

The Five Types of Blended Gifts: The What, Why and How of Closing Blended Gifts



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Fifty Rock Consulting LLC trains and presents all across the country for conferences and private clients. A partial list of 2017 engagements are below. Thank you for attending!!!

- ▶ February St. Louis Featured Presenter (2 topics)
- ▶ March New York City Breakout Session
- ▶ April Waimea Featured Presenter (2 topics)
- ▶ April Boston Breakout Session (2 topics)
- ▶ May San Francisco Breakout Session
- ▶ June Los Angeles Breakout Session (2 topics)
- ▶ June Atlanta Chief Instructor (4 hours)
- ▶ June Phoenix Keynote Presenter (2 topics)
- ▶ June Phoenix Chief Instructor (6 hours)
- ▶ June Prescott Chief Instructor (6 hours)
- ▶ August Denver Keynote Presenter (2 topics)
- ▶ September Minneapolis Chief Instructor (4 hours)
- ▶ September Boston Breakout Session (2 topics)
- ▶ September Memphis Breakout Session (2 topics)
- ▶ September San Diego Breakout Session
- ▶ September Los Angeles Chief Instructor (4 hours)
- ▶ December Seattle Featured Presenter (2 topics)

Co-presentation credit to:

Unyong Nakata, MBA, CFRE



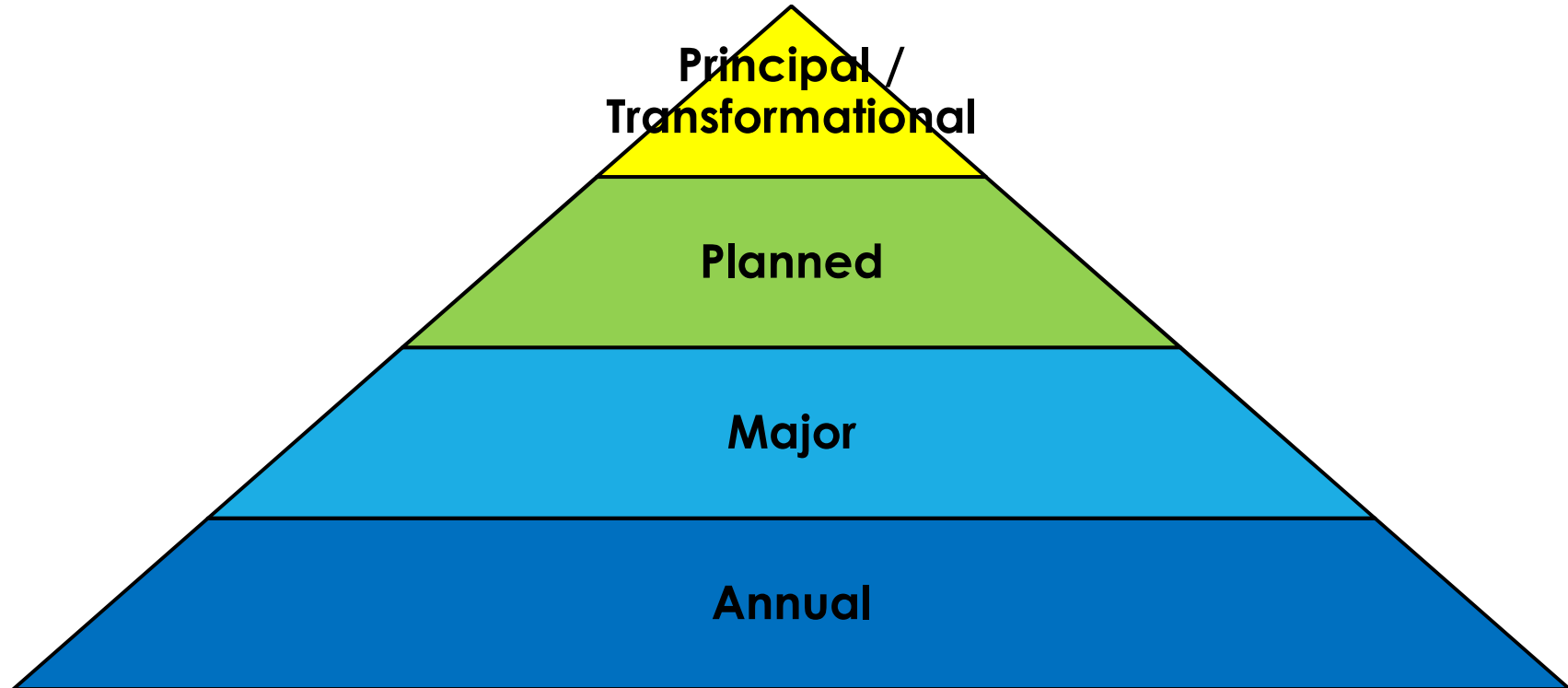
- ▶ Executive Director of Development
- ▶ Shidler College of Business
- ▶ University of Hawaii Manoa
- ▶ University of Hawaii Foundation

Session Goals

- ▶ Define Blended Gifts
- ▶ Learn the 5 types of Blended Gifts
- ▶ Identify BG Prospects & Assess BG Strategies
- ▶ Evaluate the Organization's Culture, Experience, Staffing and Metrics**
- ▶ Create and Implement Customized Solutions**

***assignment for attendees and leadership*

Standard Fundraising Model



Best Intentions / Unintended Consequences

Present Day Challenges

Expected to do more with less
(Efficiency)

We are always in a campaign
(Effectiveness)

Standard Model

Donor's gift and impact potential
(Maximization)

Donor scarcity and burnout
(Diversification)

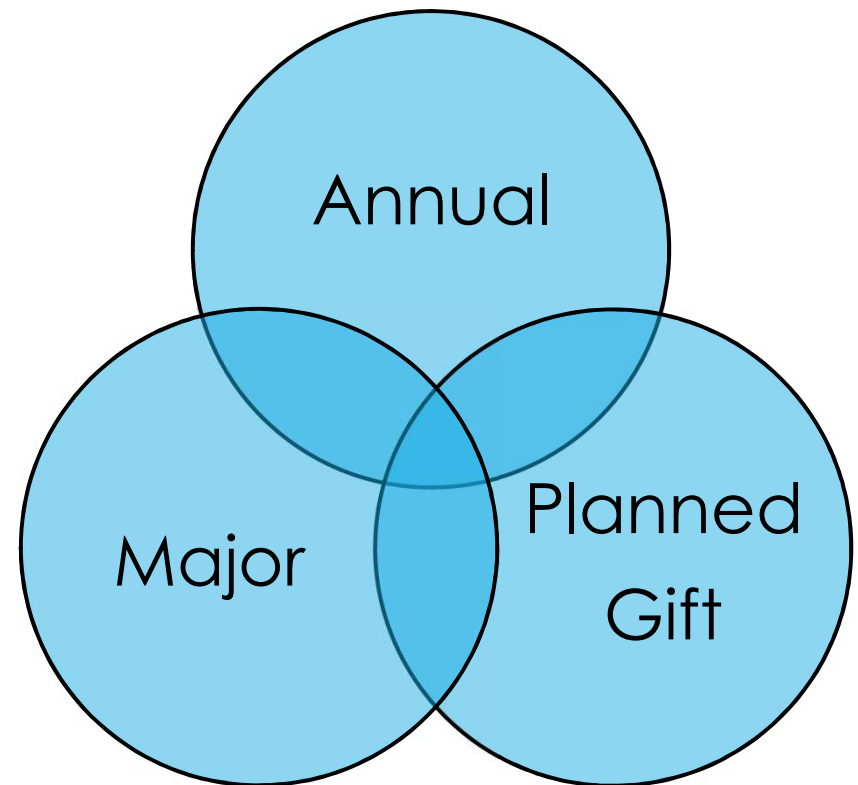
What is a Blended Gift?

When a donor makes:

- ▶ 1. Lifetime gift
 - ▶ Annual
 - ▶ Major

AND

- ▶ 2. Planned gift
 - ▶ Revocable
 - ▶ Irrevocable



#1: Blended Gift

- ▶ **Executive Summary: make a strategic “dual solicitation” for both a lifetime and planned gift**
- ▶ Popular / trending type

#2: Blended Gift

- ▶ **EXECUTIVE SUMMARY:** make an additional or second ask while closing on the first gift
- ▶ “informal best practice”

#3: Blended Gift

- ▶ **EXECUTIVE SUMMARY: identify your best outright gift donors and make planned gift asks**
- ▶ History of annual and/or major gifts
- ▶ No planned gift or legacy established



#4: Blended Gift

- ▶ **EXECUTIVE SUMMARY:** identify all of your best planned gift donors and make annual or major gift asks
- ▶ History of a planned gift(s)
- ▶ No annual or major gifts



#5: Blended Gift

- ▶ **EXECUTIVE SUMMARY:** develop big ideas, create a philanthropic culture, cultivate leadership relationships, inspire donor vision, and practice meaningful stewardship in order to attract and deserve TBG
- ▶ Strategy incorporates Type #1-4



thank you!

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