

# Index

## A

### Ability

- estate size and, 34, 37
- factors impacting, 33–37

### Academy, 222

### Acceptance

- organizational, 255–57
- staff, 263–65

### Access, to donors, 162

### Accounting, of planned gifts, 291–94

### Advertising, 151–53

- cost-effective, 152
- in external media, 151–52
- headlines, writing, 152
- print, 152–53

### Advice, free, 165–66

### Advisory group, envisioning, 172

### *AFP Code of Ethical Principles and Standards*, 28

### African Americans

- charitable bequests by, 31
- fraternities and sororities, 77
- motivation of, 72

### philanthropy of, 73

### Age

- charitable gift annuity and, 42
- propensity and, 41–43

### Aging population

- charitable bequest and, 6
- charitable gift annuity and, 8

### Aleman, Mindy, 194

### American Cancer Society, 68, 158, 159

### American Civil Liberties Union (ACLU), 187

### Annual fund, 27

- donors, 54

### Annual funds

- donations to, 4

### Annual giving, estate giving to, 34

### Annual letter, 245, 246

### Annual report, listing donors in, 238

### Appreciated stock, 35

- taxes and, 64

### Appreciation

- showing donors, 237–39
- tokens of, 243

## Index

- Ask, 185–232  
 amount, 216–17  
 for bequest gift, 222–23  
 for charitable gift annuity, 224–26  
 for charitable remainder uni-trust,  
 226–28  
 closing, 221  
 conversations, 222–28  
 with direct mail, 187–92  
 through face-to-face visits, 186,  
 200–220  
 follow-up, 220  
 marketing recommendations from  
 donors, 228–29  
 necessity of, 186–87  
 scenario for, 217–19, 220–26  
 using telephone, 192–200
- Association of Fundraising Professio-  
 nals, 18
- Attorneys, planned giving and, 30–31
- Authority, in messaging, 107, 108
- Average bequest value (ABV), 56
- B**
- Baby Boomer generation, 70, 71  
 marketing to, 72  
 nonprofit organizations and, 71  
 philanthropic values of, 13  
 women, 44
- Background marketing, 17
- Bait and switch, 247
- Barden, Ann, 143–144
- Behind-the-scenes tours, 244
- Benchmarking targets, 268
- Bequest confirmation form, 283–84
- Bequest giving, gender and, 44
- Bequests  
 ask for, 222–23  
 planned gift program potential  
 worksheet for, 277–80
- Bequest-specific motives, 75, 81–84
- Bequest tickler file, 248
- Board, governing  
 enlisting support of, 263  
 gaining approval of, 256
- Bottom line, increasing, 166–67  
 relationships and, 168
- Bram, Leslie D., 198
- Brand identity  
 creating, 92–95  
 of legacy society membership, 242
- Brand name, of organizations, 65
- Brandt, Susan Blair, 235
- Brassley, Jane, 211–13
- Brozo, Jim, 92, 112
- Budget, for marketing plan, 268
- Budget limits, for organizations,  
 150–51
- C**
- Calendar, marketing, 268, 269
- Case for Support, 257–63  
 defined, 258  
 development process for, 261–63  
 Internal Case for Donor-Centered  
 Philanthropic Planning, 259

## Index

- Case studies
  - Brassley, Jane, 211–13
  - Hoeffel, James, 204–5
- Charitable bequests, 5, 6, 26
  - actual *versus* considering, 7
  - by African Americans, 31
  - aging population and, 6
  - by Hispanics, 31
  - inflation and, 13
- Charitable estate planning, predicting, 39
- Charitable gift annuity (CGA), 5, 10, 13, 25, 26, 30, 32, 43, 62, 72, 73, 82, 95, 104, 168, 188, 192, 193, 195, 215, 241, 266
  - age and, 42
  - aging population and, 8
  - ask for, 224–26
  - brand identity and, 93
  - direct mail and, 111
  - establishment of, 235
  - legacy society membership and, 241
  - planned gift program: potential worksheet for, 280–81
  - safety of, 112
  - target market for, 266–67
- Charitable lead annuity trusts (CLAT), 11, 42
  - taxes and, 42
- Charitable remainder annuity trusts, 11
- Charitable remainder trust (CRT)
  - legacy society membership and, 241
- Charitable remainder trusts (CRT), 7, 12, 32, 66, 213
- Charitable remainder uni-trusts (CRUT), 42, 67, 212
  - ask for, 226–28
- Charitable testamentary provision, 39
- Charities
  - generational cohorts and, 71
  - trust in, 48
- Charity officer, visit with, 201
- Children, propensity and, 40
- Circular planned giving process, 30, 234
- Closing, ask, 221
- Coca-Cola, 103
- Cold calls, 273
- Colleges, giving back to, 78
- Comfort zone, of planned gift donors, 68
- Commitment
  - formal, 219
  - request for, 218
  - writing, importance of, 223
- Committee, 173
  - council *versus*, 172
  - planned giving, 173
  - time commitment of, 175
- Communication, 96–102
  - materials, 109–11
  - open, 167
- Communications
  - evaluating, 271
  - gift giving and, 80, 81

## Index

- Community, sense of, 77
  - Community-based donors, 213
  - Community foundations, 5
  - Community life, nonprofit
    - organizations and, 33
  - Community service, 163
  - Confidentiality, commitment to, 260
  - Consistency, in messaging, 107
  - Continuing education credits, 161
  - Conversations, ask, 222–28
  - Corporate citizenship, 163
  - Council, 173–74
    - building robust, 171–72
    - committee *versus*, 172
    - credibility of, 179
    - development of, 169
    - professional advisory, 172
    - recruiting members, 179
    - reinventing, 169
  - Crandall, Robert J., 221
  - Creativity, in marketing, 266
  - Credibility
    - of council, 179
    - of donor advisors, 164
    - in messages, 104
    - of organizations, 61
  - Cullinan, Tom, 169–170
  - Cultivation
    - advertising, 151–53
    - communication channel for,
      - 96–102
    - through direct mail, 111–16
    - through e-mail, 134–38
    - through events, 142–45
    - existing materials, 109–11
    - through face-to-face visits, 145–51
    - fundamental strategic approach,
      - 95–96
    - goal of, 213
    - messages about, 103–9
    - need for, 90–91
    - through newsletters, 120–26, 159
    - of planned gift prospects, 89–156
    - of professional advisors, 157–84
    - social networking technology, 139–42
    - through telephone communication, 116–20
    - through websites, 126–34
- D**
- Damen, Margaret May, 44
  - Deferred gifts, 106, 272
    - evaluating commitments, 270
    - planned gifts as, 11
    - reporting, 245
  - Deferred planned gift, 27
  - Demographics
    - impact of, 40
    - motivation and, 70–75
  - Demotivating factors, 84–86
  - Desires, of planned gift donors, 61–69
  - Development professionals
    - actions of, 69
    - advisors and, 160
    - business cards for, 110

## Index

- donors and, 2
- e-mail and, 136
- estate giving and, 160
- exchanges of value and, 161–68
- free advice and, 165–66
- loved ones of donors and, 29
- motivation of prospects and, 29
- tax deduction information from, 226
- website, questions about, 127–28
- Direct mail, 111–16
  - to ask for donations, 187–92
  - urgency through, 190
- Donor advisors. *See also* Professional advisors
  - credibility of, 164
  - cultivation of, 158–59
  - development professionals and, 160
  - exchanges of value and, 161–68, 162–68
  - fundraising goals of, 159
  - nonprofit organizations, access to clients of, 162
  - practices for working with, 180–82
  - referrals from, 161
  - requirements of, 165
- The Donor Bill of Rights*, 28, 49
- Donor-centered fundraising, 3
  - illustration of, 15–17
- Donor-centered marketing, 1–24
  - care of donors in, 2–4
  - donor-centered fundraising, illustration of, 15–17
  - getting started, 253–76
  - marketing *versus*, 12
  - myths about planned giving, 9–11, 13
  - newsletters and, 121–22
  - percentage of Americans with planned gift, 5–9
  - planned gift marketing, 4–5
  - proactive *versus* reactive planned giving, 17–18
  - stewardship and, 236
  - timing of, 13–14
- Donor-centered philanthropic planning, 286
- Donors
  - care of, 2–4
  - community-based, 213
  - defending, 249–50
  - development professionals and, 2
  - educating, 20
  - history of, 204
  - honoring wishes of, 248
  - identifying, 25–57
  - importance of gift, 185
  - marketing recommendations from, 228–29
  - mission-only, 213
  - planned gift, 27–31
  - program-focused, 214
  - reporting to, 245–46
  - thanking, 237–39
  - treatment of, 149–50

## Index

- E**
- Economic comfort level, of planned givers, 29
- Economy, future gifts and, 288
- Education
- advertising, 151–53
  - communication channel for, 96–102
  - through direct mail, 111–16
  - of donors, 20
  - through e-mail, 134–38
  - events, 142–45
  - existing materials, 109–11
  - through face-to-face visits, 145–51
  - fundamental strategic approach, 95–96
  - level, propensity and, 40, 74
  - messages about, 103–9
  - need for, 90–91
  - through newsletters, 120–26
  - of planned gift prospects, 89–156
  - of professional advisors, 157–84
  - social networking technology, 139–42
  - through telephone
    - communication, 116–20
  - through websites, 126–34
- Eisland, Elizabeth Tice, 250
- Electronic newsletters (e-newsletters), 134
- Electronic screenings, 52
- Elements, of marketing plan, 266–68
- budget, 268
  - calendar, 268, 269
  - key goals, 266
  - key objectives, 267
  - mission, 266
  - outcomes, 268
  - strategies and tactics, 267
  - target markets, 266–67
- Ellison, Roger, 52, 110, 150, 202, 270
- E-mail, 134–38
- creating, 137–38
  - development professionals and, 136
  - obtaining addresses, 137
  - spam, 135
  - timing of, 137
- Emotions, in messages, 105–6
- Endowment
- fund, 174–75
  - important roles of, 286–87
  - structures, 216
- Estate gift, 33
- to annual giving, 34
  - targeting donors, 34
- Estate planning, 21, 85
- social networking and, 141
  - taxes and, 83
- Estate planning education series, 198
- Estate size, ability and, 34, 37
- Estate tax, 43
- Events
- education through, 142–45
  - face-to-face visits as, 150
  - hosting, 143

## Index

- planning, 144–45
  - for senior citizens, 143
- Exchanges of value, 161–68
  - access, 162
  - bottom line, increasing, 166–67
  - credibility, 164
  - free advice, 165–66
  - philanthropy, 167–68
  - publicity, 162–64
- F**
- Facebook, 139, 141, 142
- Face-to-face visits, 32, 145–51
  - ask, 186, 200–220, 228
  - barriers to action in, 147
  - at events, 150
  - introductory, setting tone, 206–7
  - introductory, setting up, 202–3
  - pattern of, 149
  - trust and, 151
  - types of, 146–47
- Family
  - care of, 82
  - nonprofit organizations and, 85
- Federal Form 990, 28, 46
- Fidelity Charitable Gift Fund, success of, 166
- Financial characteristics, impact of, 40
- Financial Counseling Services (FCS), 170
- Financial planners, 30–31
- Financial security, perception of, 35
- Fiscal management, of organizations
  - donors and, 28
  - Federal Form 990, 28
- Fraternalities, African Americans and, 77
- Fraud, 247
- Fredricks, Laura, 27, 221–223
- Fundamental strategic approach, 95–96
- Fundraising
  - approaches, 187
  - bait and switch in, 247
  - donor-centered, 3, 15–17
  - friend-raising and, 46
  - goals, 159
  - journalism and, 210
  - organization-focused, 3
  - planned giving as, 10
  - proactive, 18
  - readiness, gauging, 256
  - software, 250
  - over telephone, 192–200
- G**
- Gee, Heather, 73, 77, 161
- Gender
  - bequest giving and, 44
  - propensity and, 43
- Generation X, 70, 71
- Generosity, passion and, 52, 53
- Get-acquainted session, 204
- Gift planning, 54
  - events, 142–45

## Index

- Gift planning programs, phases in, 255
- Gift proposal, 210
- Gifts, using telephone to ask for, 192–200
- Gillon, John, 146, 210
- Giving USA Foundation, 288
- Golden Rule, 2
- Governing board, social capital and, 45. *See also* Board, governing
- GPD Academy, example, 285–90
- Gratitude, as motivation, 76
- Greaves, Steven C., 67, 215
- Great generational cohort, 70, 71
- Greenfield, James M., 244
- Guide to Bequests* (NRDC), 189
- H**
- Handwritten notes, importance of, 112–13
- Havens, John J., 13–14, 75, 77
- Headlines, writing, 152
- “Health and Retirement Study,” 6, 33
- Hispanics
  - charitable bequests by, 31
  - motivation of, 72
- Hoeffel, James, 204–5
- Holistic approach, to planned giving, 17
- Honesty, importance of, 62
- Hospitals
  - donations to, 48
  - fundraising and, 15–16
- I**
- Immortality, as motivation, 83
- Inflation, charitable bequest and, 13
- Informal focus groups, 150
- Information, pros and cons of, 49–50
- Intergenerational wealth transfer, 14
- Internal Case for Donor-Centered Philanthropic Planning, 259
  - elements of, 260
  - purpose of, 259
  - sample of, 285–90
- Internal stewardship, 246–50
- Internet conferencing, 151
- Introductory visit
  - development professional’s role in, 203
  - setting up, 202–3
  - tone, setting, 206–7
  - wrapping up, 208–9
- J**
- James III, Russell N., 6, 15, 34, 39–40
- Janney, Scott R.P., 42, 159–160, 165, 168, 170, 172, 176, 180
- Jay, Elaine, 186, 229, 240
- Jargon, avoiding, 129
- Joint marketing, 159
- Journalism, fundraising and, 210
- K**
- Kendrick, John B., 82
- Key goals, of planned giving program, 266

## Index

- Key objectives, of target market, 267
- KISS (Keep It Simple and Stupid)  
 technique, 103
- Komen, Susan G., 63
- Kramer, Donald W., 114
- L**
- Language  
 jargon, avoiding, 129  
 organization-focused, 15  
 power of, 97  
 power words, 97–102
- Leadership, confidence in, 28
- Lecture series, 110
- Legacy  
 net worth and, 217  
 promotion of, 228–29  
 recognition group, 240  
 of science, 211–13  
 university, 207
- Legacy Leaders Million-Dollar  
 Challenge (NRDC), 188, 189
- Legacy society membership, 240  
 behind-the-scene tours for, 244  
 brand identity of, 242  
 criteria for, 241–42  
 death of member in, 244
- Legal documents, 220
- Life estate, legacy society membership  
 and, 241
- Life expectancy, cultural changes and,  
 43
- Life-income gifts, 172
- Life-note, 105
- LinkedIn, 139, 142
- Liquid asset, tax deduction and, 26
- Little Rock Council, 171–72
- Luncheons, for planned gift donors, 244
- M**
- Makous, Bruce, 200, 216
- Manipulation, 60
- Marketing  
 to Baby Boomer generation, 72  
 background, 17  
 channels, 90–91  
 creativity in, 266  
 direct mail and, 114–15  
 donations based on, 64  
 donor-centered, 1–24  
 donor-centered marketing *versus*, 12  
 evaluating, 271  
 impact of newsletter, 121  
 joint, 159  
 KISS, 103  
 messages, 103–9  
 multifaceted effort, 27  
 passive, 229  
 planned gift, 4–5  
 recommendations from donors,  
 228–29  
 steps in, 19–22  
 through storytelling, 106–7
- Marketing effort, evaluating, 270–74  
 areas for measure, 270–71  
 process activity, 272–73

## Index

- Marketing plan, building, 265–69  
 elements of, 266–68
- Messages  
 authority, 107, 108  
 consistency in, 107  
 credibility in, 104  
 emotions in, 105–6  
 marketing, 103–9  
 principles of, 107  
 reciprocity, 107  
 scarcity, 107, 108
- Melvin, Ann T., 122, 137
- Millennial generation, 70, 71
- Minority groups, charitable bequests  
 by, 31
- Mission, of organization, 266
- Mission-only donors, 213
- Modeling, by professional advisors, 180
- Model Standards of Practice for the Charitable Gift Planner (PPP)*, 28
- Moore, David B., 36, 110, 142
- Motivation  
 bequest-specific, 81–84  
 categories, 75  
 demographic factors impacting, 70–75  
 gratitude as, 76  
 immortality as, 83  
 manipulation *versus* inspiration *versus*, 60  
 for philanthropy, 213  
 of planned gift donors, 59–88  
 prestige as, 78  
 publicity as, 162–64  
 regional differences and, 74  
 religion as, 74
- Motivational groups, 214
- Mulia-Howell, Michelle, 191
- Multiyear pledge funding, 216
- Murphy, Phillip J., 1, 18, 263
- MySpace, 139
- N**
- Named funds, 216
- Namesake scholarship fund, 64
- National Conference on Planned Giving, 241
- National Institute on Aging, 6
- National Resources Defense Council (NRDC), 188
- Net worth, legacy and, 217
- Newsletters, 120–26  
 cultivation and, 159  
 electronic, 125, 134  
 listing donors in, 237  
 marketing impact of, 121  
 themes in, 123–24
- Nonprofit organizations, 4  
 access to advisor's clients, 162  
 advisor community and, 158  
 Baby Boomers and, 71  
 community life and, 33  
 credibility of, 164  
 data collection by, 53  
 family and, 85  
 gender and, 43  
 giver's relationship with, 39  
 giving back to, 78

## Index

- planned gift and, 6, 9  
 priority-prospect equation and, 31  
 reciprocity and, 107  
 reputation, building, 163  
 steps for telephone contact, 199–200  
 websites for, 110, 126–27
- O**
- Organizational acceptance, gaining, 255–57  
 Organizational factors, 79–81  
   of motivation, 75  
 Organization–focused fundraising, 3  
 Organization–focused language, 15  
 Organizations  
   brand name of, 65  
   budget limits and, 150–51  
   credibility of, 61  
   direct-response approaches, testing for, 194  
   donor advisors and, 162  
   e-mail from, 134  
   fiscal management of, 28  
   fundraising approaches by, 11  
   generational transfer and, 15  
   geographic obstacles for, 150–51  
   governing board of, 45  
   informal focus groups by, 150  
   lecture series and, 110  
   nonprofit, 4  
   planned gift marketing for, 4–5  
   planned giver databases, 36  
   preparing for donor-centered marketing, 254–55  
   professionalism of, 79  
   trust and, 48  
   volunteer and staff leaders of, 19  
   websites and, 17
- Outcomes, for marketing plan, 268  
 “Over-the-transom” gifts, 187
- P**
- Partnership for Philanthropic Planning, 11, 14, 69, 75, 254, 291  
 Passion, generosity and, 52, 53  
 Passive marketing, 229  
 Personal interaction, importance of, 201  
 Personalization, of thank-you letters, 238  
 Personalized letters, 195  
 Philanthropic legacy, 185  
 Philanthropic planning, donor-centered, 286  
 Philanthropic process  
   advice in, 166  
   credibility in, 164  
   professional advisors in, 157  
   trust in, 48  
 Philanthropic values, of Baby Boomer generation, 13  
 Philanthropy, 167–68  
   advisors’ facilitation of, 182–83  
   of African Americans, 73  
   database of advisors in, 161  
   motivations for, 75, 213

## Index

- Photographs, power of, 129
- Planned gift dollar worksheet,  
291–94
- Planned gift donors
- bequest-specific motives, 81–84
  - comfort zone of, 68
  - demographic factors impacting  
motivation, 70–75
  - demotivating factors of, 84–86
  - desires of, 61–69
  - general individual motives, 75–78
  - hope and, 63–64
  - interests of, 69
  - lifestyles of, 68
  - manipulation *versus* motivation  
*versus* inspiration, 60
  - motivation, identifying, 59–88
  - organizational factors, 79–81
  - recognition of, 240–44
  - risk and, 63
- Planned gift program, potential  
worksheet, 277–81
- Planned gift prospect
- cultivation of, 89–156
  - education of, 89–156
- Planned gifts
- costs of, 148
  - deferred, 27
  - as deferred gifts, 11
  - expectation of ask for, 186
  - formula for, 216
  - identify donors of, 25–57
  - percentage of Americans with, 5–9
  - percentage of people asking for, 90
  - prospects for, 26–27
  - reasons for, 76
  - sense of community inspiring, 77
  - soliciting, 198
  - volunteer team to secure, 176
  - willingness to consider, 8
- Planned givers
- advisors and, 30–31
  - basic data on, 50–51
  - characteristics of, 27–31
  - databases for, 36
  - economic comfort level of, 29
  - factors impacting ability, 33–37
  - factors impacting propensity, 38–44
  - factors impacting social capital,  
45–49
  - information pros and cons, 49–50
  - loved ones and, 29
  - priority-prospect equation, 31–33
  - prospect information, 38
  - senior citizens as, 34–35
  - trust and relationship building with,  
38
  - wealth information, gathering, 36
- Planned giving
- best time for, 14
  - brand identity, creating, 92–95
  - cheat sheets, 264
  - circular process, 30
  - effective program, 17
  - familiarity with term, 90, 153
  - holistic approach to, 17

## Index

- myths about, 9–11, 13
- nonprofit definition of, 89
- outcomes of program, 271–72
- proactive *versus* reactive, 17–18
- program evaluation, 270
- successful programs, stepping stones to, 19–22
- work groups and, 172
- Planned Giving Advisory Council, 160, 169–75
  - members and, 177–79
- Planned giving committee, 173
- Planned Giving Course*, 26
- Planning, events, 144–45
- Power words, 97–102
- Practices, for working with
  - professional advisors, 180–82
  - challenging process, 181
  - enabling others, 181
  - encouraging heart, 181–82
  - modeling, 180
  - shared vision, inspiring, 180
- Preparation, for donor-centered
  - marketing, 253–76
  - case for support, 257–63
  - marketing effort, evaluating, 270–74
  - marketing plan, building, 265–69
  - organizational acceptance, gaining, 255–57
  - organizations, 254–55
  - staff acceptance, gaining, 263–65
- Prestige, as motivator, 78
- Print advertisements, 152–53
- Priority-prospect equation, 31–33
- Proactive fundraising, 18
- Proactive planned giving
  - reactive *versus*, 17–18
- Process activity, measurement of, 272–73
- Professional advisors
  - building relationships with, 158–60
  - cultivation of, 157–84
  - defining and evolving roles of, 176–77
  - education of, 157–84
  - exchanges of value and, 161–68
  - limited experience, making up for, 169
- Planned Giving Advisory Council
  - and, 169–75, 177–79
  - practices for working with, 180–82
- Professional advisory council, 172
- Professionalism, of organizations, 79
- Program-focused donors, 214
- Propensity, factors impacting, 38–44
  - age, 41–43
  - children and grandchildren, 40
  - education level and, 40, 74
  - gender, 43
- Prospect information, 38
- Prospects
  - basic data on, 50–51
  - face-to-face visits with, 146
  - identification of, 271
  - life story of, 207
  - personal interaction with, 201

## Index

- Prospects (*continued*)  
 planned gift (*See* Planned gift prospects)  
 for planned giving, 26–27  
 rating, 52–55  
 social networking and, 140–42  
 surveying, 52  
 telephone contact with, 117  
 Prospect screening group, 37  
 Protocols, importance of, 265  
 Publicity, 162–64  
 Purposeful conversation, 203
- R**
- Rating, prospects, 52–55  
 Reactive planned giving, proactive *versus*, 17–18  
 Real estate gifts, 11  
 Realized net gift income, 271  
 Reciprocity  
 in messaging, 107  
 nonprofit organizations and, 107  
 Recognition  
 benefits of, 240  
 importance of, 181  
 of planned gift donors, 240–44  
 wishes of donor regarding, 242  
 Referrals, from donor advisors, 161  
 Relationship building, planned givers and, 38  
 Relationships  
 bottom line, building, 168  
 building with service and face time, 91–92  
 with professional advisors, 158–60  
 stewardship and, 235  
 Religion, charitable giving and, 74  
 Remember a Charity consortium (UK), 9, 86  
 Reporting, to donors, 245–46  
 Reputation, of nonprofit organization, 163  
 Revocable gifts, 234  
 Risk, planned gift donors and, 63  
 Rooney, Patrick M., 74  
 Rothey, Rebecca, 94, 110
- S**
- Sagrestano, Brian M., 53–54, 71, 121–122, 191, 259–260  
 Sargeant, Adrian, 75, 78–81, 83–84, 104, 106, 186, 229, 240  
 Scarcity, in messaging, 107, 108  
 Scenarios, for requesting gifts, 217–19, 220–26  
 Schervish, Paul G., 13–14, 75, 77  
 Screening, prospects, 52–55  
 electronic, 52  
 Screening system, 36  
 Seeley, Mark R., 203  
 Senior citizens  
 hosting events for, 143  
 as planned givers, 34–35  
 Shang, Jen, 75, 78–81, 83–84, 104, 106  
 Silent generational cohort, 70, 71

## Index

- Social capital
  - building, 47
  - factors impacting, 45–49
  - importance of, 32–33
  - organization’s governing board and, 45
  - trust building and, 49
- Social networking technology, 139–42
  - for prospects, 140–42
- Software, fundraising, 250
- Sororities, African Americans and, 77
- Spam, 135
- Staff acceptance, gaining, 263–65
- Stelter, Larry, 7–8, 26, 41, 121, 123–124, 273
- Stewardship, 233–52
  - defined, 234
  - donor-centered marketing and, 236
  - internal, 246–50
  - planned gift donors, recognizing, 240–44
  - positive feelings from, 234–36
  - relationship enhancement through, 235
  - reporting to donors, 245–46
  - thanking donors, 237–39
- Storytelling, marketing through, 106–7
- Survey of Donors* (NCPG), 240
- T**
- Target markets, 266–67
  - key objectives of, 267
- Tax advisors, 30–31
- Tax deduction, 226
  - liquid asset and, 26
- Taxes
  - appreciated stock and, 64
  - avoidance of, 83
  - charitable lead annuity trusts and, 42
  - estate, 43
  - estate planning and, 83
  - minimization of, 83
- Team, 173, 174
  - solicitation of gifts by, 176–77
  - volunteer, 176
- Telephone, 116–20
  - ask for gifts over, 192–200
  - cost effective nature of, 199
  - enrolling prospects over, 198
  - fundraising models, 199
  - as information-gathering tool, 119
  - open-ended questions on, 195
  - steps for nonprofit organizations, 199–200
  - volunteers, 192
- Testimonials, 123
- Thanking donors, 237–39
  - reasons for, 237
- Thank-you letters, 237, 238
  - attributes of, 238–39
  - formal, 238
  - package, 190
  - personalization of, 238

## Index

- Third-party endorsement, 105
- Timing
  - of donor-centered marketing, 13–14
  - of e-mail messages, 137
- Tokens of appreciation, for legacy society members, 243
  - annual event, 243
  - birthday and holiday cards, 243
  - membership gift, 243
  - special newsletters and communications, 243
- Tone, of introductory visit, 206–7
- Troutman, David C., 246
- Trust
  - in charities, 48
  - crisis in, 49
  - through face-to-face visits, 151
  - face-to-face visits to build, 146
  - organizations and, 48
  - philanthropic process and, 48
  - planned givers and, 38
  - social capital and, 49
- Twitter, 139
  
- U**
- United States, percentage of planned gift in, 5–9
- United Way, 174–75
  - professional advisory committee of, 178
  
- Universities
  - giving back to, 78
  - legacy, 207
  - telephone volunteers for, 192–200
- Urgency, through direct mail appeal, 190
  
- V**
- Value, exchanges of, 161–68
  - access, 162
  - bottom line, increasing, 166–67
  - credibility, 164
  - free advice, 165–66
  - philanthropy, 167–68
  - publicity, 162–64
- Values, philanthropic, 13
- Video telephony, 151
- Vision, shared, 180
- Volunteer groups, 173
  - committee, 173
  - council, 173
  - team, 173
  
- W**
- Wahlers, Robert E., 38, 159–160, 259–260
- Wealth information, gathering, 36
- Wealth management, 159
- Wealth transfer
  - intergenerational, 14
  - positive impact of, 14
- Websites, 126–34

Index

for nonprofit organizations,  
110  
photographs on, 129  
for planned giving, 17  
promoting, 133–34  
Wills, 42

Women  
gift planning and, 44  
high-income, 44  
Woodard, Larry C., 172  
Work groups, planned giving and,  
172

<http://www.pbookshop.com>

<http://www.pbookshop.com>

<http://www.pbookshop.com>

<http://www.pbookshop.com>

<http://www.pbookshop.com>

<http://www.pbookshop.com>