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Planned Giving Marketing for Starting/Restarting A Program



Date: June 29, 2017
 Time: 1:00 – 2:30 Eastern Time
 Presenter: Andrew Palmer
 Director of Marketing Services
 PG Calc

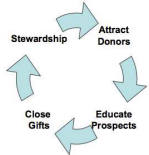


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Agenda

Planned Giving Marketing

- Are we ready or should we wait?
- But where do you start?
- Planning and tactics
- How do I do it all?



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Start a New Program


This requires no technical expertise on your part.

Encourage donors to remember your charity in their plans...

And perhaps answer questions about how a potential bequest might be used.




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Just Do It

Ready
FIRE!
Aim




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No One Likes to Talk About Death

Let's talk about your legacy...

Ask: What do you want to be known for?




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You Know More Than You Think

- Everyone knows about wills
- Bequests are two-thirds of the deferred gifts



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Keep It Simple

- Bequests
- Beneficiary Designations
 - Life insurance
 - Retirement plan
 - Bank accounts
- Appreciated Stock
- Charitable IRA Rollover




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Not an Expert? Get a Back-up Plan

- Internal – knowledgeable staff person
- External – knowledgeable colleague(s)
- Board member or other volunteer
- Consultant, e.g., PG Calc
- Legal counsel




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Start With Existing Assets

Efforts already in place

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



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Legacy Brochure

- Gives donors a quick understanding of your organization
- An overview of any planned giving subject
- Easy to share and leaves a lasting impression





Simple Letter

Education Changes Lives

*“As you look back fondly on your **Central Catholic** days, on your teachers, classmates or coaches, think about how you can help ensure future **CCHS** students have an education that is just as exceptional and life-changing as yours.”*





Seminars

You can reach a variety of audiences, including volunteers, board members, and professional financial advisors. donors.

Estate planning, tax tips, income gifts, etc.



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Create a Giving Recognition Society

- Recognition is needed for revocable giving
- Good planned giving awareness
- Initiate a conversation about legacy planning
- Learn about unknown gift intentions
- People love to join groups to meet new like-minded people



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Steward Your Donors

A good goal: visit/call every PG donor at least once a year

- Thank you gift when donor notifies you they have arranged a planned gift
- Thank you letter and/or call from President or a Board member
- Send birthday cards; holiday card(s)
- Insider report/letter twice a year
- Send timely news articles
- Invite for a tour, coffee with the President, meet a program expert


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Know Your Best Prospects

Keep your eyes open. Likely PG donors:

- Frequent, consistent givers
- Long-time donors (20, 30, 40 50+ years)
- Focus on 50+ (narrow to age 65+?)
- No children, and/or no heirs
- Engaged board members and volunteers
- Wealth – a secondary consideration



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Plan for Processing

- Plan for marketing leads
- Plan for gift administration
- A marketing vendor and/or software can help




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Advanced Planning

Your plan must be tailored to your mission.

- Establish and Articulate Objectives
- Define the Strategy
- Execute the Tactics
- Report, Analyze and Revise



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Constant Cultivation



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Digital

Number one Digital tactic:
74% use a Website

ELECTRONIC METHODS TO SEEK PLANNED GIFTS

Method	Percentage
Website	74%
Database analysis	58%
Electronic newsletter	51%
Targeted emails	47%
Web content regarding bequests	45%
Prospect research/scoring	42%
Online brochures	34%
Facebook	26%
Print ready guide to will planning	24%
Specialized planned giving software	22%
Smart landing pages	12%
LinkedIn	12%
Search-engine optimization	8%
Advert	7%
Specialized communication software	4%
Other social media	2%
Other electronic methods	2%

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Social

Only 17% find Social to have a strong impact

CURRENT IMPACT OF ELECTRONIC METHODS

Method	Strong Impact	Some Impact	No Impact
Participating in social networks and discussions	17%	58%	25%
Search engine optimization for social sites	18%	49%	33%
Multimedia content sharing	22%	52%	26%
Bloggin'	26%	52%	22%
Social sharing buttons on website	26%	47%	27%
Advertising on social sites	26%	47%	27%
Social sharing buttons on email	26%	47%	27%
Whispering social networks	26%	49%	25%
Prayer stations	26%	37%	37%
Microblogging	26%	36%	38%


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Face-to-Face Personal Cultivation

- Although it may start through direct mail or your website
- Nothing better than making a genuine connection with the donor.
- Everything we have discussed leads to this.

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Conclusion

"Our job is to connect to people, to interact with them in a way that leaves them better than we found them, more able to get where they'd like to go."

~ Seth Godin


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Don't Be Afraid to Ask

"Would you consider making a gift to [Charity] in your will?"


"Many of our donors [strong supporters like you] have made a gift to [Charity] in their will. Is that something you might be interested in doing?"



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Questions?



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Still Have a Question?

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