

Blended Giving: Influencing Both the Donor's Mindset and Your Organization's Culture

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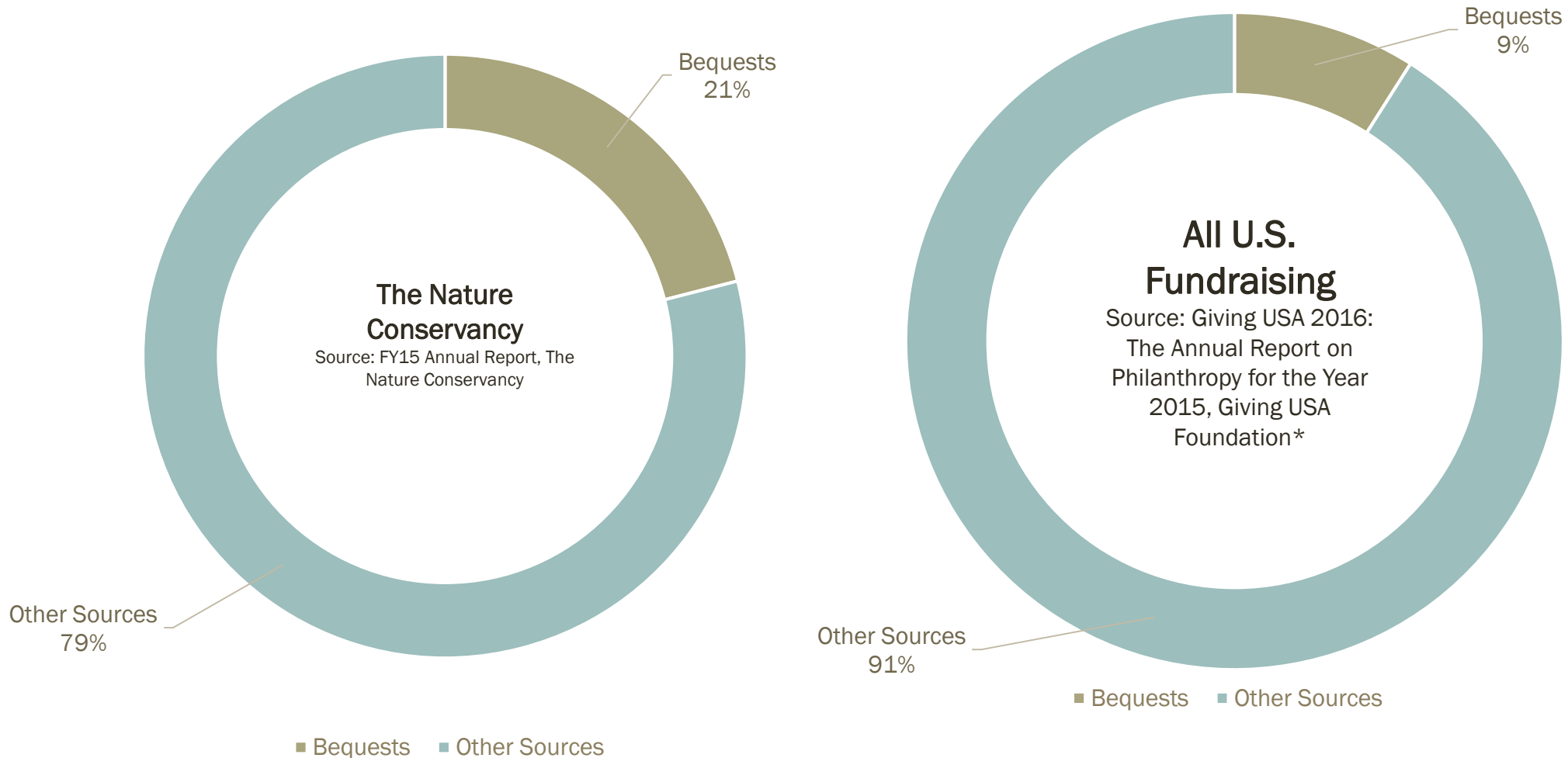
25th Planned Giving Days, May 25, 2017

OUR GOALS FOR TODAY...

- **EMPOWER** you to use the blended gift as you work to secure the future of your organization and enhance the great work all of you are already doing in the field.
- **EQUIP** you to use the blended ask to have better donor conversations, ask more strategic questions, and serve your donors better and smarter!
- **ENABLE** you to better face internal institutional challenges as you work to integrate the blended ask into your every day working life.

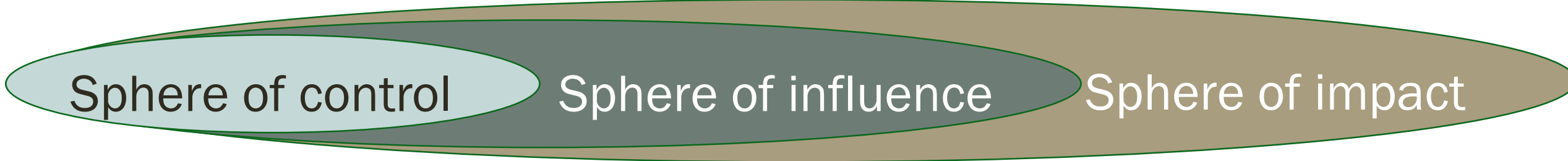
TALKING “TACHLIS”
OR
“INTERVIEWING AN EXPERT”

Over the past 5 years, 20-25% of annual fundraising revenue to the Conservancy has come in the form of deferred gifts, primarily bequests.



* Latest report data available

Strategy Theory of Change



Strategy



Key Intermediate Results



Outcomes

- 1. Donor Strategy
- 2. Coaching
- 3. Raising Awareness

- 1. Collaborate with fundraising partners
- 2. Build pipeline
- 3. Increase emphasis on **outright** gifts of non-cash assets

- 1. Joyful Donor
- 2. Increase blended gifts
- 3. Increase non-cash gifts

STRATEGY FRAMEWORK: GROWING GIFT STRATEGISTS

"Front of the house" (Strategic Pillars)

1. Donor Strategy

- Principal Gifts
- Major Gifts

2. Coaching

- How to have better Donor Conversations

3. Raising Awareness

- Board Presentations on non-cash assets and giving methods

"Back of the house" (Foundational Functions)

4. Operations: Policies & Procedures, Budget, Estate Administration, Gift Administration

5. Outreach: Marketing & Stewardship; Internal Marketing; External Marketing

6. Measures: Pipeline, Closed Gifts of non-cash assets

THE
FUNDAMENTALS

Make it personal

Be yourself

**Why is this important
to you?**

SOLICITATION STRATEGY

Why are you asking this donor for a gift?

When and where will this solicitation take place?

Will you partner or go alone?

What are the roles of the individuals present?

How much will you be asking the donor to consider?

Who will make the ask?

What materials will you need?

WHAT ABOUT GIFT PLANNING

Will this donor be considering a gift that may be complex or involve multiple resources?

Does this donor have an estate plan?

If so, have they included gifts to charitable organizations?

Are they willing to include TNC in their estate planning?

Is this solicitation a “double ask”?

THE NATURE CONSERVANCY IN SOUTH CAROLINA MEETING PREPARATION

Name:	JOHN & SUSAN DONOR
Date:	Wednesday, April 27 th
Time:	10:30AM
Location:	Donors' Home
	1 Lobster Court, Coastal City, SC
Team:	Trustee & Elizabeth Foster

Ask Amount:

- Six figure gift - combined multi-year pledge and estate gift (blended gift)

Meeting Goals:

- Ask for a 6-figure campaign blended gift
- Offer opportunity to meet with Ed Cadogan in person the week of May 2nd
- Set follow-up appointment if no commitment is made

Background:

- Mr. Donor is a Senior Science Fellow with the National Science Foundation. He served as a senior officer in the U.S. Air Force, retiring as a Colonel after more than 25 years.

- Ask amount
- Meeting goals
- Background
- TNC involvement
- Possible campaign gift options
- Talking points

Setting up the Blended Ask

“Before I ask you to consider making a gift to our campaign, please allow me to share with you

why I/others have contributed to this fundraising effort...and how I/others have given....”

CASE STUDY 1

WHEN DONORS GIVE NON-CASH ASSETS....

- Donor Facts
 - Bill was 73-years-old
 - Retired President and CEO
 - He is married and has children and grandchildren
 - Supports TNC and Alma Mater
- Non-Cash Assets
 - Vacation Home & Appreciated Securities
- Giving Methods
 - Outright Gift of Real Estate and a CLAT

THEIR GIFTS ARE LARGER....

THE DONOR'S
VIEW

IN HIS OWN WORDS

THE GIVING GAP: WORKING WITH HIGH NET-WORTH DONORS

According to Fidelity Charitable:

- **80%** have appreciated assets but only **21%** have given them to charity.
- **41%** do not know these gifts are possible.
- **90%** have retirement plans/insurance but **only 9%** named a charity.

THE SWEET SPOT....



CASE STUDY 2

"MONEY BUYS LANDS..."

- Donor Facts
 - Widow with no children
 - Retired physician
 - Planning on relocating to Arizona within 3-5 years
- Non-Cash Assets
 - 18 Real Estate Rental Investment Properties (Rental townhouses and rental homes)
- Giving Methods
 - Started as a bequest

OUTCOME: "HASSEL FREE" CASH FLOW!

NOW IT'S YOUR TURN...

TABLE DISCUSSIONS

INTERNAL CHALLENGES FROM COLLEAGUES

- “Deferred gifts are confusing for donors (there are too many vehicles; I’m uncomfortable talking about death). Outright cash is so much easier to talk about.”
- “My fundraising priorities can’t use deferred gifts because they need outright gifts now....We need money now!!!!”
- “Deferred giving hurts annual giving. FACT!”
- “If I ask people for a deferred campaign gift, they will not make an outright gift because they think they are “off the hook”!”

FINAL THOUGHTS....

- Asking for the blended ask isn't the future, it is the now
- The blended ask will better help secure the future of your organization and enhance the great work you're already doing!
- The “blended ask” will help you better help your donors, building stronger relationships that will benefit **EVERYONE!!!**
- Even small wins, are wins!
- In planned giving, there are no such thing as failures—only s-l-o-w successes

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THANK YOU!!!