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Corralling Donations

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FUND RAISING

Trends and Ideas

Gentleman Caller

A fund raiser in West Texas finds that popping in on prospective donors leads to planned gifts aplenty

By Brad Wolverton

SAN ANGELO, TEX.

ROGER ELLISON calls on 500 prospective donors every year, showing up unannounced on people's front porches in a cowboy hat and ostrich-skin boots.

In pursuit of donations, Mr. Ellison, 57, vice president of planned giving at the West Texas Rehabilitation Center Foundation, has been known to climb onto the roof of a donor's house to help lay shingles, till a field in shirt and tie, even kill a rattlesnake. While his approach might not work in parts of the country where people are mistrustful of strangers, it has caught on in West Texas, where many people leave their doors unlocked and drivers routinely give a friendly wave to passing cars.

At a time when many fund raisers are getting doors shut on them during a difficult economy, Mr. Ellison's reliance on the human touch—getting to know details about the lives of prospective donors—and his focus on spreading the message about what a donor's money will do for the region's neediest people could provide lessons that help to open doors for many types of fund raisers across the country.

Mr. Ellison, who is one of a half-dozen fund raisers employed by the rehab center, has been bringing in more than \$2-million a year in planned gifts—including bequests, charitable annuities, and trusts—for the organization since he started raising money this way in 1993.

Mr. Ellison's job is to try to persuade people to donate to the endowment of the rehabilitation center, which serves 21,000 people a year at its clinics here and in Abilene and Ozona. The clinics help people who need bum knees and twisted ankles fixed or who were injured in car accidents; they also work with disabled children, build prosthetic devices for individuals, and assist local employers in preventing on-the-job accidents.

Costs of Free Care Rising

The endowment allows the clinics to provide about \$1-million of free services every year to people who can't afford care, Mr. Ellison says. The organization expects that number to double in the next five years as health-insurance costs continue to escalate.

Before taking a job at the foundation, where he earns about \$70,000 a year, Mr. Ellison spent 19 years as a fund raiser at the YMCA of Metropolitan Dallas and served four years as chief executive of the West Texas Boys Ranch, a working ranch for neglected youths. During his time there, Mr. Ellison saw a steady increase in the popularity of planned gifts,

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PHOTOGRAPHS BY DOUG HOPPER, FOR THE CHRONICLE



Roger Ellison drives thousands of miles each year to cultivate donors for the West Texas Rehabilitation Center Foundation. Here, Mr. Ellison spends time with Ed C. Harper in his garden outside of Dallas.

Paying a Visit to Donors Pays Off in Planned Gifts and Friendships

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and decided he wanted to become a full-time planned-giving officer.

But when he first arrived at the rehab center, Mr. Ellison, a tall, lean man with well-kept nails, grew frustrated because few donors would let him visit them to talk about the facility. And he found it difficult to explain planned giving over the phone.

"Planned giving has the sound of the unknown," he says, humming along a two-lane road between Dallas and San Angelo in his Ford Explorer. "People say, 'What is that? You mean wills?' Or they say, 'What in hell do you want to come see me for? You ain't comin' to my house.'"

But Mr. Ellison persisted. A native West Texan, he used his knowledge of the region to hatch a Texas-style approach to fund raising that simplifies planned giving and helps him to establish what he considers friendships with hundreds of prospective donors.

"I grew up in this area, and I had no problem understanding these people or talking to them. I had worked ropings, gone to barbecues, looked after their cars in my daddy's garage," he says in a slow, measured voice, with an accent that resembles President Bush's. "When people out here do something nice for you, what do you do? You drive over to their house and you thank them. I realized that's how I could get to see our donors—I'd go thank them for what they've done for us."

A software program helps Mr. Ellison tell which donors are most likely to make planned gifts, based in part on contributions they have made to the rehab center in the past. "But what's missing in all the software programs," says Mr. Ellison, "is the human touch. Once I spend time with someone, my nose gets a sniff. I'll tell you, I can smell a gift annuity."

A Good Listener

Rather than seeking out only those who have made large contributions, Mr. Ellison says he often prefers to visit individuals who have made dozens of smaller donations because they sometimes have more "passion" for the rehab center and can be just as likely to establish planned gifts as those with more money.

He tends to visit many of the same people repeatedly so they think of the rehab center first when they give to charity, but also likes to pay short unexpected visits to as many people as he can.

"I believe there is a direct relationship between the number of calls you make and the number of gifts you receive," he says. He visits four or five people a day on road trips he takes a few days a week, and he reports a gift about once every two weeks.

On the Road

Life on the road keeps him away from two of his favorite activities in life: spending time with his wife of 35 years, Linda, who teaches disabled children, and experimenting in the woodworking shop behind his modest ranch house,



DOUG HOPPER, FOR THE CHRONICLE

Roger Ellison brings his laptop on the road, but he says fund raising requires "the human touch." He adds: "Once I spend time with someone my nose gets a sniff. I'll tell you, I can smell a gift annuity."

where he makes furniture out of mesquite wood.

After Mr. Ellison figures out which donors he wants to see, he climbs into his Explorer and, as he likes to say, "I roll on over to their house." He says he once drove 400 miles one-way for a five-minute conversation that bore no gift, then "turned around and rolled home."

While he's driving, he keeps his radio tuned to country-music stations and listens for information he can use when he talks with

Perkins, 79, a retired teacher and frequent donor.

Other donors agree, but say they don't give money to the rehab center because of Mr. Ellison. "Roger's a prince of a fella," says Ed C. Harper, 89, a retired mechanical engineer who now grows sweet potatoes and cantaloupes on a farm in Rowlett, a suburb of Dallas. "But West Texas, you understand, is kind of on the edge of a desert, and they go through a lot of droughts. People who live out there and try to farm quite often

removes his cowboy hat, and waits patiently to see if anyone's home.

If he hasn't met the prospective donor before, he quickly introduces himself—"Why, good afternoon, ma'am, I'm Roger Ellison, and I work for the West Texas Rehabilitation Center. I was in your area on business and my boss asked me to stop by and give you a gift of thanks for all you've done for us over the years"—and then he hands the donor a silver coin commemorating the 50th anniversary of the rehab center.

The people he visits—usually in their 70s and 80s—typically invite him in, offer him a chair, and beg for his ear.

Mr. Ellison is a patient, empathetic listener, which he thinks is the most important characteristic for a planned-giving officer. But donors say it is his disarmingly handsome looks and big white hat—"good guys wear white hats," observes one—that help him get in the door.

Making Connections

Donors also take to Mr. Ellison, they say, because he relates well to older people.

Mr. Ellison has lost his mother, younger brother, and father-in-law in recent years, events that he says help him to connect with people as they near the end of their lives or experience death in their families.

"Through his own personal experiences, he understands life—especially the things that happen toward the end of life—and that seasons his feelings and concerns and makes whatever he says truthful and genuine," says Dorothy

Perkins, 79, a retired teacher and frequent donor.

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First Stop: Eastland

On Mr. Ellison's first stop of the day, in Eastland, a small town about three hours west of Dallas, he visits with Ms. Perkins, whom he has seen many times.

In their 30-minute conversation, which takes place in a red, one-room schoolhouse built by Ms. Perkins's grandfather, Ms. Perkins

tells Mr. Ellison how excited she is to be leading a story hour with a group of 10-year-old girls in the schoolhouse; how she once went "fossicking" for opals in Australia (Mr. Ellison had noticed the opal on her necklace); and that she studied poetry under Robert Frost when he was a visiting professor at Middlebury College.

When it's time to go, Mr. Ellison stands up, puts on his cowboy hat, and says gently, "Come here, Miss Dorothy, let me hug your neck."

After Mr. Ellison drives about a mile away from the donor's house, he pulls over. "Dorothy is gracious and graceful and sophisticated," he types into his laptop. "Very worldly, but fits stereotype of West Texas woman—family means a lot to her. Brother visits every day. Cautious, doesn't make decisions from an emotional level."

When Mr. Ellison finishes typing, he says, "I have a feeling Dorothy Perkins is done giving to us, but I'll continue to prospect around her. She might tell one of her friends how happy she is with the gift annuity she established with the rehab, which would do more for us than any advertising we could do."

A Message

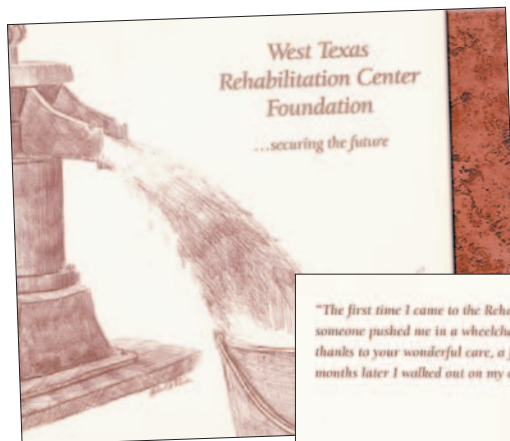
A moment later, Mr. Ellison's cell phone rings. It is Rodger Kennedy, his planned-giving colleague at the foundation. In addition to the two foundation fund raisers, the rehab center also employs four development officers who raise money for day-to-day operations.

"Millard Richmon just left me a message," Mr. Kennedy says. "I

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"I believe there is a direct relationship between the number of calls you make and the number of gifts you receive."

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The West Texas Rehabilitation Center Foundation tries to keep fund raising, even planned-giving appeals, simple. Brochures use phrases such as, "It's a matter of neighbor helping neighbor."

"The first time I came to the Rehab Center someone pushed me in a wheelchair, but thanks to your wonderful care, a few months later I walked out on my own."

"It's a matter of neighbor helping neighbor."

Creating a legacy

We all know generosity brings a sense of satisfaction, a joy that springs from knowing we helped others and contributed to the common good.

For many, this is a reason enough to give, a reason enough to fill the pump bucket for the next person.

As a friend of the Rehab puts it, "I see the reason for my gift every time I look into the eyes of a child seated at the Rehab Center."

But giving, especially when planned, also can bring you wonderful, tangible benefits.

There can be substantial tax advantages and increased income. The foundation's professionals are ready to work with you, your family, and your legal and financial advisors to structure a plan that provides the greatest benefits for generations to come.

While the foundation gladly accepts gifts of many kinds, our focus and expertise is working with people to create highly personalized gifts called legacies.

Your legacy to the West Texas Rehabilitation Center Foundation may carry your name, be named in honor or in memory of another person, or it may be anonymous. The decision is yours alone.

Your gift may provide unrestricted funds for the Center's operation, or you may fund specific rehabilitation services. Again, the decision is yours alone.

Typically, legacies are created by an outright gift, a special agreement, or through provisions in a will.

Texas Fund Raiser's Warm Ways Give Cold Calling a Human Touch

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think he's ready to do some business."

Mr. Ellison pulls over and dials the donor, a retired livestock farmer who lives a half-hour from where Mr. Ellison is.

"Millard? Roger Ellison with the rehab. I'm in your neighborhood. Can I come see you?"

In a quiet, fragile voice heard over the speaker phone in Mr. Ellison's Explorer, the donor says there's no need to stop by, but

money because he is afraid the country is headed into another Depression. Instead, he says, "I might put it in a jar and bury it in the henhouse."

A week later, Mr. Richmon will establish a \$70,000 charitable gift annuity for himself and his wife.

Waiting for Permission

Until prospective donors inquire about giving money to his organization, Mr. Ellison says, he never asks directly for their support.

"I visit people to thank them for the gifts they have made, to get to know them better, and to get a sense of how much passion they have for the rehab," he says. "I never ask for a gift until I am given permission. In order for that to happen, someone has to tell me they'd like to know more about how they can give. They usually say something like, 'I wish I could do more,' or 'I've been meaning to call you.' But if they don't bring it up, I never do."

That approach helps him to deflect any criticism he might receive from people who think that his cold-calling technique preys on older, lonely people with no way of shielding themselves from an unexpected visit.

Whenever a conversation about planned giving turns serious, Mr. Ellison says, he immediately encourages the prospective donor to call his or her estate planner and any family members who might be affected by a gift the donor is considering.

"I make sure everyone's literally sitting around the same table before any real discussion of a gift takes place," he says. Ms. Perkins confirmed that Mr. Ellison approached the process this way when she established a charitable gift annuity.

Very few times do people get offended by Mr. Ellison's cold-calling approach, he says. If he visits donors who live hundreds of miles away from San Angelo too frequently, he says, they might ask, "What in the world are you doing here again? Are you lost?" One time, Mr. Ellison says, a man called his boss to complain, saying, "Why'd ya'll send that Texas Ranger out to see me?"

But Mr. Ellison's donors say they look at him as a person who

tioned psyche." When he was asked recently to sell a handful of raffle tickets for the Rotary club in his hometown, he says he chose instead to buy the whole block of tickets for \$120.

Final Stop

Mr. Ellison's final stop of the day, to visit a 75-year-old widow, illustrates the painstaking, circuitous path he sometimes takes to focus on long-term prospects. Mr. Ellison visits this woman three or four times a year even though she has given just \$409 to his organization.

He spends only a few minutes with her—"only have time for a screen-door visit today," he says—but feels an obligation to drop in because she is a close friend of a donor who has the potential to give much more.

After Mr. Ellison turns out of the widow's dirt driveway, he dials the more-promising donor's number on his phone.

Seven years ago, this donor, who has given the rehab center about \$50,000 in cash, told Mr. Ellison that she was planning to leave the organization \$500,000 when she died. She nearly did it two years ago, but she has since fought off cancer and is in good health.

Throughout her illness, Mr. Ellison says, he phoned and visited her to let her know that he cared. Every summer since, when Mr. Ellison's wife is on vacation from school, the two of them have visited the donor together. Mr. Ellison says the donor appreciates the attention he gives her because her family doesn't visit often.

One day recently, Mr. Ellison says, the donor asked what it would mean to him if she were to make a larger gift to the rehab center, possibly her entire estate,

worth an estimated \$4-million. Mr. Ellison says the donor wanted to make sure that if she made a large contribution, he wouldn't disappear from her life.

Mr. Ellison assured her that he would continue to visit her regardless of whether she committed to making a gift. "As long as you live," he says he told her, "I will tend to you."

After Mr. Ellison speaks with the wealthy woman for a while on the phone, he tells her he will stop by this summer to visit her. "And I'll have my cute bride with me, and we'll have some iced tea and I'll hug your neck," he says.

"That'd be lovely," the donor says. "You're welcome anytime."

Interest Rates for Planned Gifts

Following are the interest rates, provided by the Internal Revenue Service, for computing charitable deductions for charitable remainder trusts, gift annuities, charitable lead trusts, and some other deferred gifts.

June 2003	3.6%
May	3.8
April	3.6
March	3.8
February	4.0
January	4.2
December 2002	4.0
November	3.6
October	4.2
September	4.6
August	5.2
July	5.6

SOURCE: PG Calc Inc.

"I never ask for a gift until I am given permission. Someone has to tell me they'd like to know more about how they can give."

"You might not always have on your best outfit, or your hair might not be fixed, but it's always an unexpected pleasure to have Roger drop in."

asks, "What's the rate on a gift annuity for a 95-year-old bag of bones?"

Mr. Richmon is considering a charitable gift annuity because he has cash he might like to give to the rehab center in exchange for fixed annual payments that are determined by his age. Older donors like Mr. Richmon receive larger payments because they are not expected to live for a long time.

Within a few seconds, Mr. Ellison gives the donor the most recent payment rates he has on his laptop.

Mr. Richmon then announces that he's not sure he wants to do anything "too risky" with his

is concerned about them—not as a salesman trying to persuade them to include the rehab center in their wills.

"You might not always have on your best outfit, or your hair might not be fixed, but it's always an unexpected pleasure to have Roger drop in," says Ms. Perkins. "I wish more people did it because it's friendly."

When Mr. Ellison makes one of his unplanned visits, he says, he never thinks of himself as a salesman. In fact, he says he is uncomfortable selling things to people. "I'm a cause-oriented person," says Mr. Ellison. "I couldn't get excited about selling drugs for Pfizer; it wouldn't satisfy my emo-