


The 26th Annual
Planned Giving CONFERENCE
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The Secret Sauce For Gift Planning: Lessons From Successful Nonprofits



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What Is a Secret Sauce?

- A secret sauce is more than the discipline and focus associated with best practices.
- It's a unique technique or feature regarded as the chief factor in an organization's success.
- The most successful planned giving shops each have a unique culture - but there are observable secret sauce patterns we can learn from.



The Self-Imposed Challenges for Charities in Gift Planning

We'll Get Serious About Gift Planning One Day

- Right now, we've got money to raise!
- Or you hear:
 - We just don't have the time for gift planning.
 - We'll get to that when.....
 - We only want cash. (The other stuff is too complicated and takes too much time.)
 - We just want unrestricted money.

Oh....But We're Different

- A frequent refrain:
 - We really don't need planned gifts. We are very successful in our annual fundraising. Besides, there's no way to budget them.
 - We've never received a planned gift - our donors prefer to give us cash. (Aren't we lucky?)
 - And by the way, our donors are different too.



The Very Real Challenges for Donors in Gift Planning

Shifting Tax Laws and Complicated Concepts - Where Do I Start?

- Donors get lost in the details.
- We contribute to the confusion when we focus on the details of the tools of our trade rather than on their objectives.
- We give them detailed illustrations instead of tools to articulate their planning goals.

24-7 Noise: Everyone Seems to Want My Money!

- Everybody knows my name (and has my e-mail address and telephone number)! How did that happen?
- I receive direct mail, electronic mail, robo calls, and telephone calls. Make it stop!
- I've told my story three times. No one seems to remember.

What Happens to My Gift When I Die? (And Other Existential Questions....)

- There's a lot of talk about wanting the gift - but not much information on what happens after the gift arrives.
 - Do you spend it?
 - Does it go to endowment?
 - Who makes decisions?
- There sure are a lot of donor lawsuits - how do I know you'll keep your promise?

How in the World Do I Talk to a Person?

- There's only a contact form or 1-800 number - there's no directory!
- Who do I call? I need a name. I want to talk to that nice person I talked with last time.
- How do I get through? There's only an answering machine.
- Why is it so hard???



The Four Ingredients of the Secret Sauce

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- An organizational commitment.
- The ability to execute a plan.
- A donor-centric focus.
- A strong relationship with the advisor community.

An Organizational Commitment



- You must have a commitment from the top of the organization - the entire executive team.
- You must have a staff that understands the role of development and considers it a team exercise. This culture is driven from the top.
- You can't raise gifts for the future without a plan for the future.
- The internal structure and incentives drive success.
- The board must understand gift planning and buy in.

The Ability to Execute



- There must be a strong platform to support gift planning and relationship-based fundraising. That includes:
 - Data management and reporting
 - Policies
 - Metrics and goals
 - Qualified, motivated, trained staff
- And you must have a team structure aligned with goals and expectations.

The Ability to Execute



- There is no substitute for data-driven planning and analysis.
- There must be coordinated clarity in messaging.
- And there must be trust and transparency, internally and externally.

A Focus on Donors



- The “we wants” and “we needs” must go - and be replaced by “you cans” and “you haves.”
- Allow donors to partner with you - make it a meaningful experience.
- Hear, celebrate, and feature donor voices.
- Make a commitment (and create processes) that ensure you honor donor intent.

A Strong Advisor Community



- Advisors are the gatekeepers for your donors.
- Charities should reach out, get to know, and create a level of trust and respect in advisors.
- Advisors need to know you, your charity, and how to engage in the philanthropic conversation.
- Develop a collaborative - not pre-emptive - environment.



So How Do You Create Your Own Secret Sauce?

The Real Secret Sauce



- Pay attention to the platform. Without a strong platform, the information you gather and relationships you build will become scattered and lost.
- Commit to ongoing outreach. You can't build relationships behind a desk. Relationships are built on trust and knowledge.

The Real Secret Sauce



- Know your organization's vision and key outcomes. Donor's give to results.
 - Don't attack with a list of "I wants."
 - Lead with a list of "you cans."
- Know your donor base. What are your unique, top donor segments?

The Real Secret Sauce



- Be realistic about your fundraising maturity. Don't draw up a plan built around sophisticated gift planning vehicles if your current fundraising strategies are direct mail and special events.
- When you put together your plan, start at the top. Let objectives drive strategies, and strategies drive tactics.

The Real Secret Sauce



- Work your plan. Do not get distracted by what someone else is doing. They have different top donor segments, a different mission, a different structure, and are at a different level of fundraising maturity.
- Celebrate and report success at every stage.

Final Thoughts

- Work smart. Start at the top, develop your objectives for the year. Develop strategies geared to your top donor segments. Then develop tactics to execute those strategies.
- Stay focused on your donors.
- Measure, analyze, and evaluate.
- Identify your secret sauce!



Final Thoughts
