

Legacy File: Gift Planners Profile Their Favorite Donors and Clients

Instructions for completing and submitting a profile to be considered for publication in *The Journal of Gift Planning*

Purpose of the profile:

- to understand donor motivation and behavior
- to celebrate inspirational philanthropists
- to consider lessons about cultivation and stewardship that can be learned from individual donors

Audience: other gift planners (NOT other donors)

Length: finished profile should be 1300 to 1400 words.

Visual materials: please be prepared to submit a photo of the donor(s), a photo of yourself, and a photo that relates to your organization. These can be submitted electronically as high resolution files in jpg or pdf format, or as hard copy prints. Photos will be returned upon request.

We prefer that the actual responses of the donor be captured in the profile (see example at the end of this document). Profiles that have been printed in donor-focused publications usually don't have the correct slant for *The Journal*, since they're intended to inspire others to give. Our purpose is to inspire the gift planner, not the donor. The "Questions to be Answered by the Gift Planner" are very important.

Submit the interview manuscript to Barbara Yeager at byeager@ncpg.org. You can also use this address for questions you may have as you prepare your profile. If your profile is selected for publications, you will be notified of the date of publications, and you will receive five complimentary copies of the *Journal* in which your profile is published.

Core questions for donor

How did you become involved with the organization to which you later made a gift? How did your involvement develop over time?

- Have there been meaningful moments or experiences with the organization that have helped you stay connected and involved?

How has your gift(s) affected your relationship with the organization?

- How do you feel about your membership in our (Heritage Society)? Do you attend any of its functions?

How do you envision your personal legacy? How does your gift fit in that vision?

Have you earmarked your gift for a particular purpose? Is there a specific part of our organization that you favor, such as scholarships, research, patient services, etc.?

Have you made charitable gifts to more than one organization? How have you balanced your interests and your philanthropy?

How did you learn about planned giving? Why did you decide to make the type(s) of gift(s) you made?

- You have chosen for your largest gift to be through your estate plans, why?
- You have chosen to be creative in the way you make your gifts; can you share what motivated you to make a charitable remainder trust?
- Did you and your spouse discuss this gift?
- Do your other family members know about your gift? Do they approve?

Who has been most influential in your personal decisions about charitable giving? Were your parents philanthropic? Did you have other role models?

Optional: ask if needed for additional information

Please tell me about yourself.

- Where born, parents, brothers and sisters, etc.
- Spouse, children, grandchildren.
- Where do you live? How long?
- What have you participated in? Example: You were a Boy Scout den mother.

What hobbies do you enjoy?

Can you think of anything that will help the reader identify with you, your feelings about our organization, the vital work we do, your reasons for wanting to make a difference by helping others?

Is there anything you consider important that I haven't asked?

Factual questions: ask to verify that information is presented correctly in The Journal

What is your name? What is your spouse's name? Should we refer to you and your spouse by first names, or as Mr./Mrs. Smith?

Where do you live (city, state)?

May we use your photo?

Questions to be answered by the gift planner at the end of the profile

Would you say this donor is typical of donors to your organization, or unique? Does this donor represent or defy trends in your donor base or American philanthropy in general? Explain.

How has your work with this donor affected your understanding of philanthropy and donor motivations?

How has this donor changed the way you do your work? What advice would you give other planners based on your experience with this donor?

Sample Profile (note that this donor preferred not to have her last name used in the profile)

Planner: Marjorie A. Houston, Wheaton College (Norton, MA)

Donor: Frances S.



Photo caption: Fran (right), returning with her parents from the British Isles aboard the Queen Elizabeth 2 in 1964.

Fran does not see herself as a philanthropist; she simply likes to see her gifts make an impact on her greatest passion—education. Fran has spent her career as a member of the faculty at Wheaton College, teaching English literature. She is a lover of Shakespeare, a passionate historical and land preservationist, a fan of music and theater and an active member of her community. In addition, she has a great interest in the stock market, encouraged early in her life by her grandmother. Her passion for education and lifelong involvement in teaching influence her actions as she constantly strives to be aware of issues important to her. Through her philanthropy, she provides the same opportunities for others.

Born in Altoona, PA, Fran was an only child. With the encouragement of her parents and grandparents, Fran completed a Ph.D. in English Literature and commenced a lifetime of teaching others pursuing an education. Her extraordinary legacy to Wheaton College is expressed both through her continued interest in the college's growth and through charitable gift annuities (33 at last count) that she continues to establish. Her gifts will make an enormous difference in the lives of future students at Wheaton, a small liberal arts college in Massachusetts.

In an interview with Fran, I asked her why she makes gifts and what she is trying to accomplish with those gifts.

MH: Why is philanthropy important to you?

F: I am lucky enough to have money and I feel as if I ought to help—it makes me happy. Achieving something with my gifts is certainly better than spending on a lifestyle that is not important to me.

MH: Have you made charitable gifts to more than one organization? How have you balanced your interests and your philanthropy?

F: I believe in lifelong learning and being aware of things, whether environmental issues, historic preservation or land conservation. Learning about the politics of land preservation, legal issues or nature is fascinating for me. I believe people can rise through education, so the organizations that I support have educational components to them. I support such national organizations as the United Negro College Fund, Habitat for Humanity and the Nature Conservancy. But over time my philanthropy has become local rather than national. I want to see the impact of my philanthropy; I like to have a personal connection to those organizations I support.

MH: What do you need to see in an organization to make a long term commitment, and how have your gifts affected your relationship with an organization?

F: Careful use of resources that is what I look for in an organization. I do not have mega-dollars to give, so I want my gifts to make an impact. My gifts help me feel more involved with an organization, especially when I can actually see the impact.

MH: How did you learn about planned giving? Why did you decide to make the type of gift you made?

F: Lots of organizations send me information about annuities. I first learned about them when they were casually mentioned in my alma mater's alumnae magazine, and I did establish an annuity there for my 50th Reunion. The former director of gift planning at Wheaton really educated me about them. While my alma mater helped shape me, it was my years as a faculty member at Wheaton that most influenced me.

I wanted to make a gift to Wheaton, and the advantages of the charitable gift annuity are a win-win for everybody. I have always had an interest in finances. My grandmother helped pay for my education. Each year she would give me a few thousand dollars for school expenses and told me that any dollars left over I should invest in the stock market. Grandmother said it was everyone's goal to own 100 shares of AT&T. It was expensive, so I bought a few shares at a time. I also bought Westinghouse Airbrake, which was a more cyclical stock. When I needed a car, I was able to parlay the Westinghouse Airbrake into \$2250. With that money, plus a few hundred for freight charges, I bought a Mercedes that lasted me 17 years.

For me charitable gift annuities are doing what my grandmother suggested—investing my money in something that will secure the future.

MH: Who has been most influential in your personal decisions about charitable giving? Were your parents philanthropic or did you have other role models?

F: Mother supported her church and the town library, which inspired me. Father left everything in trust, but the estate tax was substantial—enough to make one unhappy! I have made sure that my estate will pay only modest state tax, and except for gifts to family members, the rest is going to my charitable interests.

MH: How do you like to be approached by a charity for a gift?

F: I want to be informed about an issue. If I like the organization and can make an impact, then I will make a gift. Language makes a difference. I like to have an opportunity present itself. For example, I heard that the Norton Library needed an irrigation system to enhance its park area. I liked the idea. After being told what was needed, I made the gift. On the other hand, I hate to give a substantial gift, have it acknowledged, and then get another appeal just weeks later. That just happened to me. I sent a sizable contribution in time for the charity to receive matching funds, and then I received another solicitation within three weeks of my gift. That charity will wait several years for my next gift.

MH: How do you envision your personal legacy? How does your gift fit into that vision?

F: My gifts to Wheaton are enabling me to honor my parents and the things that they cared about most. I established a scholarship in art in memory of my mother, one in math and computer science in my father's memory and a third scholarship in economics in memory of my grandfather. It wasn't until Wheaton told me that I should think about honoring my life's work that I decided to establish a scholarship in dramatic literature and theater arts, and an internship for the same. My personal legacy will be forgotten, but the things I have done, such as land preservation and scholarship support, will live on forever.

A Legacy for the Gift Planner...

My engagement with Fran has helped to shape the way I think about approaching donors and what is possible. In many ways Fran is the ideal planned giving prospect. She is single. She lives near the college and engages in the life of the campus both as a community member and as a faculty emerita. However, she is also atypical in that she does not carry her wealth visibly. She wants to believe that her giving will make a difference in what she values. While she would never expect fancy recognition, she is aware enough of her philanthropy and its impact that she likes to receive some attention.

The small things are important to Fran, and it would be easy to overlook them because of her demeanor or apparent disinterest in cultivation. Fran will often drop into my office unannounced to chat; frequently with a purpose, but also to say hello. She has learned that mornings work best for me, and I have learned that she loves tea, as do I. We both like the same kind of English biscuits, and sharing a cup of tea with her is a pleasurable form of cultivation. Fran has her own designated cup in my office, and I am always ready to share and talk when she comes. Fran's proximity to campus has enriched my relationship with her. And thanks to that relationship, I am often reminded that it is important to reach out and engage donors in a variety of ways. It is almost always the little moments that make a difference.

Would you like to submit a profile of your favorite donor or client? For a list of interview questions and suggestions for developing a profile, contact Barbara Yeager at byeager@ncpg.org.