

Planned Giving 101

Virtual Coffee Talks

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Engaging in a Planned Giving Conversation: Qualification to Close
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Qualification to Close...and beyond



- Discovery
- Cultivation
- Content
- Close...and that's just the beginning...



Let's meet for Coffee...

Qualification for Discovery Call/Meeting



- Who is the Planned Giving donor prospect?
 - Consistent giver over the years (review gift designations)
 - Segment those who have given consistently over the last 10 years
 - Age range (55 -75+)
 - Prospect Research: Wealth or Capacity and Affinity Screening
 - Review past interactions with Development Team or Staff
 - Collaboration with other Development Officers on your Team
 - A prospective donor is not a name that is simply found on a list.
 - A prospective donor is the donor you actually ask to consider creating an estate gift.



Qualifications for the Fundraiser: Proper Mindset

- A different perspective – donor conversations begin with the mindset of the fundraiser
- Authenticity
- Mind on Mission
- Impact of your Organization
- Personal Story
- Gratitude



Can the donor believe in you?

- “People don’t give to an institution. They give to the person who asks them...philanthropy is not much different from business. People buy from companies, invest in them, work for them because they feel that the enterprise can satisfy their human needs and desires and because they believe in the people who represent the enterprise” (Lord, J.G., 1983 “The Raising of Money” p. 75-77).



Cultivation

- “More money is raised through conversations than by an appeal for gifts.” Eddie Thompson
- Meaningful Conversations...
 - Build deep connections
 - Engender trust
 - Create room for exchange
 - Ask thoughtful questions
 - Listen for impact
 - Context Matters



Put it in Context: Ask, Pause & Listen...

- How did you select Clemson for your education? Tell me about your own Clemson experience?
- Tell me about Clemson professors or student organizations that played an important role in your Clemson experience?
- Where did your Clemson experience lead you in your career or family?
- What advice would you give a high school senior considering an education at Clemson University?
- In an era where the value of a college education is being debated, what are your thoughts about the value of a Clemson degree and the college experience?
- Based on your career experience, what advice would you give the Clemson faculty as it relates to preparing young people for life after Clemson?
- What motivates you to give to Clemson? What is it that appeals to you about the areas to which you give support and how do you see your gifts benefitting students now?
- With an increasing need for private support, how can Clemson reach more donors, and demonstrate the impact their gifts make on students and faculty?



What are we listening for...

- **How a donor believes they can make a difference**
- **Personal satisfaction in giving**
- **Reasons for supporting the cause**
- **Need to give back**
- **Desire for engagement – board service or volunteer for the organization**
- **Listen for values, life events or life transitions**
- **Listen for financial values, events or types of assets**



Content of your response...

The ASK

- **Present Action**
- **Long Term Impact**
- **Future Investment**
- **Personal Legacy**

The DETAILS

- **Provisions for estate plans**
- **Gift planning features and benefits**
- **Formal or informal proposals**
- **Engagement Opportunities**
- **Consistent Follow Up/Donor Timing**



Closing the gift...

Affirming the Donor's commitment

Documenting the Donor's Legacy

Celebrating the Donor's future
investment

...and that's just the beginning

What comes next is your investment in
the Donor's Future...

Stewarding the Relationship

