

For the NWPGR Annual Conference's 2:45 p.m. Cowbell Session, "You Attended Their Memorial: Who Will Attend Your Memorial? A personal conversation about professional legacy gift relationships," it's clear that attending memorials of our community's most successful and respected leaders is a job benefit. Still, we should ask if our workplace-based relationships remain purely professional or become personal. While we've heard that "people give to people," do our professional relationships ever become too personal? Is there a balance between professional and personal?

To help us prepare for this session, Arlene Siegel Cogen and Kathy Saitas shared illustrative stories and insights (see below). Please enjoy them and join in September 4 to discuss and share your own stories, insights, and thoughts.

Arlene Siegel Cogen

1) Mr. Smith was a very successful businessman now retired to Florida. He had three children, each successful and busy with their own lives. Mr. Smith initially was very high maintenance. He was upset if the decimal points didn't line up on his statements. He would call me daily to complain about something: his account, his family or whatever. At first I was annoyed, but then put it into perspective. He was a lonely man whose children and grandchildren were too busy to spend time with him. I was the professional philanthropic therapist. What started out as him calling every day, led to me reaching out to him first. Slowly he became kinder and gentler. He began inviting me to stay with him at his home in Florida. Would you visit?

2) Jane contributed \$300,000 to the Oregon Community Foundation (OCF). She is very active in civic matters and advises OCF to make distributions from her fund to assist rural areas. She also documented a \$5 million testamentary gift for another fund on which her children will advise. The agreement includes a 10-year sunset clause within which the fund must be exhausted or go to OCF's general fund. After a wonderful meeting with her and my colleague, Jane lights up a joint and asks us to join her naked in the hot tub. Do you join her?

3) Five years ago Donald and Maria donated \$50,000, the minimum \$25,000 to create two funds. Their attorney coordinated all the paperwork and funding. Additionally there is an expected \$10 million bequest at the second death. Each fund has a separate objective at death, but during the donors' lives they asked to allow distributions from one fund to another to simplify grant making. After our foundation updated its data system, it became onerous to accomplish this. We explained the situation to the donors and provided a simple solution. Through this honest conversation we learned the donors mistakenly thought they were required to donate \$25,000 to each of these funds during their lives to ensure the repository for their estate gift. We apologized for the miscommunication with the attorney and for the additional legal costs they incurred to create these funds *inter vivos*. They appreciated our direct honesty. Can you communicate effectively, clean up mistakes, and strengthen relationships with donors?

4) According to Maslow's traditional hierarchy, humans meet their physiological, safety, social, (self) esteem, and self-actualization needs in that order. Self-actualization is realizing personal potential, self-fulfillment, and peak experiences. In fact, an updated version of Maslow's hierarchy adds (self) transcendence in which the individual's own needs are put aside, to a great extent, in favor of service to others and to some higher force or cause conceived as being outside the personal self. I believe as development professionals we are "Transcends" who help others self-transcend. We show up at their memorials because their personal growth was also our personal growth and affirms our role as "Transcends."

We can help our donors achieve self-actualization and self-transcendence by respecting and accepting their wishes, managing and meeting their expectations, and remaining neutral and nonjudgmental.

1) As a fledgling planned giving officer on one of my first donor visits, I traveled to the Chattahoochee National Forest in North Carolina. When I arrived, having driven many miles through the foothills of the Blue Ridge Mountains, I was at first overwhelmed at the beauty and then astonished at my destination: a two room cabin in the woods. An alumna from the class of '46 welcomed me. She was grateful, gracious, brilliant (formerly a federal government investigator), but very sad. A self-described recluse, her only true connection in the world was her child, a son she had out of wedlock in the late 1940s. Within the first 15 minutes of my stay she broke down in tears telling me that her son had recently died at the age of 28 in a bungee jumping accident far from her home. She hadn't seen anyone since his death--even receiving his ashes by mail. She pleaded with sad eyes for me to hike with her that very day to their favorite spot above a waterfall in a remote part of the forest and help her spread his ashes. My heart ached, knowing that we were complete strangers, connected solely through her alma mater, a place that she knew and trusted and that employed me. It was at that moment that I first learned how deeply intimate and personal work as a planned giving officer can be. Did Kathy take that hike? Would you? And then?

2) The husband of a well-known author called on behalf of his wife, asking how much it would cost to endow a scholarship in her will. I answered that at present the cost was \$75,000. However, given that his wife was in her 60s and would live a long time, I could not say how much a scholarship would cost at an uncertain point in the future, and so I proposed an alternative: that they might consider establishing a scholarship at a lower level now and then topping it off with an endowment in their wills. The husband replied that his wife had advanced cancer with a near-term prognosis. I felt awful. Still, I followed up with a practical thought: even if her life span was short, he would live a long time and their combined estate wouldn't come to the college until the end of his life. I stood behind my previous suggestion. To this he replied that he had stage four cancer and a prognosis not much better than hers. I flew to see them that week. They established a 7-figure scholarship, and she passed away within a month. Since then her husband's cancer went into remission, and he and I have become good friends. At the college, we held a memorial reading for his wife and have honored her in a number of ways. To express his gratitude the husband presented me with a stunning necklace that had once been hers. Would you accept such a gift? If so, under what circumstances?