

**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS



**Planned Gift Marketing:  
What Works!**

Date: September 22, 2022  
Time: 1:00 – 2:00 Eastern  
Presenter: Andrew Palmer  
Director of Marketing Services

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Introduction**

**“The smart ones ask when they don’t know.  
And, sometimes, when they do.”**

– Malcolm Forbes

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Planned Giving Marketing Survey**

- Sent September 2022
- PG Calc clients and friends
- Based on the 200 responses collected

This report aims to help planned giving professionals see how their views, techniques, and plans for the future stack up against others. Some of the answers may surprise you.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Don't Worry, Be Happy**

**"If the grass is greener on the other side of the fence, you can bet the water bill is higher."**

– Author Debbie Macomber

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Are You Satisfied?**

**Are you satisfied with your current planned giving marketing?**

<b>34% Yes, we are very happy</b>
<b>27% Yes, it's good enough</b>
<b>37% No, we should be doing more</b>
<b>3% No, we are not doing anything</b>

- Overall, 60% said **YES**, they were satisfied.
- 56% of those satisfied are truly "very happy."
- The remainder of those who said "yes" are not necessarily thrilled, but more or less happy. Their marketing is "good enough."

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **No, We Should Be Doing More**

- The "grass is always greener" theory
- No time
- No budget
- But no excuse if you are doing nothing

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Strategic Planning**

**“If you don’t know where you are going, you’ll end up someplace else.”**

– Yogi Berra

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Yes, We Have a Plan**

**Do you have a written planned giving marketing plan?**

**61% Yes**  
39% No

**What is the most important goal for your planned giving marketing?**

**48% Lead generation**  
34% Awareness building  
15% Education  
3% Other

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Lead Gen and Awareness Building**

- Every program needs to find donors.
- Planned giving marketing is not transactional.
- Messaging should improve the long-term, strong relationship that exists.
- Foster a relationship that educates donors on the benefits of a planned gift, and the impact that gift will have.
- Be there when they are ready.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Messaging and Tactics**

**”Spread your story and messaging out, over time, and over different types of media in short segments that invite people to want to learn more.”**

– Author Loren Weisman

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **There are Many Ways to Create a Legacy**

**In your messaging what is the most important thing you want to convey?**

- 37% There are many ways to create a legacy**
- 30% The impact a planned gift will have on your mission**
- 16% Simplicity of planned giving**
- 8% Other**
- 6% Tax benefits of planned giving**
- 3% Details about the gift vehicle or assets**

This is a bit of a trick question because one can argue it should be all of the above (and some respondents did tell us that in the "other" category).

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **What is the Most Important Message?**

- **There are many ways to create a legacy** but don't overwhelm donors with too many options in a single marketing piece.
- **The impact on your mission** was second at 30%.
- **Details about the gift vehicle or assets** was last at only 3%.
- Your messaging should always be more about the huge impact a gift will have on your mission rather than the technical aspects of any gift.

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## Winner Winner, Chicken Dinner!

- A **Print Newsletter** tied a **Print Mailer with Attached Reply Card**.
- This is only true if your newsletter has valuable information and is an interesting read.
- The biggest surprise here is how low the **Donor Survey** fared at 11%. Perhaps not enough respondent planned giving programs have tested it.

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## The Antisocial Media

**“I think social media has taken over for our generation. It's a big part of our lives, and it's kind of sad.”**

– Kendall Jenner

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## What Works the Least?

27% Social media posting
19% Website
11% Buck slip insert
9% Print traditional postcard
8% Print newsletter
8% Email newsletter
6% Donor Survey
5% Print letter
4% Print mailer with attached reply card
4% Email single issue mailing

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## No TikTok for You

- Social media has yet to earn a place among your most valuable tools.
- But test social media at least once a year. Get a baseline.
- Share inspiring stories and the self-satisfaction of giving.

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## Direct Mail Marketing

**“Neither snow, nor rain, nor heat, nor gloom of night, stays these couriers from the swift completion of their appointed rounds.”**

— Herodotus

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## How Often Do You Use Direct Mail?

How many times a year do you send out print direct mail?	
6%	1
<b>21%</b>	<b>2</b>
17%	3
20%	4
5%	5
15%	6 or more
16%	We do not

- Four times per year (20%) is what we would normally suggest at a minimum.
- Your marketing must be consistent.
- Getting something in donors' hands at least once a quarter more makes sense.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Email Marketing**

**“A bad email reputation is like a hangover—hard to get rid of and it makes everything else hurt.”**

— Chris Marriott, President of Email Connect

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **How Much Email Should You Send?**

**How many times per year do you send email marketing?**

3% Weekly
24% Monthly
11% Every other month
<b>29% Quarterly</b>
20% 3 or less
13% We do not use email

- Quarterly is what we generally recommend.
- Over-sending usually results in open and click-through rates dropping, and worst of all, unsubscribes and spam complaints.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Planned Giving Recognition Society**

**“Please accept my resignation. I don’t care to belong to any club that will have me as a member.”**

— Julius Henry [Groucho] Marx

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### Do Include Your Society in Marketing?

**Is your legacy society part of your planned giving messaging?**

42% Always
9% Never
50% Sometimes

- 88% of our respondents said they have a legacy society.
- Only 42% **Always** mentioned the society in marketing. [A missed opportunity.]
- Your legacy society, is a marketing and stewardship tool – use it.
- It is an effective way to show members they are special.

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### How Do You Promote the Society?

**How do you promote it?**

47% We just add all donors who give.
28% We ask donors to join.
15% Explain the benefits.
10% We don't promote it.

- Just adding donors is a missed marketing opportunity.
- Explaining the benefits is very important in getting prospects reasons to join.
- Make it sound like an exclusive club that only the top supporters have access to.
- It lets the donor know you are grateful and provides you opportunities for stewardship.

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### What if I Don't Have Benefits?

Here are some benefits we see often:

- Donor recognition in printed materials, websites, or in a physical space. You can also recognize donors at public events or ceremonies.
- Membership certificates signed by high level leadership.
- Membership pins. Budget friendly yet resonate with some donors. It also serves to publicize the legacy society when donors wear them events.
- Events that bring the donors insider information or experiences, such as cutting-edge research and meetings with senior leadership.
- Invitations to dedicated legacy society social events.

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### What Are You Promoting?

**“I am just a businessman, giving the people what they want.”**

– Al Capone

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### What Are You Pushing?

Which gifts do you promote in your marketing?

- 90% Bequests**
- 82% IRA Rollovers/QCDs
- 78% Beneficiary Designations
- 78% Charitable Gift Annuities
- 75% General Estate planning
- 64% Appreciated Securities
- 49% Charitable Remainder Trusts
- 49% Donor-Advised Funds
- 44% Real Estate
- 3% Other

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### What Is Your Focus?

What is the number one gift your marketing focuses on?

- 63% Bequests**
- 10% Charitable Gift Annuities
- 9% General Estate planning
- 5% Beneficiary Designations
- 5% IRA Rollovers/QCDs
- 4% Donor-Advised Funds
- 2% Charitable Remainder Trusts
- 1% Real Estate
- 1% Other
- 0% Appreciated Securities

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### Money Now and Deferred Funds Later

- Not surprised to see 90% of our respondents push **Bequests**; 63% see it as the number one gift they focus on.
- Very surprised to see the next most popular gift to promote is the **IRA Rollovers/QCDs**.
- Use it to open the conversation about using all retirement assets and discuss the opportunity for beneficiary designation.

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### Who Are These People?

**“And you may find yourself in a beautiful house, with a beautiful wife, and you may ask yourself, Well, how did I get here?”**

– David Byrne

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### What Type of Non-Profit?

**What vertical is your organization?**

43% Higher Education
13% Healthcare
8% Aid
8% Religion
6% Secondary Education
6% Community Foundation
5% Environment
4% Arts
4% Advocacy
2% Other
1% Assisted living/Hospice

We received 200 responses to our survey sent to planned giving industry professions. We asked them two simple questions to gain some perspective...

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## How Big is Your Department?

How many people work in the "Office of Planned Giving?"

41%	1
19%	2
12%	3
11%	4
5%	5
12%	6 or more

- A one-person shop can be difficult because you do everything.
- These smaller offices also have smaller budgets, and sometimes decisions are made based on lack of time and money rather than what you know is right.
- The one-person shop is why planned giving vendors are instrumental in our industry.
- Look for a vendor that will save you time while accomplishing what you need.

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## Vendors

"There is no shame in asking for help; it is one the most courageous things you'll ever do and will lead to greater connection with those around you."

— Laura Lane

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## A Helping Hand

Do you use a vendor to help with your planned giving marketing?

56%	Yes, and it is working great
11%	Yes, but we are not satisfied
23%	No, but we have previously
11%	No, but we would be interested in learning more

- A total of 66% of respondents said **Yes**, they use a marketing vendor.
- Many organizations use multiple vendors to help with all their marketing needs.
- Of those not using a vendor, 68% of them have used a marketing vendor previously.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **We Love Surveys**

**“Your most unhappy customers are your greatest source of learning.”**

— Bill Gates

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Put Surveys in Your Marketing Mix**

Surveys are also an untapped resource for leads, and intentions. They allow donors to self-identify as prospects and otherwise unrecognized legacy society members.

**Case Study:** This industry research survey. [we added 2 lead gen questions]

1. RE vendors, we asked if responders need help with their planned giving marketing by including the option, **“No, but we would be interested in learning more.”** 18% of the respondents chose that answer, and many gave us contact information.
2. A check box with the statement, **“Please contact me about improving my planned giving marketing.”** 6% of the respondents asked to be contacted.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Conclusion**

**“Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.”**

— Winston Churchill

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Market Bequests**

- We hope this look into our industry helps you make more informed decisions with your planned giving marketing.
- Ignore that noise. This is planned giving. Keep in the mail.
- Be persistent and consistent in your communications, and sensitive to changes in a donor's life circumstances.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Questions**



To ask a question, click the Q&A button at the bottom.

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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **Still Have a Question?**

**Contact:** Andrew Palmer  
Director of Marketing Services  
PG Calc

**E-mail:** [apalmer@pgcalc.com](mailto:apalmer@pgcalc.com)

**Phone:** 888-497-4970

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