Blended Gift Conversation Starters

As development professionals, one of our most important skill sets is the combination of asking meaningful questions and then actively listening to the responses from prospective donors. My standard is that if the development officer is speaking significantly more than 20% of the time, that development officer is not doing his or her job effectively.

Particularly when a planned gift is involved, these conversations require patience, active listening skills, and a greater amount of time devoted to each prospective donor in order to gain a clear sense of what meaningful goal the donor wishes to accomplish.

Below are a few examples of how you might carefully begin a discussion with a donor about a blended gift:

*“Mrs. Smith, you have indicated that you’ve included our college in your will, and you are a member of our legacy society. We cannot thank you enough for your generosity and commitment to your alma mater. However, you have not yet informed us of how you wish the college to designate the funds when they are received. How might we document your intentions in this regard, so that we can ensure the college fulfills your wishes?”*

*“Mr. Jones, you have already informed us that we are a beneficiary of the trust that will be created through your estate, and you are directing us to use the proceeds to create an endowed scholarship in memory of your wife. We cannot thank you enough for your generosity. You may not be aware, but many of our donors make annual gifts in an amount comfortable for them to fund an outright scholarship in the memory of a loved one. If you were to do so, you could experience the joy of meeting a student who will benefit from your generosity and help that student understand how important our university has been to you and your wife.”*

*“Dr. Weiss, you have been so generous to the museum over these many years. In fact, we just realized that you have been involved with us for more than five decades and you are among our most committed supporters. We are so grateful for your dedication, and hope that you continue to see the progress you have made possible. You have already designated us as an irrevocable beneficiary of your charitable remainder trust for an amount far beyond what we would consider asking you for. You have remarked numerous times that you know how important the new wing is to the museum. With that in mind, how would you feel about allowing us to present you with a proposal to place your names on our new wing? It would be reflective of the amount we will receive from your trust, as well as a current pledge that, combined, would reach the requisite amount to name the wing as set by our board.”*

These types of conversations lead to gifts that allow donors to achieve what is so important to them and meet the needs of an organization, present and future. A blended gift is a “win-win” for all parties involved.

By Stuart Sullivan