

Focus in  
this issue:  
our future  
part II



Fall 2011

Practical Planned Giving Marketing Ideas for All Fundraisers

# Planned Giving tomorrow



by  
Dr. Suzanne Tucker Allen

## Only For Nonprofits with a Future “But Donors Want to Give to Annual Campaigns!”

It doesn't matter whether you're a human being or a nonprofit organization: it's never too early to start planning and saving for the future. For people, this means starting an IRA and paying into it regularly. For nonprofits, it means building endowment.

Think of endowment as an NPO's "savings account," established early and added to often, earning interest, and insuring present stability and future security, to carry their mission forward.

A well-managed endowment offers nonprofits an income stream that grows faster than inflation. *So why don't more nonprofits don't pursue it?*

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by  
Gabrielle Dudley

## By The Numbers... A Low-Stress Approach to Making the Ask

Today most small to medium size nonprofits are merging major gifts and gift planning programs, so that all gift officers, regardless of title, are charged with meeting both current and deferred giving goals. What's a traditionally-trained gift planning officer to do? Learn to cast aside your fear, put on your major gift officer hat, and make the ask!

CONTINUED ON PAGE 6



by  
Viken Mikaelian

## Wake Up, Dear. You're Late for Reality.

Right up to the Wright Brothers' first flight, people said humans could never fly. Same with traveling to the Moon: "impossible."

*Most of the human race only sees the world clearly when it's in the rear-view mirror. Maybe that's inevitable, because we let ourselves be dominated by denial and plain laziness.*

But excuses don't feed the bulldog. And fundraisers wearing rose-colored glasses will find it out the hard way.

Now hear this: *Time to come to grips with the new paradigm.*

The down economy is more than just a bump in the road. It's time to modify your world view. Crank up your tactics. And leave your laziness and denial behind.

Check out the selections from John Foster's *Wake Up and Smell the New Paradigm* in this issue on page 2. And read the whole white paper for yourself at:

PlannedGiving.Com/1047.

*Do it now. Because chances are you're already late for yesterday's facts.*

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## Is Your Planned Giving Website Senior-Friendly?

Some new survey numbers indicate it better be. The new Nielsen Norman Group "Web Usability for Senior Citizens" survey not only notes that more than 12 million Americans over the age of 65 use the Internet, but that the numbers are increasing.

And dig this:

- Of those who decided to stop (quit) trying to execute their online tasks, 71% were age 65+, while only 29% were 21 – 55.
- Of those who ended their tasks because they had successfully completed them, only 39% were age 65+, and 61% were 21 – 64.

What this means is your website better have intuitive navigation, clear content, and user-friendly tools. *Or you're going to lose some members of your most valuable demographic.*

# Wake Up and Smell The New Paradigm

## Bold Fundraising versus Diminishing Returns

by John Foster



Not so long ago, the outlook for fundraising reflected the sunny optimism of the overall economy. Our donors had secure, well-paying jobs; the

than the previous month's.

What a difference a few years and some economic "uncertainty" make.

Your donors may think the world of you and of the institution you represent, but if one of their household's jobs disappeared this year and it's come to a choice between a \$500 gift to you or outfitting two kids for a season of travel soccer, guess which check is going to get written this fall?

Now, nothing goes on forever, and we should be confident

the hard times we're currently logging through.

We in planned giving are supposed to be the creative, non-traditional fundraisers. Looking over the current state of our economy and mood of our donors, let's try out some marketing and gift strategies that might fit these troubled times, reduce repetitive solicitations that meet diminishing responses, and build our endowments in the process...

*If these paragraphs struck a chord in your fundraiser's soul, then the*

## WHAT A DIFFERENCE A FEW YEARS HAVE MADE

value of their McMansions and vacation condos was projected to follow an endless upward arc; and when they opened their retirement-plan statements, the ending balance was always gratifyingly larger

that economic conditions in general, and fundraising results in particular, will improve over time. Yet even if good times return soon, it's possible for fundraisers to draw some non-traditional conclusions from

*whole article ought to really ring your chimes. Read it now at: [PlannedGiving.Com/1047](http://PlannedGiving.Com/1047)*

John Foster is an experienced fundraiser and a contributor to *Planned Giving Tomorrow*.

# We're Not Special and We Don't Deserve a Pass

by Viken Mikaelian

Forty years ago, a non-profit was viewed as an "angel" organization, both by its employees and society at large.

*That's the problem.*

That type of thinking has gotten us where we are today – believing that nonprofits are special and therefore merit special treatment. That we deserve a pass.

**Memo:** *We're just like any other business and we should run our nonprofits just like one.*

Have you heard of the cook who opened up a restaurant because he loved cooking? The artist who opened up an

art gallery because she loved painting? They're both broke. I was in Santa Fe recently and not one of the six gallery owners I asked was an artist themselves. (In fact one used to play for the Baltimore Orioles!)

That's because business-based, marketplace realities won't pass you by just because you love what you do. The same applies to nonprofits.

## Think Like a Business – Or Else

There are some new bullies on the block who will treat your nonprofit like a business

regardless of your opinion. The same folks who are regulating the banks will soon be regulating you... and the gifts you raise... and maybe even savings accounts. Sure, so far it's just talk, but in the business world you don't wait to prepare for trouble. You get ready for new fines and penalties for non-compliance now. It's an annoyance and it gets in your way, but that's the way business is.

I recently visited a country store. The manager proudly informed me they were run by a non-profit. Without thinking I replied, "I can tell."



# “Listen, Do You Smell Something?”\* Part 1

by Joe Tumolo

As fundraisers and sales-people, we are in the relationship building business. The faster we can develop strong relationships with donors and prospects, the more effective we will be.

A big part of building relationships is being able to relate to people, making them feel comfortable and building trust quickly. One of the best ways to do that is to build rapport. Rapport is a connection or bond we make with people.

Who are you most likely to make a connection with, someone who is similar to you, or someone very different, with whom you have little in common? Of course it's the person you feel is most like you. So it follows that in fundraising and selling, prospects like dealing with people who are most like them – someone they can easily relate to. Someone they can trust enough to reveal their emotions and feelings.

And the more we can get donors/prospects to communicate on an emotional level, the better results we get.

## How to Build Rapport

The behavioral science called Neuro-Linguistic Programming (NLP) can enable us to communicate better with others in ways that go well beyond spoken language. Non-verbal communication – how we say it and how we present ourselves when we say it – means much more than the actual words we use. Consider the following:

1. What we say (the words we use) account for 7% of our communication
2. How we say it (our tonality) accounts for 38%
3. Our physiology (body position, movement) accounts for the 55%

I mentioned earlier that people like to hang out with, do business with and connect with people they have things in common with. One way

*\*Are you wondering about the title of this article? Hint: It's from a popular movie from the 1980s. I'll explain it next month in Part 2.*

to create that connection is to match our communication style with the other person in all three areas. Let's take a look at how we can do that.

## 1 What We Say

We can use words that the other person uses or can relate to. If your donor/prospect tends to use certain phrases, you can use those same phrases when you communicate with them. For example, your donor may use a phrase like “win-win.” Well at some point in your communications, you can throw that phrase in there. Or if your donor is a golfer you can use expressions like “Let me tee it up for you.”

## 2 How We Say it

You can match your tonality to that of your donor/prospect. If your donor is a stockbroker from Manhattan, he or she may tend to talk fast and a little loudly. You can

match his or her tonality by speaking faster and louder as well. If your donor or prospect is from the American South and speaks slower and softer, you too can speak slower and softer. (Now imagine how intimidated and suspicious that Southerner could feel if you mixed up those tonal styles and used the Manhattan style instead!)

## 3 Our Physiology

When visiting face to face with someone, you can match their posture or their mood. If your donor/prospect is leaning back in their chair in a relaxed position, lean back in your chair. If they are coming across a bit hurried and impatient, then you cut to the chase and lean into them. (Have you ever spoken to someone who is all business? They are not really interested in small talk and just want to get down to brass tacks. Make sure you match their style. Leave the small talk for your “touchy, feely” donors and prospects.)

Now, matching the communication style of others may seem to be a fairly subtle technique. *Just remember sometimes it's the little things that make a big difference.* Does it always work? Nothing always works. But it's easy to try, and *with practice it can become second nature.* And instinctive rapport-building is a valuable skill.

*Next issue, in Part 2 of this article we'll explore ways to take this concept to next level with how people have different preferences when it comes to communication and building rapport.*

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## Did You Know?

The first endowment in western civilization can be traced to Plato, who bequeathed to his nephew his academy and farm so Plato's followers and their studies could be funded for centuries. *H/T Suzanne Allen*

## Giving by Age Group

(source: Convio)

Gen Y (born 1981 – 1991)

- 31.06 million Americans
- 54% give

Gen X (born 1965 – 1980)

- 39.53 million Americans
- 52% give

Baby Boomers (born 1946 -1964)

- 45.17 million Americans
- 66% give

Matures (born 1945 or earlier)

- 25.41 million Americans
- 77% give

## Guerrilla Marketing — Not!

There was this pizza-shop owner.

The police stopped him because he was acting suspiciously, leaving his own shop with a little box in hand and sneaking into a rival pizza shop nearby. Turns out the guy was *catching mice in his own pizza place, carrying them over to his competitor's shop, and releasing them there.*

The police asked, "Why are you doing this?" He replied, "The other guy started it!"

This is a true story. *We couldn't make this up.* (It happened in Philadelphia – where else?) And it's an excellent example of "within-the-box" thinking. Maybe even "trapped-in-the-box" thinking. Like the mice.

In marketing, we must do better and we can do better – even without attracting law enforcement.

## Seven Guaranteed Steps to Drive Prospects to Your Planned Giving Website

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## It's All About Endowment

Some fundraisers might say, "But donors want to give to annual campaigns. They want to see their money being used now, not invested for the future."

### [ PHILANTHROPIC FOLKS UNDERSTAND THE NOTION OF SAVING ]

To them I reply, philanthropic folks understand the notion of saving. An endowment gift is an attractive option for donors who want to build a permanent legacy. It can also be a wonderful way to honor the donor's family while creating unique giving opportunities for the future. Imagine people donating to your endowment fund as a way to recognize a birthday, anniversary or holiday!

### Real-World Advantages

Here's an example of how this can work: an agency had anticipated a gift of cash from a loyal donor and was disappointed to find the bequest

## ChCAP Builds a Bridge to Giving

"There's a disconnect between financial advisors and planned giving professionals," says Nick Gregory ChFE, CFP®, CEBA, "They don't communicate well. They believe they're fighting for the same dollar, and that's a shame because it isn't true, and it doesn't have to be that way."

language stated the money must be placed in an endowment and only the interest could be returned to the nonprofit.

To honor the terms of the bequest, we helped the agency set up an endowment fund that would provide a dependable, perpetual stream of income while honoring the donor's generosity forever. Then, another gift arrived as a tribute to the previous donor. The organization began to publicize the new endowment

fund, as did the foundation, and the gifts kept coming.

Soon the organization developed a marketing campaign around that original endowment donor's legacy and asked others to not only consider making a bequest, but to consider starting their

### [ ENDOWMENT GIVING HAS PRACTICAL ADVANTAGES ]

own endowment fund, too. A year later, that organization has three named endowment funds supporting it. It conducts an annual endowment appeal, and it has instituted a legacy society to honor the living individuals who have named the nonprofit in their estate plans.

He's on a mission to bridge that gap.

In Nick's view, *planned giving is not an island.* The distinction between what fundraisers do and what financial advisors do is an artificial one. So he's getting both sides to sit down at the same table together, and his means to this end is the Charitable Capital Design Center (ChCAP).

The organization incurred no additional costs to start and support these new income streams because our community foundation manages all the distributions, performs all the audits, sends quarterly reports, manages all types of gift transactions – including electronic transfers of stocks and gifts of property – and sends tax acknowledgments and thank-you notes to donors.

Now consider your own nonprofit, and ask yourself the following critical questions:

1. *What is our position regarding endowments?*
2. *Where will we be in 10 years, with an endowment and without one?*
3. *What other organizations in our region have endowment funds?*
4. *How do our donors feel about endowments?*
5. *How soon can we start an endowment?*

After all, it's your future and it's all about endowment.

Suzanne is VP of Development at Akron Community Foundation, where she helps charitable individuals and organizations build a permanent legacy in the community by establishing named funds. You can contact her at 330-376-8522 or [sallen@akroncommunityfdn.org](mailto:sallen@akroncommunityfdn.org).

Spun off in 2000 from Nick's firm, The Financial Engineering Institute, ChCAP has grown to 39 licensed offices nationwide encompassing more than 4,400 top-tier financial advisors. The firm enables financial advisors to better serve their clients while educating fundraisers on how a little professional financial know-how can go a long way in growing endowments.



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## Internet Means Money Matters to Online Seniors

A non-scientific scanning of the various quotes from seniors using the Internet who were included in Nielsen Norman Group's Web Usability for Senior Citizens survey shows many respondents use it for money and livelihood-related activities like online shopping, banking, researching their stock portfolios, and paying for their subscriptions to the *Wall Street Journal!*

Nick brings to this project more than 33 years of experience consulting with attorneys, accountants, and financial services professionals in some of the largest financial services organizations in the world. He also offers a precise and detailed understanding of cash management, taxation, estate preservation, retirement planning, and charitable giving.

Nick declares, "I have a passion for this. We're getting the financial advisors and nonprofit professionals to work better together to drive dollars to nonprofits while better serving overall donor objectives. Because if we let the tax man get that money, shame on us!"

Visit the ChCAP website at <http://www.chcap.org/>.

## The Case for Guerrilla Fundraising® by Wilke Nelson



*Small charities face seemingly insurmountable odds. Guerrilla Fundraising gives them a fighting chance.*

The genesis of Guerrilla Fundraising can be found in the standard litany about good fundraising. It goes something like this: *To raise money for any cause you need a good case; prospects to take the case to; and board members and other volunteers who can raise money from their peers.* Planned giving also requires a sufficient marketing budget, capable staff, and management with the long-term view necessary to invest in marketing when the results will not be realized for many years.

**Many prospects remain unqualified and uncultivated**

Most charities are generally somewhere along the road to this ideal situation. But very few organizations have the dedicated resources necessary to invest long-term to realize planned giving's true potential.

Most consulting firms offer some "capacity building services" to address deficiencies in the fundraising recipe. But due to expense and deferred payoff, many charities just don't have the financial ability to invest in such services in the first place.

### Reality-based, or Else...

A further complicating factor is the temptation to adopt lingo and practices that result in setting an arbitrary threshold for the level above which people will be considered major donor prospects.

Internal policies on giving levels based on charitable industry or peer organization "standards" often reinforce this problem. An example could be setting the threshold for donors receiving face-to-face cultivation based on arbitrary standards and not the charity's own reality. Such policies are often further complicated by inaccurate and superficial criteria such as giving potential based on wealth screening. The net effect is many promising prospects remain unqualified, uncultivated and ignored.

Furthermore, these processes play out in a fundraising world that has changed, perhaps forever. *With more competition and donor fatigue*, it is increasingly difficult to find the right board members and volunteers necessary to advance successful fundraising. A knock-on effect is that it is more difficult to find the institutional support necessary for upfront, sunk costs like planned giving marketing.

*So how do you fight these trends, do more with less, and accomplish the seemingly impossible against apparently overwhelming odds?*



We'll answer that question in the next issue of *Planned Giving Tomorrow*.

*Wilke Nelson is Deputy Vice President, Development, American Rivers*

Here's a simplified, step-by-step breakdown of techniques I've found to work. Of course, I'm still learning, and learning from experience is critical to getting better at what we do!

Some introductory hints: Try

activity at your organization – “Did you hear about...?”

**2. Say Thanks** – and Transition. Thank them for their past giving (time, service, financial support). Acknowledge how much it has meant

we are just completing our master plan for a new wing so that in the future, no child will be turned away due to lack of a hospital bed.” When you are finished making the case, the donor should fully understand the impact your program or

gift, donor recognition, or that the gift may be pledged over a specific time period. Then be silent. Let them mull it over and respond. They may respond with questions you need to answer or objections you need to overcome. With objections, I like to use a “feel, felt, found” approach: “I understand what you are saying and how you feel about this problem; others have felt the same way; but some have found that despite their concerns about that particular professor, the opportunity to helping nursing students receive their education and graduate fully equipped to meet our nation’s nursing shortage is so compelling that it merits strong consideration.”

**5. Close.** If the donor says yes right away, GREAT! Thank them and perhaps have them sign a pledge form if you have one with you. If they need time to think about it, tell

## MAKE YOUR CASE CLEAR, CONCISE, COMPELLING

to schedule 30-60 minutes, depending on the prospect’s schedule; select a location that is most comfortable and convenient for the donor; avoid mealtime meetings (too many interruptions!); select locations where noise levels or lack of privacy won’t be a distraction.

And now, by the numbers:

**1. Make the Opening** – Greet, Reacquaint, Establish Rapport. Just like when you meet a friend for coffee, you say your hellos, make some small talk (weather, family, kids, jobs, the last time you got together), and then you might update them on recent

to your organization and the people it serves. Then transition to thanking them for taking the time to meet with you today to talk about a program/project/opportunity you are excited about and think might interest them.

**3. Make Your Case for Support.** Clearly, concisely, and convincingly share with them about the program/project for which you seek support. Sometimes I couch it in terms of “past, present, future.” “As you know, in the past, we had to turn away children because our census was frequently at capacity. Today,

project will have on the lives of those you serve.

**4. Ask for the Gift!** Say something like “We hope you will agree that this program/project is worthwhile and will have a tremendous impact on those we serve, and we would like to ask that you consider a gift of \$\_\_\_\_\_ to help us realize this dream/achieve this goal/build this amazing facility/support this critically important program, etc.” Ask for a specific dollar amount or at the very least, offer them a target gift “range” that you have in mind. If appropriate, bring up a challenge matching

## The National Conference on Philanthropic Planning: Professional Development and Just Plain Fun

Sponsored by the Partnership for Philanthropic Planning, the **National Conference** is always a great opportunity for fundraisers to grow professionally, network with peers, and have a fun time.

The **2011 National Conference** (October 4-6 in San Antonio, TX) was no exception. It featured presentations and breakout sessions, opportunities to engage with peers, and a whole lot more. By the way, the keynote with Doug White and Tim Hanford was a blast. Sorry if you missed that one.

This year’s conference also featured web-based enhancements that enabled attendees to read /comment upon presentation abstracts, suggest new products and services, coordinate networking sessions – *and that was before the Conference even started.*

I was glad I made it to the conference. In addition to making my own presentation, I caught up with old friends and made new ones and had a great time.

Take my advice: *Be sure to sign up for the 2012 Conference, (pppnet.org) because if you don’t, you’re not just missing out on a good time – you’re denying yourself a raft of professional advantages no fundraiser can afford to miss.* ~ Viken Mikaelian



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them you want to leave the written proposal that outlines what was just discussed, and that you will check back in a week or so to see where they are in their thinking about this. If they say no, then try to ascertain whether it is a “no, never,” or a “no, not now.” Is it the project or the amount that is the obstacle? Will negotiating a lower amount

be experiencing legitimate financial challenges. You may have missed the mark with the right project—but you can try again later! Donors make major gifts when the time is right for them and your timing may just be off.

Be sure to follow up with a thank-you note for their time, make a promised call, or provide a pledge form or other

## A Honey of an Idea

*From our friends at The Planned Giving Company, here's a tip from Charlotte Meyer, Director of Planned Giving of the Ocean Conservancy, who offers a creative way to get a face-to-face meeting.*

“Have a shtick to get in to see people. My husband is a beekeeper. I call or write to tell a prospect I’m going to be in town and I’d love to bring them a jar of my husband’s honey as a small token of thanks for their support. If I don’t hear from them, I just drive by their house and I drop it off in the mailbox or leave it on the porch with a note. I almost always hear back from



them via email or a call to say, ‘thanks!’ They don’t forget being thanked in a sincere and personal way. It makes a positive impression. Something unusual and interesting about you, such as quirky hobby, a signature dessert or cookie, or growing prize roses, can be the key to open the door to a conversation about a planned gift.”

To read more of this interview, check out the Planned Giving Company’s website, [plannedgiving-company.com](http://plannedgiving-company.com)

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## [DON'T TAKE "NO" PERSONALLY]

work? Will offering to spread the gift out over a longer pledge period help? What if you delayed the first payment? If the project is the issue, is there another project more close to their heart that they would be willing to hear more about in the future? Can you come back and continue the dialog at a future date? Don't take a “no” personally. The relationship may not have been cultivated long enough or deeply enough. They may

information they have requested. Then pat yourself on the back for a job well done. Celebrate your successes (dark chocolate works well for me)! Ponder your “no’s” so you can improve next time. And continue getting out of your office to meet with your donors—because there is no money hidden under your desk!

Gabrielle Dudley is Director of Development, Marketing and Special Gifts, at Seattle Pacific University.

## Government Cutbacks?

### Planned Giving to the Rescue! *By Geoff Harrington*

State, local, and federal spending cuts leave no room for argument: donor support of nonprofit organizations through major gifts isn't just critical – it's becoming the only game in town.

Lucky for us planned giving represents the best way to close more and larger gifts faster. Just check out these numbers:

- 95% of our nation's wealth is in easy-to-give assets, while only 5% is in hard-to-get cash.
- A total of \$136 trillion in intergenerational wealth transfer is expected to have taken place by 2030.

- At least \$6 trillion in wealth transfers are expected to be in the form of bequests to NPOs.
- The average planned gift is 200 times larger than a donor's average annual gift.

Avoid the pitfalls of conventional and often misguided thinking. For example, some organizations fear that planned giving will compete for donors with the annual giving effort. In fact the opposite is true. *Planned giving donors are more likely to become long-term, repeat donors to your organization.* They wish they could do more, not less, to support your mission.

Make it easier for them by showing them the variety of attractive options you offer. Have confidence in your donors and trust them to make the right decision. Their support will help your organization in the short and long terms.

Don't let discouraging news out of the halls of government cause you to throttle back on your planned giving efforts! Now is the time to put the



pedal to the metal.  
Geoff is Senior Vice President, Development Services, [VirtualGiving.Com](http://VirtualGiving.Com)

## Advanced Guerrilla Marketing — No Anchovies

A pizza place started a promotion that said, “Bring us the Yellow Pages ad for any other pizza place, and we’ll give you a free large pizza!” Lots of folks took advantage of the offer, so the shop made a lot of new friends and secured new customers.

*What else did they accomplish?*

They removed their competition's Yellow Pages ads from hundreds of customers' phone books.

Translation: They *marketed themselves* and *de-marketed* the other pizza shops simultaneously.

Bold? Sure. Sneaky? Let's call it “clever.” Effective? Absolutely. And that's the bottom line.

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Hard Times Fundraising is a Job for... Us!


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(WE'RE NOT SPECIAL) CONTINUED FROM PAGE 2

(Inefficiency and lack of professionalism told the story.) The manager took offense at my comment, but that just proved my point. A savvy retailer would have asked me why I said that, what I saw that needed improving, and how he could enhance his retail operation.

No matter how proud you are of the good your nonprofit does, you have to leave your ego at home. That's how you keep your focus on succeeding as a business – for the benefit of your mission.

## Think Like a Business – Market Like a Business

Marketing like a business means taking advantage of the best practices developed in the for-profit sector.

For example, some nonprofits still flirt with extinction through resistance to establishing and exploiting an online presence.

This reminds me of a healthcare organization that, to its credit, had decided to take its planned giving program online with a website. But taking the site live was delayed and delayed because of disagreements between personnel over fonts, point sizes, and other niggling design elements. This is because the nonprofit was not aware of the principle that has been proven in the for-profit sector again and again: graphic design accounts for only 10% of the effectiveness of a website, a newsletter, or other direct mail piece.

From a business perspective, you spend your time and

treasure where it's going to pay you back best. To the healthcare organization, this means, "Forget about the fine points of graphic design. Focus on your messaging, and on the promotion of the website to the *best prospects!* And take the thing live, otherwise it's doing *no good at all.*"

Not thinking like a business also invites the self-defeating "scarcity mentality" – which is something I'll cover in a future issue.

*"In the future, there will be only two kind of nonprofits: endowed and extinct."*

The endowed nonprofits will be those that think and behave like a business, because they know they're not "special."