

PLANNED
GIVING
DAYS
MAY 26-27
2016
KEY BRIDGE MARRIOTT, ARLINGTON, VA

Keynote Session

PART ONE: KEYNOTE ADDRESS

Personalized Philanthropy: Crash Your Fundraising Matrix

Thursday, May 26, 2016 9:00 AM — 10:15 AM

Mathematicians describe an especially pleasing method of proof as *elegant*. In the search for an elegant proof, mathematicians often look for independent ways to prove a result. The *first* proof that is found may not be the best. A gift design can also have a kind of elegance when it is based on a new or original insight. That happens when it offers a perfect meshing of the donor's compelling interests and the organization's compelling needs.

But, fundraisers are often blinded to some of the best possible solutions—especially if they are constrained by restrictive goals, or charged with acquiring only one type of gift to the exclusion of all others. If you habitually stop at your same first place when considering a gift vehicle, you might want to try looking at things in a different way. We often talk a good game of donor-focused fundraising, but—without practical tools—it's nearly impossible to implement in the field.

In this session, we'll take a fresh look at the art and new technology of crafting alternative gift proposals in order to produce the right gift for your *donor* while still achieving the right purpose for your *institution*. We will look at specific examples from practice and re-think the familiar building blocks of philanthropy—centering on the blending of expendable annual (spending rate) gifts with endowed planned gifts. You will learn how you can achieve larger gifts and offer donors more impact and immediate recognition than with conventional gift designs.

Steven L. Meyers, Ph.D. is Vice President of the Center for Personalized Philanthropy at the American Committee for the Weizmann Institute of Science. He holds a Master's Degree in Organization and Management from Antioch University and a Ph.D. from the University of Buffalo.

Steven has published in *The Journal of Gift Planning* as well as AFP's *Advancing Philanthropy*, and speaks frequently at national and regional gift and financial planning events on donor-centered giving and "Planned Giving in the Big Picture." He is a contributing author for the Planned Giving Design Center, as well as for the Elite Advisor Forum of CEG Worldwide. He is the author of the book, ***Personalized Philanthropy: Crash the Fundraising Matrix***, and its companion monograph for donors, ***Personalized Philanthropy and the Four Donors: Parables for Radically Rethinking Your Philanthropy***.

PART TWO: TABLE DISCUSSION

The Four Donors – The Wise, the Wicked, the Simple, and the One Who Doesn't Know How to Ask

Thursday, May 26, 2016 10:30 AM — 11:15 AM

Join NCGPC Board members in a discussion at your table of the four donors you encounter, brainstorm for ideas to better fine tune and personalize your gift designs, and explore the benefits and challenges of blended gifts.

