BEST PRACTICES IN

DONOR VISITS

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April 8, 2010

Source of Data

Based on the experience of 20 planned giving officers from 12 national organizations in surveys during 2003 and 2005:

- American Civil Liberties Union
- American Friends Service Committee
- Amnesty International-USA
- Covenant House
- Environmental Defense
- Human Rights Campaign
- International Rescue Committee
- Lambda Legal
- National Audubon Society
- Natural Resources Defense Council
- Planned Parenthood Federation of America, Inc.
- US Committee for UNICEF

Why make donor visits?

- verify the bequest
- establish or continue a personal relationship with the donor
- learn about the donor's underlying motivation and match to your mission
- set the groundwork for an additional commitment
- solicit a new gift
- review aspects of a gift plan in person

Making the case to our bosses

If upper management is reluctant to fund donor visits, you might help make the case by saying:

- *"Other organizations are making donor visits."*
- *"We don't want to get cut out of estates."*
- *"We can position ourselves for more gifts."*
- *"We'll be more likely to receive this gift if we talk about it in person."*

Should you set a goal?

Yes. Some planned giving offices set annual goals for the department and individual goals for each planned giving officer. Our surveys found:

- An average organizational GOAL of 90 visits.
  ACTUAL completed visits of 4–120 per year per organization and 67 average completed.
- An average personal GOAL of 28 visits.
  ACTUAL completed visits of 10-50 per person and 24 average completed.

How much time is allocated to travel?

Our surveys found:

- PGOs have blended responsibilities (responding to inquiries, completing gifts, gift administration, estate work, marketing)
- Travel is estimated at 10–50% of time, with the average being 30%. This includes research, trip planning, the travel itself, the visits, and follow-up.
- The number of days spent traveling each year ranges from 15 to 50. The average days traveled is 31.

Who gets visited?

The surveys indicated:

- 1st: people who have notified you of a bequest commitment
- 2nd: actual life income gift donors
- 3rd: people who have inquired about life income gifts or bequests
- 4th: other prospects, including major donors, board members, and referrals

Referrals

"You should meet with Mrs. (Smith/Jones). She is (80-90+) and has lots of money."

Most of the planned giving officers said that they occasionally get donor visit referrals from Major Gifts, Annual Giving, Regional, Affiliate, or Chapter staff. This suggests the need for:

- shared credit for the work
- planning in advance for successful collaboration
- internal negotiating before the visit on crediting and allocation for any gifts that might result, especially if the donor asks you to decide

Who makes the visit?

Although planned giving visits are being made by staff, volunteers, and/or board members, PGOs prefer one-to-one visits and view them as most effective.

- These are most conducive to building personal relationships and ensuring confidentiality.
- This has implications for hiring and retaining staff.
- This may contrast with the "big-guns" approach sometimes preferred with major donors.
- At two organizations, PGOs were more likely to make visits and get visits with program people or local staff.

The planned giving officer's portfolio

Our surveys indicate that portfolio size ranges from:

- 250–1,600 people
- 840 average portfolio size
- This represents a significant difference when compared with the typical major gifts program.
- Merging and shrinking?

How many donors are visited per trip?

Data indicates:

- Low of 1 donor visited per trip and a high of 10 donors visited per trip
- Average of 6 donors visited per trip
- Agreement-no more than three per day.

That Special Someone

PGOs will make a trip for just one person if:

- the donors have exceptional wealth
- the donors are considering a big gift
- a visit is needed to complete the gift arrangements, negotiations, or paperwork

Preparing for the trip

Preparing for the trip includes:

- targeting a geographical area
- reviewing the donors in the area
- determining whether there are enough prospective donors to justify a trip
- OR identifing the "anchor visit“ and what other donors or prospects are in the vicinity

- Survey shows—PGO typically make their own appointments and book their own trips.
- Most use corporate credit cards, though a few use cash advances.
- All occasionally extend their trip with a personal day (at their expense).

Individual donor research

Our data indicates that many planned giving officers do their own research, including:

- Review of giving history
- Review of computer/paper file
- "Google“
- Lexis-Nexis
- Conversations with staff, volunteers, affiliates/ chapter/regional staff

- Map work for location and driving time (even with GPS) to ensure good logistics.
- Some planned giving officers said they had access to a researcher.
- This may be a contrast with Major Gifts, where more resources may be allocated to research and support.

Asking for the visit

- Most common approach - introductory note to the individual and follow-up telephone call
- Most common timing - 3 1/2 weeks before the trip (with the range of advance contact from a few hours to six weeks beforehand).
- PGOs felt that more than one month could be counter productive, making travel planning tricky.
- The longer the planned giving officer is in his or her position, the more success he or she has getting visits and being able to get last minute visits.

Men, women, couples, ages

Is there a difference in arranging a visit with a male or female donor or a couple?

- Probably not!
- Visits with couples can be very successful--but do not assume that both are in support of the organization.
- The age range of planned giving donors visited was 65 – 84, with most in the 75-79 range.

Donor residence

Is there a difference getting donor visits based on where your donors live?

- There was not agreement on whether urban visits are most difficult to get. One PGO said rural visits are more difficult to secure, while another said suburban visits are the hardest.
- Most PGOs said there is no difference from one state to the next.
- California, Florida, and Washington are presumed to be the best states to get a visit.

Getting the donor to say "*yes*"

Donors may not feel they are worthy of a visit or feel suspicious or reluctant. PGOs use different warm-up approaches for a donor visit:

- *"We want to thank you in person."*
- *"Your story/testimonial would be helpful to us."*
- *"I'm coming to town to work with the chapter/affiliate."*
- *"I'm coming to town to visit another donor."*
- *"This is not about money, not a solicitation."*
- *"We could really use your photograph."*
- *"I'd like to update you on what we are doing."*
- *"We could review this proposal in person, if you like."*
- *"May I take you out to lunch?"*
- *"Please say yes so I won't have to cancel my trip."*

How many donors say "yes"?

Our data indicates:

- Wide range of donor acceptance rates for a visit—from an average of 20–80%.
- The average "yes" rate is 30%. Higher "yes" rate of up to 50% reported by more tenured staff.
- Based on the above, on average, if you need 6 complete donor visits to justify a trip, you will need to ask 20 people for a visit.

Why do donors say "no"?

The PGOs reported donors saying:

- They already know about the organization.
- A visit is not necessary.
- They don’t see themselves as special.
- They are too busy.
- They are not well.
- They will be away.

Have the PGOs ever cancelled a trip?

Two-thirds have had to cancel at least once:

- Not enough people saying yes
- Weather
- Being sick

Caution for supervisors: too many cancellations or trips without enough donors visited

Visit location

Our data indicates that:

- The donor's home is the most frequent and preferred location.
- An informal restaurant is the second most frequent location.
- This may differ from Major Gift visits that may take place in offices or more upscale restaurants.

What do you bring with you?

- A gift (inexpensive or with organization imprint)
- Literature
- Videotape/CD
- Gift calculations
- Lap top
- Camera

WARNING: checked baggage, leaving papers behind

During the visit

Getting the conversation started:

Have some good questions ready to start the conversation or to fill in a gap.

"What do you like most about our mission?"

"How does your family feel about our organization?"

"Have you ever been a volunteer?"

Length of visit:

The average donor visit was estimated at 1 hour 40 minutes, with reported times ranging from one half hour to all day.

Visits at a restaurant

Be mindful about the selection of a restaurant or meeting place when the visit will not be at the donor's home.

- Keep cost in mind.
- Keep ambiance/noise level in mind.

Who pays for a meal shared at a restaurant with a donor?

- Survey indicated that 60% of the time the PGO pays, and 40% of the time the donor pays or the cost is split.

Gifts afterward?

- This was not being tracked!
- According to the first survey, 10% of the donors made an additional gift immediately and 17% of the donors made an additional commitment within a year of the visit.
- This percentage would increase as the proportion of visits to prospects making inquiries is increased, as opposed to many donors with established commitments and completed estate plans.

Follow-up from the visit

- Send a thank you note within a week. (Some PGOs send it right away.)
- Update the donor database.
- Write a call report with **ALL** details of the visit, all information learned, and follow-up steps documented.
- Submit expense report and update personal/ departmental travel log.
- Share details of the visit at next departmental meeting.
- Add the donor to your personal follow-up list for the future, if appropriate.

What if you learn that there is no bequest intent?

- Important to learn
- Often screened out during visit arrangements, but it may not be apparent until a visit.
- PGO might uncover that there is no actual bequest or that the bequest is for a similar organization, local affiliate, or international headquarters.
- Remove from legacy society and the planned giving mailing list to avoid future confusion.

How do we evaluate success?

There are many quantitative and qualitative ways that PGOs evaluate their visits as successful:

- A new annual or planned gift commitment
- Enrollment in the legacy society
- Detailed knowledge of the donor and bequest
- Notes, cards, emails from the donor
- Donor volunteers or begins activism

It is important to decide how you will evaluate success and put the necessary tracking into place.

How can management be more supportive?

Overall, PGOs felt their senior managers were supportive, but PGOs…

- questioned whether major donor visits were more appreciated
- welcomed more funds for travel
- desired more access to donor researchers
- wanted more administrative support
- hoped for agreement on goals and outcomes

A Summary of Best Practices

1. Set a personal and departmental goal.
2. Set a realistic time frame.
3. Choose staff wisely—those who can make visits for your organization.
4. Resist repeating "friendly familiars."
5. Realize that your best "research" takes place during the visit.
6. "There's no place like home."
7. Keep track of asks. Celebrate a 30% yes rate.
8. Use open questions to get donors to talk.
9. Agree on what constitutes success.
10. Document everything and track as much as possible.

THANK YOU!

Good luck in beginning or expanding your donor visit program.

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