

○——The Unspoken Drivers of Planned Giving:——○
A Major Gift Perspective

Mid-Iowa Planned Giving Council
October 25, 2011

Covenant
Calls

 **STELTER**
Getting to the heart of the matter

One Percent Donors

Donor or philanthropist

Philanthropic platforms

Eight unspoken motivations

A philanthropic planning process

Donor or Philanthropist?

The difference has nothing to do with financial capacity.

Donors are reactive; philanthropists are proactive

Exploring Intentionality

Why the Difference Matters To You

Donors

Don't need structure

No structure, no engagement

Doesn't require vision

Philanthropists

Find structure useful

Will engage in a process

Will engage assistance

Measuring Intentionality

Key Activity	Philanthropist	Donor
Collect proposals	Seeks	Receives
Evaluate requests	Values	Feelings
Award Grants	Systematic	Random
Charitable Mission	Thoughtful	Reactive

Evaluate the Prospect

Ask the prospect to share several significant gift stories

Use the prospect's gift stories to determine if (s)he is a donor or a philanthropist

Probe the stories for additional detail

Rate donor activity in each skill area

Sample Starter Questions

Identify three gift stories.

Need enough information to perform sufficient analysis.

By having several stories, you have places to go if you get stuck on a particular story.

“Tell me about a gift you made in the last two years that ...

Gave you a feeling of satisfaction.”

Made a difference.”

Gave you a feeling of excitement.”

Collect Proposals: Probe and Tips

How did you find that charity/program?

Tips

Reactive if responding to mail, calls or visits

Proactive if reaching out to the charity

Evaluate Requests: Probe and Tips

What was the basis for your decision to make that gift?

Tips

Reactive if based on a feeling or a desire to “own the story”

Proactive if the project/program represented a value in action

Award Grants: Probe and Tips

How did that gift fit into your overall pattern of giving?

Tips

Reactive if no connectivity to other gifts

Proactive if gift is part of a similar series

Charitable Mission: Probe and Tips

What is your criteria for making a gift?

Tips

Reactive if reasons are general or emotional

Proactive if reasons are specific and detailed

Probe Process

Open topic with the lead question.

Gain a general understanding of the situation.

Probe for detail on the key activity.

Always push for the pronoun “I.”

Philanthropic Platforms

Private foundation

Operating foundation

Donor advised fund account

Exploring Motivations

What REALLY Motivates a Philanthropist?

Motivating Expectations

The myth of donor fatigue

What prospect/philanthropists really want

Unspoken expectations

More than a feeling

Eight expectations and what to do about it

Charitable Intent

Supporting an organization or place you care about

Helping that organization

- Volunteer leadership

- Endowment gifts

Critical Issue: Be careful to document your charitable intent

Values

Getting people to believe what you believe

Perpetuating your worldview

Find an organization that shares your belief

A strategy to persuade others

Critical Issue: Finding an organization that is successful in measuring how many people were not just contacted, but actually changed

Leverage

Cause change through charitable gifts

Getting results:

- Determine what organization to work with

- Decide how to cause change

 - structural change

 - new programs

Critical Issue: Understanding how the organization is committed to the change you seek to create.

Role Model

Influencing others to give

Looking for other funders

“Buying a table at the gala”

Persuade others to consider the organization

Personally ask others to give

Challenge grants

Critical Issue: Whatever mechanism you choose, think it through so that it will actually achieve your outcome

Family

Philanthropy as a communication tool

Bring family into your practice of philanthropy

Communicate your values

Build a common purpose in multiple generations

Build skills with family members

Have a meaningful structure

Critical Issue: Determine if it is about the family
or your philanthropy

Expert

Becoming an expert in the cause you care about

Get smarter about your passion

Use philanthropy to gain access to expertise

Gifts as tuition

Critical Issue: Make sure the money gets you access to the smart people and beware of umbrella organizations

Legacy

Milestones of a life that has had impact

Naming things:

Scholarships

Buildings

Departments

Endowments

Foundations can be used as legacies

Critical Issue: Think through the issues when naming things

Significance

Internal milestones in the use of time, talent and treasure

Moving from success to significance

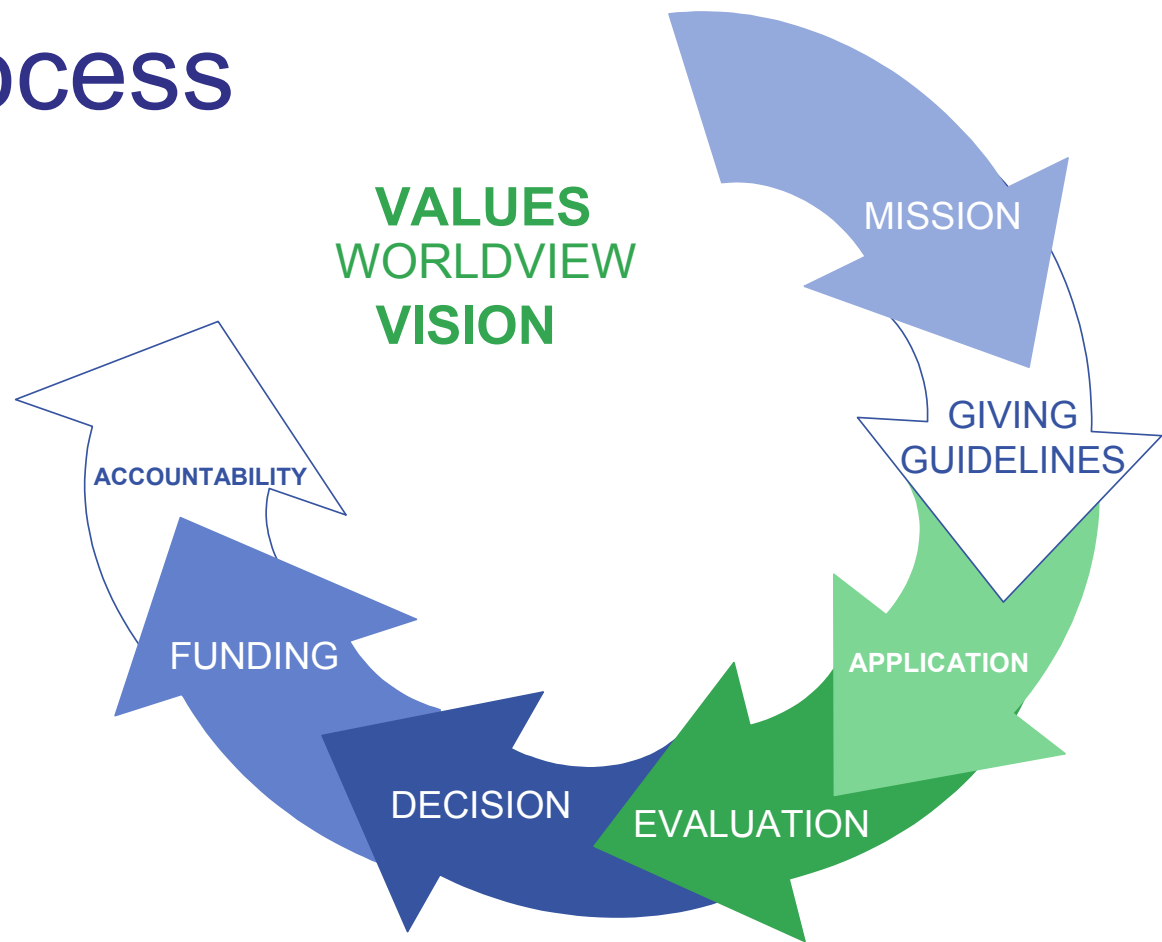
- Identify what is significant

- Determine how to measure it

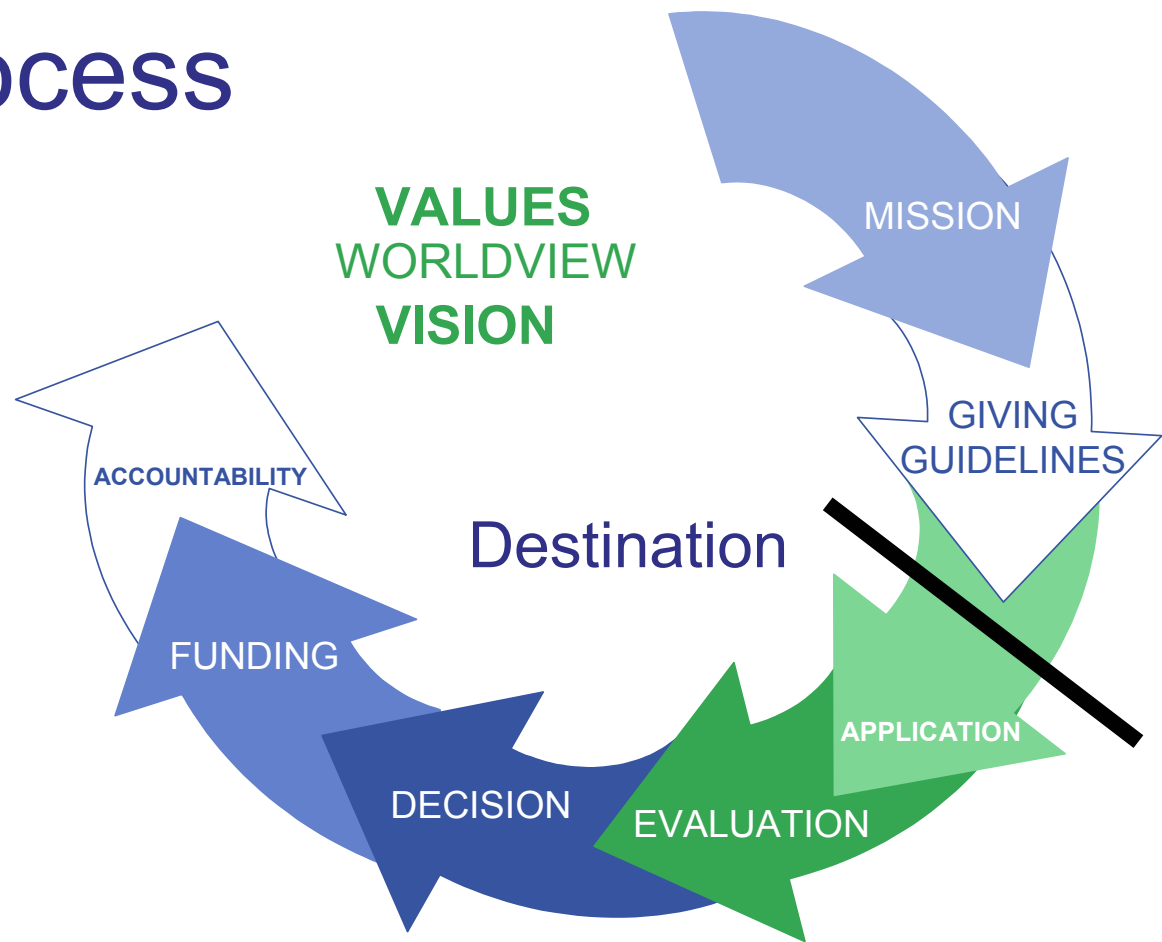
- Plan to transition from success activities to significant activities

Critical Issue: Getting the process right:
Treasure, then Talent, and finally Time

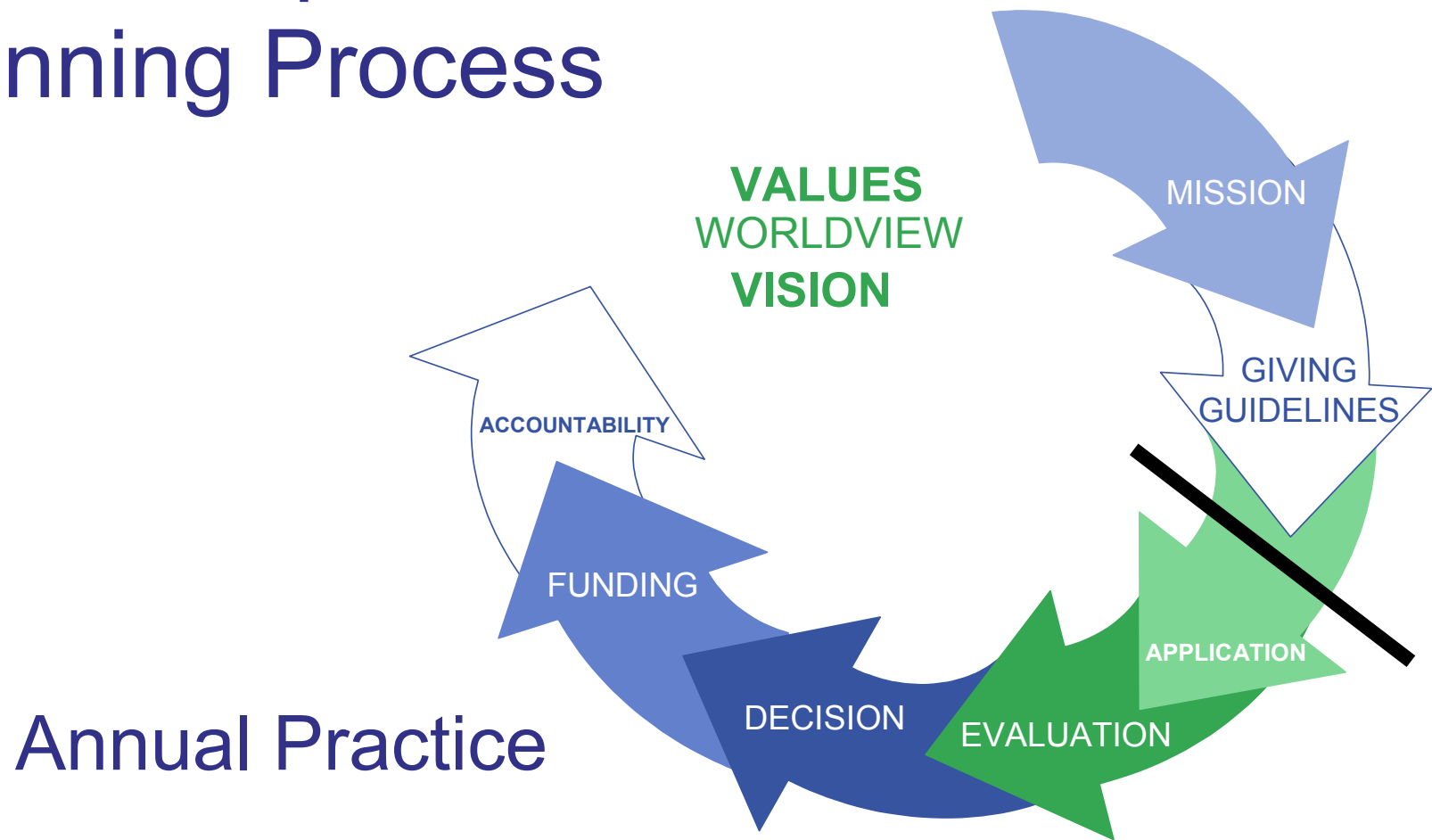
Philanthropic Planning Process



Philanthropic Planning Process



Philanthropic Planning Process



Questions?

Jay Steenhuysen

Steenhuysen Associates
1539 Fall River Ave., Suite 3
Seekonk, MA 02771
508-336-4544
jay@steenhuysen.com