

PG Calc | Your Partner In Planned Giving Success 


Surveying Planned Giving Prospects



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

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Introduction

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

– Carly Fiorina

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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.




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More Data on Donors:

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



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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.




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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



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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



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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.



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Establish Objectives

Write sample questions and answers with results:

How do you prefer to hear from us?

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



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Closed-ended Questions

Have you been to our new planned giving website?

a. Yes
b. No




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Open-ended Questions

What do you like about our planned giving newsletter?



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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

0	1	2	3	4	5	6	7	8	9	10
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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

☹️ 😐 😊

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Multiple Choice Questions

How do you prefer to be contacted?

a. Home phone
b. Cell phone
c. Email
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




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Telephone Surveys

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




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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.




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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.




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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.




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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.



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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."



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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).

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



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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."




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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.




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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?*"




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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.




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Avoid Compound Questions

- Ask one thing at a time.
- Split a question like:
"Should spending be reduced for research and marketing?"




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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!"



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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!




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Sample Questions

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




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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?



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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.




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Questions?



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Still Have a Question?

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