

THE POWER OF PLANNED GIVING VOLUNTEERS:

THE BEST OF THE BEST

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Committing time to serve a nonprofit organization or special interest group as a Planned Giving volunteer requires a dedication often beyond that required of a typical volunteer. But then who ever said a Planned Giving volunteer was typical? The individual that volunteers for this post has to be well-connected in the philanthropic community, politically savvy, and focused on attaining the financial results that can make a difference both to the organization and to the donor.

Of course, all volunteers involved in the Major Gifts program meet these criteria. What makes a Planned Giving volunteer different? It is the essence of the gift. The Planned Gift itself is a direct reflection of the donor's history: the individual's passion, drive and the past successes that created a situation where a Planned Gift is even possible.

Take a moment to really consider what constitutes the Planned Gift your volunteer will be seeking. For example, a Planned Gift may be a bequest of the prospective donor's home, business or other acquisition: how much more personal a gift can one offer? The potential giver must be capable of openly discussing their age and eventual death: for many this is an extremely personal and sensitive topic. Because of the very nature of the gift, a successful Planned Giving volunteer is unique.

James Hohn of pgresources.com describes a Planned Giving volunteer:

"Volunteers who accept assignments to pursue planned gifts are typically talented and experienced people. The key personal traits required are empathy and understanding. They must have the ability to be inquisitive without forcing the topic. Excellent communicators, these folks build strong relationships and are respected in their field. Based on their personal success, they are able to show long-term value to the potential donor and the prospect's family as well as to the benefiting community.

To fulfill the role of Planned Giving advocate for your organization with grace and humility, you need a powerful volunteer. "

Today's Planned Giving volunteers are the best of the best. When you are seeking to add a new Planned Giving volunteer to support your organization, be cognizant of the unique abilities this new volunteer must possess. To be certain you're on the right track, I'll share some of the recommendations offered by James Hohn, CEO of pgresources.com when he works with an organization to build its Planned Giving department.

WHAT DO YOU OFFER?

Attracting volunteers and staff is an on-going function at every nonprofit organization. Consider the amount of time it takes to identify the appropriate person to fulfill a key role— the time investment is often more than most realize. Hohn explains: “I have found that locating and enticing volunteers and staff to join a nonprofit actually takes less time than it does to prepare the candidate to assume the new responsibilities.” Both phases of finding and orienting new members represent a significant investment of time and money.

“Those volunteers who choose to work in Planned Giving are typically better informed, educated in finance administration, and understand the big picture – the future of the organization they support” explains Hohn. “The organization’s task is to determine what they have to offer to these volunteers – what is in it for them to devote their time, energies and passion.”

To develop a good understanding of what new Planned Giving volunteers will gain from their association with your organization, take some time to talk to existing volunteers. Schedule a private interview and ask them to describe what they find of value about the task and why they choose to carry out this role in the organization. Take care to identify the factors each person describes that serve as a motivator and inspiration for their continued effort.

“Typically, a Planned Giving volunteer will tell me that they appreciate the amazing personal value of each gift as if they were making it themselves. This goes to the heart of a good Planned Giving volunteer: they have to speak from experience. The most powerful Planned Giving volunteer you will have is someone who has themselves given the institution a planned gift.” states Hohn.

Hohn advises “When you meet someone who understands the process and realizes the gravity of the gift as well as the substantial value of the donation by the giver as well as the recipient, it is your task to find a way to encourage them to become a Planned Giving volunteer – because this is the best of the best volunteers you can possibly find.”

ATTRACTING THE BEST OF THE BEST

Once you have identified an individual that is qualified to become a Planned Giving volunteer, consider what you can offer that volunteer. Employ the insight you gained from interviewing existing volunteers when you asked them to describe their personal motivations and the value they gained from contributing to a Planned Giving initiative. Here are four key descriptions from Hohn’s past Planned Giving volunteers you can add to your growing list of the motivators that inspire Planned Giving volunteers:

1. Self-satisfaction. *“The work is important and allows me to extend myself for a worthy cause beyond my every day occupation.”*

2. Relationships. *“I meet with wonderful people, committed to give back to the community and establish a legacy their children and children’s children will look back on with pride and respect. These are the type of people I most enjoy and am proud to assist at this phase of their lives.”*
3. Time. *“There are not enough hours in the day to do everything I want to do. So I make choices and do only those things that have value. Contributing to this organization and working with these prospective donors – many of whom have become my friends -- has lasting value.”*
4. Competency: *“I know this is a difficult task, that when carried-out properly can provide significant long-term gratification to the donor and the institution. Because I am fortunate to have the skills to make these connections, I am glad to put my knowledge to good use.”*

Hohn adds: “I have worked at many different organizations and institutions, but it is my Planned Giving volunteers that still stand out in my memory. Every single one of them was a vital, dedicated and passionate person I am proud to have known.”

HOW TO ‘ON-BOARD’ A PLANNED GIVING VOLUNTEER

Termed “on-boarding” in the corporate world, the task of orienting and preparing a new person to become a contributing member of the organization has taken on a new significance. Studies indicate that by engaging a new employee – or a new volunteer – from the start, will result in longer retention and greater commitment to achieve quality performance.

Provide Background

There should never be surprises for the volunteer. Before meeting with them to extend an invitation to join, prepare an outline explaining the details of the volunteer role, including:

- A complete description of how they will be supported by internal staff and other volunteers, providing a list of contact names and phone numbers.
- Examples of previous work in the field, including donor names, types of gifts and how those gifts benefited the organization.
- Clear and specific expectations for their efforts must include how their work will be evaluated, how they know when they are succeeding, and how their achievements will provide value to the organization.

It is particularly important for you to share past experiences as well as future expectations, particularly if your Planned Giving effort in the past has not been successful. In the situation where you have not achieved your Planned Giving goals during past initiatives, engage the prospective volunteer in an activity to review how the task was performed in the past to identify both the effective and ineffective actions.

Outline the Task

Develop an outline of the process of seeking prospects and presenting Planned Giving options, including typical time-lines to secure a gift and various outcomes others have achieved in the past. You must be honest and open, describing the work and dedication required.

Regardless of past successes, it is useful to review past practices to find areas that can be improved. Continuous improvement to determine best practices is vital to maintain volunteer effectiveness in a changing environment. Remember, everyone has their own strength and weaknesses: be certain the process you present to each volunteer plays to their strengths.

To be certain you are in tune with their expertise and areas of comfort, review the previously employed process with them. As you cover each step, encourage the volunteer to offer new ideas to overcome past areas of weaknesses and to expand on processes that appeared to be successful in the past. By contributing their ideas to how they will perform their task, they will have greater 'ownership' and thus commitment to the process.

CALLING ON A PROSPECT

Once your new Planned Giving volunteer has agreed to accept the role, continue to provide close support. No matter what stage in the development of your Planned Giving campaign, it is important to encourage teamwork and the involvement of your organization's Board of Directors.

Hohn clearly states the need for members of an organization's Board of Directors to be role model's for all volunteers and staff: "The key to successful fundraising is the involvement of and model set by the organization's Board of Directors. Every member of the Board contributes to setting a tone and level of commitment to carry out the organization's Mission. This is particularly true when it comes to Major Gifts and Planned Giving – their actions and responsiveness to the organization's need is directly reflected in the giving of all volunteers and potential donors."

There are many ways volunteers are organized to work with members of the Board of Directors or staff of an organization to conduct a Planned Giving campaign. Here are three examples of practical working relationships:

- New Planned Giving campaign without a staff member: A member of the organization's Board of Directors is selected to head the initiative and work with assigned Planned Giving volunteers to develop and implement a program.
- Planned Giving Campaigns guided by Staff: Staff typically accompanies the new Planned Giving volunteer on the first call. On subsequent calls the volunteer may recommend to staff that a member of the organization's Board of Directors or a volunteer with specific experience of interest to the potential donor attend the meeting with the prospect.
- Existing Planned Giving campaigns: Partner new volunteers with experienced volunteers for joint calls, involving Board members as appropriate to the interests and background of the potential donor.

Before visiting a Planned Giving prospect, it is important that those who will make the visit are thoroughly prepared and have available to them all materials, endorsements and documentation necessary to secure a gift. Remember, the Planned Giving process often requires several meetings with prospects and may take weeks, months and even years to move from a concept to an actual gift.

RECOGNIZING PG VOLUNTEER EFFORT

Retaining a qualified and trained Planned Giving volunteer is vital to the organization's long-term growth. Because the giving process can take a long time, several people may actually work on one bequest before the final paper work is ever signed. Therefore, it is important to recognize the volunteer commitment and effort that has been invested in every step of the process.

Maintain records

Volunteers and staff at nonprofits are versed in recording and monitoring all gifts and donations. Volunteer management is equally important – especially when working with powerful Planned Giving volunteers. These talented and experienced people are donating their valuable time and energies on behalf of the organization – it is the organization's job to track the time invested as well as to maintain records of each achievement or step in the progress to secure a Planned Gift.

Developing a 'time line' for each prospect's file in an effective way to record each meeting and the progress made. For example, the initial contact with the prospect is may be listed as Meeting #1, while the meeting to detail all of the Planned Giving options, may not occur until six months later, during Meeting #3.

It is extremely important to maintain consistency and develop a connection between the organization and the prospect. Each volunteer should continue to work with the initially selected group of prospects as long as the volunteer is involved with the organization, the prospect remains of interest, and the established rapport remains strong, positive and supportive.

Recognition

Recognizing and rewarding volunteer effort is an on-going activity at every not-for-profit organization. Be certain your Planned Giving volunteers are recognized for their contribution to the long-term effort, not only for those Planned Giving efforts that are achieved.

Developing a sustainable organization requires consistent programs, monitored processes and constantly evolving goals aligned with the Mission Statement.

If your organization is fortunate to have identified and secured the passion, commitment, expertise and talent of a powerful Planned Giving volunteer, it is your job to provide the support and encouragement that will assure success to the volunteer, prospect and in the end, to your organization.

