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# *Till Death Do Us Part*

## The Marriage of MGOs and GPOs

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# Introduction

- Observations and strategies about collaborative MGO and GPO efforts that may enhance the quality of your donors' experience and generate more gift revenue for your organization
- Not a technical gift planning discussion
- “Marriage”

# Elements of Marriage

- Motivation for Marriage
- Complementing Each Other
- Trust
- Shared Vocabulary
- Sensitivity to Needs
- Estate Planning
- Friends and Family
- Fun and Adventure
- Marital Bliss

# Bob and Charlie Moore

- Married for 59 years, themselves
- Bob's Red Mill and gift born out of their marriage
- Gift illustrates many topics of this presentation
  - Advisor referral, MGO/Presidential lead, GPO role, faculty involvement, seamless execution, blended gift, metrics rewarded all

# Motivation For Marriage

- Pre-Wedlock
  - Gift planning in the 1990s and early 2000s
- Current development climate supports collaboration (i.e. “marriage”) between MGOs and GPOs

# Complementing Each Other

- It's apparent when MGOs and GPOs work well together
  - Donors understand the two roles
  - Seamless execution
  - Fun
- 
- An Observation: May – December romance

# Trust

- Aspiring to successful collaboration is not enough
- Reward efforts with supportive systems and metrics
- Reporting system that allows both MGO and GPO to count gifts at full face value
- Metrics that encourage non-competitive Lead and Team participation
  - Measure total Lead + Team
  - 75%/25% philosophy

# Shared Vocabulary

- Basic gift planning toolbox
  - Working knowledge of common gift vehicles
  - Awareness of donor motivations for gift plans
  - Basic knowledge of tax laws
  - Avoid danger for organization
- Request tools for success from GP Dept
  - Tailored to your individual experience level



# Shared Vocabulary

- Basic major gift toolbox
  - Awareness of programmatic initiatives and strengths
  - Access to current materials
- Faculty understanding of deferred planned gifts
  - On front end
  - On back end
  - General benefits

# Sensitivity to Needs

- Talking about death and estate planning
  - Generally
  - When it's cancer
- An opportunity for empowerment
- Timing of motivation and gift
- Stewarding survivors

# Estate Planning

- Promoting revocable “bequests”
  - Opportunity and importance
    - Revocable
    - Binding testamentary gifts
  - Joint and ongoing participatory effort
  - Impact on pipeline
  - GP Dept drives administration
  - Documenting strategies for key individuals
  - MGO can override default stewardship
  - MGO credit for closing expectancies and estate gifts

# Friends and Family

- Advisor relationships
  - Key professions
  - Different roles of “financial advisors”
  - Awareness of motivation
  - Examples

# Fun and Adventure

- Blended gifts
  - Defined
  - Using multiple assets
  - To make a larger gift
- Gift trends
  - CRT gift solutions
  - Bargain sales
  - Big ideas
  - Philanthropy leading to more philanthropy

# Marital Bliss

- Results of neuroscience study
- Takeaways that lead to greater satisfaction in your work with your GPOs, and better results for your donors and organizations

Questions?

Thank you!