Slide 1		
	Visiting with Donors	
	A 17 Year Retrospective	
	Roger Ellison, CFP	
	Northwest Planned Giving Roundtable	
	Portland, Oregon	
	Friday, November 12, 2010	
lide 2		
	I was clueless!	
lide 3		
ilue 3		
	Planned giving was a foreign sound	
	and concept	

Slide 4	Gain an understanding of our donors	<u> </u>	
	(walk in their shoes)		
	• Who were they?		
	Where were they? From where had they come?		
	How did or had they made their way?		
	What were they like?	_	
	What was their world like? How did they look at the Pakeh?		
	 How did they look at the Rehab? Why and how did they give?		
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Slide 5		7	
Silue 5	Gain an understanding of the Rehab (see ourselves through the eyes of		
	others)		
	When did we begin?		
	Why did we begin?		
	Who made it happen?		
	What did we do? How did we do it?		
	Why had we been so successful?		
	What was our image?	_	
		-	
Slide 6		_	
		_	
	Do I fit?		
		_	
		_	
		_	
		_	

Slide 7

How was I to connect our donors to the Rehab through my work?

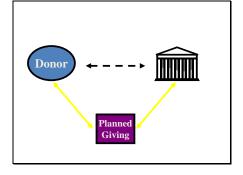
- we were appreciative of their gifts
- it was only appropriate to thank them
- neighbor helping neighbor was our history
- our donors were our neighbors and our friends
- drop by and thank them
 - On their turf, in a manner which fit them, but with my agenda.

Slide 8

How to tell the story

- My introduction
- What do I do?
- · Seven words or less
- Elevator speech
- My business card

Slide 9



Slide 10		Ì	
	Contamatic and lighting of goods		
	Systematic application of passion		
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Slide 11			
	Systematic search for passion		
Slide 12		1	
Silue 12			
	I am the Rehab		
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Slide 13

Absolute integrity

- Model Standards/Ethical principles
- The Garrett Standards
 - Never do to a donor what you would not do for your own mother and father.
 - No gift is worth the good name of your charity.

Slide 14

Where do we get our prospects?

- Response to marketing
 - Direct mail
 - Newsletters
- Self nominations
- Referrals
- Professional advisors
- Lurking at events!
- Face-to-face at their front door!

Slide 15

	Total Giving ↓			
	\$10.000 or more	9	5	1
GENE	\$5000 to \$2222,22	10	6	2
GENEROSITY	\$1000 to \$4030.20	11	7	3
	\$1 to \$222.92	12	8	4
4 Page Silver	# of Gifts →	1-24 gifts	25-40 gifts PASSION	50 or more gifts

Slide 16	Focusing on the Donor the entire process in a nutshell Plan your meeting Open honestly Probe donor needs Explain benefits Nurture concerns Ultimate commitment Preserve the relationship		
Slide 17	Behavioral Styles • Discern • Understand • Adapt		
Slide 18	Emotion = \$]	

Emotional needs Financial issues

• Decision-making process

Slide 19	Opening the Meeting • Begin with the end in mind – Covey • Build rapport • Share the purpose –NOT the objective • Seek permission to question	
Slide 20		
	Resolving Issues • Nurture their emotions • Ask questions • Solutions you can offer • Agreement	

Slide 21

Gaining Commitment

- Bit by bit
- Feel the pulse
- Circle back
- No manipulation or pressure

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Presenting Benefits

- Convince mode
- When?
- Transition
- Beware of yourself
- Benefit Statement Planning
- Never present on paper what you can present in person!

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Benefits

- Match your benefit statement to the donor's behavioral style
- Personalize the opportunity
- Tie their passion to the gift

Slide 24

Making the Ask

- Sometimes there is no need for an ask
- Summarize
- Simple ask
- Be patient
- Nurture objections
- Details

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Gaining commitment

- Get agreement part by part
- Take the pulse often
- Stop and go back as necessary
- · Apply no pressure

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Stewardship

- Thank early!
- Thank often!
- Thank differently!
- Find ways!
