



## Effectively Promoting Your Planned Giving Program



Date: November 18, 2021  
Time: 1:00 – 2:30 Eastern Time  
Presenters: Andrew Palmer  
Director of Marketing Services  
PG Calc



Jonathan Steele  
Director of Marketing  
PG Calc



## Introduction

*"Master the topic, the message,  
and the delivery."*

— Steve Jobs





## Agenda

### We'll Discuss:

- Marketing vs. Planned Giving Marketing
- Strategy
- Messaging
- Tactics
- Impact of the Pandemic
- Testing

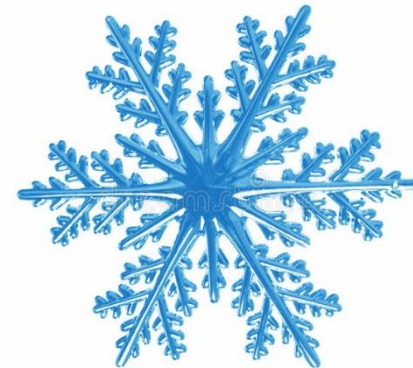




## Introduction

Marketing a planned giving program is unlike other forms of marketing:

- Very specialized
- Unlike B2C and B2B
- It's about:
  - Building relationships
  - Understanding donors
  - Educating donors





## Strategy

### Marketing Strategy

Roadmap showing:

- Where you've been
- Acknowledgement of where you are
- Declaration of where you want to go
  - Tied to goals and objectives
  - Need for consensus





## Strategy

### **Assessment of Your Market Position**

- Who are your key audiences?
- What's the strength of your brand?
- Who is your competition?



## Strategy

### **Review Your Current Marketing**

- Which efforts have been successful?
- What are your metrics?
- How does this plan address specific goals?



## Strategy

### Where You're Going:

- Account for each of your goals/objectives
- Articulate the tactics you'll use
- Detail how tactics work for audience segments
- What's the big picture you're creating?
- Remember to measure!
- Are we done yet?





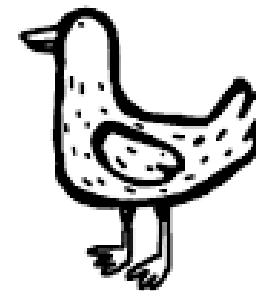
## A Long-Term Strategy

Identify what you want to accomplish.

It could be as simple as acquiring more bequests.

Planned giving marketing is not transactional.

It takes time...

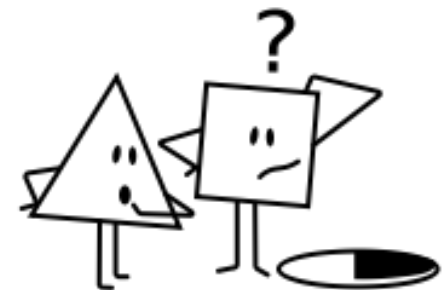


my goals.  
Eat. Fly  
Sleep. swim  
quack.  
mate  
Lay eggs  
raise chicks  
~~learn taekwondo.~~  
Build a nest.



## One Size Does Not Fit All

A marketing strategy that works for one organization will not work for all. It must be tailored to your charity and its mission.





## Planned Giving Success

### Follow Your Plan

Executing it will help ensure that you're using your resources most effectively and will align your activities and goals, providing you the best chance for success.





## Factors to Consider

- How much can you afford to spend each fiscal year?  
[Budget]
- Your target donors
- Marketing schedule
- Be consistent



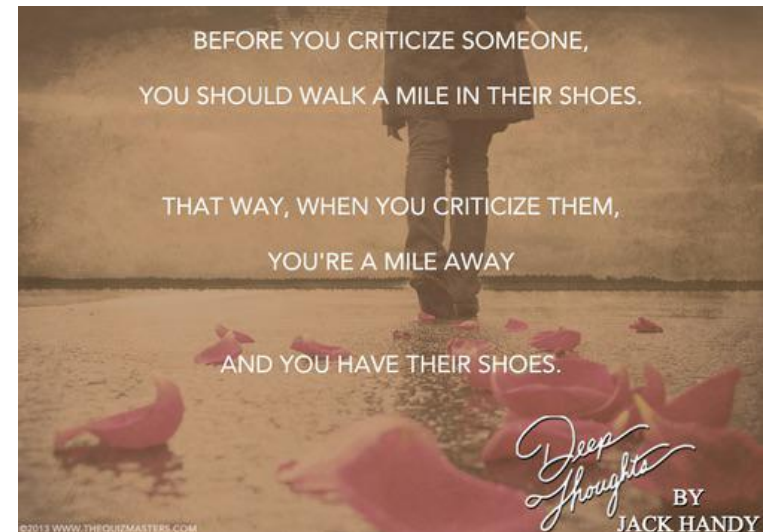


## Messaging

### Developing a Messaging Platform:

#### Value Proposition

- Meaningful
- Newsworthy
- Differentiated





## Messaging

### **Developing a Messaging Platform:**

#### In Non-Profits

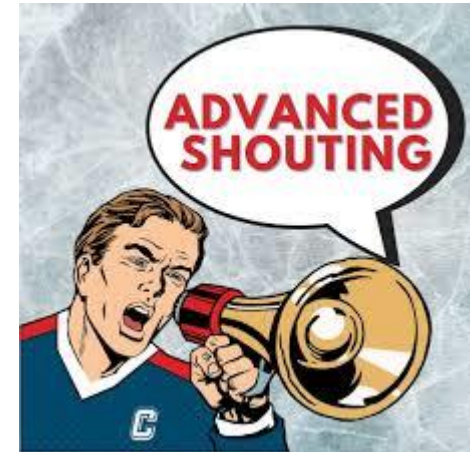
- Sharing a vision
- Engaging constituents
- Demonstrating outcomes
- Making it personal



## Messaging

### What Works:

- Repetition
- Good listening: create opportunities for response
- Articulate and reiterate your mission, and show how supporters empower it
- Build a dialog

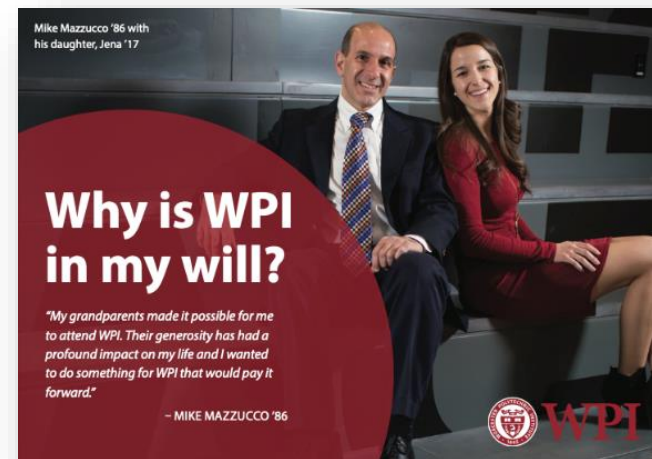
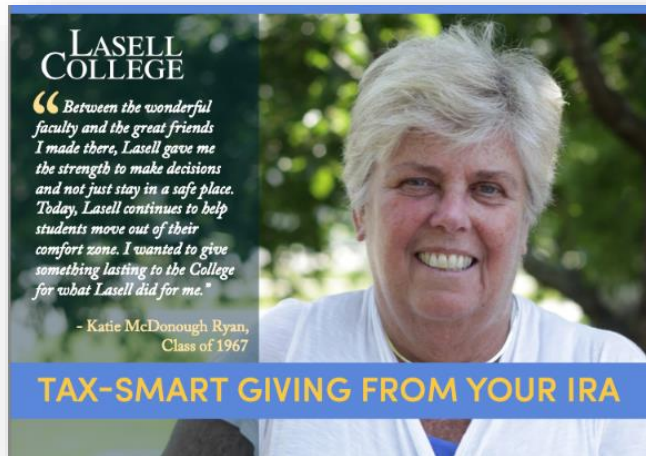




## Messaging

Branding and Imagery + Education and Awareness = Credibility

Donor stories and testimonials are key

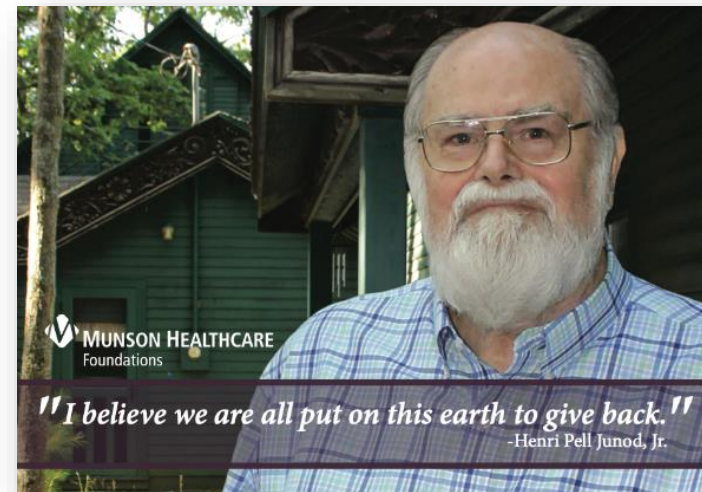






## Keep the Messaging Simple

- Benefits to the donor
- Self-satisfaction of giving
- Impact the gift





## Messaging

Stay away from formal and technical terms:

“A gift from your will”

VS.

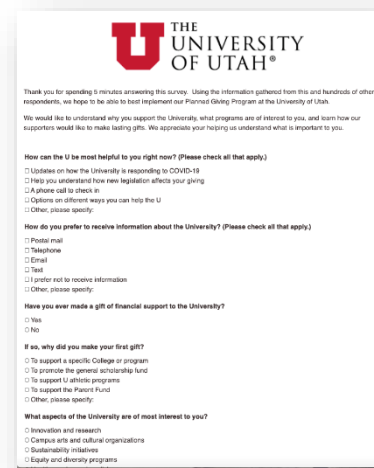
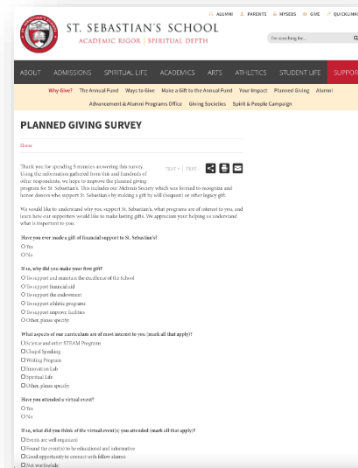
“Bequest”





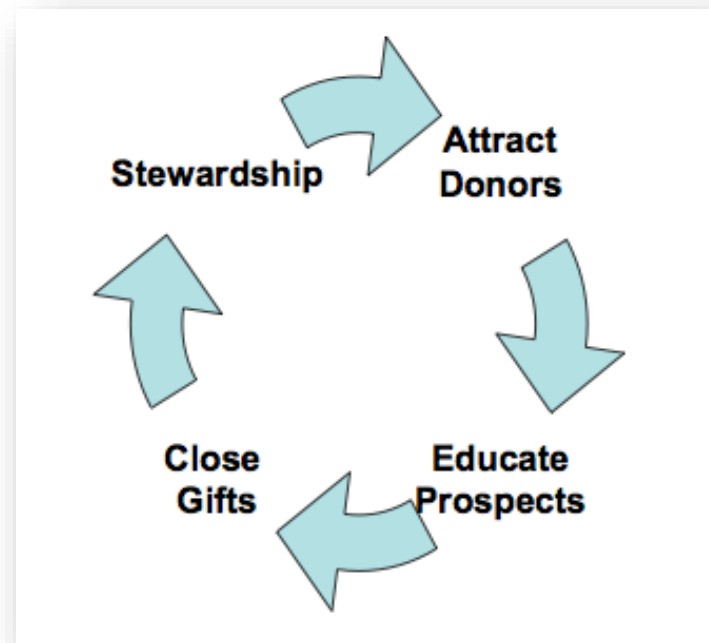
# A Survey Can Help with Messaging

- We care about you.
- This is your organization.
- Our donors are our greatest assets.  
(data collection, leads, intentions, etc.)





# Tactics





## Efforts Already in Place

- Inserts in thank you letters
- Checkboxes on reply envelopes
- Annual report
- Newsletter
- Facebook page
- Internal telephone callers
- The Board

What *legacy* will you leave?

1962 Varsity Tennis Team

As you look back fondly on your St. Sebastian's days—on your teachers, coaches and classmates—think about how you can help ensure future St. Sebastian's students have an education that is just as exceptional and life-changing as yours.

*If education changes lives then charitable gifts to education help make that change possible.*

Learn how a charitable gift to St. Sebastian's, like a bequest in your will or living trust, can match your goals, values, and what you hope your lasting legacy will be.

For more information about gift planning and including St. Sebastian's in your estate plans, contact Ed Davis '65 in the Office of Planned Giving at 781.247.0158 or [ed\\_davis@stsebs.org](mailto:ed_davis@stsebs.org) or visit [plannedgiving.stsebs.org](http://plannedgiving.stsebs.org).

ST. SEBASTIAN'S SCHOOL  
*Rev. Charles D. McInnis Society*



## Tactics: Email

### Email:

- More important than ever in the pandemic
- They will not read it all, so repetition is ok
- Focus on single messages and a single call-to-action





## Tactics: Email

### Email Benchmarks:

Industry	Open Rate	Click Rate	Bounce Rate	Unsubscribes
All Industries	20.9%	7.8%	0.6%	0.5%
Education	25%	7.5%	0.5%	0.4%
Healthcare	21%	8.9%	0.6%	0.4%
Non-Profits	20.4%	2.7%	1.1%	0.2%



## Tactics: Email

### Apple: Ruining Everything for Everyone (Or At Least For Marketers)

- iOS 15
- All emails automatically count as “opens”
- Inflating your open rate by 10%
- Up to 46% of all devices







## Email – in Addition To, Not in Lieu Of

- Quickest and most cost-effective way of conveying your bequest giving message
- Not always the most effective
- Email should be well-written, personal, and a benefit to your donors
- Builds relationships faster





## Be Careful

Are you sending too many emails?  
Unsubscribes are forever.

Or do they never see the light of day?





## Most Importantly

Is it a good read?

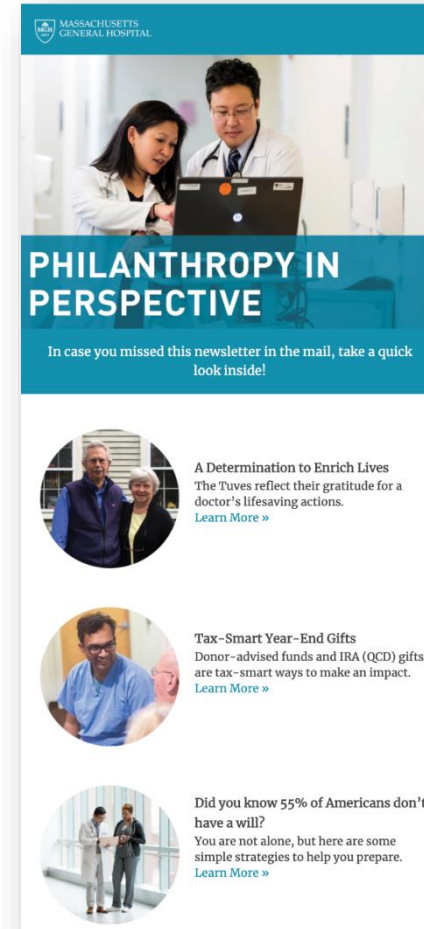
Is it a benefit to your donors and relevant to their expectations?

If not, don't send!






# E-newsletters Work Well





# And So Do Single Issue Email Blasts

**HARVARD T.H. CHAN**  
SCHOOL OF PUBLIC HEALTH



%%Date%%,

Dear %%Salutation%%,

Our staff and alumni/ae join in wishing you a very Happy Birthday! We have a unique present that will give back to you for the rest of your life and create a legacy here at Harvard!

If you create a special gift to the Harvard Chan School called a "deferred gift annuity" Harvard would pay you


**9.0%**

of your gift total, beginning in 10 years, every year for the rest of your life. There are no hidden costs and no fees to create a deferred gift annuity.

If you are interested in receiving a personalized illustration, just reply to this message.

Whatever you decide, we wish you all goodness and a very Happy, Healthy Birthday.

With sincere thanks,




Judi Taylor Cantor  
Director of Planned Giving  
[jtcantor@hsph.harvard.edu](mailto:jtcantor@hsph.harvard.edu); (617) 432-8071

P.S. In addition to enjoying your annual payment throughout your lifetime, you will receive recognition among the Harvard Chan School community for the full, face value of your gift and you will become a member of the **1913 Society**.

**HARVARD T.H. CHAN**  
SCHOOL OF PUBLIC HEALTH

**OREGON HUMANE SOCIETY** OHS Legacy Giving



**Are you ready for some certainty?**

**A Charitable Gift Annuity provides you guaranteed income for life!**

A charitable gift annuity provides a fixed payment for life in exchange for your contribution to Oregon Humane Society. Your contribution helps us shelter, care, and find forever homes for thousands of pets each year.

The amount you receive depends upon your age when you make your gift. Importantly, the payment is fixed and does not change for the remainder of your lifetime.

Additionally, you will receive a current year tax deduction for the charitable value of your contribution and a portion of each payment will be tax free.

Let us show you how a charitable gift annuity can provide certainty for you. Contact Gary Kish for more information.

**LEARN MORE ABOUT THE BENEFITS OF A CGA**

**OREGON HUMANE SOCIETY**

**Contact Us**  
Gary Kish  
[Legacyteam@oregonhumane.org](mailto:Legacyteam@oregonhumane.org)  
503-416-2988



## Tactics: Direct Mail

### Direct Mail Still Works:

- 56% of Americans find mail a “real pleasure”
- 73% prefer being contacted by mail
- 58% of mail is marketing
- 51% find postcards useful
- 90% peak open rate for mail
- 17 days: average time mail is kept
- 5x-9x greater response rates than any other channel



## Tactics: Direct Mail

### Direct Mail Is a Tangible Reminder to Act:

- 75% of people recall a brand from mail (vs. only 44% after seeing a digital ad)
- 64% of marketers say mail has the highest response rate
- 40% increase in online donations from mail





## Tactics: Direct Mail

### Good Direct Mail:

- Has a clear call-to-action
- Includes a reply mechanism
- Has moving stories
- Is personal and expressive
- Reiterates your core messaging





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SINAI

## Temple Sinai High Holy Day Legacy Campaign



During these High Holy Days, we stop and ponder our purpose and the legacy of our lives, as we remember the legacy of those who came before us. Personally, our priority is to secure the future of our families and causes important to us. We humbly ask you to consider including Temple Sinai legacy - to secure a progressive Jewish future in Vermont!

If you are interested in exploring a legacy gift to Temple Sinai, call Stacie Gabert at (802)862-5125 or email [administrator@templesinaivt.org](mailto:administrator@templesinaivt.org).

*Help us make sure that what we've built continues l'dor vador, from generation to generation.*





## Constant Cultivation Is Key

- Your older donors will respond on an emotional level
- Younger donors will respond because this is something different
- Must be tailored to your mission





# Newsletter



## Gordy and AMC: An 80-Year Romance

Gordy had been born an AMC fan ever since climbing Mt. Washington with his 80 grand best friend and his father. They spent the night in the Tip-Tip House on the summit, when it was still functioning as a hotel. "I vividly remember going to sleep hearing the wind whistling across the rugged stone face of the building. It was exciting," says Gordy.

The affection and bond of fresh detail he imparts to these recollections make them sound recent, in fact. Gordy is now 80 years old. While technically a nonparticipant in his donor's lifetime, he made a generous contribution to the AMC in August of 1934. Gordy today remains an eligible member of the AMC. Even during these trying times, AMC continues to give him reasons to smile.

Check a special trip into the Northern White Mountains this past October, where he walked to his beloved Baker Pond in part of AMC's 70,000-acre Madoc holdings. He had hiked back to the six miles to it in 1948, looking for trout. That was before there were today's networks of logging

roads which make the paved routes accessible more than 60 years after that initial trip, he and three generations of his family built a computer there as a gift to the AMC for more on Gordy's recent visit, see AMC's website "Styish Delight in the Time of Covid: A Nonparticipant's Return to the Madoc House Woods."

**"To be acknowledged for these gifts and able to visit and see them in reality makes me feel good. A deferred gift enables this, and you can't have it when you're six feet under."**

Another reason Gordy smiles is his recollection of entering the AMC's Presidents Society with Sam Fryer, Mary-Ann Cross and Fred Spier in 1981. He recently topped it off by including AMC in his estate plan and as such, becoming a member of the Summit Trust. This special deferred gift named the both

honoree of Little Lyford "Gordy's Back Country Sign." Additionally, he made a generous contribution to help AMC buy and conserve the 4,000-acre "top" of Baker Mountain, which looks down on Baker Pond.

"To be acknowledged for these gifts and able to visit and see them in reality, makes me feel good. A deferred gift enables this, and you can't have it when you're six feet under."



## New Year, New Opportunity

As 2020 recedes further in the rear-view mirror we and millions to the first few months of 2021, we turn our attention to the road ahead. No one can say what routes and turns await but we know for sure that the mission of the Appalachian Mountain Club continues.

AMC is grateful for the generous support of our donors who help sustain our mission to foster the protection, enjoyment and understanding of the outdoors and carry it forward for years to come.

During this time, you may be making plans of giving that provide flexibility in some your circumstances change. We understand the priorities you have for your family and loved ones, and we know that they come first. A charitable bequest - a contribution from your estate after you are gone - can allow you to continue to support our conservation efforts while keeping your options open as you change your charitable bequest at any time if you need.

Your charitable bequest can make many more. The simplest is a contribution of a specific amount to AMC. Or, you may wish to consider a contingent charitable bequest which allows you to set specific conditions under which your

contribution will be made for example only if your spouse is no longer living. Perhaps a remainder charitable bequest, which provides for a contribution to AMC only after all your other heirs have been paid, might be for you.

Finally, if you have money in a retirement account, a contribution at the end of your lifetime can be a very tax efficient way of giving because it avoids the income tax that would be due on money left in your account when you are gone.

Your charitable contributions are a tangible way you can make a positive difference while strengthening access to the outdoors and protecting our natural resources. We're all eager to feel the joy of seeing the results of our charitable contributions. It's exciting, but helping others helps us regain perspective on our own circumstances and gives us a sense of accomplishment by being a part of something larger than ourselves.

To discover ways to adapt your charitable giving for 2021 please contact our planned giving office at 877-391-0838. You can also visit our planned giving website at [legacy.outdoors.org](http://legacy.outdoors.org) to learn more.

## Beneficiary Designations: A Legacy Made Simple

Would you like to help support AMC's mission of protecting the outdoors without changing your will or paying with any assets now?

You can do this by designating AMC as a beneficiary of certain assets or accounts you own. This "beneficiary designation" is one of the simplest ways to make a gift to AMC. It's literally as easy as filling out a form.

You can name AMC as the sole beneficiary of your assets or as one of several beneficiaries. For your gift, you can name of your assets to make a legacy gift and use the rest to provide for family members or other loved ones.

There are many benefits of making a gift by beneficiary designation:

- **Flexibility:** Assets remain in your control should you need them.
- **Easy to arrange:** It doesn't require a change to your will.
- **Reversible:** You can change your gift designation at any time.
- **Tax incentives:** Family property by beneficiary designation to AMC are not subject to income or estate tax. The maximum 30% of your gift is available for use by AMC.
- **Family-friendly:** You can name family or other loved ones to benefit from some of the asset value, with AMC receiving the remainder upon your death.
- **Support your cause:** Your gift to AMC helps to create a future where being outdoors is an integral part of people's lives.

### Assets to consider designating for AMC include:

Retirement assets. These include IRAs regardless of the type of IRA and most qualified retirement plans, such as 401(k) and 403(b) plans. Request a Beneficiary Designation Form from your plan administrator and designate AMC as a beneficiary of either a percentage of your plan balance or of a specific dollar amount.

Retirement assets can be taxed at rates of 50% to 70% or even more if you leave them to someone other than a surviving spouse. This is because most distributions from an IRA, 401(k), 403(b), or other qualified retirement plan are subject to both income tax and estate tax too.

Life insurance policies. Simply complete and return to your insurance company a form designating that AMC receive all or a portion of the death benefit associated with your life insurance policy.

Bank accounts. You can instruct your bank to pay to AMC all or a portion of what remains in your checking or savings accounts. Your bank can provide you with the appropriate Beneficiary Designation Form.

Investment accounts. You can invest your investment account to transfer to AMC some or all of the investments held in your account at the time of your passing. Your broker or agent can let you know the process for doing this - it may be as simple as making "TIC" to AMC after your name on the account.



**Yes, I'm interested in the Summit Trust!**

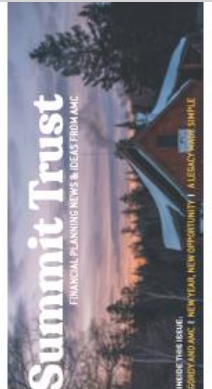
I am pleased to inform you that:  
 I have included AMC in my estate plans, please send me info on the Summit Trust.  
 I am considering including AMC in my estate plan.

Please send me free, no-obligation information on the following:  
 a gift by will or trust  
 a gift that will provide guaranteed income for life  
 an IRA charitable distribution

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Office Phone: \_\_\_\_\_  
 Email Address: \_\_\_\_\_

For questions or more information, contact Stephanie Schwab at [aschwab@outdoors.org](mailto:aschwab@outdoors.org) or call 617-391-6838.

To explore options for gift planning that fit your personal goals, please visit [legacy.outdoors.org](http://legacy.outdoors.org).



For questions or more information, contact Stephanie Schwab at [aschwab@outdoors.org](mailto:aschwab@outdoors.org) or call 617-391-6838. You can also visit our planned giving website at [legacy.outdoors.org](http://legacy.outdoors.org) to learn more.



Appalachian Mountain Club  
 44th Planned Giving Office  
 1000 Main Street  
 Boston, MA 02119



# Self-Mailers

## Time is running out – 2020 is the perfect time to give cash!



**Tell me more!**

I am interested in taking advantage of the CARES Act through a gift of cash.

I am interested in establishing a charitable gift annuity.

I have included Caltech in my estate plans.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Email

\_\_\_\_\_  
Telephone

California Institute of Technology  
Office of Gift Planning  
Mail Code 9-22  
Pasadena, CA 91125

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PREFER PAPERLESS? LET US KNOW.  
Cover photo: Although classes and events remain remote due to COVID-19, research has resumed in many labs on campus.  
Credit: Caltech.

FOR CONFIDENTIALITY: TEAR, FOLD, TAPE, AND RETURN.

## As the calendar year comes to a close, take advantage of new tax incentives.

In March, Congress passed the Coronavirus Aid, Relief, and Economic Security (CARES) Act, which provided new and expanded tax incentives for charitable giving.

### How might this benefit you?

If you itemize, you may be able to deduct gifts of cash to offset up to 100 percent of your adjusted gross income (AGI) for 2020 only. Ordinarily, the income tax charitable deduction for cash contributions is limited to 60 percent of your AGI. Some donors are increasing their cash contributions in order to take advantage of this opportunity.

Gifts of cash to fund charitable gift annuities—an option that provides you with a lifetime of income—also qualify for the higher deduction allowance.

If you would like to start a conversation about your gift, please call Caltech's gift planning professionals at (626) 395-2927 or email [giftplanning@caltech.edu](mailto:giftplanning@caltech.edu).

Learn more online at [giftplanning.caltech.edu/cares-act](http://giftplanning.caltech.edu/cares-act).

## Torchbearers Legacy Society

Caltech extends membership in the Torchbearers Legacy Society to individuals who have provided for the Institute in their estate plans or other planned-giving vehicles, such as charitable gift annuities. If you have already done so, we hope you will let us know and allow us to include you in this group of esteemed alumni and friends who share the desire to ensure that their support for Caltech continues beyond their lifetimes.



NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES

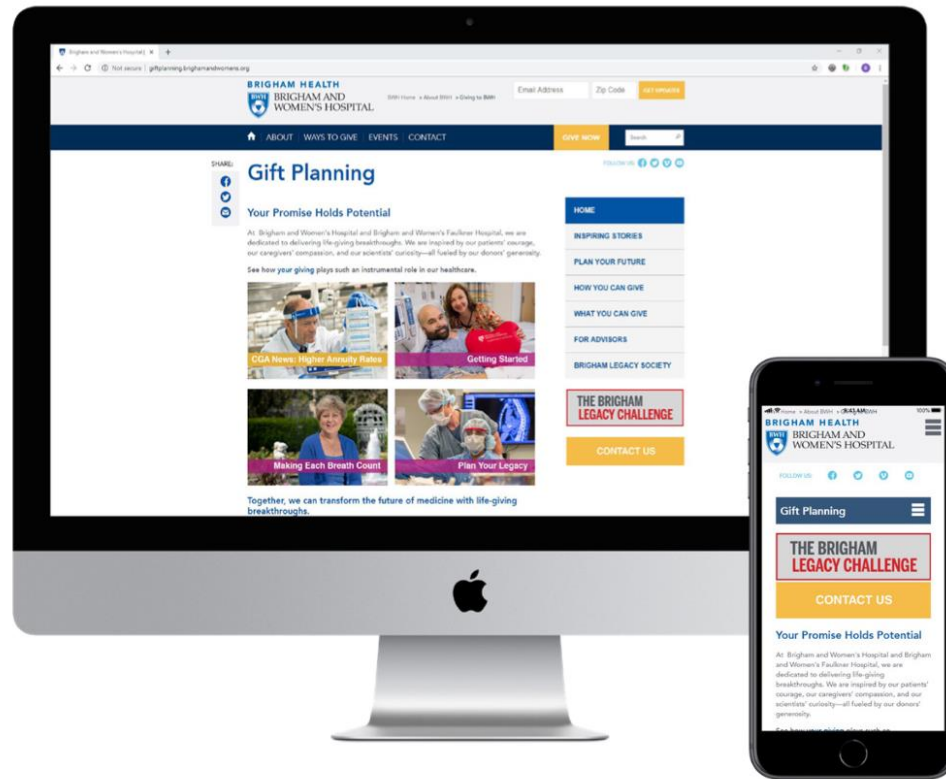
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# Websites





# Marketing Collateral

**Why Make a Legacy Gift?**

Your planned gift can have an extraordinary effect on New England Conservatory and make an impact that lasts for generations. A gift through your estate plan will allow our students and faculty to transform the world through music. The unique chemistry of an NEC education, which is grounded in joyful, supported, respectful, collaborative relationships, cannot happen without resources, such as those provided through planned gifts.

**Join the Tourjée Society**

When you share your bequest intention or other type of planned gift with NEC, you will become a member of the Tourjée Society. Named after NEC's Founder Eben Tourjée, the Society recognizes those who have made a planned gift to support NEC.

Tourjée Society members receive an annual report on the impact of gifts to NEC, along with updates and periodic invitations to events. To share your planned gift, please contact the NEC Office of Planned Giving at 617-585-1724.

New England Conservatory is a 501(c)3 non-profit organization. Our non-profit tax ID is 23-725104.



**NEC**  
New England Conservatory

For more information on creating your legacy, please contact:

*NEC Office of Planned Giving*  
617-585-1724  
Allison.Boehret@necmusic.edu

Visit the website:  
[plannedgiving.necmusic.edu](http://plannedgiving.necmusic.edu)


**NEC**  
New England Conservatory

*Create Your Legacy*



**NEC**  
New England Conservatory

*There are several easy ways to make an impactful gift that not only advances the NEC community, but also benefits you, your estate, and your heirs.*



**Bequest Through Your Will**

A bequest is a gift provision in your will or revocable living trust. All assets, including cash, securities, real estate, and tangible personal property, may be transferred to New England Conservatory at the end of your life.

Making a bequest is perhaps the easiest and most flexible way to support NEC. You maintain complete control of your assets during your lifetime, and you also determine how you will impact the NEC community. It also can enable you to achieve your financial goals and may save on capital gains taxes and estate taxes.

**Consider adding the following suggested language to your will:**

*"I give, devise and bequeath to New England Conservatory, a nonprofit institution of higher education located in Boston, Massachusetts, [either "the specific amount of \$ \_\_\_\_\_" OR "% of my residual estate,"] for use in the area of greatest need as determined by the NEC Board of Trustees."*

**Bequest Alternatives**


In addition to adding bequest language to your will, you may wish to consider using the following assets for your Legacy Gift:

- Life insurance policy
- IRA, 401(k), or other retirement plans
- Bank accounts or investment accounts
- Donor Advised Fund

For any of these assets, you may include NEC as a full or partial beneficiary; **simply request a change of beneficiary form from the company holding the assets.**

**Tax-free Gift From Your Retirement Account**

If you are 70 1/2 or older, you can distribute up to \$100,000 per year from your IRA as a charitable gift. Tell your IRA administrator to transfer your gift directly to NEC from your retirement account. While you will not receive an income tax charitable deduction for this distribution, it does impact your taxes as the funds will not be taxed as income to you.





## Tactics: Social Media

### Social Media – the Next Big Thing (Since the Last Big Thing)



- Email is more likely to drive sales than social media marketing
- 60% made a purchase from email vs. 12.5% buying on social
- 67% find mail more personal than the internet



## Tactics: Social Media

### Social Media Does

- Connect people
- Leverage personal relationships/networks
- Influence others
- Effectively share personal stories
- Show impact (especially with video)
- Help you meet donors where they are
- Bolster your other marketing





## Where Are Your Donors?

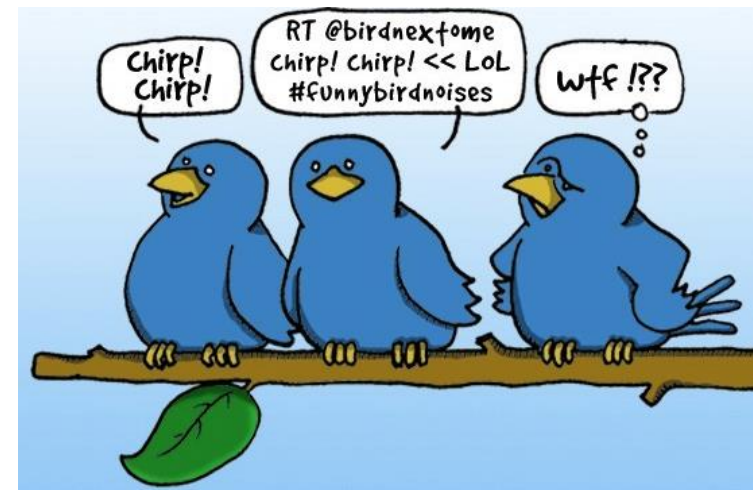
- Facebook
- Twitter
- LinkedIn
- Instagram





## You Should Have Been There!

**Social Mentions:** It's a natural fit for announcing, live reporting, and post-event postings.





## Effect of Covid

### The Pandemic Changed How We Communicate

- Email became more important
- Boundaries between work and home blurred
- People are craving connection
- Customization is key
- Donors are no different





## Keep on Swimming!

- Messaging is now a bit more complicated
- **BUT KEEP MARKETING**
- Your good communication can help make sure that their “new normal” includes consistently showing up for those in need
- Focus on being smarter, and how you, and your organization, are here to help them





## Talk About It, and Keep Talking...

- In healthcare, show donors what your org is dealing with, has achieved, or will encounter
- While COVID brought so many things to a halt, cancer, hunger, homelessness, or whatever problem you're working to solve hasn't stopped
- Keep connecting online! Zoom!





# Testing





## We Learn When We Fail

- ***There is no failure. Only feedback.***
- **Test as much as you can**

No matter how well your marketing is performing, it can always do better.





## Everyone Can Do This

### Subject Lines

You **MUST** convince your donors to open.







## Ideas...

- **Ask Questions:** Can I really get paid for giving?
- **Create a list of three:** Stocks, Bonds, and Mutual Funds
- **Use pop culture:** *Always Look on The Bright Side of Life*
- **Alliteration:** How to happily help the homeless
- **Keep it conversational:** What will your legacy be?



## More Ideas...

- **Create urgency:** Only 30 days left to give tax-free in 2021
- **Create uniqueness:** Can I pay you for life?
- **Write benefit-oriented copy:** Tax-wise giving opportunities
- **Be ultra-specific:** Get \$1,450 every year for life
- **Keep it clear and concise:** Why you need a will
- **Use humor:** The perfect going-away gift



# Testing

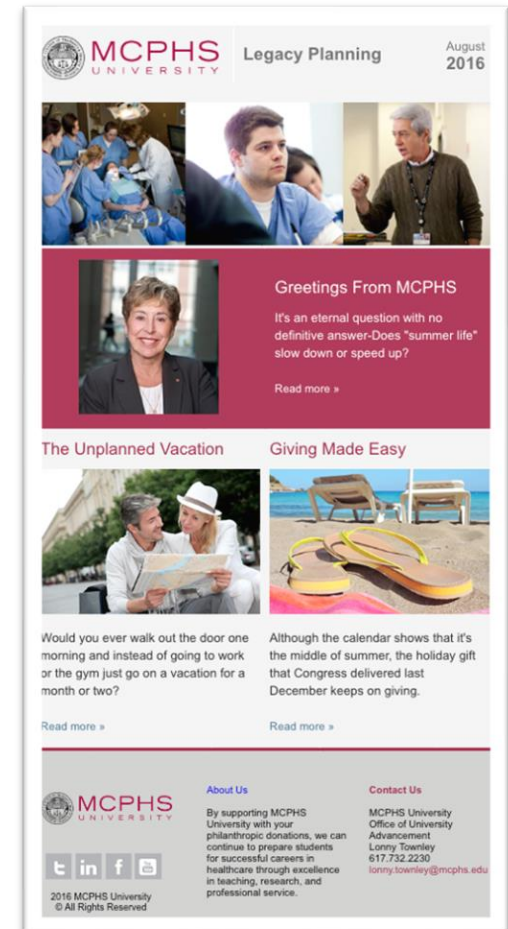
A: ***“Planning for the unplanned”*** - a variation on the estate planning article.

**Open rate of 37.5%.**

B: ***“Giving made easy”*** - the title of an article about the IRA Charitable Rollover.

**Open rate of 31.4%**

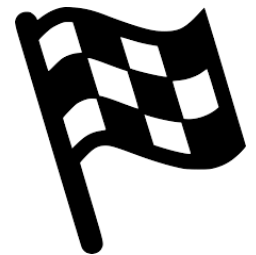
Reaffirming the hypotheses that “giving,” although specific to the mailing, may not give the highest open rates.






## In Conclusion

- Be persistent and consistent in your communication
- Be sensitive to changes in a donor's life circumstances
- Just don't stop marketing
- Be proactive
- Patience is a virtue





## Questions?

- To ask a question:
  - ✓ Click  to the left of the slide.





## Still Have a Question?

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