

Focus in
this issue:
our future



Spring/Summer 2011

Practical Planned Giving Marketing Ideas for All Fundraisers

Planned Giving tomorrow



by
DEBRA ASHTON

IT'S ALL ABOUT ENDOWMENT But Most Nonprofits Still Don't Get It

A title like that certainly entitles a fundraiser to ask, "Okay, what is it precisely I don't understand?" So first let's look at what's special about endowments.

You could say what sets endowments apart is that they're "leveraged." Look at annual giving: As the money comes in, you use it to pay off the various day-to-day expenses of your nonprofit: money in, money out. With endowments, however, you never spend the principal of the gift. Your charity uses the interest earned by the invested endowment funds to pay its bills and to support its programs. So at the end of the day you still have the original gifted funds. And they're still working for you, earning more interest to pay next year's bills.

Small Is As Small Does

For example, let's say you're a small nonprofit community center, and the rent for your facility costs \$25,000 a year. Instead of constantly running around trying to

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SHOW, DON'T TELL. (IT WORKS) Steve Perry's Forthright Approach to Fundraising

Steve's principles of fundraising marketing are just as bold as the manner in which he expresses them.

And they work. Because he applies for-profit *business principles* to the nonprofit world.

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by
VIKEN MIKAELIAN

READ EVERY INCH! It's All About Your Future

Why do so few pursue planned gifts when it's so *easy*? Because planned giving is *proactive*, yet most folks are *reactive*. If everyone was proactive, we'd all have perfect teeth and dentists would be out of business.

So stop focusing on 5% of this nation's wealth that is in hard-to-get cash. Instead, tap into planned gifts that are *easy* to get. I still hear: "But, but, but, we need the cash now" from the *same* birdbrains who sang that *same* song 10 years ago. *What is it they don't get? Can we get different results from doing the same thing over and over?* No. Prove me wrong and I'll make my next public appearance in a pink bikini. Promise.

In this issue: [Debra Ashton](#) explains what's so special about endowment. [Steve Perry](#) shares his bold take on what works. [Jim Pierson](#) tells us the difference between your guitar and Eric Clapton's guitar. [Joe Tumolo](#) cuts through the chaos with sound advice on donor cultivation. [Michael Rosen](#) explains why women are important in philanthropy. And more...

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Tax Code Changes Bad News for Nonprofits?

A recent survey by the Association for Healthcare Philanthropy (AHP) indicates that most fundraisers feel that pending tax code changes, which include significant reduction in tax incentives for charitable giving, will negatively impact their programs. They believe that tax incentives offered to prospective donors are critical in closing gifts.

The survey was emailed to 4,654 AHP members, of which 317 responded. (*There's a lesson in those numbers about e-blast response rates, but that's not the subject of this article.*)

This is no surprise. The tax advantages of planned gifts represent a major selling point. Losing that lever from our marketing toolbox is no joke. Maybe it's time for us to start exercising our noggins on how to market planned gifts effectively in spite of any tax law changes that may come our way.

SHORTSIGHTED NONPROFITS IN TROUBLE

There's Another One in Each Day's Paper

by VIKEN MIKAELIAN



Of course, these are urgent times, and nonprofits are selling an "intangible." It's tough to make a compelling case to a prospect who's *choosing between fulfilling a personal need and making a donation*. For some, it's even tough when they're choosing between *purchasing a luxury* and making a donation.

But let's face it: *nonprofits' real problem lies within*. Why are they really in trouble? Because they never pursued the gifts that really build endowment—planned gifts.

For example, a few weeks ago I received a call from a fund-

raiser at a small private school. She was new at her job, having replaced someone who had established a relationship with us previously.

"We're just not ready for planned giving yet," she told me in a plaintive voice.

As long as that fundraiser continues to focus on the urgent (immediate \$100 gifts) rather than the important (future \$1 million gifts), her school will always be in trouble and will never be ready for planned giving. *Foolish nonprofits stagnate while their fundraisers run around in circles putting out everyday fires.*

Progress is made by staying focused on the future.

I am not saying ignore the present. But balance immediate gifts with future gifts. The easiest way to do it is by going after the planned gifts *anyone can make*. Gifts that are easy to give, easy to receive, and easy to market. Gifts that do not

affect donor's cashflow. These are: *bequests, appreciated "stuff," IRAs and life insurance*. They make up 85% of all planned gifts. And most provide immediate benefits (that is, *they are not deferred*). Remember:

- Cash-starved times are the best times for planned gifts.
- Planned giving targets the 95% of this nation's wealth that is in easy-to-get assets.
- A planned gift is typically 200 to 300 times the size of a donor's largest annual gift.
- Those who make planned gifts make you part of their family. *Their giving is likely to increase over time.*
- If you're not asking your prospects for planned gifts, *someone else is*. And you will soon see *your cash gifts going out the door, too.*

[If you're a small nonprofit and don't know where to start, check out what Brian Sagrestano and I are up to with **Planned Giving in a Box**. *Ad on page 6.*]

Appreciated Stuff?

by JAMES PIERSON

Donors can make contributions in the form of "appreciated stuff." Like appreciated securities, for example. But it might also mean a *1955 Corvette*, a collection of antique glassware, or ...

How about a bunch of famous guitars played by *Eric Clapton* ...

That's what was on the block at a recent charity auction sale held in New York City for the benefit of Clapton's Crossroads Center.

Located in the Caribbean, the *Crossroads Center* is a drug and alcohol addiction treatment center which the celebrated guitarist founded in 1998 after a career dogged by substance abuse.



Appreciate this: How much is an old guitar – or an old amplifier – worth? Well, if it was Eric Clapton's '48 **Gibson hollow body electric, it sold for \$83,000**, which is only about \$53,000 more than such a vintage guitar usually brings.

More than 70 of the guitarist's instruments sold at the auction for a total of \$2.15 million, all of which benefited the Crossroads.

Now, you may not have celeb donors like Clapton, but gifts of "appreciated stuff" are *easy to make* and greatly expand your possibilities. And it's even fun! Such gifts can be great subjects for donor profiles – and that means inspiring other donors, as well.





by JOE TUMOLO

MAKE TIME FOR DONORS

Don't Let Chaos Control Your Schedule – or Your Career

Share Your Thoughts!
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There is nothing so useless as doing efficiently that which should not be done at all.

— Peter Drucker

It's too easy for us to get distracted.

Emails, phone calls, getting called into meetings ... we know they keep us from doing what we should be doing: speaking to donors and prospects. Each day when I talk to gift planning professionals, I ask them, "Are you getting out and visiting donors?" I would say 90% of the people respond: "Not as much as I should or would like to."

What is the Other 10% Doing?

What is their secret for staying focused on donors and making the time spent with them as productive as possible? Deepak Chopra's answer is, "Do less, accomplish more." To get out from under, we have to look more critically at the activities that take up our day, *and then decide not only what we will do each day, but also what we won't do.*

So ask yourself: *what won't I do today?*

- Do I *really* need to spend time with that co-worker, and go out to lunch?
- Do I *really* need to go to this event or that meeting?
- Do I *really* need to pick up the phone and chat with a relative or friend?

Save an hour here, half an hour there – it adds up. And all the time you're getting better at telling the important from the unimportant. That skill is important.

Accomplishing the Important: Action Steps

Here are some ideas to free up or create more donor time:

- *Disconnect yourself from email.* Not literally! But stop checking for new messages all the time. Configure Outlook to check incoming emails only every 2 or 4 hours.
- *Schedule time for donor calls.* Set some time aside each day to lock your door, turn off your cell phone, and call some donors. *Even if it is only a 15-minute period daily, it will make a difference.*
- *Delegate some duties.* When you pick up that file or document, when you open that email, ask yourself, "Can someone else in my office handle this?"
- *Designate one day for donors.* Sam Caldwell of The Planned Giving Company suggests spending one day a week out of the office for donor visits. Tell your boss and coworkers that you will be out all day meeting personally with prospects. Don't even go in to the office. Don't let the chaos grab you.

Making the Most of Quality Donor Time

Here are some suggestions about how to turn time spent with donors into more and bigger gifts:

- *Confirm commitments and say thanks.* Have all the donors in your PG Society been contacted within the last year to confirm their commitment? Have they been called just to

remind them how much you appreciate them? Call 1–3 current PG donors a day.

- *Target your loyals.* Run a report listing donors who have given for ten or more consecutive years, *regardless of the size of the donation.* Choose 1–3 people from that list per day and connect with them. Send them a letter or email thanking them for their long-term loyalty and let them know you'll be calling them in the next week or so to check in. A week later, call them, thank them again for their loyalty, and let them know you'll be in their area and would like to stop in to thank them personally. If you cannot get to them face-to-face, chat over the phone.

Time is a crucial asset! So make the effort to make time and maximize contact with donors and prospects. Eliminate the unnecessary. Focus on the important. *It works.*

Joe can be reached at Joe@VirtualGiving.com

Seven Guaranteed Steps to Drive Prospects to Your Planned Giving Website

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Tidbits

- > A man recently gifted \$27 million. *His initial gift was \$12.00.*
- > Another gentleman had been gifting \$3 a month, in cash, for 11 years to his favorite charity. That's a lot of licking and stamping! Now that's a great planned giving prospect! *Why? Loyalty counts.*
- > Interesting number from Paul Stabile at the Pittsburgh Diocese: about 50% of their bequests and CGAs come from 12%-15% of their prospects, and those are prospects who do not have children.
- > The Gertrude Barber Institute recently received \$700,000 — *from a man who was a barber all his life.* This is not a play on words. It's true.

I was asked...

"Viken, how do you get so much done in a day?" That's a question I can't help asking myself with admiration and amazement every night!

Here are some tips:

- I follow Ben Franklin's advice: *early to bed, early to rise.*
- I answer my cell discriminately.
- I urge my staff to think before calling or emailing me.
- I avoid needless meetings.
- I check email 3 times a day, not every 5 minutes.
- I delete useless emails such as long jokes.
- I am not on Facebook every 30 minutes.
- I am not tweeting every 5 minutes and posting on GIFT-PL every 55 minutes.
- I am not hanging out at Starbucks 3 times a day.
- I eliminate time vampires.
- I do happy hour once a week, not every day.

Finally, I keep ROI-conscious, and create and update this ongoing three-tiered to-do list:

1. Down the road
2. Proactive and Important
3. Urgent

I try to minimize the Urgent so I can focus on #2. Best way to do it? I take a "thought break" into nature (it's easy here in Valley Forge Park) with my notepad and "think." And yes, I shut off my cellphone.

Do I always succeed? **No.** Only about 25% of the time. But that's a good start.

52/52

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Endowments build your future.

solicit multiple small gifts every year to cover that cost, you go for a larger, planned gift. An endowment gift of \$500,000 earning 5% annually takes that cost off your books permanently. By their very nature, endowment gifts strengthen your nonprofit's position in perpetuity.

The fact is an endowment can be used very effectively to offset operating expenses. And it's equally easy to market this kind of giving: just go down the list of expenses on your charity's balance sheet. Rent, maintenance, utilities, office expenses, vehicles, programs, whatever – each one of these represents an opportunity for you to suggest that a donor endow a named fund to permanently eliminate it as an expense.

So what's holding some nonprofits back from soliciting endowment gifts?

Nothing but Fear Itself

I think they may worry that if they go after these larger, gifts, somehow their annual giving cash is going to disappear. So, okay, worst case scenario: even if you don't get that \$1000 annual gift from a donor who decides to make a \$20,000 endowment gift, you're going to have the

earnings that principal provides, and you have the principal itself. Plus, as I said above, an endowment gift can eliminate a cost from your balance sheet permanently, which is something annual giving can't.

Philanthropy is not a zero-sum game. Getting more support over here doesn't mean you have to lose the same amount over there. When you choose not to solicit for endowments, you're cutting your nonprofit off from the larger, transformative gifts that really make a difference to you and your organization.

Endowment giving enables a quantum leap of engagement with your supporters. Donors who make those larger, transformative donations to your institutions now feel that you are part of their family (and vice versa). They are more deeply involved with the success of your mission, and therefore more likely to give more often in the future. Also, those donors who make larger gifts have earned a more intense level of stewardship from your charity – more cultivation, more information, more contact, etc. So they actually become more likely to continue to give after they make an endowment gift. It's a win-win situation.

No Special Skills Required

Some nonprofits worry that soliciting and managing endowment gifts requires extra effort or ability, but they can relax. *Endowment giving isn't rocket science.* There's nothing

unusual about having your lawyer draw up an endowment instrument. Nonprofits routinely work with lawyers and the only reason you need a lawyer for endowments is to set them up properly under applicable state laws. *The rules of nonprofit governance aren't so esoteric that your organization's legal eagle can't handle it.*

Still, some nonprofits make it even easier for themselves by *partnering with a local foundation* that takes care of endowment details. That's the foundation's mission as a public charity: the endowment account is set up through the foundation, and the foundation administers it. While a management fee may be involved, for the smaller nonprofit that wants to go after endowment gifts with the least trouble, this is a convenient option.

This is no time to let opportunities slip through your fingers

Donors are becoming increasingly sophisticated in investments and philanthropy because the big charities are telling them about attractive ways to give. Basically, smaller nonprofits have to shed any inferiority complex that's holding them back, and step up with equally proactive and attractive plans, like endowment.

Because if you don't, you're losing out on those more significant, larger, transformative donations.

Debra Ashton is a respected planned giving consultant based in Massachusetts. Her classic The Complete Guide to Planned Giving, nicknamed The Blue Bible by her readers, has gone through three editions since it was first published in 1988.
<http://www.debraashton.com>

Accept All Substitutes

by PHYLLIS FREEDMAN



Are you monitoring your competitors? Don't even think you have competitors? Think again.

How often does a will where you are named a beneficiary also include the names of two or three groups working on the same or similar issues?

In a recent blog post, Seth Godin talks about how easy it is for consumers to switch because there are so many substitutes out there. We often believe we're unique but that's not necessarily how our donors see us.

If you haven't already done so, make a donation to/join your competitor organizations and then check every box they offer, including requesting gift planning information. You'll learn what they are doing but, more importantly, you'll learn how they are positioning themselves, their work and the need for planned gifts. That can help you in your own marketing.

Phyllis Freedman is fundraising consultant specializing in gift planning marketing and the intersection of gift planning and direct marketing. She can be reached at pfreedman@smartgiving.com or (202) 265-1910.



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Not As Important As Men

NONPROFITS IGNORE WOMEN AT THEIR PERIL



by MICHAEL ROSEN

In the planned giving world, underestimating women is bad for business. After all, Dr. Russell N. James, III, a researcher at Texas Tech, reports that women are just as likely as men to make a bequest.

But some significant factors suggest women are actually *more* important to the planned giving process than men.

In bequest giving, for instance:

- Women are more likely than men to make a bequest to environmental, health, human service, and religious organizations.
- Harvard Med reports that women outlive men by about 4.5 years, so the wife's will is likely to control most or all of a pre-deceased husband's assets.

According to Margaret May Damen, President and Founder of The Institute for Women and Wealth, women make 84% of all philanthropic decisions. So it's sound strategy to include your male prospect's wife in the discussion.

Cherchez la Femme

Of course, women themselves make excellent prospects. Those in the Boom Generation and younger are often those who earn and invest a significant amount of the family's net worth.

Women are also more willing to use sophisticated gift planning instruments. As I point out in my new book, *Donor-Centered Planned Gift Marketing*,

- High-income women are more likely to use innova-

tive giving vehicles such as donor-advised funds and charitable remainder trusts.

- In 2008, 7% of them made charitable gifts using securities, versus 3% of high-income men.
- 16% of them have or use a donor-advised fund, charitable remainder trust, or private foundation, versus 10% of high income men.

Behind these gender differences above are subtle differences in motivation. Dr. Patrick Rooney of the Indiana University Center on Philanthropy has identified several such distinctions. While gratitude and a desire to give back are important motivators, women are particularly interested in knowing the nature and significance of the impact their bequest will have. Also, a greater percentage of women than men are interested in helping those who have less.

Web-enabled social networking tools such as LinkedIn, Twitter, and Facebook are proving to be important aids in educating prospects and cultivating relationships, and here again women represent a vital demographic: women between the ages of 55 and 65, for example, rank as the fastest growing group on Facebook.

The simple fact is: nonprofit organizations ignore female prospects (or the wives of their male prospects) at their own peril, and women's importance will only become greater.

Michael J. Rosen, CFRE is President of ML Innovations, Inc. He can be reached at mrosen@mlinnovations.com. See his new book at <http://tinyurl.com/279gz94>.



A graduate of University of South Carolina School of Law, Steve passed the Massachusetts Bar in 1990, but soon decided the legal field was not for him. Having gravitated toward real estate law, he made the jump in 1992 to working as a full-time real estate professional. His success in this field continued until he perceived storm clouds building over the real estate market, and he then moved on to his current position as Director of Planned Giving at Furman University in Greenville, SC.

How would you characterize your transition from the for-profit to the nonprofit world?

There's no real difference. I look at what I did in marketing for my for-profit business and try to use it in planned giving. There is no "silver bullet" mar-

keting for planned giving, as it is not distinct from normal marketing in the corporate sector. *It's about focusing on the benefits to the donor. Always think benefits first.*

My real estate career taught me some of those basic things you have to keep in mind when you're marketing planned giving. For example, we're in a unique marketing climate due to the recession, so you've got to get "outside of the box." The same-old, same-old isn't going cut it. Try one new thing every year.

Do you see any special challenges facing fundraisers in higher education?

A major challenge I see is a demographic shift in the charitable behavior of graduates. Those who graduated between the 1940s and 1960s, for instance, were incredibly

philanthropic. Those who graduated from the 1970s to the 1990s are not naturally as generous. The first group had experienced The Great Depression. Perhaps there was a greater appreciation of a college degree in those days. There might be all sorts of reasons, but the bottom line is the present day is a tough marketing environment not only for planned gifts, but annual fund and major gifts as well.

What's your recipe for success under these conditions?

This is where I like to invoke one of my favorite aphorisms: *Never write what you can tell someone in person, and never tell someone something that you can show them.*

I experienced the power of that principle firsthand watching Jimmie Fund telethons up in Massachusetts. The Jimmie

Fund raised money for a cancer center for children. They ran their telethon TV spots in commercial breaks during Red Sox games. You'd be watching the Red Sox and then between innings you'd see them bring out a child cancer patient who would say, "Without your donation, I wouldn't be able to live another five years!" That is what I mean by showing them. The Jimmie Fund spots would emphasize how the kids benefit, and make a point of thanking donors. *That's high-leverage messaging. Powerful stuff!*

And it illustrates another of my aphorisms: *You have to try to make your audience cry.* Not necessarily literally, but what you're trying to do is establish a substantial emotional connection with your prospective donors. Those Jimmie Fund spots did it beautifully.

Value Every Donor as a Friend...

By ROB SILBAUGH

I went to visit a donor for the first time at her home. She's 98 and full of energy. I walked into her house and what do I see in her living room?

A coffin.

I asked, "Is that what I think it is?" She says, "Yes, dear, it is."

I asked, "Why do you have a coffin in your living room?"

"When my husband passed away, I wanted to have the same coffin as his. The funeral home said it would charge me \$1,000 a year to store it until my death. Do I look like a fool that would just throw away money like that?"

I said, "No, you are not a fool."

"Good answer." She said. "And

in answer to your next question, your charity is already named in my will. So let's go for a walk now and then have lunch and do business."

And there's more. When we got back, she said, "I have something for you."

I was expecting a check, but she said, "I like you, dear, and want to give you my husband's sport jacket. It is the last physical possession of his that I have and I want you to have it."

I was touched by her generosity. The jacket hangs on my wall to remind me every day to *value every donor as a friend.*

Rob Silbaugh is the Director of Development at The Central Association of the Miraculous Medal.



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How do you apply these principles to fundraising at Furman?

Okay, for instance: you could tell an audience of good planned giving candidates, loyal Annual Fund alumni donors in their 70s, that “Furman University needs scholarships for deserving minority students in South Carolina” and they might just roll their eyes. Not a lot of sizzle there. *But now imagine if you bring out a smiling young black student who shakes their hand, looks them in the eye, and thanks them for their past support of Furman.*

The black student goes on to say that they are the first person in their family ever to attend college, and without Furman’s Endowed Scholarship program and assistance from fine alumni like the audience, they could never

afford college. *Then, after the Kleenex box is passed around,* you have a room full of people reaching for their wallets and checkbooks and asking you for a referral to a good estate planning attorney. *You’ve grabbed their attention emotionally.*

As a fundraiser, you have to think in terms of how you break through to an unmotivated group and motivate them to act upon something that is lying beneath the surface. So you’re *showing* the donors, not just telling them something. You’re establishing that *personal, emotional connection*. You’re imparting to them focused messaging from the very lips of one of the scholarship recipients.

You’re talking about using powerful techniques in a bold way to influence prospects.

Can you recommend any more subtle methods to get results?

Well, being more subtle takes more creativity. For example, to drive traffic to our planned giving website, we’ve been adding simple, short and sweet, one-liners in our monthly institutional electronic newsletter. This monthly e-newsletter features facts and tidbits about what is happening on campus; and we send it to alumni, parents, staff and University friends – about 23,000 recipients altogether.

A sample one-liner could read, “Have you thought about your Will lately?” and then link to a document on our planned giving website titled, *8 Pitfalls to Writing Your Will*. It’s a helpful article that *subtly suggests making a planned gift*. We put up different catchy one-liners each month, and link

them to a different part of the site. Our web stats tell us that people are going to those links every month; and then most viewers cruise around the web site, once they are there.

Do you have any insights about prospects you think fundraisers should keep in mind?

Getting prospects to act is the hardest thing in the planned giving world. Many donors have the good intention to make a planned gift, however gently persuading them to get to their estate planner’s office and to finalize their stated wishes is a delicate dance. There’s no “silver bullet” method here either. Focus on the donor’s desire to make a difference and to help a particular program and *make it all about them*, not about the university’s needs or wants. Once you have accomplished that, the sky’s the limit.

Donor Outreach: Personalizing the Grey Flannel Suit

By KYLE ANASIEWICZ

Donors don’t leave legacies to grey flannel suits. Planned giving is about people. Personalization is key to attracting prospects, optimizing donor relationships, and maximizing the donations that result from them. Try the following:

- **Biographies** – Include these on your website (on the “Who We Are” or “Our Staff” page) and in print pieces (e.g. an “About the Author” blurb). The bio itself should list education and professional accomplishments, include a personal statement (“I joined MySchoolsCharity.Com to help alumni make a difference!”) and something fun (“Regardless of the season, Lisa enjoys photograph-

ing wildlife at the National Seashore”); plus a sentence to help donors see staff members in a company context (“When you call our office number, Jason’s will be the first voice you hear.”). Hint: Use the staff member’s first name in the body of the bio.

- **Photographs** – Seeing is believing. Balance friendliness and professionalism. Capture your staff members at ease and in full “customer-relationship management mode.”

- **Phone communications** – A greeting like “Good afternoon, this is Sandy, how can I help you?” makes a warm impression. Emphasize the personal in responses like,

“Oh yes, Mrs. Meyer, thank you for calling,” instead of “Hold please.”

- **E-mail and letters** – Foreground different members of your team in your various communications: “Dear Mrs. Meyer, My name is Richard Jones and I am going to make sure we all stay on the same page during the process of finalizing your gift language.” The team members themselves don’t have to write these – you can ghostwrite them – but they should know what they are supposed to have said!

Just remember: Impersonal is the opposite of outreach. And outreach makes gifts happen.

A Planned Giving Website for the iPhone?

Our client, *Pomona College*, believes that a prospect will more likely follow up a website visit with a call if she visits their PG website using a hand-held device. That makes sense: *the phone is already in her hand.*

Our job at VirtualGiving is to prove it by developing a hand-held-friendly website!

Pomona also pushes the envelope by advertising their attractive CGA rates in the *Wall Street Journal*. That’s thinking out of the box!

The school is also using Google Adwords and Facebook ads in their marketing.

Richard Chute, Bruce Paolozzi and their peers at Pomona are being proactive by staying ahead of the curve.

IN THIS ISSUE

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Make Time for Donors
Accept All Substitutes

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Viken Mikaelian

Associate Editor:
James Pierson

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Submissions/Feedback:

Success@PlannedGiving.Com
PlannedGiving.Com LLC
1288 Valley Forge Road, #82
Phoenixville, PA 19460
800-873-9203 | 610-672-9684 (fax)
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When Director of Development **Charles Evdosis** of United Cerebral Palsy of Long Island visits prospects, he carries some powerful ammunition. It is powerful enough where a license should be required.

And no, it's not a gun.

He's been advertising his Free Estate Planning Kit in his local paper (*Newsday*) for 5 years now. The ad pulls in average over this period of 2500 requests per year and 8% of those result in appointments. **And he successfully closes 95%.** Do the math.

How does he get such powerful results? It's his compelling video about a child. *His prospect can't help but wipe his tears and swallow that big gulp in his throat.* The deal is then immediately signed so that no

further damage can be done to the prospect.

Charles knows fundraisers have to engage their constituents' emotions. That's what involves them and motivates them. That's what makes them give. It also requires a passion and an individual that can transcend their emotions to close the deal.

Emotions are the key: feelings like rage, guilt, shame, ego, pity. *Use the one that's right for you.* And you don't have to

have a video to use them and use them effectively.

Are you projecting your mission with that kind of passion?

PS: Another reason Charles is successful is because *his job is his passion.* In fact, he does not need the money. He's been a successful businessman all his life and he's running his department at UCP *like a business.* **I have been professing this to non-profits for 10 years now.** One thing fundraisers have to learn is that *planned giving is not fundraising. It's sales, marketing and relationships.* It all comes down to solid business principles. It's that Simple. ~ Viken