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How to Present So People Will Listen

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Introduction

In my job as a planned giving officer, I am expected to give presentations to all types of people in an effort to inspire them or their clients to give planned gifts to my institution. In my community, it is important to establish credibility as an expert in planned giving so that professionals come to my institution to get help and assistance when they are working on a planned gift. I also am expected to give presentations to donors and other constituencies to inspire them to give to my institution. Planned giving involves a great deal of one on one discussion with donors, but also requires most of us to appear in front of large groups to explain the planned giving process and to inspire others to complete a planned gift.

Purpose of Presentation

This presentation will show you how to plan, write and give your own presentations so that you connect with your audience and grab their attention. You will learn how to develop a theme, write an outline, write your narrative and design supplemental materials for your presentations. What this means to you is you will enjoy giving presentations and feel more confident in your role as presenter. You will learn how to personalize your presentations so that your audience is inspired to do something: call your office, talk to you after the presentation, and consider making a planned gift in the future.

In this internet age, an enormous amount of information overwhelms people on a daily basis. Research indicates that people receive an average of over 3,000 marketing messages per day through email, web, television and other sources.¹ As a planned giving professional, my audiences and senior level management challenge me to transform my planned giving presentations, which are technical by their very nature, into a non-technical, fun and interesting experience for the attendees. Planned giving has a reputation of being complex, boring and very technical. This presentation will show you how to use some proven techniques to attract your audience, gain their attention, and motivate them with your planned giving presentations. These techniques are useful for all types of planned giving presentations, including donor gatherings, internal development staff trainings and other audiences. I will show you how to plan your presentation, write the outline, develop your dialogue and help you become more comfortable with planning and giving presentations.

Basic Principles of Presenting

Planned giving information is technical by its very nature. Planned giving concepts were created by the United States tax code. Financial planning and tax implications are an integral part of planned giving. As a result, planned giving officers are accustomed to dealing with technical information on a daily basis. We prepare planned giving technical illustrations for donors using gift planning software; we explain the tax law implications for donors, advisors and development officers; we keep senior management and boards apprised of changes affecting planned giving and we train staff in planned giving concepts. It is in our very nature to approach planned giving on a technical level. We spent years and years learning the technical aspects of planned giving and want to impart our knowledge to others so they will be spurred to action. Guess what? Unless you are giving a formal educational training to professionals such as accountants or lawyers, no one wants to hear about the technical planned giving information that we all know and love so well. Presentations with mostly factual content have their purpose in the workplace. You use these types of presentations to inform people of facts, not to persuade or to give your opinion.

The first concept in presenting planned giving information is to rid yourself of the idea that you are educating people in planned giving techniques. This *is not* what you are trying to do. The purpose of presenting to your audience is to *persuade* your audience to do something; in other words, to take some action. In most cases, you are trying to persuade your audience to explore planned giving concepts in greater detail by contacting your office, to consider making a planned gift, or to spark their interest in planned giving techniques. This means that you can use numbers and data, but only in pursuit of your ultimate objective of inspiring your audience to make the next step in completing a planned gift.

This is perhaps the most difficult part of making planned giving presentations. You need to resist the urge to educate and present technical information. This is your opportunity to influence people. You want them to

¹ Dawn Hudson, quoted in Christine Canabou, "Advertising Under Review," *Fast Company.com* 57 (March 2002). <http://www.fastcompany.com/magazine/57/one.html>.

leave your presentation energized about how they can impact their favorite causes using methods they may not have heard about previously. You need to approach your presentation with the goal of persuading and influencing people. Facts do not excite people...perceptions are more powerful than facts. You must create perceptions which are interesting and exciting for your audience. People are inundated with data and multitask all day long. Some people are checking their blackberries right now as we speak. How do you grab their attention? One facilitator and consultant I know does not allow people to multitask during his presentations. If people are caught using a blackberry, he puts the blackberry in "blackberry time-out." He confiscates your blackberry and puts it out of reach until the meeting is over.

People also forget fast. Most people will forget what you said by the next day. You need to spur them to action so that the next day they will do something rather than remember something you said. The presentation is not about you and your skills. The presentation starts with understanding your audience so that you can spur them to action.

Communication has changed dramatically in the past 10 years. I find myself emailing the person down the hall; calling my husband on my cell phone from the garage to help me with groceries, and getting online before I even have my first cup of coffee in the morning. People receive most of their communication visually, either seeing it on the web or on TV. People's attention spans are very, very short. The first principle of presenting is that you need to duplicate this visual communication by making it easy for your audience to visualize your ideas. You need to make your ideas clear, interesting, and most of all, believable. The audience must be able to imagine themselves in their minds doing what you are suggesting through your presentation. You must grab their attention and keep it so that they remember what you said to do.

In summary, you need to grab your audience's attention, make your topic meaningful and make your audience remember what you want them to do. Your presentation should be a call to action which spurs your audience to take the next step.

How to Prepare Your Presentation

The first rule of presentation is to know your audience by putting yourself in their shoes. You need to analyze why your audience is attending your presentation, who they are, how they feel about attending your presentation, and what they are expecting to learn from your presentation. You should make a list of the persons expected to attend your presentation, their backgrounds, knowledge, why they are attending your presentation, and what they expect (vs. what you expect them) to learn from your presentation. You should spend time figuring out your audience's ages, interests, and the main point you are trying to get across to them and motivate them to action. You should ask yourself from the listener's point of view, "Why should I listen to you? What is in it for me?"² You need to focus on your potential audience and answer these basic questions.

Examples:

Your audience is generally 65 and older. They are retired, former entrepreneurs or successful corporate employees. The audience is about 50% male and 50% female. They are attending your presentation as part of a Donor Event and Board Retreat in which they have chosen your presentation from other choices in an afternoon of workshop type sessions. Your audience contains staunch supporters of your organization, and they have heard about planned giving through mailings and publications you have sent to them for years.

Your audience is an average age of 45. They are busy professionals attending a luncheon you have arranged to discuss your organization and gift planning techniques. Some of the audience is familiar with your organization, while others are not familiar with the mission of your organization and have come to find out more about your organization. Others are there for the free lunch at the country club. How would you design your presentation differently for each of these groups?

In the older group, they are looking for ways to increase their retirement income while helping your organization. Some of the group is wealthy and looking for tax-advantaged ways to contribute to your

² Sonya Hamlin, *How to Talk so People Listen* (New York: HarperCollins, 2006), 192.

organization. The stories you tell should focus on the ways that they can give to your organization while gaining something for themselves. They want to know about how they can make a difference but also want to know what is in it for them. They are inclined to listen to stories about others in their positions in similar circumstances who accomplished something by doing what you suggested. These people will respond to stories which mirror their own experiences and duplicate their goals. What type of stories could you use in this circumstance? Try giving them a vivid example of a person who is retired and living in similar circumstances. Your audience needs to be able to relate to the persons in your stories. They are more interested in “giving back” and also concerned about outliving their wealth. They are concerned about long term health care and living a pleasant retirement.

In the younger group, they are apt to be more interested in how they can immediately see the impact of their gift to your organization. They are not as interested in increasing income, as they are in the “asset accumulation” portion of their financial lives and focused on their careers. They are more apt to respond to stories which focus on the impact which your organization has on those served by your mission. This group is impacted by the fierce loyalty to a cause and the feeling that they can directly affect others’ lives by making a donation to your organization.

In all cases, you must make the topic meaningful and grab their attention. You need to keep them engaged and give them a call to action. Ask yourself:

1. Who is in my audience?
2. Why are they attending my presentation?
3. What are their ages, gender, and background?
4. What do they already know about your subject?
5. What do you have to offer your audience?
6. What will they respond to?
7. Do they need more visual or verbal materials?
8. What is in it for your audience?
9. What are their interests?
10. What are their basic goals and needs?
11. What is important to your audience?
12. What is a current problem that could affect your audience?
13. What you are trying to say and what the audience is expecting to hear?
14. What would be the best outcome for you and your audience?

The process of knowing your audience involves examining their needs and expectations. Are they attending your presentation because of the free lunch at the prestigious country club? Are they attending your presentation to learn more about gift planning? Are they attending so they can connect with other donors? Are they attending because they want to be recognized for their contributions? Are they attending because they want to learn a new skill or gain new information? You can find this information by talking with event planners, doing research on your own, or think it through yourself.

The audience’s ages, gender and employment status affects your presentation both in content and style. Younger people are accustomed to getting information over the internet and TV (visual) than print materials (newspapers and books). Younger audiences are used to technical gadgets and would rather text message their friends than talk on the phone or send an email. A younger colleague of mine confided that the reason he sent text messages was that often he didn’t even want to have a conversation or connect with his friend. All he wanted to do was communicate some information, ask a question or give a tip to his friend. He didn’t want to have “the bother” of a full conversation.

You also need to be aware that people’s awareness of technical information and cultural icons varies dramatically depending on their age and background. I was attending a live presentation when the speaker proudly announced that his weekly talks would be available in podcast format. He thanked those who had made this possible and encouraged everyone to check this out. Someone in the audience timidly raised their hand and asked, “What is a podcast?” The speaker laughed at tried to explain to an older couple how the podcast worked, but they were

confused and embarrassed. Be sure that you know if your audience is familiar with any technical lingo, sports analogies, current expressions, etc. or you could be perceived as flippant or condescending.

Full time employees and business owners want to get their information quickly and get back to the office while older donors may see the event as a social occasion. You will need to tailor your presentation to the majority of those in the audience and ask yourself how to respond to the majority. As yourself what the goal and expectations are for the people attending your presentation. If you don't give them what they expect, your presentation will not be successful. How many of you have left a presentation and said: "It wasn't what I expected." That can be a good thing or a bad thing. If you leave a presentation and received more than what you expected, that is a successful presentation. On the other hand, if you leave disappointed, then the speaker did not deliver what he or she promised. Make sure you give them what they expect to receive.

You need to find out why your audience is coming to your event. Were they told by their boss to attend? Are they truly interested in the subject? Do they hope to gain personal knowledge which will be helpful in their lives? *You need to find out what the major goal is your audience is seeking and then respond to that need.* Ask yourself what you can give your audience. What do you have that they need and what can you say to make them act in a positive step forward?

How to Determine What Your Audience is Expecting

- How did you invite the audience to your presentation?
- What publicity did the audience get regarding your presentation?
- How was your presentation described?
- How were you described?
- Who invited the audience to your presentation?
- Is your presentation part of an organized event or a stand alone event?
 - I have had more success with presentations which are part of a larger event, such as a donor event or Trustee meeting, or class reunion.
 - Food always draws people to events, but don't want to align yourself with others who "sell" their products at regular luncheon seminars.

Typical types of audiences for planned giving presentations:

- Trustees of your organization
- Older retired donors and prospects
- Development officers and staff
- Professionals, such as attorneys and CPA's
- Business persons and entrepreneurs

Each of the above audiences is different and you need to prepare differently for each group. Consider that the Trustees may have been involved in your organization for a long time and are familiar with your mission. You don't need to convince them of your mission, but do need to show them new vibrant stories in order to keep them involved in your presentation. Find some new angle to present to them which they haven't heard before, such as a story about how someone found out about your organization, rather than the services you provided to them. Older retired donors and prospects are most likely more interested in the general concepts of planned giving, how it affects them, and how they can create a legacy using planned giving. Stories about your organization and about others in their situation will have the most impact on them.

Development staff and others in your internal organization are a tough crowd. You will need to tailor your presentation to encourage them to do something. If they don't see anything in it for themselves, they won't attend or won't listen. You need to publicize the information as new, fresh and exciting and a new way for them to raise funds for their constituency. Use a new idea, such as the IRA charitable rollover, to draw them in and then add the other more familiar concepts in your presentation. I have learned to be brief and concise with development staff. Two of my most successful training tools for development staff took me years to figure out. One of the best ideas was a small 3"x3" pocket guide to planned giving which I handed out to my development colleagues every 6

months. I asked them to keep one in their briefcase, one on their desk and one in their car. It has only the most basic information about planned giving, but they use it constantly. This solved the problem of development officers complaining that they didn't want all the details and didn't have time to attend planned giving presentations. The other problem I continually had was how to help development officers get over their fear of planned giving. They were either scared of the topic, or didn't feel comfortable in speaking to a donor about sensitive topics (such as estate planning). I suggested that all they had to say to the donor was "Has anyone from UP ever talked with you about including UP in your [will, trust, estate plans]?" This simple sentence allows the development officers to broach the subject in a non-threatening way. Then all they have to do is tell the donor that they have "just the person" who can help them out....which of course is you (the planned giving expert!)

Professionals and CPA's need to know what you can bring to the table to add value to their client discussions. Charitable planners can be ignored unless you tell them why it is important for you to be at the table. Give examples of how not including the correct language or directing the donation to the correct school or program can change the entire donor intent. Business persons and entrepreneurs are interested in your programs' successes and how your program can improve the community in which they live. They are usually interested in the process of your programs and how they operate, rather than the planned giving technical aspects of your presentation. The key is to find out why they are attending your presentation and then respond to their needs.

It is up to you to make sure that your audience is fully informed of what they can expect and what they will gain from attending your presentation. You need to consider:

- Who should send the invitation to your presentation? Should it come from the organization's CEO, from a donor who is asked to host the event, from a Board member, other person?
- Consider if the person hosting the event will draw the audience. If their name is not recognizable, then be sure to give a brief explanation of their background.
- Example 1: Joe Smith, former CEO of Chevron, Inc., USA, invites you to a luncheon and presentation on gift planning with Sharon Kloss Hogan, Associate Director of Planned Giving, University of Portland.
- Example 2: John Wise, Executive Director of National Children's Charities, invites you to a luncheon and presentation on gift planning with....
- Example 3: Please join us for a luncheon and presentation on gift planning with....
- Does your audience know what gift planning is? Do they expect to be asked for money? Do they expect to interact with you? Do they expect to learn something new?

Consider where the presentation will be held and what type of environment you desire. Your environment will affect how people perceive you, the amount of interaction with you, and the formality of your presentation. Consider the impact the environment has if you host a small luncheon, a large conference style seating arrangement, or a classroom format. Consider how your visual aids will be used in the space available.

- Do you want your presentation to be a lecture style?
- Do you want your presentation to be formal or informal?
- Do you want your audience to participate in the discussion?
- Do you want to have your audience take notes?
- Do you want to have your audience remember numbers or concepts?

Lecture Style: Audience is there to learn something and not interact or ask questions.

Formal vs. informal: Do you want your audience to be seated in a formal classroom setting, auditorium seating, or individual separate tables of 8 to 10 people?

Consider your timeframe: Do you want to hold questions at the end or let the audience interject questions during the presentation.

Do you want to create an expectation that the audience take notes by supplying them with paper and pen?

Do you want your audience to focus on you, the material or the message?

Consider your role and your style of presentation

You need to consider your style of presentation and the role you will play in front of your audience. You can stand in front of a group of people sitting in front of you and they may not even want to listen to you. I was a Girl Scout leader for many years and the way in which the girls perceived me changed dramatically over the years. When they

were 5, 6 and 7 years old, they sat quietly, listened to my instructions and seemed genuinely interested in what I had to say. When the girls entered 5th grade, there was a dramatic difference in how they perceived me and how they responded to me. Overnight, I went from their teacher and guide to a sermonizer, boring, and unimportant figure of discipline. They ignored me and nothing I said could bring them back into the fold. You need to think through what attitude would be most helpful to getting people on your side and to listen to you.³ Do you want to put yourself in the role of a teacher, guide, or an inspirer? For most planned giving presentations, you will probably want to cast yourself as both a teacher and an inspirer. You will probably want to teach your audience about planned giving concepts while at the same time inspiring them to act.

Organizing Your Thoughts

After you determine who your audience is and what they expect to gain from your presentation, then boil your presentation down to 1 idea, 1 theme, 1 major concept on which you will focus. Is it to align them with your organization's mission? Is it to explain how they can help your organization? Is it to educate them about a problem of which they are unaware and they need your help to solve? After you figure out your major theme, the rest of your presentation plan should always relate back to your major theme.

Examples: You work for a small nonprofit that protects children in the court system by appointing special advocates for them in court proceedings. Your audience is not familiar with juvenile court proceedings, or how parental rights can be terminated through these type of proceedings. You must first educate them about the problem before you can ask for their assistance in solving the problem. You must establish the general nature of your talk first. You can explain to your audience about the court system and how juveniles may have attorney representation in addition to a special advocate. You will need to explain why special advocates are critical to determining the appropriate action in juvenile proceedings in the courtroom.

After you explain the general concepts to your audience, then you will need to present the basic components of your talk. What do you want your audience to learn? How do you want them to respond? Then you can explain the details of your talk and give examples. You then can show what needs to make your plan or process happen and how it fits in with your audience.

One of the biggest mistakes presenters make is to jump into complicated and complex details of an idea before the audience gains interest. Be sure that you grab your audience's attention before you go to the details! In the above examples, one way to do that would be to start your talk with the results of a court proceeding in which a court appointed special advocate was involved and one in which the special advocate was not involved. This would grab your audience's attention and immediately show them the impact of the special advocates in the court system. Tell your audience what you want them to learn right away so that you keep their attention.

Example: Give your audience your theme and why they need to know your message.⁴ In the above situation, you could tell the audience that you want them to know why court appointed special advocates are critical in the justice system today. You want them to learn why this role is so critical and what the results are if these roles are not filled. You will tell them why it is important that they know about your organization and how they can join you in the mission to recruit, train, and retain court advocates in your community.

Tailor Your Presentation to Your Audience's Interests

You have now determined what you want your audience to learn and how you want them to respond to your presentation. Now you need to actually prepare your presentation. The first step in preparing your presentation is to write down your ideas and cluster related ideas together. Then you will transform these ideas into an outline. Make sure that each component of your outline relates back to your major theme. After you have created your outline, then you can write your script.

The first part of your outline is to develop an introduction. You should set the stage for the rest of your presentation. You will tell your audience what you are going to say (in the introduction), say it (in the presentation), and then remind them what you said (in your conclusion). Your introduction needs to clarify the goals and objectives of your presentation. You want to grab the attention of your audience...this is your chance to draw them in and appeal to

³ Hamlin, 193.

⁴ Hamlin, 201.

their interests. You need to tell them what problem you will solve for them or focus their attention on a subject you will explain.

Example:

Goal: To get audience to follow up with the Planned Giving office and further discuss planned giving options based on their individual circumstances.

1. Who is your audience? Retired, entrepreneurs, widows, etc. Their major goal may be to increase their retirement income, help their favorite causes, provide for their families or live an enjoyable retirement. How can your organization help them with these goals?
2. Have they already completed a planned gift? If so, they already have aligned themselves with your organization. What can you tell them that can help them in the future?
3. Have they made a bequest to your organization? If so, they are entrusting their lifetime assets to your organization. They need to be thanked at every opportunity during your presentation.
4. What problem can you solve for them?
5. What can you offer your audience which distinguishes you from their other advisors?
6. Remember what your theme is and what you want to give your audience.

Your Mission is the Focal Point of your Presentation

Talk about the mission first and last. Make the audience feel the passion of your organization. People want to hear success stories and motivating incidents which inspire them. Talk about how your organization positively impacted a situation, person or community. Explain how your organization fulfills a need or solves a problem. Explain how easy it is to become a part of your organization, a part of the “inner circle.”

Example: Talk about how your organization allows students to achieve their educational goals through special scholarships and other financial aid packages which are funded by private donations. Talk about how your institution impacts the community and the world. Talk about how each contributor makes a difference to your organization. The most effective stories are those told by persons who have been affected by your organization’s mission. Let others tell the story for you.

I have found it is better to start with the results of philanthropy rather than the process. After the audience appreciates what your organization has accomplished, then they will naturally want to know more about how they can help and participate in reaching the goals of the organization. The bottom line is stories, stories and more stories!!

I attended a luncheon where 3 scholarship students gave short talks on how much their scholarships had affected their lives. These were exceptional students who were not only brilliant, but humble and appreciate of any assistance they had received. These are the types of testimonials which you should use in your presentations. If you can’t have someone speak in person, then tell stories about some of the best successes of your organization.

So now you have created stories and have to transition to how donors can help your organization. The first thing you should do is tell donors that there are many ways to contribute to your organization which are less well known than cash. I often try to tell the audience that giving a check is simple, but there are other ways to give which may be new to them, but which are beneficial in many ways.

Writing the Presentation

You will go through five steps when you write your presentation. Remember that PowerPoints are *not* your full presentation, but only serve to highlight major points for your audience. You will develop:

- Outline
- Key points
- Narrative
- Visual Aids
- Your notes for use during the live presentation

1. Develop your outline and each component.

- a. Prepare the objective. What do you want your audience to do? What do you want to accomplish during this presentation? What are the major points you want to make in your presentation? Do you want the audience to act or to do something else? Ask if what you are telling the audience will inspire them to act or to do something.
- b. Prepare key points. Write down which planned giving concepts you wish to explain to your audience. What problems could they solve? What life situations could they fit into? Who could benefit from these concepts? What is the end result for the organization when the gift is received? Work backwards from this point. Put yourself in the place of the donor and your audience. Paint a picture in which they could imagine themselves.
- c. Develop narrative presentation. This is where you write your formal presentation. This is not an outline or a PowerPoint presentation. This is the “guts” of your talk which contains everything you want to convey to the audience. You will leave nothing out of the narrative.
- d. Design visual materials and slide presentations, if appropriate.
- e. Only after you practice and find out what you need in your notes can you prepare helpful notes for use during the presentation.

Humor or Not Humor?

All of us had read articles which say that speakers should start out their presentations with a joke. I have found that this does not work for me. I am not a good joke teller and I have a tough time figuring out if a particular joke is suitable for the crowd. I have found out through experience that oftentimes a comment which I intended as a totally serious comment caused huge laughter in the audience while a joke I had prepared elicited total silence. Remember:

1. Some people, like me, just can't tell jokes
2. You never know for sure if your audience will think the joke is funny
3. Some groups are just tough

I just try to be myself and genuine. If I say something funny, then that's great, but if not, I don't stress over it. I am not after all a stand up comedian. Jerry Seinfeld once said that his TV show was about “nothing,” but in actuality it was about everyday situations to which we could all relate. Make sure your jokes and comments are ones to which people can relate.

How Visual Materials Make a Difference

When you give your audience the visual message, this allows you to give them your impression of the information, rather than your audience coming up with their own imagery. You need to not only say what you want to the audience but show them your ideas and make it visual in their minds. You need to speak visually to the audience by giving them pictures they can imagine; to actively participate with you in the presentation.

Consider: You show an image of a large African village which is in need of donations to fund water purification systems. You can either explain how the scene appears, or show a visual which has much more impact on your audience. There is a website for Run for Africa which organizes running events on trails to fund wells, water filtration systems and rainwater harvesting systems. Nowhere on the first page of the website do any wells or water appear. There is a John Lennon “Imagine” video playing while photographs of African children are seen fading in and out of the video. You don't see any sick adults or hospitals. Only happy children are shown in this message.

Visuals get you straight to your point without distraction. Photos and other visuals are attention getting...you need to keep your audience's attention. Visuals can include numbers if they are easy to interpret and show a message. I used to design PowerPoint slides with numbers and then fill in a picture or two. I now spend a significant amount of time finding pictures to emphasize the mission.

Delivering your Presentation

The first thing to remember is that there *are* no perfect presentations. There are so many factors involved in a presentation which have nothing to do with you. Are you presenting late in the day? Is the room freezing or too hot? You cannot design a presentation which will work perfectly for every audience. One of the things I have learned is that I need to refresh my presentation every time I am in front of a different audience. You must adapt your presentation to the group, the circumstances and the environment. Unfortunately, I don't have a "one size fits all" perfect presentation to give everyone that you can take with you and adapt for your own use. Making presentations is a time intensive process and one that you must constantly improve.

You also need to remember that there are many ways to present your information. There are many ways and approaches to present to different audiences. Successful presentation skills are about how effective you can be in getting your message across. You need to determine the best way for you to present your message.⁵ You need to be yourself or the audience will not buy your message. You need to convey enthusiasm through your voice and body language. If you aren't enthusiastic about your topic then you will need to pretend as if you are enthused about your topic. You need to speak in a tone which reflects your enthusiasm. Don't speak in the same tone for the whole talk or your audience will become bored.

Stage fright

I can't stand here and tell you that it is easy to get in front of a group of people and not have some kind of nervousness. That is normal and even fulltime entertainers get the jitters. What you need to remember is that you are a person just like your audience. You want them to identify with you as someone they can relate to. Remind yourself that your audience would like this material and wants to hear it.

Whoever thought of the "just imagine your audience naked" suggestion to avoid the jitters obviously had never been to a nude beach. There is nothing more frightening than imagining all of you prancing around naked while I am up here delivering my presentation. You need to figure out what works for you, but generally once you get started it is never as bad as you thought it would be.

Opening the Presentation

Chatting with the audience rather than making a speech or lecture is more comfortable for both them and you. If you do this, it makes you a real person. Again, just be you and identify with the audience:

- As I was preparing last night, I was thinking...
- As I flew here on the plane, I was thinking...
- Invite your audience to come in and listen to more⁶

Ask Your Audience Questions

Ask questions at the beginning of your talk to determine what is on the minds of your audience. Ask them if they have ever thought about something you intend to cover in your talk or ask how many have ever done something which is common for this particular audience. Draw them into your talk right away.

PowerPoint or Not to PowerPoint?

PowerPoint was invented in 1987 and was never intended to be the entire presentation or the entire proposal. The original business plan for the PowerPoint program was 53 pages of densely argued pages. It was accompanied by a dozen or so slides that only contained the highlights. "A lot of business people have given up writing the documents. They just write the presentations, which are summaries without the detail, without the backup. A lot of

⁵ Hamlin, 221.

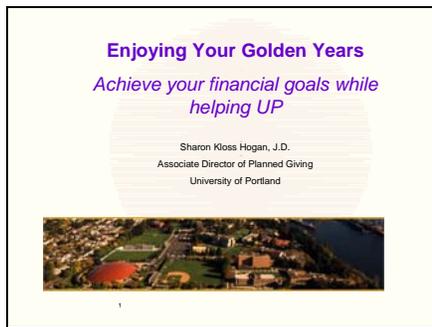
⁶ Lani Arredondo, *How to Present Like a Pro* (New York: McGraw-Hill, Inc., 1991), 36.

people don't like the intellectual rigor of actually doing the work."⁷ PowerPoint was intended for a very small group of sales people to make sales presentations. When my daughter was 11 years old, she presented me with her Christmas wish list in PowerPoint. I personally don't like PowerPoint for making presentations. When was the last time you saw a truly motivational talk using PowerPoints? I find them distracting and annoying when I need to keep looking at the screen to be sure the right slide is on the screen. Plus I am not that coordinated. I find that I can't keep looking back and forth and also maintain my focus with my audience. If you use PowerPoint, keep it to a minimum and only use those slides which emphasize your major points. I find they are helpful when I am analyzing a planned gift and want to go through the calculations with my audience. I also use it to summarize and for visual stimulation in emphasizing my organization's mission.

Sample PowerPoint Slides for a Presentation

I keep to a minimum and only list key concepts.

Slide 1



Slide 2



⁷ Robert Gaskins, quoted in Lee Gomes, "PowerPoint Turns 20, as its Creators Ponder a Dark Side to Success," *The Wall Street Journal*, June 20, 2007, Page B1.

Slide 3

Goals in Retirement

- Enjoy retirement
- Financial stability
- Help your family
- Make a difference
- Travel
- Other



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Slide 4

Charitable Gift Planning can:

- Help you help others
- Increase your income
- Avoid taxes
- Leave more assets for your family
- Help offset concerns about low interest rate environment
- Help you make a difference



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Slide 5

How?

- IRA Charitable Distribution allowed through December 2007
- Age 70-1/2
- \$100,000 per person
- Qualifies for required minimum distribution
- Tax advantages (get tax advantage even if you do not itemize)

5

Slide 6



- Appreciated Stock
 - Don't have to pay capital gains tax on the appreciation
 - Get a charitable deduction for the full fair market value of the stock
 - More bang for the buck
- Outright or fund a life income gift

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Slide 7

How a Gift Annuity Works

- Transfer cash or stock to UP
- Receive payments for your lifetime
- Rates depend on your age(s) when you make the gift
- Rates generally range from 5-11.3%
- You receive a charitable deduction
- Part of your income is tax free!!

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Slide 8

Current or deferred payments

- Defer payments at least 1 year in the future

Gift Type	Current Gift Annuity (Payments start at 60)	Deferred Gift Annuity (Payments start at 65)
Annuity Rate	5.7%	7.7%
Charitable Deduction	\$ 9,493	\$11,068
Annual Payout	\$ 1,425 (Fixed) \$644 is tax free	\$ 1,925 (Fixed) \$700 is tax free

Notes

- Donor is 60 years old and funds annuity with \$25,000
- Federal mid-term rate of 0.2%

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Slide 9

Thinking of selling your vacation home or rental property?

- Rude awakening: Taxes and more taxes. Capital gains; no main residence exception.
- Solution: Donate outright or fund a charitable remainder trust
 - Simple procedure
 - More income, less taxes, help UP
 - We help with the entire process

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Slide 10

Transfer property to a Charitable Remainder Unitrust

- Avoid capital gains
- Receive annual payments with minimum of 5% of the value of the trust
- Receive a charitable tax deduction
- Free from maintenance and management worries
- Designate your favorite programs at UP to receive the remainder of the trust

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Slide 11

How a Life Estate Works

- Deed your property now to UP
- Continue to live in the residence
- You pay maintenance, taxes and other costs of home ownership
- You get an **income tax deduction now**
- UP receives the proceeds from your home or farm upon your death(s)
- You determine which area benefits

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Slide 12

Want to help UP but concerned about health expenses in the future?
Consider a Bequest:

- Provision in your will or trust
- May reduce estate taxes
- Percentage or dollar amount
- Contingent bequests (if a family member doesn't survive you, then to UP)
- We will help you through the process
- Set up a special endowment now and start funding it during your lifetime
 - See the results of your donation now.

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Slide 13

Other Ways to Give

- Designate UP as the beneficiary of your IRA
 - If you designate your **children** as beneficiaries of your IRA, taxes can eat up 75% or more of the value of the IRA!!!

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Sample Presentations: There is no one size fits all for every presentation, but every presentation has the following components:

Objective: Motivate audience to pursue a planned gift

Educate audience about planned gifts only so they are motivated to pursue a planned gift

Introduction (for general planned giving presentation to donors and prospects): Thank you for coming to this presentation today and taking time from your schedule to be here. I have been with XYZ Foundation since _____. I suppose many of you have been involved with XY Foundation for many years. Has anyone here been involved with XYZ Foundation for more than 10 years? 15 Years? 20 Years? The mission of XYZ Foundation is to _____. One of my favorite stories is when (insert a story here which highlights your mission and will grab your audience's attention). Stories like this are the reason I love working at XYZ Foundation and why many of you are involved with XYZ Foundation. Do any of you have a story about XYZ Foundation that you wish to share with others here which shows why you became involved with XYZ Foundation? (If this is a presentation for development officer or internal staff during a meeting, hen this part may be skipped.)

The reason we are here today is to explore ways that you can personally help the XYZ Foundation by strengthening our long term stability. I would like to show you some ways that you can help XYZ Foundation's mission to _____ and ensure that future generations also continue to receive the benefits of XYZ Foundation. I also would like to show you how you can help future generations enjoy the same commitment to our mission as you do.

Bill mentioned that he became involved with XYZ Foundation because he can identify with the people we assist with our _____ program. Did you know there is a way that you can help fund this program so that it continues in the future? Did you know there is a way to help the _____ program in future generations now? I would like to tell you about Jim, who benefited from our _____ program and now, is a volunteer for XYZ Foundation. Jim would not be where he is today without XYZ Foundation and wants to be sure that the future generation is able to receive the same type of help which Jim was able to receive. I would like to show you some simple ways in which you can help people like Jim and also perhaps receive some tax benefits at the same time.

Key concepts:

Steve and Nancy, ages 78 and 79, were strong supporters of the XYZ Foundation and wanted to make sure that they remembered to include XYZ Foundation in their wills. Steve and Nancy met with me at their home and were happy to find out that this is a simple process. We discussed the programs which meant the most to them and also which programs at XYZ Foundation they wanted to be sure and include in their estate planning process. I explained to Steve and Nancy how it is critical to include the correct language in their will or trust so that we can follow their instructions and honor their intent when we receive the gift. I explained that I would be happy to work with their attorney, Bob, and answer any questions both Steve and Nancy, or their attorney, had about their estate plans. This conversation happened several years ago and now Steve and Nancy's wishes are being carried out for future generations at XYZ Foundation.

Call to Action: If you would like to be sure to include XYZ Foundation in your will or trust, you need to see your attorney and ask him or her to include a provision in your will or trust. I would be happy to schedule an appointment with you to further discuss this and other options.

Another easy way to include XYZ Foundation in your estate planning is to designate XYZ Foundation as a beneficiary of your IRA. (Insert story here about a program which was assisted with the help of an IRA designation). Explain the donor story as you did above with Steve and Nancy. Then you can segue into the IRA legislation.

How many of you have heard about the new IRA legislation which is in effect only until the end of 2007? This is exciting news because it allows people to donate up to \$100,000 from their IRAs to the XYZ Foundation without having to pay any income tax on the distribution. This legislation allows you to use another source of funds from which to help the XYZ _____ program and also not suffer adverse tax consequences. Let me show you how this works:

You can withdraw up to \$100,000 per person, for a total of \$200,000 per couple, during 2007 and the amount counts toward your minimum required distribution of your IRA. If you are interested in this, please call me and we can chat further about how this works. So far this year, we have received \$_____ in IRA funds and this has been a significant source of funding for us.

Depending on how long your presentation is, you can do this same type of scenario for other gifts, including life income gifts. You need to be careful not to overload your audience on too much information at one time. When I talk about CRTs, I generally limit the information to a brief overview and focus on the mission and what the gift accomplishes for the organization and the donor.

Consider:

Charitable Remainder Unitrust: Is it age appropriate for this audience? What problem could it solve? How have the remainder from other CRTs been used in your organization? Why should the audience be excited about this concept? Tell a story about how a CRT positively affected your organization and the community which it serves.

Write the story and then state the general concept and related results of the CRT...all without numbers. The very last thing you should do is give an example using numbers because your audience will then try to follow along and get distracted by the math.

Remember: Mission, stories and how to solve problems. Then give some examples using numbers if you have time. Give stories of how planned giving gifts have (or can) positively affect your organization. Use stories with details of people, places and situations to which your donors can relate.

Example: CRT funded with real estate. How did it solve problems for the donor and what did the remainder proceeds accomplish for the organization/fulfill the mission?

Bill and Nancy, both 68 years old, owned a rental apartment which they bought in the early 1990's. Bill has been a Trustee with your organization for over 10 years and would like to somehow use the apartment to fund a gift. Talk about Bill and Nancy's involvement with your organization, their family, their goals and their life. Then transition into how they became involved with your organization and decided they wanted to make a larger commitment with the apartment building they owned. Talk about where the apartment building was located, when they bought it and how long they owned it. Talk about how it would be hard to relinquish control of the apartment but that Bill and Nancy wanted to make a large commitment to the capital campaign and this was the best way they could contribute to your organization on a larger scale.

Remember to focus on telling the story. You still haven't mentioned any numbers or value of the gift. The next step is to transition to a short explanation of the transaction without mentioning any numbers. At the very end, then tell the audience how the transaction worked using a rough outline of the respective values.

Major Points:

- Avoid capital gains tax upon transfer of appreciated property to CRT
- Charitable tax deduction
- Capital gain income
- Receive income and also help favorite programs

Overview

- ⌘ Cash vs. Stock
- ⌘ Real Estate/Timber/Timberland
- ⌘ Bequest
- ⌘ Gift Annuity
- ⌘ Charitable Remainder Unitrust
- ⌘ IRA's
- ⌘ Life Insurance
- ⌘ Life Estate



Why is the above overview too much for your audience to handle in one sitting? Don't try to dazzle with your knowledge. You need to focus on motivation and action.

- What needs are critical to your organization?
- How can planned giving concepts help your organization?
- Talk about planned giving as a means to an end. What can their gifts accomplish?

Professional Seminars

Attorneys and accountants are interested in the technical information but you also need to persuade them of 3 things:

- You want them to think of your organization if a client wants to do a CRT and is looking for a Trustee.
- You want them to think of your organization if a client asks which organizations he should support through his CRT or other estate plan.
- You want them to think of you as someone to have at the table when a client says they want to include your organization in their estate plans.

You need to tell them what services you can provide such as financial analyses, tax projections, and other information which is needed for a client CRT or gift annuity proposal. You need to convince them that they need correct language for a will or trust. Attorneys and CPAs generally like some "bad results" stories to motivate them to include you at the table. You can tell a story in which a gift ended up with the State government or in litigation because the wording was not clear which charity should receive the gift. You can also talk about how donors want to gain personal knowledge from the organization about the programs they plan to support. You also need to emphasize that prior notice of gifts from donors is critical to the planning process at your organization.

Summary

The purpose of presenting is to persuade. You need to determine your objective and what you want the audience to do as a result of listening to your presentation. Perception is more powerful than fact so focus on ideas and concepts instead of facts. The goal of your presentation is to grab their attention, make it meaningful, make them remember and spur them to action. Just remember that in every presentation most people in the audience are thinking: I am glad I am down here in the audience and you are up there.

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Suggested Reading Material:

Lani Arredondo, *How to Present Like a Pro* (New York: McGraw-Hill, Inc., 1991)
Cliff Atkinson, *Beyond Bullet Points* (Redmond, Washington: Microsoft Press, 2005)
Sonya Hamlin, *How to Talk so People Listen* (New York: HarperCollins, 2006)
Marilyn Pincus, *Boost Your Presentation IQ* (New York: McGraw-Hill, Inc., 2006)
Jennifer Rotondo and Mike Rotondo, Jr, *Presentation Skills for Managers* (New York: McGraw-Hill, Inc., 2002)