



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS



When You Can't Take Your Donor to Lunch



Date: September 23, 2021

Time: 1:00 – 2:30 Eastern

Presenter: Stacy B. Sulman, J.D.

Vice President for Personalized
Philanthropy and Legal Affairs
American Committee for the
Weizmann Institute of Science



Remember These?





And These?





Is This It?





Scope of Webinar



Background and Context



From Old Normal to New Normal



Adaptation and Buy-In



Background and Context (Asset Donors)

What is Planned Giving?

Gifts of Assets

(vs. Gifts of Income)



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Background and Context (Audiences)

Who is Planned Giving?





Background and Context (Audiences)

Who is Planned Giving?

- Leadership
- Legacy
- Loyalty
- Larger Community
- Liaisons to Estates



Background and Context (Audiences)

Leadership

- Board
- Committees





Background and Context (Audiences)

Leadership

- Lay Chairs as Models
 - ✓ Inspire at Meetings and Programs
 - ✓ Sign Welcome Letters
 - ✓ Motivate Peers
 - ✓ Blended Giving
- Participation & Buy-in



Background and Context (Audiences)

- Legacy
- Current Legacy Society Member
- Identified Expectancies





Background and Context (Audiences)

Legacy

- Yes, in their plans
- But generally revocable (absent a gift agreement)
 - ✓ Make sure no one falls through the cracks
 - ✓ Pivot them to major gifts while Alive
 - ✓ Blended giving



Background and Context (Audiences)

Loyalty

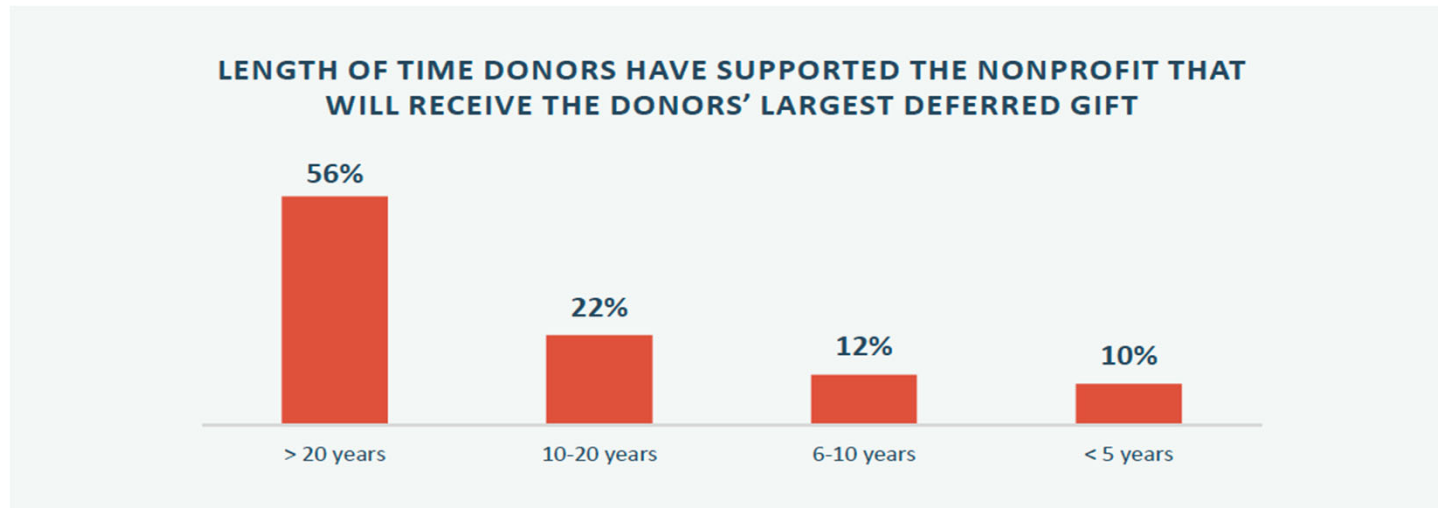
- Core Planned Giving Prospects
- Annual modest donors





Background and Context (Audiences)

- Source: Giving USA Foundation, Giving USA: The Annual Report on Philanthropy for the Year 2020 (2021).





Background and Context (Audiences)

Loyalty

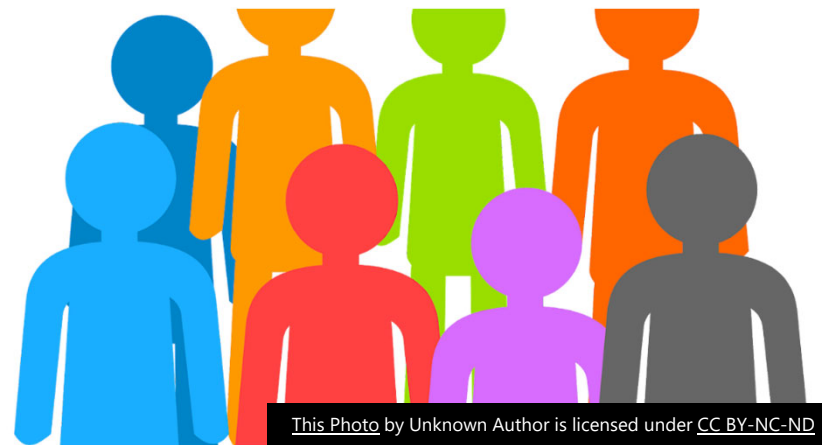
- Organizationally defined
 - ✓ Over age 70;
 - ✓ 3 gifts out of 10 years;
 - ✓ Cumulative giving under 100K;
 - ✓ Plus ...



Background and Context (Audiences)

Larger Community

- Widest Range of Other Prospects
- Unknowns





Background and Context (Audiences)

Larger Community

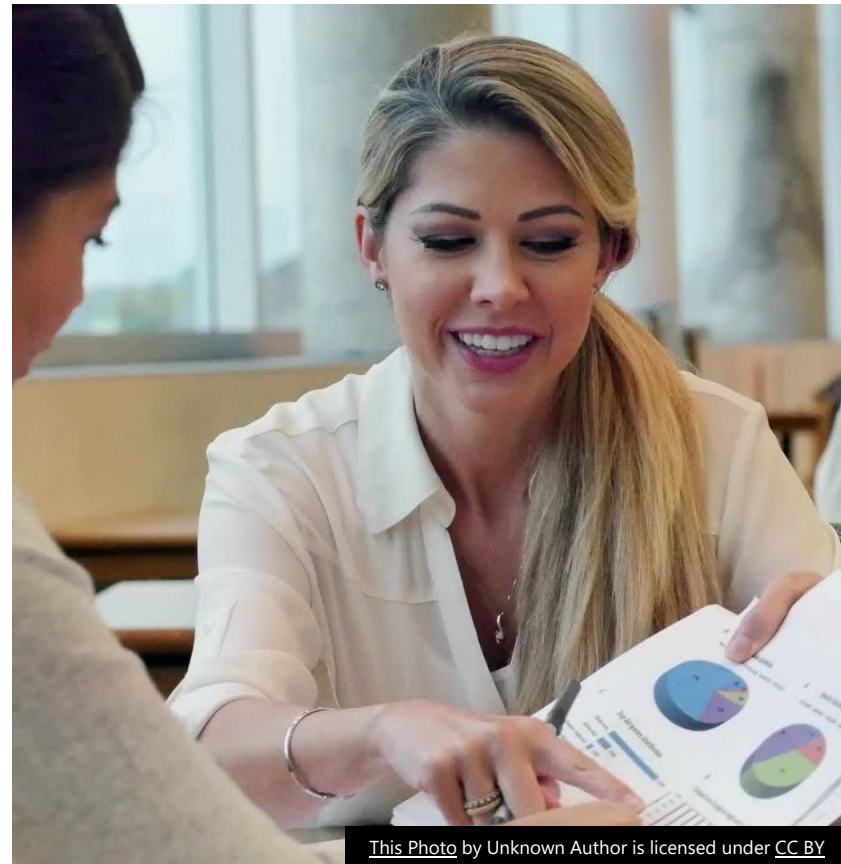
- Direct mail; advertisements; website
- Individuals in database over age 60/70
- Goal: move them to a higher category



Background and Context (Audiences)

Liaisons to Estate

- Executors
- Trustees
- Advisors to High-Net-Worth Donors



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Background and Context (Audiences)

Liaisons to Estates

- Opportunity to recommend to client
- Discretionary power of estates occasionally
- Below-market work for charity



Background and Context (In Person Visit)

Part of a strategy to...

- Increase New Planned Gifts
 - ✓ (Cultivation to Solicitation)
- Ensure Gifts Stay in Donors' estates
 - ✓ (Stewardship)
- Seek out Major Gift Potential



Background and Context (In Person Programming)

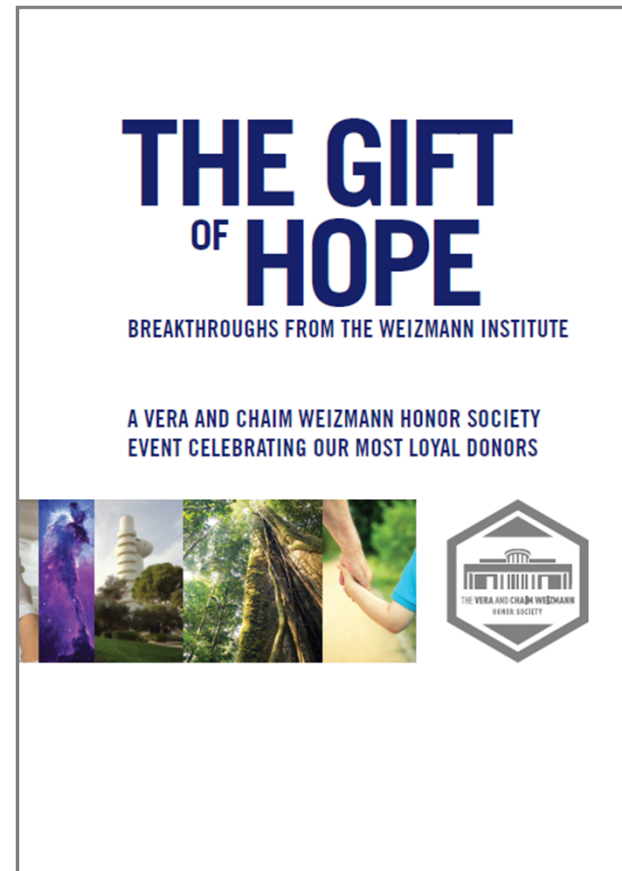
In-Person Legacy Programming Strategy to ...

- Make donors feels part of a larger community
- Honor current and members
- Inspire prospects to join
 - ✓ Mission oriented programming
 - ✓ Peer modeling
- ***Special invitation/core constituency/focused agenda



Background and Context (In Person Programming)

- ***Special invitation/core constituency/focused agenda





Old Normal to New Normal





Old Normal to New Normal (Leadership)

Leadership

Pre-Covid

- Peer to peer
- Board updates at meetings
- Personalized letters
- Ongoing outreach plan with goal of 100% participation



Old Normal to New Normal (Leadership)

Now -- Virtual is Meaningful

- Peer inspiration through virtual testimonials
- Leaders who appreciate the need for support (without an in-person meeting)
- Engaged leaders engender critical buy-in for increased or modified budgeting





Old Normal to New Normal (Legacy)

Legacy

Pre-Covid

- Meet in home to cement gift in estate plans;
- Possibly increase or ask for additional current gift
- Many still through mail and phone calls



Old Normal to New Normal (Legacy)





Old Normal to New Normal (Legacy)

Now Most Everyone is Remote

- Dedicated staff provide personalized attention via phone calls and handwritten notes
- Virtual programming and conference calls to create warm community
 - <https://weizmann-usa.giftplans.org/index.php?cID=163>
- Donor testimonials can be recorded, cementing commitment and providing inspiration
- You can reach new donors who may have not wanted to attend in the past.



Old Normal to New Normal (Loyalty)

Loyalty

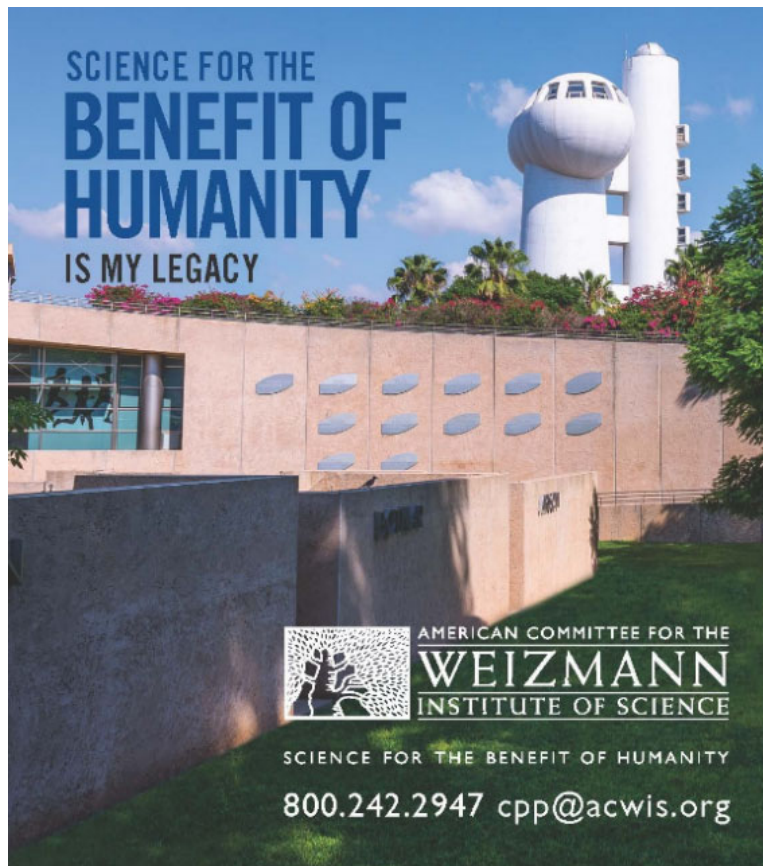
Pre-Covid

- As with Legacy, sometimes met in-person to cultivate
- Invited to Legacy events to inspire and motivate

****Many preferred remote contact – mail and phone only*



Old Normal to New Normal (Loyalty)



- Special Mailings
 - ✓ Holiday cards
 - ✓ Year-end summaries
 - ✓ Token gifts
 - ✓ Birthday & get-well cards
- Invitations to CEO calls
- Invitations



Old Normal to New Normal (Loyalty)

Now, More Opportunity to Connect

- Opportunity to scale up outreach to this group
- Dedicated staff and virtual programming as with legacy donors
- Add extra fanfare when donors join legacy society – gifts, personal calls, etc.



Old Normal to New Normal (Loyalty)

It is not all bad either --

- You can reach a wider audience
- Include those who would not attend before
- Conference calls for those not comfortable with webinars



Old Normal to New Normal (Larger Community)

Larger Community

Pre-Covid

- In-person opportunities were fewer for such a large population
- Often with minimal ROI



Old Normal to New Normal (Larger Community)

Now You Can Treat Anyone Like Loyalty!

- Include invitations to virtual programming through emails or by adding invitations to standard mailings.
- Treat those who attend as if they are loyalty donors, regardless of giving.





Old Normal to New Normal (Liaisons to Estates)

Liaisons to Estates

Pre-Covid

- ✓ Were meetings worth it?
- ✓ Did Advisors have time?
- ✓ Meaningful ROI?



Old Normal to New Normal (Liaisons to Estates)

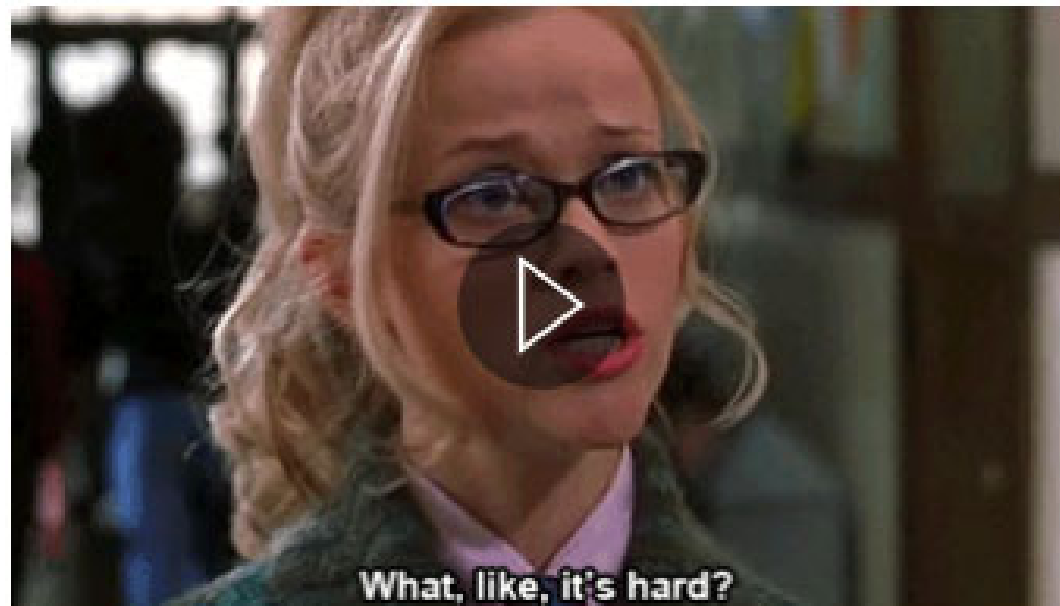
Now Improved ROI

- Donors increasingly want advisor names
- Easy to jump on a Zoom or call
- Advisors have more time than before



Adaptation and Buy-In

Change is Never Easy





Adaptation and Buy-In (Metrics)

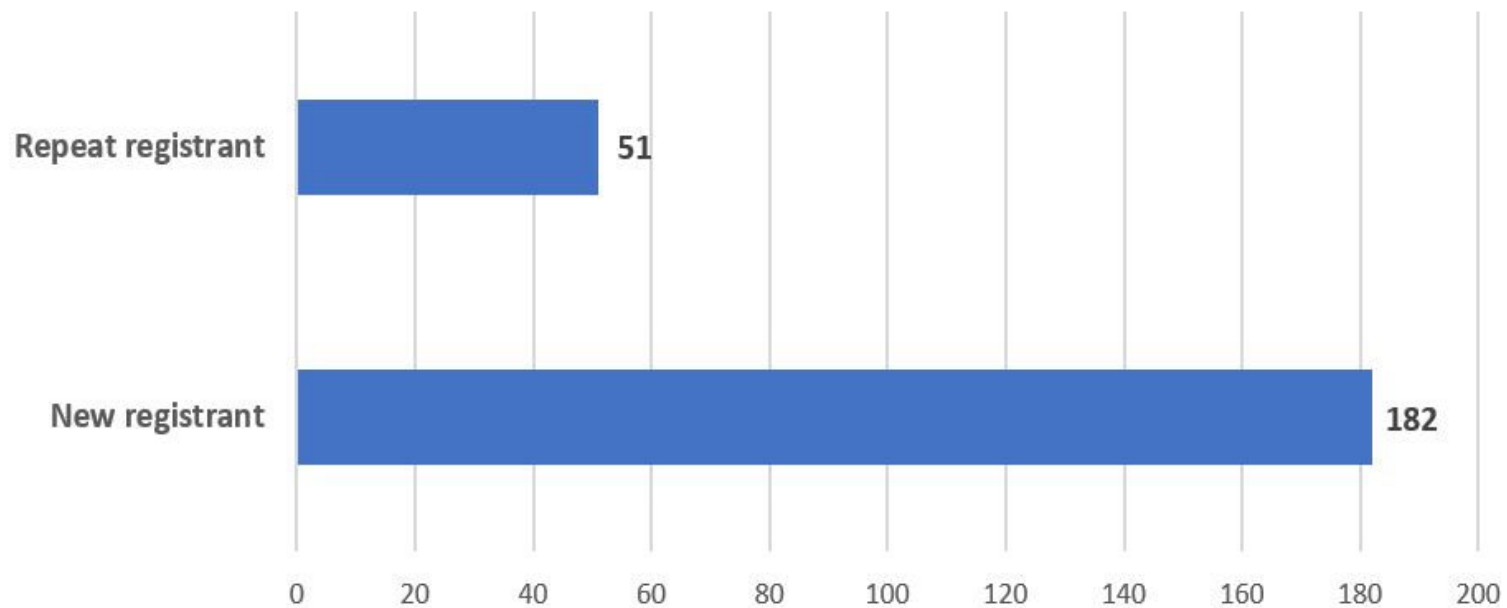
1. Define and track measurable goals

- ✓ Program attendance
- ✓ Responses to outreach (e.g., new leads)
- ✓ Metrics Help Buy-In



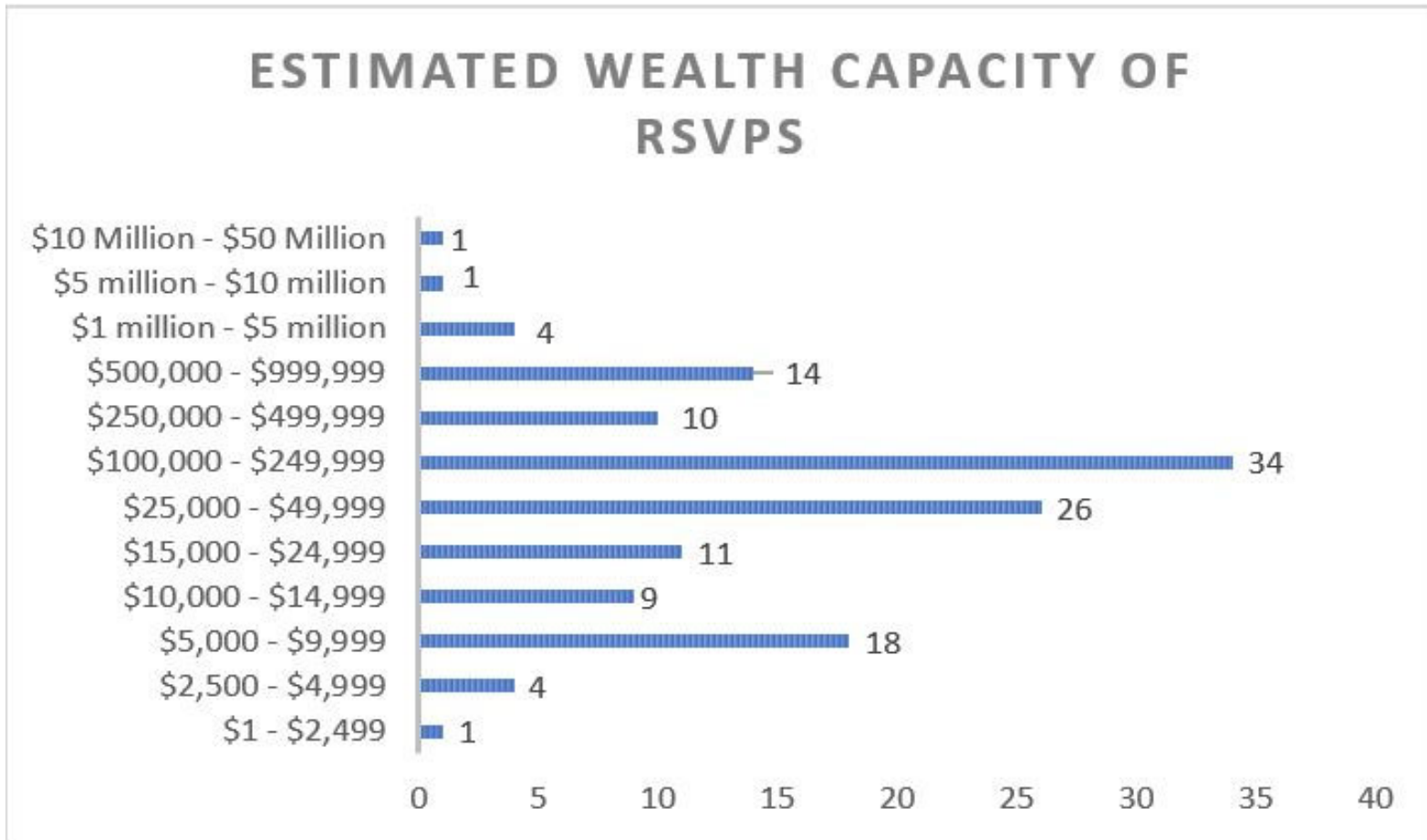
Adaptation and Buy-In (Metrics)

Legacy Society Events - New or Repeat Registrants



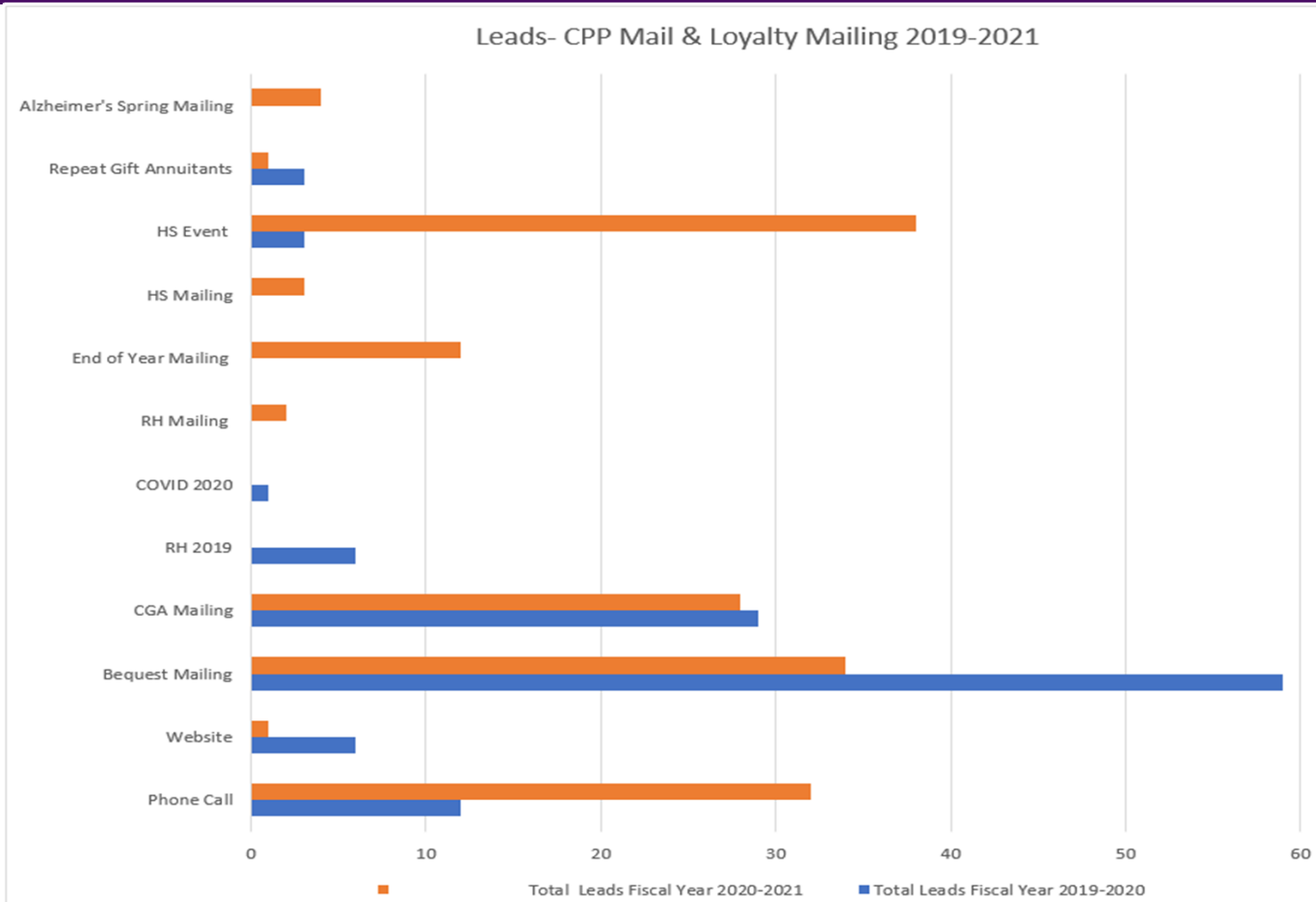


Adaptation and Buy-In (Metrics)





Adaptation and Buy-In (Metrics)





Adaptation (Technology)

2. Master The Necessary Technology

- ✓ Dedicated staff during virtual programming

GENERATION Z:
CONNECTED FROM BIRTH.
Born mid-1990s to 2010.



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Adaptation

3. Rethink Your Budget

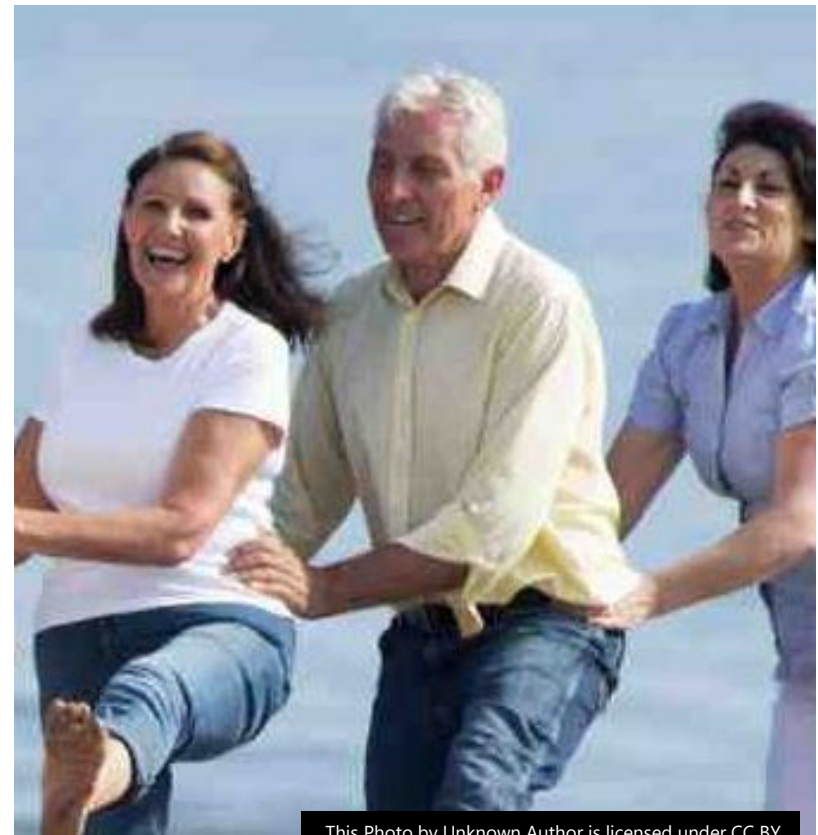
- ✓ Age overlay
- ✓ Increase outreach to Legacy and Loyalty, etc.
- ✓ Less-expensive virtual programs for wider audiences
- ✓ Less travel



Adaptation and Buy-In (Paradigm Shift)

4. Accept the New Paradigm

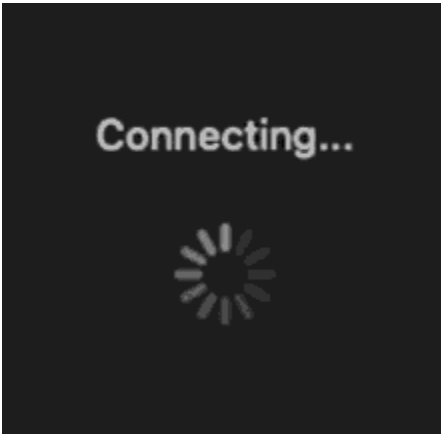
- ✓ PG donor base changing
- ✓ Baby Boomers need different ways to connect



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It's All About Connecting...





And Finding New Ways to Connect





Thank You





Questions?





Still Have a Question?

Contact: Stacy Sulman

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