

Yes, We DO Accept Legacy Gifts!

Marketing your Planned Giving Program

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Agenda

- The lay of the land – What we inherited
- Case centered marketing and current trends
- Our plan
- Measuring success
- Marketing tactics for all budgets

What we inherited

- Passive conversations
- Old brochure
- Newsletter articles, sometimes
- Events

Where we wanted to go

- Active and consistent conversations
- Use resources wisely
- Maximize existing lines of communications
- Makes events useful
- Employ multiple marketing channels

Marketing PG Then



Often driven by tax law

Similarly, agency marketing by program

Case Center Marketing

- What makes your organization unique?
- Why does it need to exist?
- Why does it deserve extraordinary support?
- What gaping hole would be left in the community, country or world if your organization could not obtain adequate financial support to continue to fulfill its mission?

Current Trends

Inside the Mind of the Bequest Donor

Research findings from experimental psychology and neuroimaging



Professor Russell James
Texas Tech University

Russell James, J.D., Ph.D., CFP

- Perceived immortality
- Link to family and memory
- Feeling part of a group

Current Trends

Focusing your message with big data & analytics



Cambridge Analytica

Current Trends

Soliciting feedback, donor survey's



We want your feedback!

Please take a moment to answer these questions.

1. I support the American Cancer Society because ...

- I have/had cancer. If so, what type of cancer? _____
- A family member or friend has/had cancer.
- I want to help find a cure.
- Other (please specify) _____

2. What is your marital status?

- Married Single Widowed
- Divorced Never married

3. Do you have children?

- Yes No If yes, how many? _____

Current Trends

Special invitations
Exclusive offers



Assessing our supporters

Long term supporters, committed to our work



Assessing our supporters

New generation, unfamiliar but willing



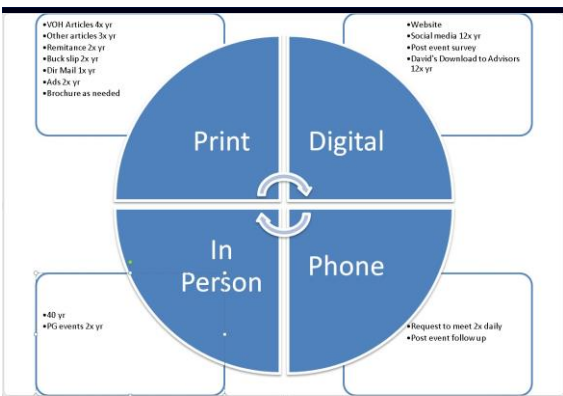
Assessing our supporters

A word about millennials...in Silicon Valley

"61% of Millennials would consider a company's commitment to the community when making a job decision"

"68% of employers report that their employees expect them to support volunteerism"





Print

Articles: Internal & External

Catholic Charities of Santa Clara County

Voices of Hope

- Human interest
- Technical articles
 - Frame it
 - Activate advisory committee

3rd party vendors

THE VALLEY CATHOLIC

The Good News of The Diocese of San Jose's Business Directory on 10 December 2014. © The Valley Catholic. All rights reserved.

Print

Remittance envelopes

- The right message
 - Be compelling but brief
 - What would you respond to?
 - Think creatively
- Response process in place?
 - Is someone checking?
 - What's your plan for response?

Print

Buck Slips


- Cheap
- Easy
- Flexible
- Targeted

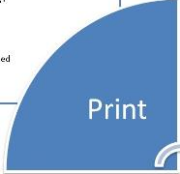
Catholic Charities of Santa Clara County

"I'm prosperous enough to be able to give. I was happy to learn a smart way of doing so."
--Caritas member Jack Van Dyke

This year, Jack renewed his Caritas membership by using the IRA Rollover, a provision that allows those over age 70 1/2 to roll over like Jack, to make a contribution to Catholic Charities directly from an IRA. Although Jack did not make a charitable deduction, he came out ahead because the gift was not taxed as income and it fulfilled his annual required minimum distribution.


If you would like sample instructions for the IRA Rollover or learn more about giving smart, contact David Brown, Senior Director of Planned Giving at 408-325-5248 or dbrown@catholiccharities.org





Direct Mail

- Segmentation
 - Consistent givers
 - Young professionals
 - Older adults, i.e. over 70 1/2
- Tailor your message

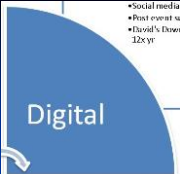




Brochures



- Do you REALLY need them?





Website

- Social media
- Facebook
- Email's Down 12yr

Plan your Giving

CREATE YOUR LEGACY

GIFTS THROUGH A WILL OR TRUST

• Social media
 • Post event to
 • David's Tower
 325 yr

Digital

Website
Is your website mobile friendly?

• Social media
 • Post event to
 • David's Tower
 325 yr

Digital

Social Media

- Set realistic expectations
- Define “good content”
- Engagement vs information
- Make a plan

9 Key Areas of your Online Presence

1. Website & Blog
2. Online Directories
3. Review Sites
4. Social Networks
5. Micro Blogging
6. Rich Media
7. Mobile Apps
8. Industry Specific
9. Event Promotion

Phone

- Request to me
- Post event fol

Phone?...yes, phone!

- Set a goal per day
- Purpose: Get visits!

But who to call?



In Person

In-person visit



In Person

Information events

- Set expectations
- Fundraising
- Be compelling
- Get feedback
- What's your hook?



In Person

Stewardship events

- Set at time to thank, not ask
- Invite a friend
- Be compelling or interesting

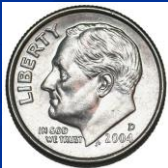



Measuring Success

- Defining a successful legacy program
 - **Set** number of message by channel and message type
 - **Set** number of asks
 - **Set** number of secured expectancies
 - **Count** number amount of realized gifts
 - **Set** number of stewardship opportunities

Legacy Marketing On A...

- Dime
 - Forgo print or recycle
 - Short message & Tax ID on website
 - A few social media posts
 - A few personal emails per year
 - One hour a week on legacy giving
 - Phone to get visits
 - Visits



Legacy Marketing On A...

- Few bucks
 - Produce one good brochure about your work
 - Dedicated legacy giving page & Tax ID on website
 - A social media plan
 - One annual mailing or piggy back
 - Remittance envelope
 - A few hours a week on legacy
 - Phone to get visits
 - Visits



Legacy Marketing On A...

- A load of cash
 - Dedicated legacy brochure and annual newsletter
 - Dedicated legacy giving page & Tax ID on website
 - A social media plan
 - One targeted annual mailing
 - Remittance envelope
 - Legacy staffer
 - Phone to get visits
 - Visits



Thank you!

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