Conversational Gift Planning

Competence Confidence Comprehension

The language of donor-participatory fundraising is best learned in a contextual environment. Your personalized tutorial provides the necessary context for learning. We call it conversational gift planning.

This basic training for frontline fundraisers (regardless of job title) teaches donor-participatory fundraising, emphasizing the gift conversation from the donor's side of the coffee table. Based on the instructor's decades-long experience with donors, it introduces an intentional approach to the conversational agenda that must be followed if the answer is to be YES.

Your personalized introduction to Conversational Gift Planning consists of 10.5 hours of individual attention. The basic coaching plan is outlined below. The default schedule is to complete a session each week over seven weeks, although flexibility is important since our students are working professionals and conflicts do arise.

"Conversational Gift Planning is the perfect name for this personalized coaching program. We took a close look at both the mechanics of a wide variety of gift planning strategies and, more valuable, how to explain them to my donors. It was just what my colleagues and I needed."

Ryan Hart, Executive Director of Gift Planning, Columbia University

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"This training program has benefited us far beyond what we initially foresaw. We wanted to increase deferred giving and that has happened. The great surprise has been the significant increase in outright gifts, not to mention the strong partnerships the office of planned giving enjoys with fundraising staff across the Smithsonian. We can point to at least $30 million in additional gifts that we most likely would not have received without this training support."

John-Joseph van Haelewyn, Director of Planned Giving, Smithsonian Institution

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Basic Coaching Schedule

You must first earn the right to share your growing legal and technical expertise on gift strategies and pertinent tax law. Before you get to explain how a charitable remainder trust works you must find a good candidate for a retirement CRUT. Before you describe the due diligence required for a gift of real estate you must identify a good candidate for a bargain sale. Before you discuss a gift of shares from a closely held business you must find a partner/shareholder of a Limited Liability Company or an S-corporation.

The first four sessions show you how to do that by introducing **The Four Decisions** every donor who says 'Yes' will make in some degree of detail. This is the same curriculum that has been taught in person to hundreds of fundraising professionals at the American Civil Liberties Union, Cornell University, Columbia University, Princeton University, the Smithsonian Institution and World Wildlife Fund.

Session 1 90 minutes	**WHY** (Decision One)
Session 2 90 minutes	**Introduction to The Two Part Conversation** **WHAT** (Decision Two)
Session 3 90 minutes	**HOW** (Decision Three)
Session 4 90 minutes	**WILL YOU?** (Decision Four)

Once you discover your prospective donor may be a good candidate for a specific gift, your job is to explain it to that donor, usually a layperson, in language that's emotionally appealing and intellectually accessible. Sessions five – seven introduce Interactive Case Studies, semi-scripted role play exercises that accomplish two goals. They give each student ample opportunities to practice finding his/her voice using the language of The Four Decisions. They also introduce various gift strategies/assets in conversational context. We will work with you to pre-select what gift strategies/assets you want to learn more about.

Session 5 90 minutes	**Introduce Interactive Case Studies**
Session 6 90 minutes	**Interactive Case Study**
Session 7 90 minutes	**Interactive Case Study**

You may purchase additional Interactive Case Study sessions to learn the full array of gift strategies and giftable assets. Please contact us to discuss details.