

GiveTake®

Ideas and Insights From Sharpe Group

Sharpe Wholistic Solution:

A Message From the CEO

This issue of *Give & Take* focuses on the diagram that depicts how we help charities and nonprofit organizations raise large gifts (see cover of this issue). It is named the **Sharpe “Wholistic” Solution** because it encompasses the entirety of the “what to do” for fundraising success.

Sharpe Group is well known for seminar training, custom publications and planned giving websites. The Wholistic diagram shows the Sharpe Group services and tools used to accomplish the “what to do.” Our services and tools interrelate to provide the Sharpe Wholistic Solution concept.

Sharpe partners with you to communicate, educate and build the bridge between yourself and those who support your mission and can make large gifts. Cultivating donors to become a valued part of your family is the trusted role of Sharpe Group.

The Sharpe Wholistic Solution will:

1. Use technology-based Augmented Intelligence (AI) analysis of donor data to identify donors (**Know Your Donors**) and provide strategies and tactical recommendations for your development team to use to strengthen donor relations.
2. Use scientific-based workforce assessment tools to identify and deliver services that enhance your development team’s skill set used to strengthen your donor relationships and create individual and team development and training recommendations (**Know Your Team**). Both the human and technical components are critical to delivering an effective fundraising program.
3. Use proven words, phrases, layouts, media, photos, interviews and educational messaging as strategies and tactics to develop and build relationships between your development team and donors (**Create Your Plan/Implement Your Plan**). While development staff members typically view the donors as a group with a common philanthropic desire, the donors see themselves as individuals. Connecting these perspectives optimizes fundraising.
4. Provide stewarding messages to maintain relationships with older donors, widows, widowers, donors relocating to senior living communities and especially those donors experiencing dramatic life changes that eliminate the capacity to maintain giving frequency (**Steward Your Donors**).

(continued)

Quality **OVER** QUANTITY?

Sharpe Group has seen response rates from various gift planning mailing approaches over the years that range from 10% (and more) to one-tenth of 1% or less. In today's competitive and budget-driven environment, the most important measurement is of the quality of response rather than the quantity.

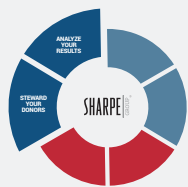
Any number of factors can influence the response one can expect. Among them:

- ▶ Demographics of the recipients, including age, wealth and giving history.
- ▶ The method of communicating, e.g., digital or printed or a combination of the two.
- ▶ The content of the materials. Do they seem like advertising, or are they designed to be perceived as helpful information?
- ▶ What is offered on the response device (such as a complimentary booklet or brochure)?
- ▶ The level of confidentiality conveyed.
- ▶ Number of previous mailings to the same list.
- ▶ The time of year the material is sent.

The makeup of the prospect file, the level of commitment to your mission and prior development efforts are probably the most vital determinants of both the quantity and quality of response received.

Show—and tell—the most interested supporters the best ways to make their gifts. Build relationships with those who express interest and commitment. Then judge the results of your efforts over time, rather than by the number of reply cards you receive.

The ultimate goal is to find those who will include your organization in their estate plans, thus elevating you to the status of family. ■



MEASUREMENT & METRICS: Analyze Your Results

Sharpe Group believes analyzing your results is a vital component of a successful fundraising strategy. We have tools to help you measure the effectiveness of your efforts. Contact us at info@SHARPEnet.com or 901.680.5300 to learn more. ■

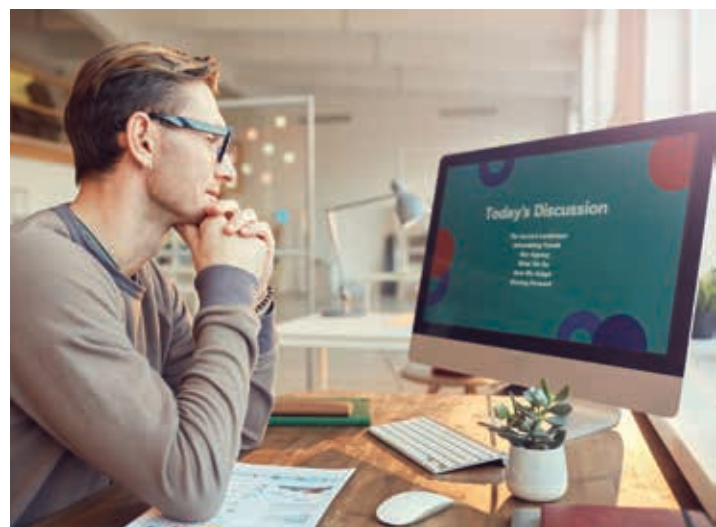


SHARPE TRAINING for Staff, Board and Donor Education

The 2020 modules of the Sharpe Online Academy have come to a close. Watch for our expanded 2021 schedule coming soon, including the return of our in-person seminars sometime in late 2021 or 2022, if deemed safe.

Searching for something unique? Our experienced seminar presenters can design personalized training for your organization's staff and board and educational presentations for donors. You can choose from our extensive presentation topics, and each seminar will be customized to your organization's mission, needs and schedule.

For more information about customized Sharpe Training, visit www.SHARPEnet.com or contact us at info@SHARPEnet.com or 901.680.5300. ■



Is It Time for a Checkup?

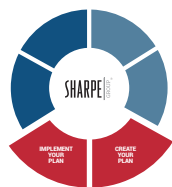
Using a Wholistic approach, we know how to structure a planned giving program and develop strategies based on our more than 50 years' experience that help organizations raise large gifts.

If you are beginning a planned giving program or your existing program needs a check-up, talk to us about a planned giving program audit. Our consultants will perform a comprehensive review of your organization's strengths and weaknesses. Audits are a way of discovering valuable information that can help drive your current and future marketing and donor cultivation efforts.

Sharpe's Planned Giving Program Audits are scalable, depending on your organization's size and needs and may include:

- ▶ Interviewing staff and senior management.
- ▶ Comparing the organizational experience with industry norms, paying special attention to realistic income potential that would help determine the appropriate scope of planned gift development efforts.
- ▶ Evaluating marketing materials and communication strategies to determine if they are appropriate and effective for donors.
- ▶ Analyzing a series of multi-dimensional database reports to determine if gifts and estates are being handled systematically and proactively.
- ▶ Studying estate administration and gift acceptance policies and suggesting improvements where appropriate.
- ▶ Examining age and demographics of current and deceased members of a donor recognition society to determine effective stewarding practices.
- ▶ Reviewing and analyzing an appropriate number of realized bequests to determine important metrics, such as how many other charities are named in estates, whether any appear repeatedly and the ratio of residual to specific bequests.
- ▶ Making a projection of reasonable gift planning potential.

For more information on how a Planned Giving Program Audit can benefit your organization, contact us at info@SHARPEnet.com or 901.680.5300. ■



STRATEGY & TACTICS: Create Your Plan & Implement Your Plan

An important part of charting any journey is knowing where you've been, where you are now and where you want to go. Because we know every organization will answer those questions differently, we recommend starting with a planned giving program audit. (See "Timing Is Everything: The Planned Giving Program Audit and Review" in the July/August and September/October issues of *Give & Take*.) From there, the strategies and tactics your organization needs will become clear.

Sharpe Group will help you create a strategic marketing plan and can coach and mentor you and your team throughout the process to help secure large gifts, including drafting gift acceptance policies. And when it's time to implement your plan, we offer:

- › Ongoing technical support.
- › Customized training for staff and board.
- › Sharpe Online Academy.
- › Charitable Giving Tax Service and *The Advisor* eNewsletter.
- › Sharpe Gift Planning Matrix®.

For more information visit www.SHARPEnet.com. ■

IT'S ALL IN THE DETAILS: A Conversation With Lori Aratari, Rochester Regional Health

By Ainsley Willis



Two of the keys to success in gift planning are building relationships with donors and then stewarding the relationships over the long term. First and foremost, understanding how—and when—to communicate with your donors is critical.

Sharpe Group talked to Rochester Regional Health Development Officer Lori Aratari about how a simple act of

kindness fostered a meaningful relationship that resulted in a gift of a lifetime.

In 2013, Lori Aratari was a newly hired development director for United Memorial Medical Center, a hospital in New York that later merged with Rochester Regional Health. After spending a few years at United Way in corporate giving, Lori transitioned to the healthcare sector with little experience in gift planning. She relied on her relationship-building skills as she navigated her new role. Early in her now 10-year tenure, she received a note from a donor requesting an appointment and expressing interest in leaving a legacy gift to the hospital.

Building relationships

When they met, the donor provided information about her plan to include United Memorial Health, now Rochester Regional, in her will. "When I am meeting with donors, I focus on building a relationship with them. I don't ask many questions about the actual gift amount. The gift will come in the long run if you do the right thing."

That was one of only two in-person meetings Lori had with the donor. The donor politely declined Lori's invitations for a meal or coffee. "She was a very humble woman. She preferred to keep in touch through written notes. I knew she was interested in our fundraising events, so I would write her and tell her what that year's gala theme was or the items we were auctioning off."

"Typically, we corresponded three or four times a year until this past May when she passed away." After learning of her death, Lori reflected on their first meeting. "I asked about her experience with the hospital and why she chose

to leave a gift. She explained that while she had had great experiences there, she decided to include the hospital in her plans because of the sympathy card she received from me when her brother passed away."

"I was new and doing my best to train myself," Lori explained. "I looked up donors who had made consecutive gifts. I saw this donor had been making smaller gifts for about 15 years and wanted to establish a relationship with her. I happened to notice that her brother passed away, so I sent her a sympathy card."

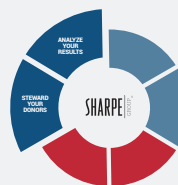
"People don't send cards anymore. I just want my donors to know that I am there for them. I've built relationships over the years by recognizing the things that are important in their lives, whether it's a baby, a wedding or even a death in the family. I think we all find it touching when we receive a handwritten note."

Lori was stunned when she got the news of the donor's \$1.3 million gift. "I was a bit emotional when I found out how much the gift was. I was overwhelmed by her kindness and generosity."

"This is actually my first planned gift. I'm just thrilled to know we are going to put it to really good use." ■



Ainsley Willis is an editor, working with clients to create custom printed and digital communications. She has authored Sharpe Group blogs and is a contributor to *Give & Take*.



MEASUREMENT & METRICS: Steward Your Donors

Sharpe Group has the expertise and talent to help you create donor communications in both digital and print formats including:

- › Newsletters
- › Booklets
- › Brochures
- › Postcards
- › Surveys
- › Websites
- › Advisor materials



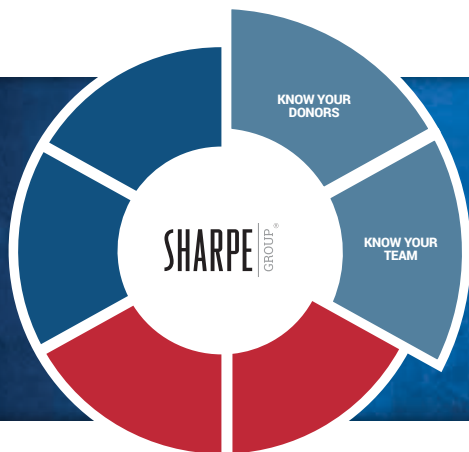
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KNOW YOUR DONORS

By Jana Lawyer

Throughout Sharpe Group's 50-plus-year history, we have found an underlying truth for the success of any fundraising program is to **"know your donors."** Having information on your donors' demographics, their giving history and their preferred means of communication enables you to strengthen your relationships and better identify the likely timing of gifts based on your donors' individual needs and intentions.

How is this accomplished?

Sharpe Group takes a data-based approach to finding solutions for your fundraising challenges. Our process starts with an extensive array of statistics that are used to thoroughly understand the attributes and nature of your donor database. These analyses would statistically describe the many aspects of your membership/donor base, including an individual's ability to give, the way in which they give as well as their age, wealth and gender.

Other important information is marital status, education and giving history. After an initial member/donor analysis, we accurately profile your organization's "success measures." Success measures are your desired results, such as total amount given, gift number, bequests and so on.

Sharpe combines member/donor attributes and the organization's success measures with predictive analysis using our proprietary Augmented Intelligence (AI) platform. In our "predictive analysis," our AI platform provides us with data-based insights and predictions. Our predictions tell us which members are likely to give and how much. It also tells us what communication types are most successful with a diverse donor base.

In one example of bequests we analyzed, the best planned giving prospect was a donor who is 70 or older, has a home value greater than \$300,000 and is widowed. This donor typically has a history of giving at least one moderate-sized gift (>\$5,000) and has been a member for more than seven years. Surprisingly, in this study, the total number of gifts was not an accurate predictor of bequest amount.

Finding your best prospects

The Sharpe research team has an impressive array of AI-based data analysis tools to help you uncover your best prospects. We use our AI platform, our years of experience and your defined needs to provide the data insights and prescriptive plans to build your donor relationships. Our platform is intended to be a continual cycle of analysis that consistently improves your success measures.

Our Donor Data Enhancement Service gives you the data-based insights you need to accurately integrate your resources into communication and development plans. We deliver an enhanced version of your donor file, containing powerful and actionable demographic data. Appending intelligence to your database will help you determine the most cost-effective strategies that can increase your success in current and deferred gift planning efforts.

To help you determine what types of giving vehicles (**Create Your Plan/Implement Your Plan**) you should target to donors and when and how to communicate to them, we use the Sharpe Donor Lifecycle and Sharpe Gift Planning Matrix®. By segmenting your donor database, you can streamline your donor communications with specific messages that have a better chance of resonating.

Knowing your donors allows you to develop communications, whether in a print or digital format, that speak to individual donors and demonstrate ways of giving that may allow them to give more than they thought possible.

This intelligence is a cornerstone for a successful gift planning program that makes the most of your organization's resources and encourages transformational gifts. Contact us today at info@SHARPEnet.com or 901.680.5300 to start a conversation about how Sharpe Group can help. ■



Jana Lawyer is a Sharpe Group senior consultant based in California. She has worked with nonprofit organizations of all sizes on their planned giving marketing and donor demographics.

Know Your Team

Your donors are not the only people vital to the success of your fundraising efforts. Your team is another key to development. Investing in your organization's team members strengthens the relationships between donors and your mission.

Sharpe Group offers tools to help you understand and build your best team:

- › Workforce assessment using DISC analysis.
- › Team building, coaching and mentoring.
- › Leadership development.
- › Hiring platform.

Visit www.SHARPEnet.com for more information.



Sharpe Wholistic Solution:

A Message From the CEO

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5. Provide analytics of website traffic activity timed to publication mailings and measure response results to prescribe program modifications (**Analyze Your Results**).

Planned giving national conferences, regional and local council presentations, webinars and other virtual training are all about the “what to do.” Most stop there, though, with an example or a case study without revealing “how to do it.”

The **Sharpe Wholistic Solution** provides the tools, expertise and the measurement and metrics to your staff that are critical to your fundraising success.

Kind regards,

Jim Ross

Chairman, CEO

Learn more at SHARPEnet.com or contact us via phone or email. Sharpe Group consultants know that every organization is different, so every project begins with a conversation about *your* needs.

info@SHARPEnet.com | www.SHARPEnet.com

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Strategy & Tactics: Create Your Plan & Implement Your Plan



Quality Over Quantity?



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www.SHARPEnet.com

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Personalized **GIFT PLANNING BROCHURES**

Sharpe Group offers an efficient and appealing way for you to personalize your gift planning brochures in our online platform. Choose an **accent color** and **cover image** from the provided selections to create a brochure that aligns with your fundraising strategy and fits your organization. You can also upload **your own image** and your **full-color logo** to further personalize your brochure.

Available titles include:

Caring for Your Four-Legged Loved Ones (pet trusts)

Eleven Things to Remember (wills and bequests)

An Estate Planning Quiz (estate planning)

Making Retirement Accounts Less Taxing (retirement plan giving)

Questions & Answers About Gift Annuities (available with or without recommended ACGA rates)

Questions & Answers About Retirement Plan Giving

Questions & Answers About Wills and Bequests



We continue to add titles to our online platform. Check our website at www.SHARPEnet.com/personalized-publications for the most current options. For more information, visit the website or contact us at 901.680.5300 or info@SHARPEnet.com.

RECIPE FOR SUCCESS With Advisors

Having a relationship with financial advisors and estate planners in your area is an important part of comprehensive gift planning efforts. Sharpe Group has the ingredients to help you reach this group successfully.

- ▶ *The Advisor* is a digital newsletter created every other month written specifically for those who have more technical knowledge than the average donor. Content includes relevant IRS rulings and court cases, tables and charts and the Philanthropy Puzzler. Organizations can brand *The Advisor* with their logo and contact information, providing advisors with timely and valuable information to share with their clients who have charitable intent.
- ▶ The 2021 edition of the popular "Federal Tax Pocket Guide" will be available soon. This booklet features the most updated income tax and estate tax figures and is an ideal planning aid for attorneys, trust officers, financial planners, accountants and other centers of influence. Imprinting is available for those who want to add their information to the cover.
- ▶ Available exclusively from Sharpe Group, Charitable Giving Tax Service (CGTS) is an online reference library of tax-related philanthropy information. CGTS includes sample gift documents, trust forms and gift deduction worksheets and tables. Sections are cited to the Internal Revenue Code and Regulations, plus court cases and rulings—all searchable by keywords or phrases. Subscriptions are available on an annual basis.



For more information on tools for advisors, please visit www.SHARPEnet.com/for-advisors.

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