



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS



Extend Your Reach: Make Major Gift Officers Active Partners In Gift Planning



Craig Smith
Senior Consultant
John Brown Limited, Inc.
585-730-0853
craig@johnbrownlimited.com
www.johnbrownlimited.com

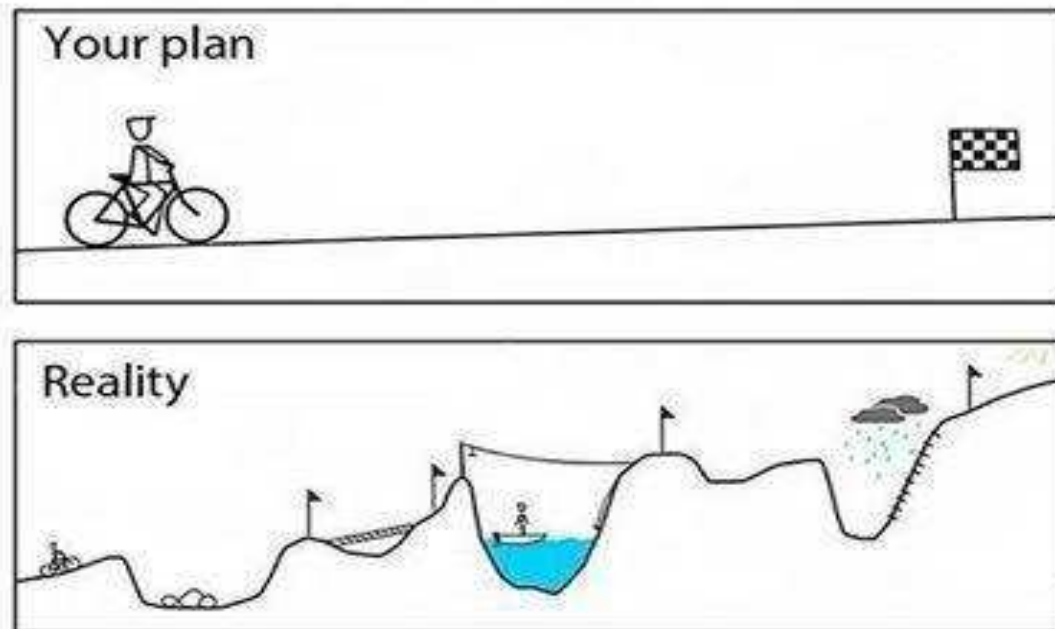
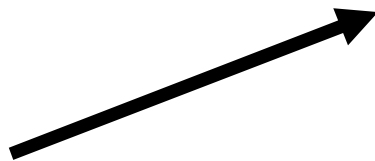
April 19, 2018



It's a Little Science And a Lot Art

- We wine 'em
- We dine 'em
- We sign 'em

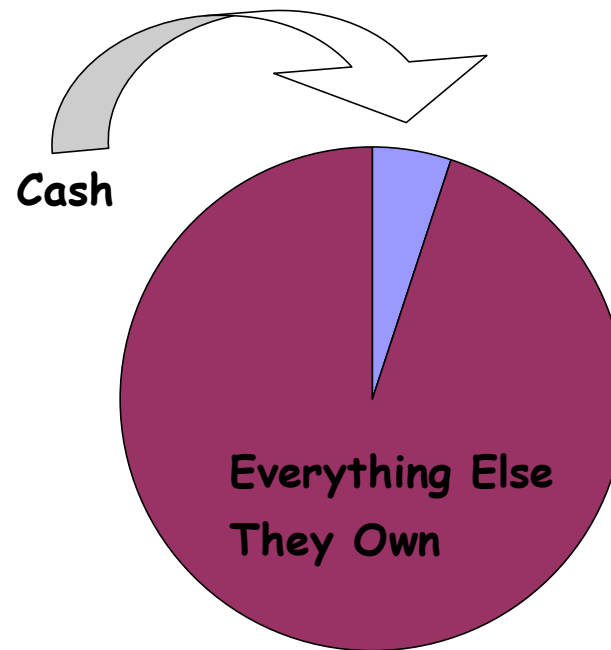
What really happens!





What Do Most of Us Want?

- Biggest immediate gift, paid in cash, all at once
- People don't keep their wealth tied up in cash!





Assets People Donate

- Cash
- Stocks - public
- Stocks - private
- Bonds
- Real estate
- Life insurance
- Live stock
- Timber
- Mineral rights
- Copy rights
- Royalties
- Personal property



Only Four Ways to Give

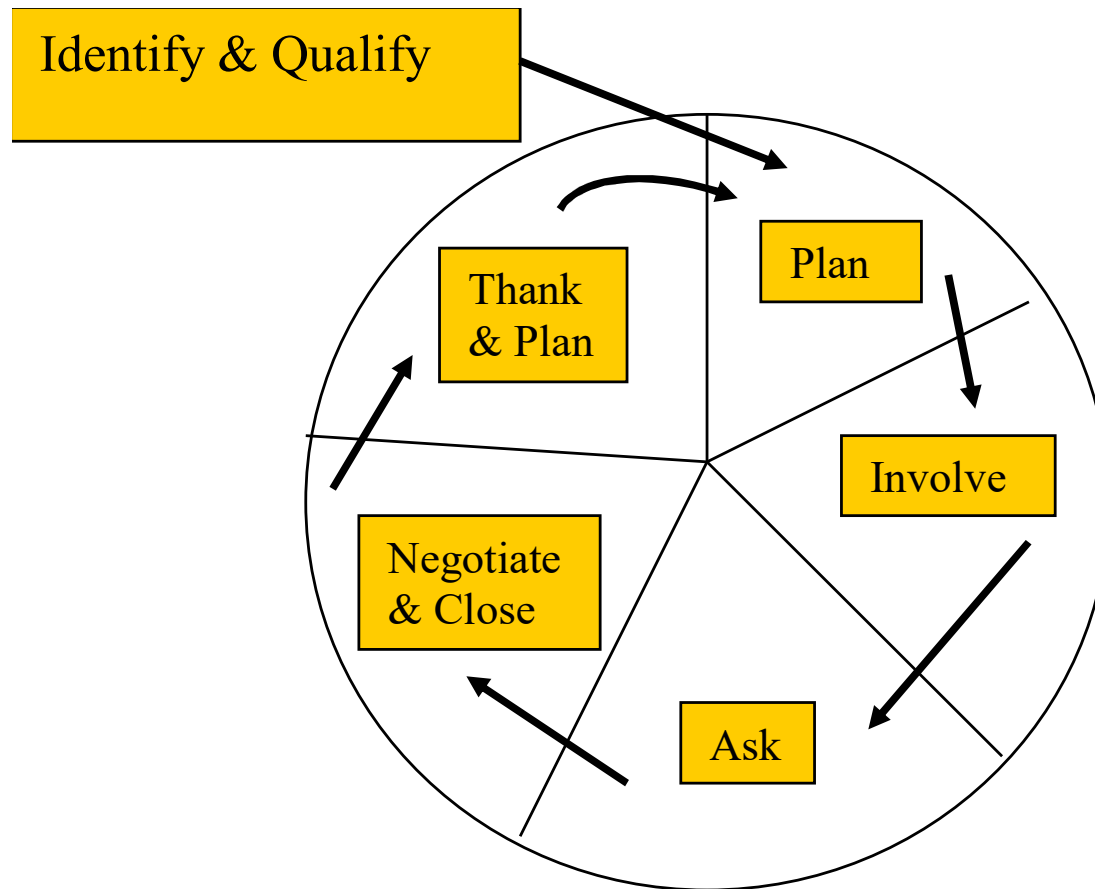
- **Current**
- **Income to “charity”**
Assets to Family
- **Income to Family**
Assets to “charity”
- **Bequest**



**Gift planning
applies to every
category.**



Stages of Major Gift Fund Raising





Transactional Tools and Technical Knowhow

- Assets people can give
- How they can give them
- How can I move them toward giving



Shared Credit

- Turn competition into collaboration
- Make partners out of perceived competitors
- Be generous with credit, it's free to bestow



My Roadblock List

- 1) Conversations stall on technicalities
- 2) Current vs Deferred conundrum
- 3) Bequests . . . Who wants to talk about death?



Traditional

- Teaching technical knowledge about methods and assets
 - ✓ It's how most learn planned giving
- Doesn't stick
 - ✓ Contextual void is the culprit
 - ✓ Sets up avoidance behavior



Innovative & Donor Centric

- **Teach the Four Decisions & Two-Part Conversation Approach**
 - ✓ Provide anchors, context, methodology that can be carried around in your head



The Pros

- Position MGO and PG leaders
 - ✓ as partners in on-going education
 - ✓ Show commitment to professional development
 - ✓ Create common bonds and challenging experiences in real time, safe environment – **build team**



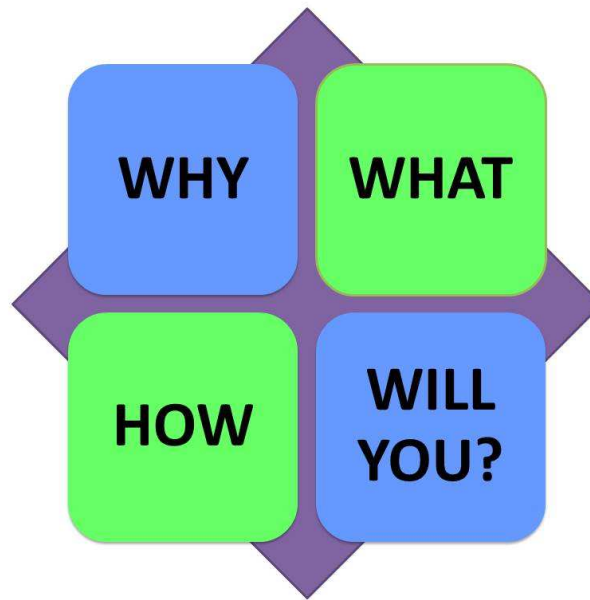
The Two-part Conversation

What Is It?

- Invite them to talk first about *why* they care, and *what* they want to support
- Explain that you want to have a second part to be about *how* they might make a gift and *whether they want to*
- **Intentionally** lead conversations from heart to head
- Avoid transactional conversations in the process



Easy to Remember **Powerful to Apply . . . with Practice**



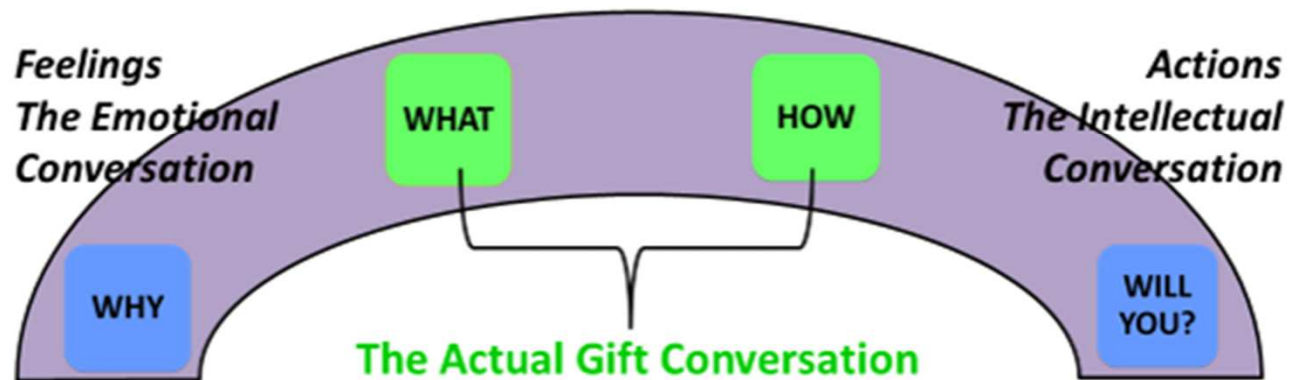
The Four Decisions

The Gift Conversation From the Other Side of the Coffee Table



Leap The Hurdles **Conversational Gift Planning**

The Conversational Bridge You Must Help Your Donor Cross





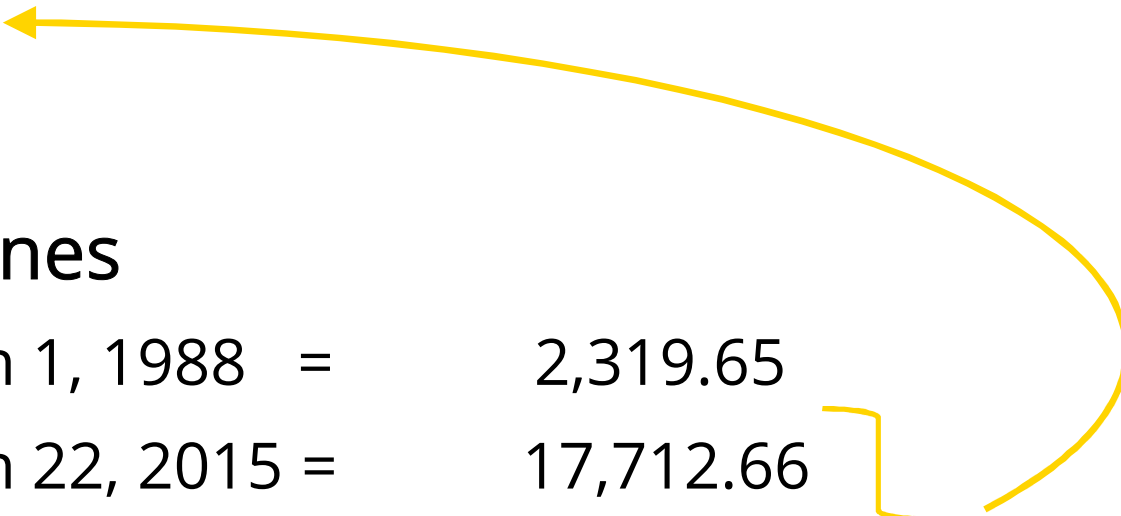
Avoid Transactions . . .

- Use a Two Part Conversation
 - ✓ Put guidance and control into field officer's hands
 - ✓ Deflect "I know what you do, and why you're here, so let's talk about how much you want"
 - ✓ Create "heart first" and "head second" conversations



Donors Have Appreciated Assets

+35%



Dow Jones

- March 1, 1988 = 2,319.65
- March 22, 2015 = 17,712.66
- March 25, 2018 = 23,877.71





Create A Team Of Detectives

This Is How You Extend Your Reach

- Arm field officers with intentional language and knowhow
- Get them comfortable using the **Magic Answer**
 - ✓ **I don't know, but I'll find out for you.**
- Turn them into super sleuths who can't wait to debrief with gift planning colleagues to decide next steps
- Show them how involving their gift planning colleagues at the right time and in the right way unlocks larger gifts



Sustainable

Interactive Case Studies

- Most training is “one and done”
- Interactive case studies are ongoing and as infinite as your donor experiences
- You can write them using your own case material
- Building out a library of cases enables PG/MGO leaders to teach regularly and over time, building depth and success among field officers



Making It Go

- Develop the case and draft the script
 - ✓ Including the page of facts for the “donor” to work from that the development officer doesn’t know
- Choose the role players and coach them separately
 - ✓ Including the gift planning expert who will participate
- Put them in front of the audience
 - ✓ Closed door, same overall group each time
 - ✓ Ask the fundraiser to summarize the known facts



Making It Go

- Set the role play in motion
- Ask the audience to debrief their gift planning colleague(s)
- Invite the gift planning expert into the second stage of the role play
- Facilitate a group discussion about the role play and the gift options presented



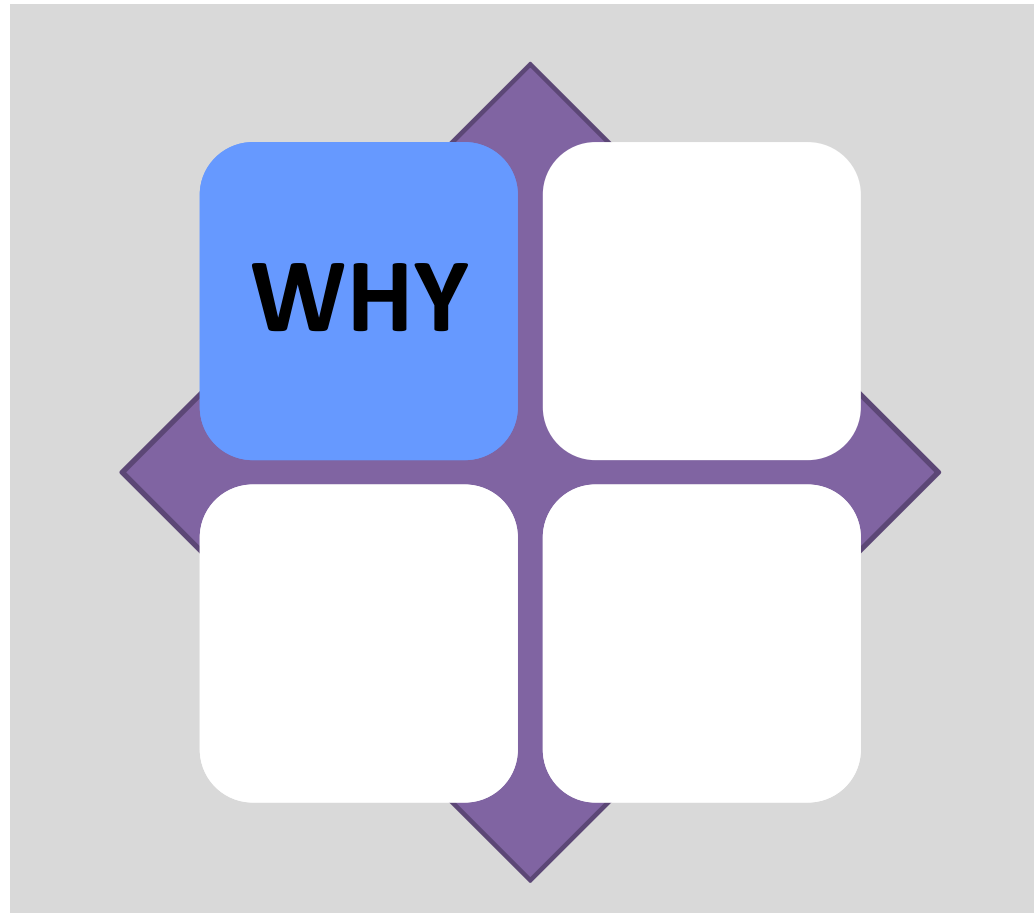
Case Basics

Donor Background

- Age 76, retired faculty member at a local college
- Is second generation supporter of (organization)
- Annual giving \$500 each of the past five years
- Lifetime total giving: \$4,400
- \$50,000 rated gift capacity
- Research says donor's house is worth \$315,000
- Donor's house is furnished with what appear to be mid-late 19th century antiques



The Heart





What You Learn by Asking Probing “Why” Questions

- Donor’s mother introduced Donor to (pick a special program or project).
- Donor has been a regular for a number of years.
- Donor cherishes the memories of his/her family’s involvement.
- Donor would like to make a gift in mother’s memory, but doesn’t have the cash.



Transition To **What**

The First Half Of The Gift Conversation

How to invite a conversation that identifies a promising gift purpose

- **Ask . . .**

“Based on what you have told me about your experiences, memories, wishes, etc., if I can help you find a way, **WHAT** at our nonprofit would you most like to support financially?”

OR

“What sort of legacy would you like to create through your giving?”



Good News About **What**

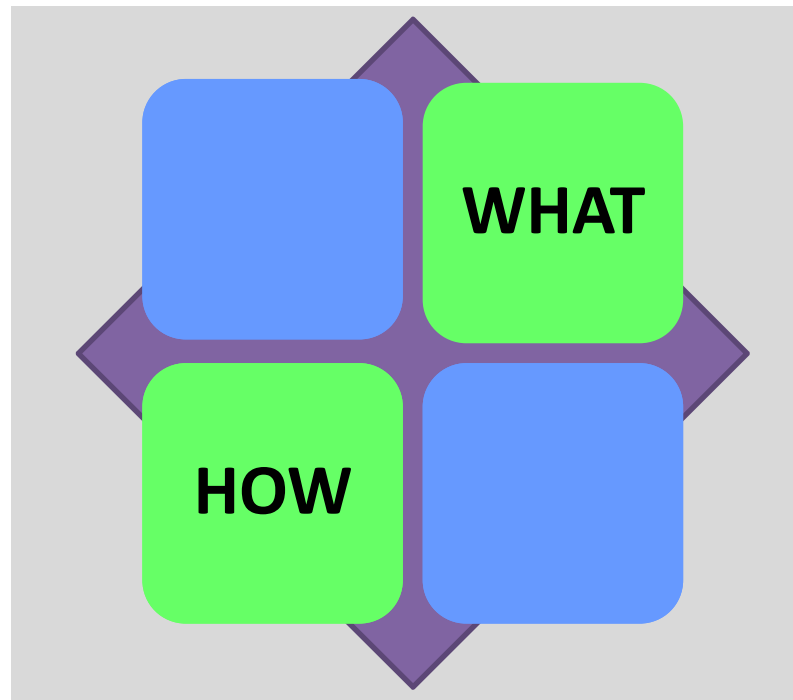
There Are Only *Five* Possible Gift Designations

- 1) Unrestricted, for our greatest needs or opportunities
- 2) For those served (students/patrons/clients/patients)
- 3) For those providing service (faculty/staff)
- 4) For programs (existing or new)
- 5) For special/capital projects



The Transition From **What** To **How**

The Second Half Of The Gift Conversation





Be Intentional: The Two Part Conversation Is The Answer

What could you choose to ask?

- Selling a vacation home to invest for retirement
- Meeting with lawyer to update your estate plan
- Anticipating an inheritance or other windfall
- Planning for business succession and retirement
- Creating Donor Advised Fund or a foundation



Be Intentional: The Two Part Conversation Is The Answer

What could you choose to ask?

- Wondering about required minimum distributions from deferred comp plan
- Starting a gifting program for a grandchild's education
- Recently met with your CPA who advised you to start reducing the size of your taxable estate



What You Learn About **How**

What gift planning strategies would you like to discuss?

- Donor to sell house & live with sibling in Arizona.
- Donor owns the house outright; paid \$85,000 for it 35 years ago; now worth \$315,000.
- Donor's 403(b) is worth \$455,000.
- Owns \$100,000 life insurance policy; sibling sole beneficiary.
- Donor's total estate = \$850,000
- Donor plans to live on proceeds from sale of the house, 403(b), and social security.



The Keys to How Field Officers Learn to Probe

- Gift motivation
- Triggering life events
- Giftable assets
- Tax-related issues
- Specific giving strategies
- Who should be consulted



Interactive Case Studies

90 Minutes Start to Finish

- Pick the players and coach them separately
- Role Play (Interactive Case Study)
- Debrief with audience & role players
- PG expert didactic explanation
- PGO joins Development Officer in role play
- Ends with group conversation



Interactive Case Studies

- Everyone participates
- Everyone plays a role over time
- Regular conversations, questions, insights
- Gift methods and assets in context
- Working as partners becomes norm



Conversational Gift Planning - The Ideal Outcome

Interactive Case Studies
promote and underscore
contextual approach



Author's Note

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Questions and Answers





Still Have a Question?

Contact: Craig H. Smith
Senior Consultant
John Brown Limited, Inc.
585-730-0853

E-mail: craig@johnbrownlimited.com
www.johnbrownlimited.com