



PRESENTERS



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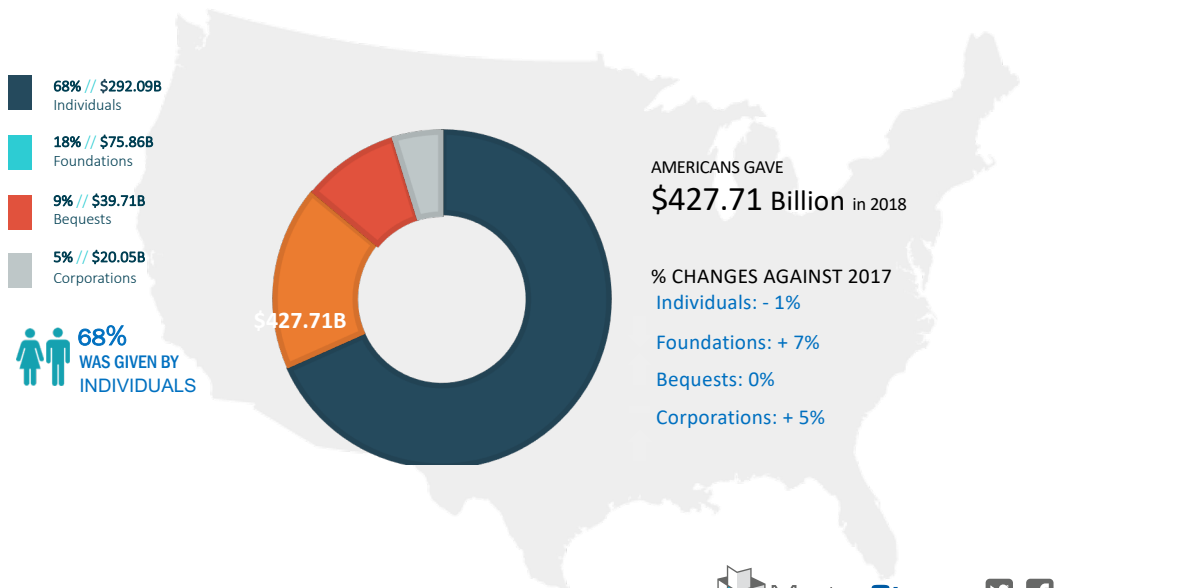


TODAY'S WEBINAR CONTENT

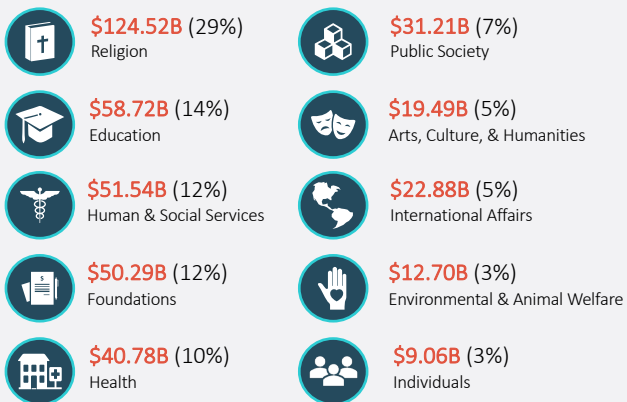
- Philanthropic Landscape: *Giving USA* Data
- Three Leading Fund Development Strategies
- Roadmap to Giver Development
- Gift Planning: Non-cash gifts and legacy gifts
- How to Meet with Givers
- What We Can and Can't Control
- Giving Responses & Truths
- Q/A



UNDERSTANDING THE PHILANTHROPIC LANDSCAPE



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A Closer Look at Gifts of \$1M+, Top 10 Sectors
As Reported by *The Chronicle of Philanthropy*



THREE STRATEGIES

Annual Giving/Event

- 1** • Modest gifts made from discretionary income
- Made for current operations & immediate use
- Participation and increasing gifts is the focus

Major Giving/Capital Campaigns

- 2** • Gifts from assets or multi-year pledges
- Gifts to capital needs and special projects
- Gifts generally of significant size

Planned Giving

- 3** • Gifts from assets or estate wealth
- Gifts used for endowment or designated purposes
- Gift request is built over time
- Likely the giver's largest gift



DEVELOPING GIFTS

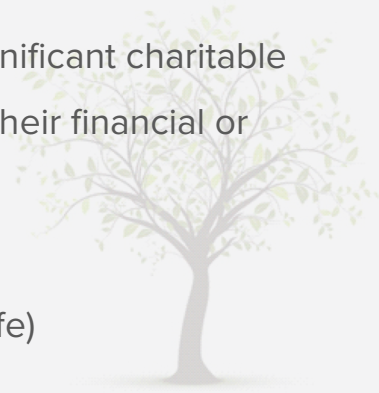
Steps in a successful personal visit:

1. Identification
2. Planning and Evaluation
3. Cultivation and Preparation
4. Gift Request
5. Diligent Follow-up to Secure Commitment
6. Stewardship



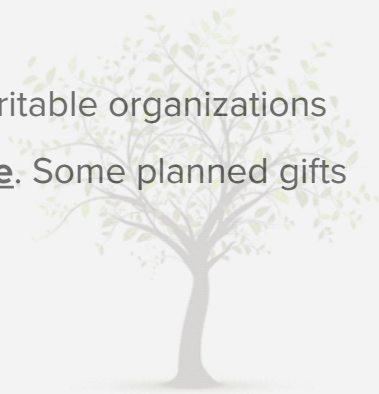
PLANNED GIVING – *What is it?*

- Planned Giving is the process of making a significant charitable gift during a giver's life or at death as part of their financial or estate plan.
- Usually synonymous with a Bequest (end of life)



GIFT PLANNING – *What is it?*

- It enables **givers to make larger gifts** to charitable organizations **than they could make from ordinary income**. Some planned gifts provide a life-long income to the giver.



GIVER COMMUNICATION



- Discuss details via phone
- Go unprepared
- Make visits without confirming your own gift
- Apologize for your visit



- “We’d like to meet with you for 45-minutes to discuss your leadership in our project.”
- Familiarize yourself with the potential giver prior to your visit.
- Visitors who make their own gift first are more confident, persuasive, and successful.
- You are offering the opportunity to expand the church’s impact in your community for the immediate and the long-term.

GIVER COMMUNICATION



- Forget to communicate the project/case and vision
- Rush!
- Forget to get the giver excited about the opportunity
- Presume capacity



- Share your passion for the church and your community. Discuss how your church plays a critical role.
- Be yourself. Take your time. Listen. Give the potential giver a thoughtful presentation.
- If you describe how their gift will be impactful they may ask, “*how much do you need?*”
- “*We have no idea what you are capable of, but we do know the impact your gift will have...*”

GIVER COMMUNICATION



Don'ts

- As for “whatever you can do.”
- Say a word after the request.
- Leave right away.
- Allow too much time to pass before following up.
- Be negative.



Do's

- “We respectfully ask you to consider a gift of ‘X’ each year for three years for a total pledge of X. Do you think you can make this commitment?”
- Listen. Listen. Listen and respond accordingly.
- Be prepared to respond to yes, no, maybe.
- Schedule time to follow-up to “confirm your decision” within 5-7 days.
- Your enthusiasm will be contagious and influential.



WHAT WE CAN CONTROL

- Your time in prayer and asking the Lord to bless your relationship with the giver
- How well you make the Case
- The style in which you invite the giver's support
- The setting for the meeting
- How much time you have to talk
- The content you discuss
- How you respond to the giver's questions



WHAT WE CAN'T CONTROL

- The giver's financial ability
- How the giver will react
- The giver's level of interest
- What the giver will initially offer
- Reasons why the giver won't give
- The giver's other circumstances
- What questions the giver will have



RESPONSES

- **Response 1:** "Yes, I will make a gift."
- **Response 2:** "I need more time to decide."
- **Response 3:** "I will make a gift, but not at the level you've requested. What if we did [amount]?"
- **Response 4:** "I am not going to make a gift at this time."



GIVING TRUTHS

1. People respond to opportunity more than to need.
2. People haven't always given everything they have to give.
3. People give in response to clear priorities.
4. People want you to invite them to give!
5. It's dignifying and effective to invite specific types of gifts or amounts.
6. People give in response to who asks them.
7. Personal visits result in larger gifts.
8. You know enough to make the ask.



Next Steps

Free Gift Planning Report from MortarStone

Customized report that gives you a snapshot of your givers and the potential for planned gifts.

- **Get your free report @ MortarStone.com/plannedgiving**

