



**gabriel**  
GROUP®

**TrendWatch**

[www.gabrielgr.com](http://www.gabrielgr.com)

---

***Seven Planned Giving Lessons  
from a Walnut Grove  
(With a Little Research to Back Them Up)***

1009N

---

# ***Are You Looking to Get More Yield from Your Planned Giving Efforts? Start with a Look at a Walnut Grove***

In Missouri, they call black walnut trees Ozark Black Gold. A hard, durable and very beautiful wood, walnut is in great demand. However, walnut trees take time – and lots of it – to grow to usable dimensions—not just years, but decades. Furthermore, there is a fair amount of work involved. But the rewards make growing walnut worth the time and effort.

Does that sound familiar? Walnut groves and gifts by bequest have a great deal in common. Both take time to mature; the rewards often take years to materialize. But when the time comes, the rewards are worth the wait.

***Both walnut trees and planned gifts take time to realize their full potential—and both are worth the wait.***

There are many lessons planned giving specialists can learn from walnut groves (especially when they use solid planned giving research as a reality check).

**Lesson 1: Pick the right spot.** For walnut farmers, it's an area with enough moisture, but well drained, and moderate temperatures. For planned giving specialists, the place to look for success is the annual gift list. Every donor who has made repetitive annual gifts should be considered as a bequest prospect.

***Every donor who has made repetitive annual gifts should be considered as a bequest prospect.***

We can hear you asking now, “That’s a pretty large group of people. How can we possibly work with all of them with our limited staff?” Thank you, that leads us to . . .

**Lesson 2: Learn to recognize the trees most likely to grow.** Even the best land will only support so many trees, so the good farmer focuses attention on the most likely to grow. The farmer must learn to quickly identify potential. A productive planned giving program also needs a way to sort prospects in order to make the best investment of time and effort. A solid, constantly refined database marketing program that gets donors with high potential to raise their hands delivers that capability.

***A database marketing program will help you focus on the prospects who show the most promise.***

**Lesson 3: “Plant and forget” is not a good plan.** Neglect doesn’t work for walnuts, and it won’t generate planned gifts. Consider a thoughtful cultivation program that includes information as well as “asks.” What information? Certainly you want to let donors know how gift money is being used. Information on giving options and regulatory changes that might affect their plans are also helpful. And it is hard to say “thank you” and “we appreciate you” too often.

***Caring cultivation promotes growth of both gifts and trees.***

**Lesson 4: You don't always know what you've got.** In the walnut grove, the actual yield may differ from expectations, better or worse. A similar situation exists with planned giving, except that the potential for "better" is very high. Yes, you'll have immediate knowledge of certain gifts such as charitable gift annuities, but research suggests that you will know about only one in four gifts by bequest. Now, if only your walnut grove would deliver such pleasant surprises.

**Lesson 5: Patience is a virtue.** Unlike the wheat farmer, who plants and harvests within a period of a few months, the walnut grower waits 20-30 years. While planned givers once considered the likely period being the making of a bequest and its distribution, evidence suggests that the average interval may be getting longer. Why? Several research studies indicate that people are making wills earlier than previously thought, and a recent program managed by Gabriel Group was very consistent on this point. That's not all—life expectancy is rising. While you may have to wait longer for planned gifts, like walnut trees yield walnuts every year, your donors also yield annual "crops" . . . and your bequest donors will very likely remain as solid, reliable annual gift donors throughout their lives.

*Research suggests people are making wills at younger ages.*

**Lesson 6: Respect the differences.** There are many varieties of walnut trees, and even more among donors. Some want to be recognized publicly; others want their gifts to be private. Some give for purely philanthropic motives; others want to know the financial advantages of their gifts. While research indicates donors are unlikely to remove a charitable cause from their wills, some want to keep the right to change. Make sure donor preferences are recorded, so your associates and successors know to take as good care of them as you do.

**Lesson 7: Make the best possible use of your resources.** Your resources are your team and your tools. Growing lumber and growing gifts is a team effort, so take the time to reach out to yours. Make sure your board knows that building planned gifts is one of their commitments; then work out a plan that helps them do an effective and fulfilling job of it. Volunteers can be both prospects and scouts. Develop a trustworthy network of marketing and database partners, and learn from their experience. Finally, see that you have good tools, beginning with a good internal database and contact manager.

**A Final Thought:** There are billions of dollars at stake. In 2008, reported bequests totaled \$22.66 billion. Most of these gifts were designated years ago, and many of them were the result of thoughtful cultivation by professionals who were willing to invest their time and efforts to build a solid future for their organizations.

**Sources:**

Giving USA, a publication of the Giving USA Foundation, researched and written by the Center on Philanthropy at Indiana University

Planned Giving Depth Interview Report, commissioned by Gabriel Group for The Salvation Army Eastern Territory

Mirren, Kathryn, Asking the Right Questions: The Metrics and Mysteries of Planned Giving Indiana University School of Philanthropy, 2008 Bank of America Study of High Net Worth Giving

Gabriel Group

- *Planned gifts, especially gifts by bequest, take time to mature, but the yield makes them worth the effort.*
- *Consider every donor of multiple annual gifts as a planned gift prospect.*
- *Use a solid, consistent database marketing program to identify the prospects for personal follow-up.*
- *Cultivate continually.*
- *Be patient. You may never see the rewards of your efforts, but your organization will.*

### **About the Authors**

#### **William Ziercher**

##### **Vision Leader and Chairman**

As Vision Leader, Bill taps into his deep knowledge of marketing to produce forward-thinking plans for both the company and its clients. His resume includes founding The Sterling Companies, which his team built from start-up to \$30 million in sales in a little over a decade then sold and subsequently founded a business consulting group, prior to becoming an owner of Gabriel Group.

Bill has received numerous awards for excellence in business and direct marketing including Direct Marketer of the Year from the Direct Marketing Association of St. Louis, and Young Entrepreneur of the Year. He also participates in a variety of community affairs, as a trustee, advisor and board member for several nonprofit and Christian organizations. He has a BSBA from the University of Missouri and has completed studies at MIT.

#### **Elsie L. Listrom, CFRE**

##### **Vice President**

Elsie is Vice President of Gabriel Group's Nonprofit Division and has more than 20 years of direct fundraising experience with nonprofit organizations across the country.

At Gabriel Group, she has developed and trained a team of fundraising professionals who bring their clients practical, results-driven fundraising solutions. Under her leadership, the nonprofit division has quadrupled in size and has become nationally recognized for its strategic use of database analytics to foster renewal and upgrade of donors. Prior to joining Gabriel Group in November 1994, Elsie served as Director of Development with the Missouri Historical Society; Director of Development for the Society for the Performing Arts in Houston, Texas; and at the University of Houston Foundation; San Diego State University and her alma mater Minnesota State University at Moorhead.

#### **Renee L. Durnin, CFRE**

##### **Director, Nonprofit Services**

Renee joined Gabriel Group in 2006 as Director of Nonprofit Services heading up the company's Salvation Army team. Additionally, she is responsible for onboarding new fundraising clients and developing production processes for Gabriel Group's Nonprofit Division.

Renee is a direct marketing professional with more than fourteen years of industry experience specializing on accounts such as the National Multiple Sclerosis Society, San Diego Zoological Society, Smithsonian Contributing Membership, The Interfaith Alliance and Elizabeth Glaser Pediatric AIDS Foundation. She has extensive knowledge of all phases of the production process.

She graduated magna cum laude from Truman State University in Missouri.

### **About Gabriel Group**

Gabriel Group is a full-service fundraising company engaged in smart deployment of traditional and emerging technology tools. The company serves its clients needs across the spectrum of opportunities—acquisition; retention and upgrade; annual, major and planned giving campaigns; and fulfillment.

For more information on Gabriel Group's work for nonprofits, please call or email Elsie Listrom, CFRE, Vice President at 3-5710 or [elsiel@gabrielgr.com](mailto:elsiel@gabrielgr.com).

Gabriel Group

*Gabriel Group employs today's technology to help companies and philanthropic organizations communicate effectively with customers, prospects and donors. But we still have room for good, old-fashioned friendliness in our relationships with our clients. The world may be changing, but that never will.*