Legacy Giving At Lunch

Key Discussion Takeaways from:

Engaging Your Donors Through Powerful Questions with Scott Nelson, CFRE, CGPA

Scott Nelson, Director Gift Planning for Benedictine Health System, reviewed key points of the downloadable Leave A Legacy Minnesota brochure entitled *Engaging Your Donors Through Powerful Questions*. He addressed the primary issue that participants face – that of being the leader for their nonprofit organization in which planned giving is only one of many responsibilities to manage.

How do you get that first appointment with a potential planned gift donor?

- Start with past donors whom you can thank for their past gift
- Mention a referral from another individual
- How you treat a donor between the time you ask them for a first gift and the time you ask them for a second gift will determine whether they retain with you.

What do you do before meeting with a donor?

- Prepare what you want to result from this meeting.
- Write down what the best and least acceptable outcome could be from the meeting.

What do you do when you meet with a donor for the first time?

- Seek understanding to start a relationship – what is their story?
- Understand that planned gift decisions are made by a couple – knowing the spouse's preferences is important.
- Never leave a meeting without asking for something (not necessarily a gift).
    - Ask for insight or advice
    - Reminds them what the purpose of the meeting is
- Be patient with those who "think out loud"
- See if you can be a resource to help the donor engage with the organization in another way.

Do you ask for a gift in that first meeting?

- Determine before the meeting whether you need to make the ask now
- Be nimble about whether to ask for a gift in the first meeting depending on how you perceive the conversation evolves.
- Be attuned to donors who have left many small gifts over time.
- Don't ask for money but be prepared for every meeting in case the opportunity presents itself.