What Should We Say?
Tips For Effective Communication With Gift Planning Donors

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SIGHTSEEING ITINERARY

QUALIFICATION STAGE
- Introduce Yourself
- Meeting Agenda-
  Learn About Donor
- Discuss Organization
- Helpful Tips
- Audience Challenge

CULTIVATION STAGE
- Meeting Agenda-
  Learn About Donor
- Discuss Priorities
- Donor Feedback
- Helpful Tips
- Audience Challenge

SOLICITATION STAGE
- Meeting Agenda-
  Learn About Donor
- Discuss Proposal(s)
- Donor Feedback
- Helpful Tips

GIFT COMPLETION
- Meeting Agenda-
  Gift Amount &Structure
- Recognition
- Donor Feedback
- Helpful Tips
- Audience Challenge

PRESENTATION APPENDIX
- Ask Questions
  Along Our Route!
Qualification Stage

**Introduce Yourself and Schedule Meeting**

Example of an Effective Introduction:

“I’m (name), (position title) with (organization). I secure philanthropic gifts from people who believe in and generously support our mission. (Name), our CEO, asked me to meet with you to thank you for your ongoing support and to learn more about your experiences with us. Since we haven’t met before, I’d also like to hear about your life journey and discuss any feedback you have about our mission, programs and services. Plus, I’d be glad to update you on our recent accomplishments. May we please schedule a meeting together at your earliest convenience?”

**Helpful Tips**

a. Communicate clearly, concisely and directly.

b. Communicate introductions by email, letter, phone (or multiple channels).

c. Many older major and gift planning donors enjoy in person meetings. Be sensitive to their timeframe and keep the initial meeting agenda simple.

d. Donors will often meet in their homes where they are comfortable. If meeting elsewhere, choose a place for quiet and private conversation.

e. For donors who are working, try to meet at a time when they’re able to relax.

**Challenge for Audience Discussion**

Donor tells you they prefer to meet by phone instead of in person. What should you say?
Qualification Stage

Meeting Agenda
Meeting Agenda Balances- A) Learning About Donor B) Discussing Organization Information C) Obtaining Donor Input/Feedback

What To Learn About Donor (How? Ask Questions and Listen Actively – See Appendix for Questions)

1. Meaningful Life Events, Milestones, Family and Career Background, Hobbies
   Sample Question- “Since we haven’t met before, I’d like to learn more about you. If you were summarizing your autobiography, what are some of your most meaningful life moments?”

2. History and Strength of Connection to Your Organization
   Sample- “What aspects of our mission, programs and services are you most interested in and why?”

3. Likes and Dislikes About Your Organization
   Sample- “How do you stay informed about what we’re doing? Are there other things we can do to keep you well informed?”

4. Other Nonprofit Organizations the Donor Supports
   Sample- “Do you donate charitable gifts to other nonprofit organizations besides ours? (If yes) “Please tell me about the other causes that you support and why.”

5. Comfort Discussing Charitable Giving and Personal Financial Matters
   Sample- “How important to you are any tax and financial benefits you receive from your charitable giving?”

Organization Information to Discuss and Obtain Donor Input/Feedback
News, Achievements, Beneficiary Impact, Updates On Specific Programs the Donor Supports.
Qualification Stage

**Helpful Tips**

a. Before ending any meeting, ask donor to agree on important agenda items for your next meeting.

b. After meetings, promptly send thank you and handle follow-up information/materials prior to scheduling next meeting.

c. What you learn in meetings should confirm donor’s financial capacity, organization interests and preferences for further engagement.

d. It’s ok to take multiple meetings to fully qualify a donor. Do not overwhelm them with conversation in any meeting.

e. Active listening skills: Restate/acknowledge/clarify to validate what was heard and confirm accuracy of interpretation. Pause while listening.

f. Donor-centered approach is about facilitating and educating. Important to avoid coercion.

g. Authenticity, integrity, open-mindedness and reliability are essential elements of building trusting relationships with donors.

**Challenges For Audience Discussion**

1. Donor complains about a bad experience with your organization. What should you say?

2. Donor thinks your organization has plenty of charitable financial support. What should you say?
Cultivation Stage

**What To Learn About Donor**
Now Based On- A) What You Haven’t Learned Yet From Prior Meetings, B) Deeper Dives Into Areas Already Learned

**Organization Information to Discuss**
Funding Priorities That Align Well With Donor Interests

*What to Discuss For Each Funding Priority-*
- a. Context (Project features/benefits; why is it a priority; people who will benefit)
- b. Anticipated Impacts (Opportunities to transform organization, community and society)
- c. Gaps (What problems to solve, situations to fix/improve)
- d. Project Plan (How will people be helped, problems solved, situations fixed/improved)
- e. Costs (Budget, timeline and costs of inaction)
- f. Other generous donors (those supporting the priority and having impacts)

**Donor Input/Feedback to Obtain**  
(How? Ask Questions/Listen Actively – See Appendix for Questions)

6. **Thoughts, Feelings, Concerns, Questions About Priorities**
Sample Question- “How does that funding priority resonate with you? What aspects feel especially compelling to you? Are you interested in learning more about it?”

7. **Specific Further Involvement/Engagement Donor Wants in Funding Priorities**
Sample- “Would you like to attend a special activity/event to learn more about that priority project and meet some of the people leading it?”

8. **Thoughts About Other Generous Donors Who Are Having Impacts**
Sample- “What types of impact would be most meaningful to you? May I please tell you about another generous donor who shares similar desires for impact on the project as you do?”

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Cultivation Stage

Helpful Tips
a. You are helping build the donor’s knowledge, understanding and conviction to support funding priorities that accomplish organization’s mission.
b. It’s ok to take multiple meetings for donor to fully learn, meet leaders of, and engage in activities concerning their priorities of interest.
c. When donor seems ready, ask if they will meet to discuss a proposal for how they can make a generous gift to achieve their desired impacts.
d. In major and planned giving, a donor’s charitable gift commitment to a funding priority of interest PRECEDES their gift planning structure.

Challenges For Audience Discussion
1. Donor thinks others having impact are far wealthier and can’t imagine giving at such levels. What should you say?
2. Cultivation starts well but donor starts to delay/avoid/ignore your requests to take next steps and meetings. What should you say?
Solicitation Stage

What To Learn About Donor
Still Based On- A) What You Haven’t Learned Yet From Prior Meetings, B) Deeper Dives Into Areas Already Learned

Organization Information to Discuss
Gift Proposal for Each Funding Priorities of Donor Interest

Donor Input/Feedback to Obtain (How? Ask Questions/Listen Actively – See Appendix for Questions)

9. Sample Questions to Ask Concerning Proposal

Before Discussing Proposal- “Before discussing the proposal details, would it help you if we briefly review highlights of the project plans for that funding priority?”

“You told me how important it is for you to have meaningful impact on the people who will benefit from (name of funding priority). I have a proposal to discuss that could help you accomplish that. Before we discuss the details, would you mind briefly sharing which parts of the plans for that project excite you the most? I want to be sure your gift commitment is designated to impact all those areas that are exciting to you.”

After Discussing Proposal- “Do you have any questions or feedback you’d like to share about the proposal for (name of funding priority)?”

“Yes, we can certainly make your requested modifications to the proposal. Do we have your agreement that once the modifications are made, you intend to make a gift to support the (name of funding priority)?”

Helpful Tips
a. Proposals can be oral, written or a combination. Be sure to define any jargon.

b. Your role is to guide and educate, not to advise. Refer donor to tax/legal/financial advisors during decision-making.

c. If donor hesitates, discuss concerns. Are concerns about the project?..gift amount?...gift timing?...externalities? You may need to slow down process.

d. It can take multiple meetings to complete a major/planned gift commitment (including obtaining signed documents).
Gift Completion Stage

Donor Input/Feedback to Obtain (How? Ask Questions/Listen Actively – See Appendix for Questions)

10. Gift Amount Range and Timing

Sample Questions to Ask-

"Based on our discussion and your agreement to support the proposal, we would like you to consider a total charitable gift of $(x,xxx,xxx) so you may achieve the impact you said is important to you. What are your thoughts?” (If all ok) “May we now move our conversation ahead to discuss the timing and some options for structuring your gift?”

“There is a range of gift amounts through which you can have an impact on the people who will benefit from (name of funding priority). I’ll suggest three options for your consideration. First, a total gift commitment of (Highest $ Amount in Range) will enable you to have impact by (describe impact on beneficiaries). Second, a total gift commitment of (Middle $ Amount in Range) will enable you to have impact by (describe impact on beneficiaries that is less than first option and more than third option). Third, a total gift commitment of (Lowest $ Amount in Range) will enable you to have impact by (describe impact on beneficiaries that is less than second option). Which of the three options would you like to discuss further?”

11. Gift Structure Options and Promised Recognition

Sample Questions to Ask-

“Some donors who support us as generously as you do, are donating appreciated assets like stocks, bonds, mutual fund shares, and investment real estate that have been owned for at least a year and have increased in value. You can receive additional tax benefits by using appreciated assets for your gifts instead of cash. May we discuss that option further for structuring your commitment? I’ll also encourage you to discuss it with your tax/financial advisor as you decide which giving options are best suited for your specific tax and financial situation.”

“You mentioned that you’re taking required minimum distributions from your retirement plans. May I please tell you about a gift structure called the QCD, which stands for qualified charitable distribution from an IRA? The QCD option could help you fund part of your gift commitment to support (name of funding priority).”

“As an expression of our organization’s gratitude for your generous commitment, we would be honored to recognize and celebrate your support. May we please discuss options for recognition and publicity so we can work together to arrange those that you prefer?”

Challenges For Audience Discussion

1. Stock markets take a big dive during gift completion and donor gets cold feet. What should you say?

2. Donor’s spouse balks at a gift range that is too much. What should you say?
Thank You CCPG Sightseeing Audience

Presentation Appendix

Many more sample questions you can use with donors!

For Additional Information, Please Contact

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