

2018 Planet Philanthropy Conference  
Ft. Lauderdale, Florida  
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Westin Ft. Lauderdale Beach Resort

*The Blended Appeal: A New Normal in Major Gift Fundraising*

9:30 – 10:45 a.m.

By

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*What is a Blended Appeal?*  
*(Within the context of major gift fundraising)*

Asking for more than a gift or pledge toward a capital campaign goal.

Soliciting an annual gift, a capital gift, and a legacy gift.

*What is a Blended Appeal?  
(Within the context of major gift fundraising)*

Involves an Outright and Deferred gift.

Focuses on the total value of the gift  
(for recognition's sake).

*What is a Blended Appeal?  
(Within the context of major gift fundraising)*

Blended appeals happen within a Comprehensive Campaign.

*Definition of terms –  
What is a Planned Giving?*

Planned giving is a tax-wise manner of giving that typically involves three representatives: 1) the donor, 2) the nonprofit development officer and 3) lawyer/will; financial broker/stock; real estate broker/land; agent/life insurance, etc.

Planned giving is not only relevant to legacy giving, it is also a factor for increasing annual support and capital support.

# Tax-wise?

Less so due to recent tax law changes:

Increased standard deduction decreases demand for making an itemized charitable gift and claiming a deduction for income tax purposes.

Increased federal estate tax threshold (\$5.45M for individuals and \$11.9M for couples) has decreased demand for estate tax planning as only .5 percent of those who passed away in 2014 had sufficient assets to require filing a federal estate tax return. (Ref. Treasury Department report)

# My how fundraising has changed!

Experience 30 years ago –

Necessary to explain the difference between an annual gift to support operations (to help an organization Go), and a capital gift/pledge to support a project or program (to help an organization Grow)



# The Great Recession

My consulting experience

# The New Normal

The Blended Appeal

# Advantages

More money

Efficient use of volunteer time

# Up Your Game

Making your annual, capital, and legacy giving case  
(Go, Grow, Stay)

Policies and Procedures  
(e.g., Investment and Spending Policies)

Other relevant information?

# Up Your Game

Working with the Donor's legal and accounting representatives and family.

# Tracking

(If it isn't tracked, it isn't measured.)

# Tracking Columns

(Making sure the 5 R's are in play.)

- **Prospect Name**
- **Past Year's Giving, Annual Total**
- **Past Capital Campaign Giving**
- **Legacy Gift (Y/N)**
- **Predisposition to Give (1-4)**
- **Annual Giving Ask Amount – Gift/Pledge – RNR**
- **Capital Giving Ask Amount – Gift/Pledge – RNR**
- **Legacy Gift Ask – Gift (Y/N) – RNR**
- **Solicitors (MGO, PGO, SC Volunteer, CEO)**
- **Interest Area**
- **Comments**

# Reporting

Counting vs. Accounting



# Testing the Waters

Feasibility Study

Thank You!