



## Surveying Planned Giving Prospects



**Date:** September 26, 2019  
**Time:** 1:00 – 2:30 Eastern Time  
**Presenter:** Andrew Palmer  
Director of Marketing Services  
PG Calc



## Introduction

*“The goal is to turn data  
into information, and  
information into insight.”*

– Carly Fiorina



## Why Donors Like Surveys

A survey empowers donors by letting them have impact on the future of the institution they support.

And make their voices heard.





## More Data on Donors:

- Involvement in charity
- Loyalty & passion
- Opinion on funding issues
- What motivates their giving?
- Any need to create a legacy?





## Gifts and Intentions

### **Direct questioning** allows:

- Donors to self-identify as prospects.
- Learn about gift intentions.
- Donors to say they are interested in making a gift now.





## Lead Generation

- Surveys generate qualified planned giving leads
- Smaller: All should be flagged as highly engaged prospects.
- Larger: Those self-qualified
- Use scoring criteria to rank





## Establish Objectives

A clear directive so you can tailor your questions to get the answers you need.

- A relaunch
- Program innovation
- Gain some insight for marketing





## Establish Objectives

Goal: What is the effectiveness of our planned giving marketing?

- Assumption: The majority of our loyal donors prefer email over print newsletters.
- Assumption: Very few donors filled out a print reply card, thus email will be just as effective.







## Establish Objectives

Write sample questions and answers with results:

How do you prefer to hear from us?

- a. Email (60%)
- b. Postal mail (40%)





## Closed-ended Questions

Have you been to our new planned giving website?

- a. Yes
- b. No





## Open-ended Questions

What do you like about our planned giving newsletter?





## Rating Questions

How likely is it that you would recommend our email newsletter to a friend or fellow alum?

**Not at All Likely**

**Extremely Likely**

<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
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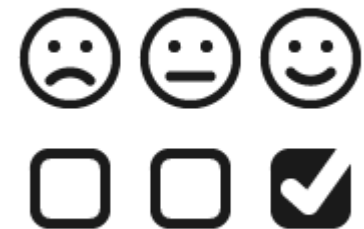




## Likert Scale Questions

I would recommend other members to join the Legacy Society:

Strongly disagree	Disagree	Neither/Nor Agree	Agree	Strongly Agree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>





## Multiple Choice Questions

How do you prefer to be contacted?

- a. Home phone
- b. Cell phone
- b. Email
- c. Text
- d. Other: Please specify

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## Demographic Questions

What is your gender?

- a. Female
- b. Male
- c. Non-binary/ third gender
- d. Prefer not to say





## Telephone Surveys

- Telephone surveys, which were once a preferred method, are now sharply in decline.
- Thank you, caller ID.







## Face-to-face Surveys

- Face-to-face surveys are still widely used for data collection in the for-profit world.
- However, this interaction comes at a much higher cost than other channels.





## Online Surveys

- Online surveys have become the most widely-used method.
- Some offer a free version.
- Google Forms, Survey Monkey, SoGoSurvey, Typeform, Client Heartbeat, Zoho Survey, Survey Gizmo and Survey Planet.





## Paper Surveys

- Paper surveys are an old school approach.
- Don't discredit this option.
- If direct mail works with your donors, then so may paper surveys.





## Who Should I Survey?

- You should target a specific subset that is based on your survey's goals and objectives.
- Demographic, wealth, or loyalty characteristics.
- And don't forget your legacy society.





## Survey Story Arc

A welcoming introduction

*“Thank you for spending ten minutes answering this survey.*

*As one of our key supporters, we want to learn more about what you think and value, what we can do to serve you better, and how we can best implement a legacy giving program for the XXX.”*





## The Middle is the Meat

*Many people like to make a gift to charity and receive guaranteed fixed income for life (a charitable gift annuity).*

- a. I have not heard of a charitable gift annuity.
- b. I have heard of a charitable gift annuity but have not created one.
- c. I have heard of charitable gift annuities and have created one for another charity.



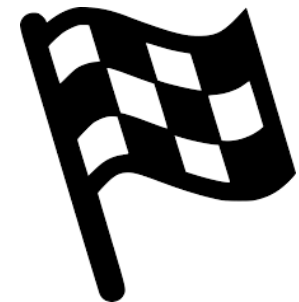


## The End of Our Story

Appreciation and a call to action:

*"Thank you for your time.*

*As part of our mission to bring an end to XX disease, we are asking donors to consider leaving a bequest to XXX in their will. If you'd like to receive more information about this, or have any gift planning questions, please contact XXX."*





## Keep it Short

- Shorter surveys are likely to produce higher response rates.
- Try not to include more than 10-15 questions.
- It should only take between 5 and 10 minutes.

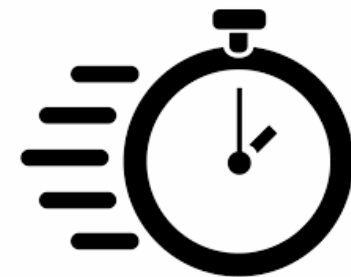






## Be Simple and Specific

- Don't use legalese, jargon, acronyms or internal references.
- Use simple, familiar words whenever possible.
- *"Have you ever done a CGA?"*





## Avoid Leading Questions

- You want unbiased responses so don't plant opinions in your donors' answers.
- Avoid presuppositions.
- You may also find you need to add a neutral choice in some questions.

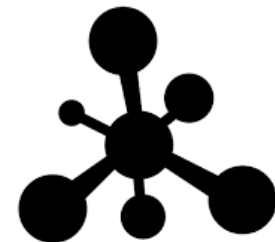




## Avoid Compound Questions

- Ask one thing at a time.
- Split a question like:

*“Should spending be reduced for research and marketing?”*





## Write Good Subject Lines

- If the email doesn't get opened, then the survey does not happen.
- Speak to the donor personally.

*“What do you think about XXX?”*

*“XXX needs your help!”*





## Follow-up Strategy

- Connect with your donors who asked for more information.
- Reach out to every respondent, to thank them for their feedback.
- Pick up the phone.

**Analyze the data!**





## Sample Questions

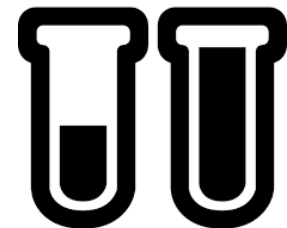
- **Demographic:**  
Do you have children?
- **Participation:**  
Attended events? Which ones?
- **Why are they giving?**  
Why do you give to our organization?





## Sample Questions

- **Planned giving marketing?**  
Do you like our email newsletter?
- **Bequest information:**  
Have you included our organization in your will?
- **Other gift information:**  
Is a tax benefit important to you when making a gift?





## Conclusion

*“What do you think?”*

- Surveys can lead to a deeper planned giving conversation.
- Let your donors make their voices heard!
- But only if you ask.







## Questions?





## Still Have a Question?

Contact: Andrew Palmer

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Phone: 888-497-4970