

THE PLANNED GIVING ADVISORY COUNCIL Get Yourself Some Help By Lorri Greif, Breakthrough Philanthropy

Getting help from outside professionals can give a real boost a planned giving program. I believe that being able to ask for guidance or assistance is highly professional in almost any field and actually shows true confidence and competence. After all, nobody knows everything!

That's why I think that planned giving fundraisers should create a Planned Giving Advisory Council. Yes, it's more work but it can be a huge help in reaching new prospects, facilitating the gifting process, and may also add to your organizations credibility and reputation. It also solves the problem of not always being sure of how to proceed regarding certain technical details related to closing gifts other than cash or marketable securities.

Who should be on your Planned Giving Advisory Council? It is generally made up of professionals such as accountants, bankers, wealth managers and other financial advisors, attorneys (trust & estate and real estate), insurance specialists, real estate agents, and others who are in a position to refer donors and also occasionally answer questions regarding certain gifts.

Please understand that this advisory council is not the same thing as a "planned giving committee", which is usually led by and peopled with your board members, who have fiduciary responsibilities to your organization. But, if you don't know where to start looking for Planned Giving Advisory Council members, there's no reason not to diplomatically ask your board members to introduce you to some resources if they can.

It's also important that the Planned Giving Advisory Council members not be board members or in some other way connected to another nonprofit that could present a conflict of interest for them. Keep in mind that they are your volunteers and you'll want to build their loyalty to your organization. As with other volunteers they need to be shown leadership, stewardship, and given specific and achievable responsibilities.

Create a plan with goals and responsibilities for this advisory council; what actions will be necessary on your part and the members' part and how you will judge success. These will all be busy people (like you) so they have to feel their time is being put to good use.

If you already know one or two prominent professionals that fit the council member profile, it's great if they will agree to help with outreach to other professionals and possibly assume a "senior advisor" or "co-chair" role so correspondence can go out over their signature and they can give you honest feedback from the other advisory council members. Make sure your potential council members understand your organization - mission - finances - programs, etc. This information should be a part of the invitation or indoctrination process.

I recommend having a list of responsibilities that will not be overwhelming and at the same time offer opportunities for them to network as well as improve their visibility. Ultimately, the arrangement should be beneficial to both sides and help to increase planned gifts and other donations as well as expedite the processes and provide you with "expert" resources.

Once you're on your way to a whole group of volunteer experts to support your planned giving campaign efforts, give the council a formal name, and tell them what's expected. Possibly:

- Attendance at two Planned Giving Auxiliary Council meetings a year to review process, and success stories.
- Occasionally helping to lead an "educational" fundraising seminar for prospects and donors such as "How to Handle Your Estate Planning in Two Year Intervals" or something that your constituents will be interested in learning.
- Sometimes being willing to give pro-bono professional guidance when asked by only you (and not everyone in your nonprofit).
- Occasionally providing articles for your newsletter (which actually promotes them as experts to everyone who gets it).
- **Referring prospective donors!**
- Other appropriate assignments if necessary.

And then, tell them how you'll thank them (after all, they're volunteers). Possibly:

- Press releases to announce they're joining your advisory council.
- A framed certificate worth hanging in their office so everyone who visits their office will know their volunteer connection to your charity.
- Extras of your newsletters that include their articles to leave out in their offices so those who visit them will learn about your organization as well as their professional connection.
- "Comp" them to certain events when appropriate.
- Mail them updates or newsletters to let them know what's happening with your nonprofit.
- You may want to list them somewhere on website's planned giving page.
- Don't forget WIIFM (what's in it for me?) either. If there's a way to highlight a council member...do it.
- **Thank and thank and thank them. They're volunteers**

This may seem like a lot of extra work, but if you break it down, it really isn't. And the result is a cadre of experts to help *you* be a gift planning expert and eventually they'll become strong advocates (and donors) for your nonprofit.

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