

# Give&Take<sup>®</sup>

IDEAS AND INSIGHTS FROM SHARPE GROUP



## Treat Your Donors Like Family

Page 2

When **Giving Away a Favorite Stock** Is the Smartest Thing to Do

PAGE 4

**Structuring Blended Gifts Seminar**, in New York, August 10-11, 2017

PAGE 5

What's Up With **Giving?**

PAGE 6

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## Treat Your Donors **Like Family**

By Nancy Jeffers

One of the bedrock principles in gift planning is stewardship.

I recently attended a gift planning conference in New York where I was reminded of the profound impact Sharpe Group has had over its 54-year history. The opening speaker at the conference has been a friend of ours for many years. When we greeted one another, he remarked that he'd recently been reminded of something he learned at a Sharpe seminar early in his career. He had never forgotten the advice and said it had always served him well.

What was that advice? "Treat your donors like family." While the world of

charitable gift planning has changed quite a bit over my 34 years with the Sharpe Group, one thing has not: The only people and organizations that rise to the level of being included in someone's will are close family and loved ones—and a few favorite charitable interests. We should never forget that when donors include a charity in their estate plan, they are elevating that organization to the level of family. Keep in mind that these wonderful people have worked their entire lives to earn what makes up their estates. It is a very special thing to be entrusted

with a portion of a donor's accumulated assets at the end of their life.

From the beginning, Sharpe associates have emphasized the importance of continuous stewardship of donors who have included charities in their estate and financial plans. We believe remembering this advice is one of the bedrock principles of building a program that encourages estate gifts. Embracing this idea will impact how and when you choose to communicate with and recognize donors, what appropriate "documentation" of the gift may entail and many other as-

## Donor Stewardship that Won't Break the Bank

By Barlow Mann

As noted above, successful gift planning programs know how important it is to treat planned giving donors like family. But while building meaningful relationships with planned giving donors is vital to an organization's success, so is careful stewardship of an organization's financial resources. How can you treat your donors like family without breaking the bank?

### Make personal visits

One suggestion is to strive to make travel time and resources serve multiple purposes. Coordinate visits to planned gift expectancies with previously scheduled trips to call on major donors or attend training seminars or other events. These "on the fly" visits don't normally require a lot of planning. Simply call a planned gift donor to let him or her know you are in town and would love to stop by for a moment to thank them in person for their special support and perhaps drop off an annual report or bequest society recognition materials.

### Pick up the phone

Personal visits aren't the only way to steward relationships with important donors. Phone calls to thank them for current gifts or recognize cumulative giving or longevity

milestones, invitations to events, personal handwritten notes, holiday or birthday cards and inclusion in a heritage society help you stay in touch and let donors know that their gifts are appreciated and have an impact.

### Don't forget about older donors

Some people receive a high level of contact because of their current giving level, but older donors whose giving may have lapsed still need your attention as well. A number of factors can keep older donors from giving as much as they previously did. It is easy to allow older, lapsed donors to fall off your radar screen, but make every effort not to let that happen. A significant number of bequests come from those who make their final will three or four years following their last gift. If a donor has previously told you they have included you in their estate plans, make sure they continue to receive attention from you—beyond requests for funds. Such attention now may lead to substantial rewards later. ■



*Barlow T. Mann is  
Chief Operating Officer  
for Sharpe Group.*

pects of continuous stewardship with these donors.

## Getting started

But what does it mean to treat your donors like family? And how do you do that? The answer is quite simple and begins with listening to your donors.

Helping a donor create a legacy is an honor that goes beyond a dollar amount. Developing a strong relationship with bequest donors requires a different mindset than many other development activities. Gift planning often involves an older age group and requires sensitive discussions about how a gift may best be structured. (See “Tips” below.)

## Following through

After you and the donor have worked out the details of the gift, don't simply put away the donor's file and wait for the eventual gift. Remember that, by making the gift, the donor has re-

vealed how important your nonprofit is to him or her. Your role is to sustain and possibly strengthen that relationship over time. Besides being the right thing to do, such a bond may also lead to additional gifts.

Also, never forget that bequests and many other estate gifts are revocable up until the time of death. Just because your organization is in a donor's estate plans doesn't mean you'll stay there. In fact, many estates include gifts to multiple charitable interests. If one of these organizations never acknowledges the expected gift or doesn't maintain the relationship through a continuous stewardship program, the donor may drop that organization in their final will.

And when it comes to a donor's will, the final version is the only one that matters.

***Editor's note:** A recent article in Give & Take featured advice from a major*

*donor's perspective. Learn more about what strategies work best with donors in “Do Your Homework: One Donor's Perspective on Fundraising Strategies That Work” in the May 2017 issue or online here: [www.SHARPE.net.com/give-take/donor-perspective-fundraising](http://www.SHARPE.net.com/give-take/donor-perspective-fundraising). ■*



Nancy Jeffers is a Vice President and Senior Consultant with Sharpe Group and has worked with hundreds of Sharpe clients over her career.

## Tips to build and maintain planned gift donor relationships

Here are a few tips we have shared with clients over the years to help build and maintain planned gift donor relationships through a continuous stewardship program.

- Know as much about these donors as you can. Listen to them.
- Honor, celebrate and acknowledge them.
- Communicate regularly with them and know the communication channels they prefer.
- Regularly remind these donors how their gifts will help further your mission.
- Be knowledgeable and passionate about your mission.
- Include visits and phone calls when appropriate.
- Help them clarify their gift objectives.

## Sharpe Group on the Road

Sharpe Group Managing Consultant Joe Chickey will be speaking at the **Colorado Planned Giving Roundtable Summer Symposium** in Denver on August 28, 2017.

Sharpe Group Chief Consultant and Chairman Robert F. Sharpe, Jr. will present **“Introducing the ‘Gerontrophilanthroplutocracy’”** as the keynote speaker at the **National Catholic Development Conference (NCDC)** in San Diego, September 27-30, 2017. He will also lead two breakout sessions: **“How Will the Baby Boomers Really Boom?”** and **“Accelerating Bequests—Your Bequest Goldmine.”**

In addition, Robert has been named as Dean of the Summit Track at the **National Conference on Philanthropic Planning (NCP)** in Baltimore, October 9-11, 2017. He will present along with five other veteran charitable gift planners.

### Sharpe Group Speakers Bureau

Since 1963, Sharpe Group has been a leader in the field of major gift planning. In addition to our popular seminar series, Sharpe consultants frequently speak to groups of all sizes and at national and professional conferences. For more information, visit [www.SHARPE.net.com/speakers-bureau](http://www.SHARPE.net.com/speakers-bureau). ■



## When Giving Away a Favorite Stock Is the Smartest Thing to Do

Last month we examined charitable giving strategies for donors who are nervous about the current stock market valuations and concerned that the bull market may be overdue for a correction. But what about donors who believe that economic growth and business/consumer-friendly tax reform will continue to drive the stock market to new heights?

You may have donors who own securities that have performed particularly well over the years. Many of those donors can be reluctant to sell or give the stock because they want to hold that investment as part of their portfolios. Fortunately for you and them, there is a charitable gift planning strategy that allows them to make a gift of that security and, in effect, maintain their ownership position.

### How it works

For example, suppose an individual has been considering a cash gift of \$25,000 to your organization. Instead of giving cash, she decides to give stock currently worth \$25,000 for which she originally paid \$5,000 several years ago. She may then use the \$25,000 cash she did not donate to repurchase shares in the same company.

In this way, she can make a tax-deductible gift of \$25,000 with stock that originally cost just \$5,000. Since this was a charitable gift, she does not owe capital gains tax on the \$20,000 of appreciation. By repurchasing the stock, she still owns shares but with a new, higher cost basis of \$25,000. If the value of the stock increases in the future, she will have less reportable capital gain if it is ever sold. If the stock declines in value, she may be able to claim a capital loss.

While no one can accurately predict how the stock market will perform, there are really only three possibilities: stocks may grow in value, maintain the same value or decline in value. Those who carefully consider the interrelation of their gifts and financial planning strategies may be able to achieve multiple goals and enjoy unexpected benefits as a result.

### What you can do

Charitable entities that inform, educate and motivate their affluent donors about gift strategies that also help meet donors' personal financial objectives will be more likely to reap the full benefits of the current bull market. According to IRS studies, gifts of publicly traded securities are the number-one source of noncash charitable gifts each year and regularly yield more gift income than total realized bequests. Do you have a plan in place to promote these gifts and receive your share?

*To learn more, consider attending the "Structuring Blended Gifts" Seminar in New York, August 10-11. See Page 5 for details. ■*

## Tools for Encouraging Gifts of Securities

Record highs in the stock market make now an ideal time to encourage gifts of securities. Recent IRS reports indicate that gifts of appreciated securities have led the post-recession recovery in giving. According to the IRS, the average gift of appreciated securities ranges from \$55,000 to \$65,000.

Sharpe offers several tools to help you show donors the benefits of making their charitable gifts through appreciated securities. Professionally written and updated, Sharpe's publications are designed to encourage gifts of securities and outline strategies to provide for both your mission and your donors' ongoing financial interests.

For more information, visit [www.SHARPEnet.com/stock-gifts-tools](http://www.SHARPEnet.com/stock-gifts-tools).



**"Every major gift or planned giving officer should attend this seminar. I found it to be insightful, applicable and meaningful to enrich conversations with donors and help them better achieve their philanthropic dreams to do more good. Thank you for so many 'light bulb' moments."**

—**Sonny Gast,**  
Engagement Officer,  
Albion College



## Upcoming Sharpe Group Seminars

### An Introduction to Planned Giving

#### Discover how to build your planned giving program.

Learn the keys to effective communications with your donors. Examine the donor lifecycle and explore how you can help donors make larger gifts today and plan gifts through bequests, trusts, gift annuities and other vehicles. Learn to work effectively with those 65 and older who may make up much of your donor base—or soon will. This seminar is appropriate for those who are new to planned giving or responsible for finding ways to enhance an existing program.

Washington DC September 14-15, 2017  
Chicago March 22-23, 2018

### Structuring Blended Gifts

**NEW**

#### Explore ways donors can give using a blend of current and deferred gifts.

This seminar explains how blended gifts can make it feasible for those balancing multiple financial priorities to make larger gifts than they may have thought possible. In the days ahead, donors and advisors will increasingly turn to blended gifts to reap both current and future benefits. Note that proposed tax law changes will be incorporated throughout the presentation. Make sure you're informed so your organization doesn't miss out on this growing trend.

New York August 10-11, 2017  
Chicago October 2-3, 2017

### Integrating Major and Planned Gifts

#### Learn how major and planned giving can work together.

Discover how to help donors make the best gifts based on their age, wealth and other factors, while meeting your current, capital and endowment needs. Learn how to listen for clues to help donors determine which giving option may be the best fit for them and how to help them make charitable gifts that might not otherwise be possible. This seminar is for you if your organization has both departments and would like to bring everyone together, or if you or others are responsible for both major and planned gifts.

Washington DC November 2-3, 2017  
Memphis January 22-23, 2018

See full agendas and register at [www.SHARPEnet.com/seminars](http://www.SHARPEnet.com/seminars) or call **901.680.5318** with questions.

# What's Up With **Giving**?

Several newly released reports provide information on the state of charitable giving in America. Two widely followed reports, *Giving USA 2017: The Annual Report on Philanthropy for the Year 2016* and *2016 Voluntary Support of Education*, both reported record levels of charitable giving last year. A closer look reveals a few surprises.



## **Giving USA Results for 2016**

*Giving USA 2017: The Annual Report on Philanthropy for the Year 2016* estimates another record year for total giving from individuals, foundations, corporations and estates of \$390 billion, up 2.7 percent from \$373 billion in 2015. This increase in giving came during a year that saw ongoing improvements in the economy, job market, salaries and household net worth.

These economic trends reportedly helped fuel estimated giving by individuals to \$281.86 billion, a 3.9 percent increase from 2015. Foundation gifts increased 3.5 percent to an estimated \$59.28 billion. Corporate giving also increased 3.5 percent to an estimated \$18.55 billion. Preliminary estimated bequest giving, however, fell 9 percent to \$30.36 billion, following two years of strong growth, including a 27.7 percent increase in 2014. Giving to all major categories

## Other Recent Charitable Research

### **Winter 2017 Nonprofit Fundraising Study, Nonprofit Research Collaboration**

A study covering charitable receipts from nonprofit charitable organizations in 2016 in the United States and Canada.

#### **Highlights**

- Approximately 7 in 10 charities reached giving goals last year, down slightly from the previous year.
- Two-thirds of U.S. charities predict growth in 2017.
- 6 in 10 charities reported increased giving in 2016.
- 6 in 10 reported an increase in planned giving revenue and commitments.

For more information, visit [www.npresearch.org/images/pdf/2017\\_reports/NRC-W2017-FINAL.pdf](http://www.npresearch.org/images/pdf/2017_reports/NRC-W2017-FINAL.pdf).

### **Charitable Giving Report: Blackbaud Institute**

The fifth annual Blackbaud Report on how nonprofit fundraising performed in 2016 based on \$23 billion in total fundraising from 6,845 nonprofits.

#### **Highlights**

- Overall charitable giving increased 1 percent.
- 7.2 percent of overall giving, excluding grants, was reportedly completed online.
- A strong U.S. economy and increased consumer confidence had minimal impact on giving.
- December remains the largest giving month of the year, followed by June.
- The average age of donors in the U.S. was 62, and older people were more likely to give.

For more information, visit [www.institute.blackbaud.com/asset/2016-charitable-giving-report](http://www.institute.blackbaud.com/asset/2016-charitable-giving-report).

**2016 Voluntary Support of Education**  
**Bequests and Deferred Gifts 2006-2016 (Dollars in Thousands)**

Year	All Personal Giving	Bequests	Deferred Gifts
2006	\$12,146,049	\$2,185,085	\$579,490
2007	\$12,140,496	\$2,469,902	\$608,426
2008	\$13,268,550	\$2,654,372	\$740,474
2009	\$10,739,787	\$2,338,799	\$380,493
2010	\$10,597,255	\$2,164,734	\$363,413
2011	\$12,140,854	\$2,313,696	\$447,239
2012	\$11,751,157	\$2,110,470	\$513,116
2013	\$13,554,286	\$2,332,274	\$513,616
2014	\$14,445,345	\$2,730,380	\$569,577
2015	\$16,543,931	\$3,002,929	\$618,319
2016	\$15,142,307	\$2,755,010	\$662,447

ries of recipients was up for 2016, only the sixth time this has happened in the past 40 years.

The entire report is available for purchase at [givingusa.org](http://givingusa.org).

### 2016 Voluntary Support of Education Results

The *Voluntary Support of Education* survey found that charitable giving to colleges and universities increased 1.79 percent to \$41 billion, with the top 20 universities accounting for 27 percent of all gifts to higher education. The top 20 raised a total of \$11.12 billion last year, slightly below the \$11.36 billion they raised in 2015. Another surprise was that outright giving from individuals to higher education actually declined in 2016. Gifts from alumni fell 8.5 percent, and gifts from other individuals fell 6 percent. That slippage was made up by increased giving from corporations, foundations and other organizations. Charitable bequests to higher education amounted to \$2.8 billion in 2016 and accounted for just over 18 percent of all individual giving. The present value of trusts and other deferred gifts was nearly \$600 million, approaching levels not seen since before the Great Recession (see chart above).

Bequests and other deferred gifts accounted for more than 22 percent of all individual giving. The average number of realized bequests was 22 per reporting institution with an average value of \$5.29 million. Mirroring much of charitable giving coming from the wealthiest donors, the top three bequests accounted for the majority of bequest revenue for most colleges and universities. Furthermore, gifts from corporations, foundations and donor advised funds increased dramatically.

*For more information or to order the entire report, visit [cae.org/vse-data-miner/vse-survey/vse-annual-publication](http://cae.org/vse-data-miner/vse-survey/vse-annual-publication). ■*

## What Happened to the “Wealth Effect”?

A decade ago, fundraisers could count on economic prosperity and the accompanying “Wealth Effect” to have a positive impact on charitable giving. This phenomenon led to record giving levels in 2006 and 2007, as both real estate and stock markets reached record highs.

U.S. household net worth hit \$66.5 trillion in 2007 but fell 15 percent to \$56.2 trillion in 2008 as the Great Recession took hold. Since then, household net worth has steadily recovered, reaching nearly \$95 trillion in the first quarter of 2017. The first quarter also saw stocks and mutual funds increase by \$1.3 trillion and home values rise nearly \$500 billion. Since the lows of March 2009, the Dow Jones Industrial Average has climbed from 6,547 to 21,215 in June of 2017.

### Uneven recovery

Unfortunately, economic recovery has been uneven and wealth in America remains highly concentrated. According to the Pew Research Center, the middle class continues to feel economically stressed. Meanwhile, America’s wealthiest households have never accumulated more wealth, though even they report feeling unsure of the future.

According to press reports, 10 percent of the U.S. population owns 80 percent of stock market wealth, with the heaviest concentration in the top 1 percent. The net worth of the broader middle class is more closely tied to the value of their homes, which have only recently recovered from the aftermath of the housing bubble. Consumer spending is still substantially below the level seen before the Great Recession. With sluggish overall growth in consumer spending, it appears that most Americans may not be experiencing the “Wealth Effect” to the same degree as before the recession.

### Your best strategy

Until the middle class starts feeling more confident, your best fundraising approach should be to identify your wealthier, higher income donors and then initiate a targeted approach to appeal to donors who have the greatest capacity to give, particularly those who are middle aged or older.

If you would like to learn more about how to enhance your donor data files with age and wealth information, visit [www.SHARPE.net/data-enhancement-services](http://www.SHARPE.net/data-enhancement-services). ■



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10,000 - 14,999	\$.32 each
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20,000 - 29,999	\$.30 each
30,000 - 39,999	\$.29 each
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