time to go visit with prospects and ask for gifts. Put another way, fundraisers already have one job. **Planned Giving in a Box** is *the* way for them to add planned giving to their organization without driving themselves crazy with work!

You can learn more about Planned Giving in a Box at:

www.PlannedGivinginaBox.com
(800) 873-9203

Getting In Touch With The Feminine Side

By Elizabeth Diehl

Women have become philanthropy's Holy Grail: development professionals have embarked on a mission to seek, solicit and win women over as donors.

Not so fast.

With all of the focus on the promising data about women and the unprecedented level of wealth they now control, a simple but important truth seems to get overlooked: Women are not men.

In a line of work that requires the personal touch, there seems to be surprisingly scant attention paid to how we cultivate our female donors-to-be. We tend to swap out John

Doe for Jane Doe, using the same language, approach and enticements that have worked well with male donors, only to find that these methods often fall flat. Assumptions that women respond as their male counterparts do result in missed opportunities for gift officers, organizations, and would-be donors alike.

Masculinizing Philanthropy

Development's male-centered tendencies are understandable: after all, our tried-and-true fundraising practices spring from 19th century "Gilded Age" and early 20th century philanthropy. That era spawned Andrew Carnegie's "scientific philanthropy," in which "giving" may come with many strings attached. As in the old expression, "He who pays calls the shots", the

donor assumes a position of power and influence based on potential benefactions, not necessarily expertise.

Philanthropy, once considered an avenue for women to collectively wield influence in society when cultural norms kept them out of government and policy-making positions, suddenly morphed at the turn of the 19th century into an extension of the business world with decidedly masculine structure and traits.

The result? Some women with the financial means to be philanthropic do not necessarily feel that philanthropy aligns with their feminine — or feminist — values, and may be difficult for gift officers to engage, especially if our language and approach are geared to males.

Difficult but Not Impossible

Recognize that what is good for the gander may not resonate with the goose. Listening carefully and adjusting our conversations with prospective donors is key. Research over the past decade has uncovered some compelling notions about what motivates a woman to give and what may put her off, and guides us in tailoring our approach.

It's a Relationship, Not a Transaction

Historically, women tend to be collaborative, and seek to be part of something they believe in. They may not necessarily be motivated by or comfortable with being singled out. Additionally, women prefer their giving to be relational, not

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Passing the Buck

Boomers, Gen-Xers, Millennials and The Philanthropic Mantle

by Kelly Wesley Taylor, JD

According to the Pew Research Center, as of January 1, 2011, the oldest Baby Boomers turned 65 and every day for the next 19 years, about 10,000 more will cross that threshold. This generation represents 26% of the US population.

Many charitable giving thought-leaders talk about Boomers moving from a focus on "success" to "significance"; and "living a legacy" rather than "leaving a legacy." This characterization of such a large segment of our population is promising — but what about the Gen-Xers and Millennials following them?

While Boomers tend to see philanthropy as a means for community responsiveness and civic leadership in general, Gen-Xers and Millennials regard philanthropy as an "investment" for specific results in social change. What do their varying perceptions of philanthropy mean for how we give and receive in our society, now and in the future?

The Greatest Generation must take the lead now in shaping perceptions of responsible giving and receiving. But how?

The passing of the philanthropic mantle must happen in our families and our mission-driven organizations.

How they educate and cultivate the culture of philanthropy will determine the level of philanthropic leadership we realize in the future.

How do we teach responsible giving?

- Identify passion and purpose to determine one's philanthropic focus
- Define a vision for creating positive social change around one's passion
- Implement change through giving
- Evaluate the impact of the gift

CONTINUED ON PAGE 10

transactional. While women tend to put careful thought and consideration into a philanthropic proposal, ensuring that it aligns with their goals and objectives; they expect in return a meaningful, ongoing relationship with the cause or organization, even — and especially — after they have written the check or signed on the dotted line. And while it may take longer to engage and cultivate a female donor, patience and diligence pays off because her loyalty to the cause or the institution is likely to be deep.

A Word About Wives

If a male prospect is married, by all means include his wife whenever possible and appropriate. She will likely influence her husband's philanthropic decisions during his lifetime and is quite likely to

have the final say in the family's estate plans since she will probably outlive her husband.

Taking on a woman-centric approach to development promises to be relevant on a broad scale as we look to the future — and not just in terms of women. Philanthropic giving among the younger generations — female and male — bears an uncanny resemblance to women's philanthropy. Grassroots-style, collaborative philanthropy such as the giving circle model has taken off among young donors, bolstered by the advent of social networking and instant communication.

The bottom line: women are influential, and the organizations for which we raise funds will no doubt benefit now and in the future from our channeling the



feminine.

Betsy Duncan Diehl is a major gifts officer at Gettysburg College.

*Her master's thesis is entitled, **Philanthropy as an Expression of Feminism: Aligning a Traditionally Masculine Concept with a Decidedly Feminist Ideal** (2010).*

Proud to be a Planned Giving Tomorrow Contributor!

Dear PG Tomorrow,

I mean it. I truly appreciate your publication. I just told my husband last week (as I was reading the Fall 2011 edition), that it's the best newsletter I get. He asked why, and I said it's something about the *attitude of the publication* and the articles actually contain *practical information* unlike most everything else I get.

So... thanks and keep up the great work!

Jessica Bergman

Win a Ferrari.



Now that we have your attention...

Do you have a war story to share? A fundraising disaster? An unusual situation your peers could benefit from? A gift that went sour? A lesson learned? How about a warm and fuzzy anecdote about a donor relationship that turned into a life-long friendship?

Send it to us. The first 10 respondents to this notice *whose pieces are accepted* will receive a \$25 gift certificate. E-mail us:

Success@PlannedGiving.Com

We'll publish it with your name attached, or anonymously if you wish.

YOUR PROSPECT: CONTINUED FROM PAGE 2

Do you know who inspires her? What books she reads? Have you looked for clues on her walls, pictures of grandchildren, awards, what has affected her in her life? Did she go through the Great Depression? Did her family?

Have you stopped listening to yourself and started listening to your prospect while in conversation? Or are you still locked in The Echo Chamber with yourself?

Wealth Is Relative

There is no one "rich" and no one "poor." *When talking with prospects, forget about "wealth."* I am not saying never consider their assets — just put it out of your mind and out of the conversation at that time.

Many "rich" people think they

are poor because they might run out of funds by the time they are 102. (No one thinks they are going to die tomorrow, regardless of their age.) And you'd be surprised how many less fortunate people would consider themselves wealthy!

When Shaquille O'Neal was asked "Don't you think making \$28 million a year is somewhat excessive?" he answered *"In the 4 seconds that it took you to ask me that question Bill Gates made \$6700 in interest."*

All of us tend to focus on those who make more than we do. I remember a friend of mine complaining how excessively Hollywood actors are paid; he himself only made \$640,000 a year. I also know of a man who is very envious of those making \$50K or more

a year. He only earns \$25 K a year. But his envy has kept him there all his life.

Fund-Raising Means Friend-Raising

It means treating your prospects as donors and your donors as friends. The very process of developing market empathy — getting to know your donor — will have a lasting positive effect on your relationships. It certainly beats selling to yourself inside The Echo Chamber! And knowing your donors will result in more and larger gifts.

I guarantee it from the heart. ❤️

The above is a verse from Viken's keynote presentation: *There Is Money Out There.*

PlannedGiving.Com/seminars

Foundation Giving Fundamentals

According to **The Foundation Center**, foundations gave \$45.7 billion in 2010 (not greatly changed from 2009). Of that total:

- Independent foundations contributed 71%
- Community foundations contributed 9%
- Corporate foundations contributed 10%
- Operating foundations contributed 10%

Technical Skills vs. People Skills

Did you know most organizations base 80% of hiring decisions on technical skills, yet 85% of turnover is due to behavioral incompatibility?

Later that year, Jessica became ill. The doctors said she had neuroblastoma, a form of cancer that most commonly affects children under the age of five, usually detected only after it has started to spread. So even before she was age two, Jessica knew what it was to lose her hair to chemotherapy.

The illness brought our whole parish together to find ways to help Jessica and her family. It was no surprise that one major area where help was needed was money. Jessica's parents were not well-to-do people — just good people.

Many Voices

So with the parents' permission I began organizing fundraising events. One was a multi-choir concert featuring singers from four multi-denominational local churches. It seemed a life-affirming way for the community to contribute.

Ticket proceeds would help to pay the \$5,000 deductible on the little girl's health insurance.

One day I met Jessica and her parents at Children's Hospital of Pittsburgh — where the little girl was receiving an emergency transfusion — to finalize some important concert details. Jessica's dad invited me to stick around until his wife and Jessica returned. Knowing the effect I had on the child, I was hesitant to stay, but ultimately I did.

Soon, Jessica's mom turned the corner pulling one of those portable IV drip trolleys. Jessica was in her arms connected to an IV tube. When Jessica saw me she immediately hid her face against her mom. We all chuckled, and I thought, "Some things never change. What is it about me that frightens her?"

Jessica knew what it was to lose her hair to chemotherapy

Jessica's Gift

But the next thing I knew, Jessica turned back, stared at me for what seemed like minutes, then reached out her little arms like she wanted to give me a hug! After I cautiously approached, she put her arms around my neck and just squeezed. One-and-a-half-year-old Jessica was giving me the biggest hug she could. Words can't describe how I felt at that moment.

Then Her Parents Explained

"Do you know why Jessica hugged you, Jack? It's because you're bald. Jessica thinks you have cancer, too. And she's trying to comfort you."

Jessica passed away a few months later. If she had lived, she'd be celebrating her 20th birthday in 2012. Fortunately, her parents were later blessed

with another daughter and a son — all healthy.

I share this story because Jessica's compassion changed my life. I began by trying to generate a gift for her, and in the end her gift to me was greater — a lesson on how suffering can help people put aside their fears to serve one another. She enabled me to realize that there is no greater gift than the gift of compassion.

When I was recently ordained a deacon in the Roman Catholic Diocese of Pittsburgh, I incorporated Jessica's story into my first homily. I continue to share it today with others as I have with you.

Despite Jessica's short lifespan, she lives on through her kindness and compassion. That's what I call leaving a legacy.

Jack is a fundraising consultant based in Western Pennsylvania. www.jackoutsidethebox.net

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BOOMERS... CONTINUED FROM PAGE 8

Families teach responsible giving by engaging children and grandchildren of all ages in conversations about wealth and philanthropy. Whether in formal family meetings or simply when sitting around the dinner table, ask one another questions about life's passion and purpose. These will foster a collective understanding about how each member of the family visualizes the positive social impact they seek to accomplish. Parents and grandparents can model the means of finding life's passion through their own volunteer work so that the younger

generation will seek out that connection for themselves.

How do we teach responsible receiving?

- Learn to engage the giver's passion
- Build and maintain sustainable governance practices to ensure proper stewardship
- Receive with gratitude
- Demonstrate impact

Organizations teach their leaders to be responsible receivers. It is critical that receivers learn about organizational accountability and how to ensure the public's trust. Non-profit leaders must be trained to engage the passion of their donors, to

build sustainable governance practices and to demonstrate the impact of their mission facilitated by the philanthropic support they receive.

Responsible receiving should always be at the forefront of organizational development and mission advancement.

Consider who will be there for you to "pass the buck" to after you are gone. How well we act to ensure the public's trust today will be our greatest expression of human-loving gratitude we call philanthropy.



Kelly Wesley Taylor, J.D. is a partner with Trek Advancement, New Albany, IN.

How to Commit?

A nonprofit has to be pragmatic about gift planning; it will require time, effort, budget, staff, and sustained attention from leadership, both internal and volunteer. The charity will need gift planning policies and investment expertise to manage the endowment dollars it raises. It may collaborate with community foundations as well as other local charities with similar missions. And the charity may need to add to its internal staff in areas such as accounting, investment and donor relations.

Envisioning by leadership is a priority. The Board must ask itself, *"What should this charity be doing that it's now not currently doing, if money were no object?"* This exercise helps leadership determine its future goals so the nonprofit can talk to prospects in prospective terms about what it wants to achieve with its endowment.

A charity won't be successful in raising endowment if the organization simply adds "planned giving and endowment responsibilities" to the job description of its already-overburdened development staff. It also won't be successful if it does not provide the staff meaningful support such as:

- Continuous training
- Outcomes-based vs dollars-based goals-setting
- Effective software and database applications
- Prospect education and marketing materials
- Funds to cover expenses for face-to-face prospect cultivation
- Professional support such as consultant or legal counsel

Such support must also include membership in the nearest planned giving council, with national membership in the Partnership for Philanthropic Planning, as well as conference attendance. These collegial groups are excellent sources of gift planning expertise both local and national.

Getting Beyond Today

As former board president of our community's nationally-recognized women's shelter, I advocated for an endowment at our local community foundation during a brief matching gift period. When I proposed endowment-building as a component of the shelter's capital campaign, the reaction was as usual: that we need all dollars currently, and that our needs are too great to raise future dollars that will produce only a limited annual return.

My response was: "In which of our 30 years of existence have funds *not* been desperately needed?"

At this point, **commitment is key**. When a nonprofit undertakes and announces that it is now raising endowment in addition to the development options it already promotes, it is publicizing to the world that its work is so vital that the organization itself has committed to seek endowment to sustain its mission into the future.

At the same time, the nonprofit should be scouring its data base for older donors; donors who are "urgent," moving, or retiring; high-loyalty volunteers and/or donors of many years; donors who should have named funds



Are you talking to me?

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at the charity; and any donors who have expressed interest in doing more for the charity.

Many donors and volunteers wish they could do more for charities they love, but don't know how. Our role as gift planners is to show them how they can make a difference — even with limited income from their CD's or retirement distributions, or unproductive yet marketable assets they don't want to sell because of capital gains tax — while accomplishing their own personal planning goals to greater benefit.

The longest journey begins with but a single step. Commitment to endowment-building through planned gifts is what makes taking that step, and all the steps that follow, possible.

Pamela J. Davidson is President of Davidson Gift Design, Senior Vice President for Thompson & Associates, and a longtime active member of the National Committee on Planned Giving, now the Partnership for Philanthropic Planning.

Surprise: You're NOT a Fundraiser

You're in Marketing and Sales. When you are promoting philanthropy, you're selling an intangible.

That means you have to be creative and persuasive right now — today.

How? Use emotions. *Rage. Passion. Anger. Ego. Pity. Shame. Guilt.* Go right for the heart.

Rage for a child or animal abuse center. Passion for music or an environmental agency. You get the point.

If the word "sales" conjures up images of obnoxious, pushy types that force stuff on you, re-think. For you, the model is using your prospects' emotional connection to the things they love (or hate) to help them towards making the gift.

Again: you're not a fundraiser. You're in sales and marketing, and you're helping people.

Don't like it? Maybe you should find another line of work.

IN THIS ISSUE

Jessica... a lesson from a 2 year old

Commitment to Survival

A Relationship, Not a Transaction

Winning the Style Wars

Donors Seek Lucid Giving

Guerrilla Your Dreams

Your Real-World Planned Giving Solution

Philanthropizing Millennials

Opinions? We want to hear from you.

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Are You Doing These Five Things Daily? *(You should be!)*

Big gifts come from strong relationships. Here's five ways to treat your donors as friends every day:

- 1 Send a donor an article, make an introduction, pass along a referral — something that says you care about their friendship.
- 2 Call a donor with some exciting news — a new professor, program, award, or acquisition — that's not yet general knowledge.
- 3 Call or send a donor an email — not because you want something, but just to stay in touch — it lets them know you think about them.
- 4 Send a birthday or holiday card, or a note to say how

much you appreciate their support. *Get creative — make it a birthday-and-a-half card!*

- 5 Invite the donor to an event he or she will want to attend.

Hint: A systematic approach to treating donors as friends include building a profile of key donors' likes, dislikes, hobbies, interests, favorite foods, etc. That way, you can be sure they'll really appreciate your invitations, communications and suggestions.

With older donors, be alert to their past hobbies and activities. I remember one elderly donor who had been a passionate cyclist, who was delighted when the chairman of the board invited him to share grandstand seats at

a bike race. This step in the gradual friendship-building process helped lead to a six-figure planned gift.

Some of these actions should be built into your moves management plan, but being alert to cultivation opportunities is part of a fundraiser's job. *A little spontaneity can go a long way.*

For more good ideas on relationship building, try Jeff Gitomer's *Little Red Book of Sales Answers* and *Little Black Book of Connections*, as well as Todd Smith's *Little Things Matter* (littletthingsmatter.com).



Geoff is Senior Vice President, Development Services, VirtualGiving