

Prospect Research and Management with Gift Planning

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Let's do the last slide first!

- Gift planning and prospect management and research are natural collaborative partners!
- Since research is only as effective as the activity that follows, give your gift officers the message as well as the research; better yet, make your research the message!
- Collaborate, innovate, coordinate!

Gift planning and the "3-tiered" ask

- Annual fund prospects (affinity only)
- Major gift prospects (affinity + capacity)
- Estate planning (incorporates both approaches to allow a prospect to determine legacy)

Shared challenges of our offices

- Getting buy-in as strategic partners
- Encouraging collaborative behavior with our colleagues
- Working in prospect management with a donor-centric view

Identifying gift planning donors

- Estate gifts (general understanding of a prospect's assets):
 - Real Estate Trusts
 - Stock Holders
 - Repeated Annual Fund Gifts
 - Demographics
- How do we go further, and how do we identify life income plan/stock transfer donors?

Giving to area report

Find Donors
Use this tool to show, for example, "donors who have given at least 8 out of the last 10 years to Nursing and are not assigned"

Number of years with giving
(greater than or equal to)

Within the last number of years

To a specific area?

Assigned?

Powered by the Office of Prospect Development

Results for researchers and gift officers

- High Capacity/High Propensity Prospects
 - Potential principal gift/major gift prospects
 - Proactive research reviews
 - Strong annual fund/planned giving
- High Propensity or High Capacity Prospects
 - Potential annual fund/planned giving prospects
 - Cultivation and review

How life income plans work

- The donor transfers assets to the institution to fund a plan, which pays income to donors for life
- Upon the plan's termination, the remaining assets are held by the institution
- How that income is determined depends on the type of plan
 - Charitable Gift Annuity (CGA) – fixed sum
 - Charitable Remainder Unitrust (CRUT) – fixed percentage

Life income donors

- Your prospect wants to increase income and decrease risk
- Your prospect wants to do more than they believe they can
- Your prospect represents that they are sophisticated
- Things life income plan donors say
 - "I would like to, but I can't right now."
 - "Wow, the market has (been terrible/been on a tear) lately."
 - "I need (income/to provide for my family)."

Locating consistent annual fund donors

- Gift clubs
- Simple queries on giving
- Donor Trajectory Report

Donor Trajectory Report (drop-down)

Donor Trajectory
Use this tool to show donors with a positive or negative giving trend. For details, click [here](#).

Time span: in years (recommend a minimum of 5)

To a specific area?

Positive or negative trend?

Assigned?

Stock Holders

- Do you know your securities holders? (Can you search on stock gifts?)
- Do you know your top companies?
- What materials are ready to go (for officers AND donors?)

Securities Alerts

- Top companies (city and state)
- Top stock donors
- Free real-time alerts (set on ticker symbol)
- Blast e-mail when major event occurs (to gift planning and relationship manager)

Portfolio Management for Gift Planning Officers

- Officer vs. consultant – how will you manage your interactions
- Think of your “top 25” in stewardship
- Discovery prospects (repeated giving to area combined with territory)

Resources

- Apra 2014 – Strategic Partnerships with Gift Planning
- Apra 2017 – Strategic Partnerships with Gift Planning II – Plan Harder
- NCPP 2017 – Strategic Partnerships with Prospect Research
- “A Gift Frequency to Area Report Can Locate Your Most Loyal Donors” – Fundraising Compass blog
- <https://www.aprahome.org/> (Apra)
- <https://charitablegiftplanners.org/> (National Association of Charitable Gift Planners)

Questions?

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