

How to...

**START A PLANNED GIVING PROGRAM
(EVEN IF YOU DON'T KNOW ANYTHING ABOUT
PLANNED GIVING)**



REFOCUS
COMMUNICATIONS & FUNDRAISING



HOW IS A NON-TECHNICAL APPROACH POSSIBLE?

1. Gifts in Wills are far and away most popular.
 2. Gifts in Wills are simple.
 3. Donors don't expect you to be a financial planner.
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- ✓ Most donors don't give for technical reasons, and respond far better to a non-technical approach.

BEFORE WE BEGIN

Who currently has a
Planned Giving
(aka Legacy)
Program?



OBJECTIVES TODAY

1. Creating resources, systems, and plans.
2. Engaging and cultivating your supporters.
3. Measurement, stewardship and maintaining focus.



MY GOAL TODAY

Get you excited about beginning a planned giving program even if you are not an expert in the details.

(That's why we have Advisors!)



Creating resources,
systems, and plans

A SYSTEMATIC APPROACH TO ENGAGE

- Sustained, coordinated outreach
 - My go-to step-by-step most successful options
 - Manage capacity — plan for your ability to respond, not to reach out.
- ✓ Key is donor engagement and staying top-of-mind for when the supporter is ready to create a legacy gift.

THE HEART OF THINGS (AKA THE SYSTEM)

- Guided meditation (aka Survey)
 - Continue the conversation (aka Case for Support)
 - Get to know them better (aka Follow-ups)
- ✓ There must be back and forth or you are just monopolizing the conversation. Strive always for two-way engagement.

SURVEY

- Not trying to educate, not about awareness
 - No ranking favourite charities or causes
 - Needs to make the legacy ask
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- ✓ Questions should be about donor, their connections to cause, their story of involvement, and whether they see that continuing beyond their living years.

- **Survey** mailing + cover letter
- Reminder mailing + cover letter
- To increase response, try calling good prospects the day the mail drops to their home

Initial
Survey

Follow-
ups

- **Thank you calls** to new Expectants
- **Thank you letters** to all respondents
- **Case for Support** to 'Would Consider', 'Unsure', and 'Already left a gift'
- 6 month **check in letter** with tear off

- **Follow-up Survey** mailing + cover letter
- *NO reminder mailing as we know this group is responsive*
- Thank you letter + **Mini-Case for Support**
- **Next Steps Sheet**

Phase 2
Survey
Cycle

Individual
Outreach

- **Personal follow up** with key prospects
- Include new and old tools for engagement, ie. send Legacy Newsletter, Legacy video, Luncheon invitation, tour invitation, birthday card, personal meeting request, Next Steps sheet, Survey report, etc.

“There’s a simple rule:

You say it again, and you say it again, and you say it again, and you say it again, and you say it again, and then again and again and again and again, and about the time that you’re absolutely sick of saying it is about the time that your target audience has heard it for the first time.”

— Frank Luntz

SELECTING YOUR INTERNAL TEAM

- Ideal hires or volunteers
 - Organized/systematic
 - Personable, warm
 - Not afraid to talk to people



- ✓ They don't need to know anything about Charitable Remainder Trusts or Donor Advised Funds.

DEVELOPING YOUR EXTERNAL TEAM

- Allied professionals for technical stuff
 - Develop relationships with Lawyers, Insurance Advisors, Trust Officers, etc.
 - Use resources like CAGP's Ask An Advisor service
- ✓ Most legacy gifts are through a Gift in a Will – you don't need to be an expert in all the other options.

SELECTING DONOR POOLS

- Regular people – not major givers
 - Unmarried women
 - Longevity, recency, frequency
- ✓ Donors are not experts in the details of gift planning vehicles, and they don't expect a charity to be either.

Engaging
and cultivating
supporters

ENGAGE, DON'T EDUCATE

- Reach out to supporters in a way they'll respond to
- The majority of donors are not creating legacies for technical reasons
- Ask for feedback to understand their connection



REMEMBER WHAT HELPS DONORS FEEL ENGAGED

- Impact
- Values & Vision
- Conversational language
- Stories
- Consistency



IMPACT

- This is what your donor wants
- Demonstrate 'who' and 'why'
- Not 'what' - not facilities or equipment
- The positive changes that will make the future better



VALUES

- This is what your donor is really connecting with at the core
- May not be your official values, but rather what your organization represents in the world to the donor
- The “Why?”



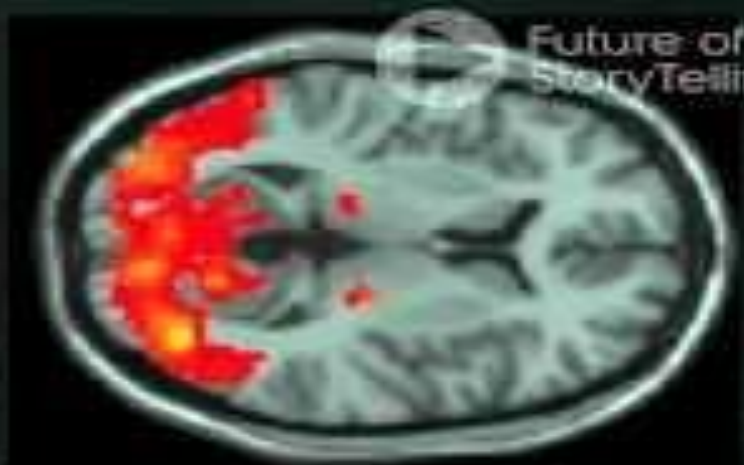
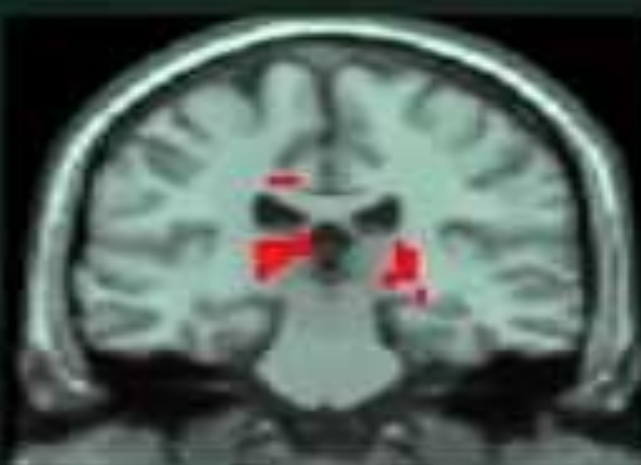
CONVERSATIONAL LANGUAGE

Aimée's Rule for Writing for Humans™:

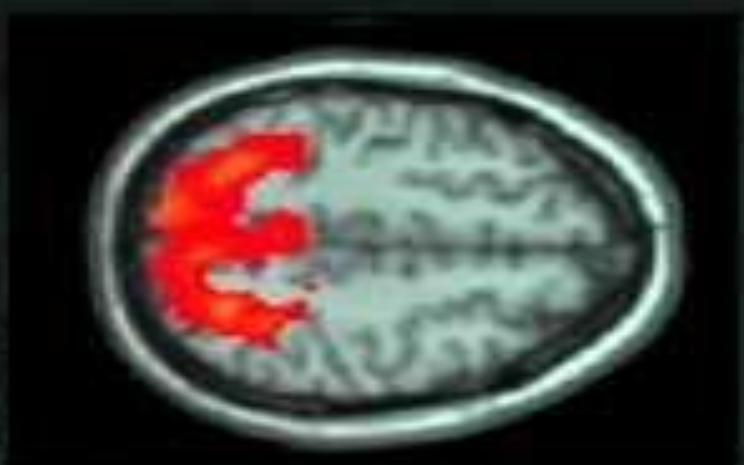
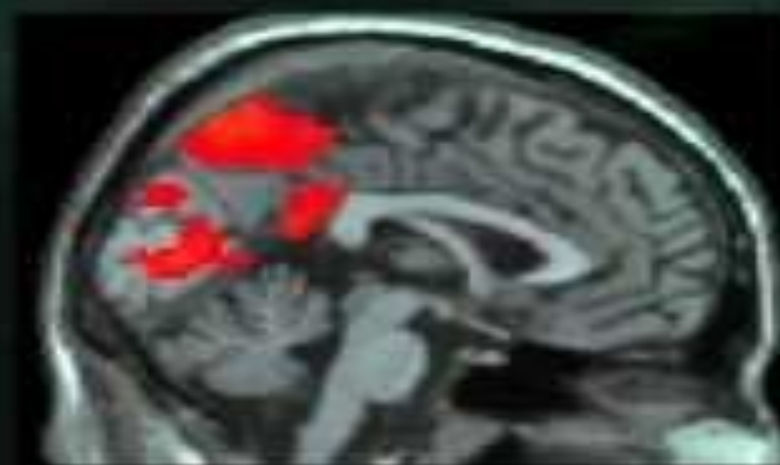
*If you are writing for humans,
write like a human.*

- Not formal, not officious
- Clear, engaging, succinct
- Write to a person, not a crowd





Future of
StoryTelling



Initial Survey

Thank you Calls to
new Expectants

Survey Thank you
+/- Case for Support

Reminder of Initial
survey to non-
responders

Outreach to Prospects

6 month Check-in
letter w tear-off



Next Steps Sheet to
those considering

Outreach to Prospects

Follow up Survey

Thank you calls to
new Expectants

Thank you letter to
Survey respondents
- with Mini Case
(unless now a 'no')

Outreach to Prospects



Stewardship,
metrics and
maintaining focus

STEWARDED EXPECTANTS

- Maintain relationship
- They can take you out of Will – or upgrade gift!
- Recognition is rarely important to these donors, but should be an option



METRICS & MEASUREMENT

- # Surveys out, response rate, prospects, new expectants

Legacy Survey Results & Analysis - FY 2018/19

Surveys sent	Surveys received	Response rate	Expectants/Donors	Projected value of Expectant/Donors (\$50K)	Legacy leads	Projected value of leads if 50% convert (\$50K)	Legacy unsure	Projected value of unsure if 25% convert	Cumulative value of Expectant, Leads & Unsure
300	165	55%	4	200,000.00	24	600,000.00	48	600,000.00	1,400,000.00
500	222	44%	2	100,000.00	29	725,000.00	60	750,000.00	1,575,000.00
300	112	37%	5	250,000.00	32	800,000.00	52	650,000.00	1,700,000.00
-	-	0%		-		-		-	-
500	141	28%	2	100,000.00	16	400,000.00	34	425,000.00	925,000.00
500	190	38%	3	150,000.00	11	275,000.00	30	375,000.00	800,000.00

METRICS & MEASUREMENT

- Expectancies x historical value = projected future revenue

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-	-	0%		-		-		-	-
500	141	28%	2	100,000.00	16	400,000.00	34	425,000.00	925,000.00
500	190	38%	3	150,000.00	11	275,000.00	30	375,000.00	800,000.00

METRICS & MEASUREMENT

- # follow ups, # phone calls, # meetings
 - Set targets based on your capacity and resources
 - Always prioritize the follow up over sending out more new outreach pieces.
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- ✓ Dollar value of incoming gifts should not be a metric for a new program.



METRICS & MEASUREMENT

- Annual conversion rate
- Over time, track conversion rate of those who initially said they would consider, who have now said they have created a gift.
- Average conversion takes roughly 2 years.



METRICS & MEASUREMENT

- Projected ROI
- Cost to raise a dollar (over long term)
- Comparison to other fundraising methods:

*Planned Giving is **dramatically** lower than Events, Annual, etc.*



DOING IT

- Systematic plan with goals
- Keeping on top of things – prioritizing manageable numbers vs. reaching everyone all at once



RESULTS

Numbers you get from these systems are pretty inspiring!

- Build a case for future investment
- Better life-time donor stewardship + increased giving
- Examples



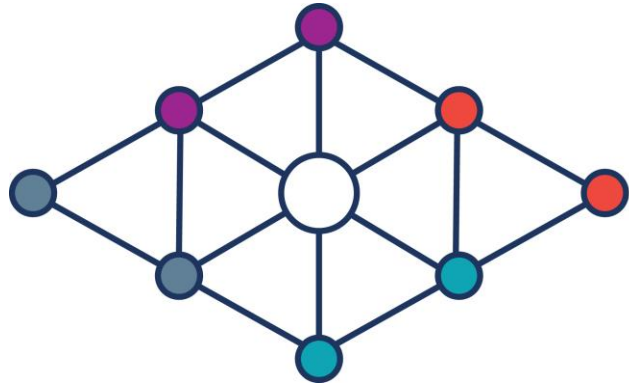
THANK YOU! ANY QUESTIONS?

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