


**PG Calc** | YOUR PARTNER IN PLANNED GIVING SUCCESS

### The Social Work of Fundraising



**Date:** October 22, 2020

**Time:** 1:00 – 2:30 Eastern

**Presenter:** Sherrie Beal  
Gift Planning Officer &  
Regional Gift Specialist  
The Nature Conservancy

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### Giving in a Time of COVID-19

“For avoiding a premature death, hum a birthday tune under your breath.

Get rid of grime, wash your hands all the time, like my role model, Lady Macbeth.”

- Anne



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### Poll



**How cautious are you right now about reaching out to donors during a pandemic?**

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### Overview of Learning Objectives

- **Prioritize** your planned giving prospects
- Know how to get at your **donor's motivations for giving**
- Avoid jumping to a gift vehicle without **understanding the donor's circumstances**

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### Who I Am and Why Planned Giving Matters

**Professionally**



**Personally**



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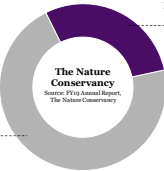
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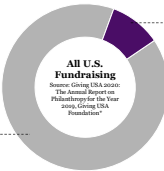
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### Bequests are a Significant Source of Revenue

Over the past 5 years, one quarter of annual fundraising revenue to the Conservancy has come in the form of deferred gifts, primarily bequests.



**The Nature Conservancy**  
Source: FY19 Annual Report, The Nature Conservancy



**All U.S. Fundraising**  
Source: Giving USA 2020: The Annual Report on Philanthropy for the Year Ending Giving USA Foundation

\*Latest report data

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**A Simple Ad**

**Have You Considered Including Nature In Your Will or Trust?**

The Minnesota Land Trust has made a commitment to conserve land and water resources in our state forever.

A gift through a will or trust (or through a beneficiary form), can shape the future of conservation in Minnesota.

For more information (including sample will language), please write or phone Sherrie Beal at.....

**Join our Legacy Society today!**



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**Michael's Legacy & Lessons in Facing Death**

"I saw your ad in the newsletter, and I would like the language to include MLT in my will."

"I have always loved the outdoors".

"I'm afraid I have no time: I'm dying."

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**Michael's Legacy**

**\$400,000**

the largest gift to date from an individual to a small, nonprofit

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**Resources & Tips from Real Life**

- Sometimes "I am sorry" and "Thank you" is all that you can say.
- People are touched by handwritten notes and genuineness.
- Many of our supporters simply want to put their affairs in order and our service to them is helping facilitate that.
- Read "Being Mortal" by Atul Gawande.

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**Giving in a Time of COVID-19**

"I'm bored; why not work on my estate plans?"

"TNC is a strong company; we as donors have to invest in making it stronger".

"[The pandemic] makes us reflect how we live going forward".



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**Prioritize What You Do**



"It's better to do a few things well vs. too many things poorly."

- Former Board Member

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## Communicate You're Open

Webpage & Response Form

Direct Mail Response Device

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## Your Prospects—Prioritized

- People **who care** about what you do:
  - Long time members
  - Board members (Legacy Ambassadors)
  - Volunteers
- People **who have a stake** in what you do:
  - Passion for cause
  - Benefited

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## Your Prospects—Prioritized (cont'd.)

- People With Wealth Indicators
- People Who Live Simply
- People Whom You Don't Have To Share
- People With Complexities & Stuff
- People Who Are Older...but not too old

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### When Marketing and Our Donor's Timing Converge



Dear Hank and Sharon,

Knowledge of your client's intent combined with a well-planned marketing strategy is critical to success. Planning for the future is essential to ensure your client's wishes are met and their legacy preserved.

**The Nature of Giving**

100% Charitable Deduction | 100% Exclusion | 100% Gift

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### Sharon and Hank – Loyal Donors



From \$100 to **\$5 million.**

**Hank and Sharon**  
LOYAL DONORS

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### Sharon and Hank – Loyal Donors

- Lived in "Millionaire next door" neighborhood
- Donating to TNC 20+ years, \$100 year ("commitment" to cause)
- Wealth Ratings ("capacity to give")
- In 2003, increased their annual gift to \$1,000 ("trigger")
- We cultivated; they contacted us when their circumstances demanded planning

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**LIFE EVENTS**

Retirement  
Care for Family  
Death of a loved one



**WEALTH EVENTS**

Sale of Business  
Stock Market Gains  
Downsizing



**TIMING**

**IS EVERYTHING!**

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**Ray's Gift: Stock**

- "I have a tax problem"
- "I own too much of Amazon stock"
- "I don't need income"
- "I want to support TNC now"
- "I forget things"



**Ray**  
STOCK DONOR

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**Poll**



**Have you encountered donors with memory issues?**

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**First, Get Your Own Plan in Place**

**60%**  
of Americans do **NOT** have an estate plan



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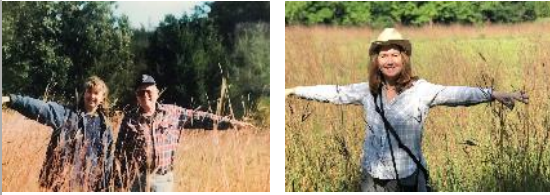
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**Talk to People While They are Present**



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**Prioritize But Don't Overlook**

**\$325K** Average size of estate gift to TNC

**29%** Fundraised Revenue from Estate Gifts

**25%** TNC donors who are loyal donors

**2%** TNC members that we know has TNC in plans

Prioritize but do not overlook anyone who has your organization in their plans.

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### Importance of Touchpoints

**\$325K**

LEGACY CLUB MEMBER

**\$166K**

NON LEGACY CLUB MEMBER

\*NUMBERS INDICATE THE AVERAGE SIZE OF AN ESTATE GIFT TO TNC

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### Start the Conversation

**Know what questions to ask donors to get at motivation, interest, capacity and competency.**

- Have you had to sort out the estate of others or been the beneficiary of the estate in a positive or negative way?
- Do you have an estate plan in place? What are the barriers for you in planning?

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### Be Cautious of Donors Motivations



Seeking tax breaks, revenge or the impossible

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**Start the Conversation**

Know what questions to ask donors to get at motivation, interest, capacity and competency.

- Do you recall what influenced your first gift to our organization?
- Would you like to become more involved with our organization? What might that look like?

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**Real Life Answers**

"I'd like to volunteer and become more familiar with your work."

"I would love to see more of your projects or volunteer, but I am just too busy. I would like to do more".

"No, I am giving all that I can give and I need to save what I have for (my old age) or (the kids)."

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**Start the Conversation**

Know what questions to ask donors to get at motivation, interest, capacity and competency.

- Have you talked to your children (or loved ones) about your plans?
- If you made that gift to us, would you have sufficient resources to cover your other needs?
- I need to remind you that [this particular gift] is irrevocable and we would encourage you to get outside counsel.

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**Start the Conversation**

Know what questions to ask donors to get at motivation, interest, capacity and competency.

- How can I be of help?
- **Would it be helpful to you if I touched base with you from time to time? How often?**
- I would be remiss if I didn't ask you if you have considered including charity in your estate plans?

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**Don't Lead With the Gift Vehicle**



Find out your donor's motivations and circumstances first.

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**Can We Avoid Leading With the Gift?**



"I have a property that I would like protected, but I can't afford to donate it to you."  
- Jim

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**Can We Avoid Leading With the Gift?**

“What is motivating you to come to The Nature Conservancy at this time?”

“What are your income needs?”

“Have you talked this over with your family?”



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**A Gift Worth Your Time**



“I just love your organization and I would like to do something for [our cause] through my estate.”

“I wish I could do more.”

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**Rules I Live By to be a Successful Gift Planner**

- Expand the tent
- Be wary of donors who lead with seeking benefits
- Run from certain gifts
- Be honest

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**Rules I Live By to be a Successful Gift Planner**

- Share credit and expand the relationship
- Know your limitations and lead with your organization's priorities.
- Admit when you don't know the answers
- Use your ears and eyes

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**Rules I Live By to be a Successful Gift Planner**

- Be vulnerable, authentic, sometimes unscripted & SILENT.
- Do not be consumed by the workplace

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**Questions?**

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This Presentation is Dedicated to The  
Memory of Joey Marxhausen Who Loved  
Nature & Whose Mother is a Social Worker  
Who Influenced My Planned Giving Practice

Sherrie Beal | [sbeal@tnc.org](mailto:sbeal@tnc.org)

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