

STRATEGIC PLANNED GIVING MARKETING
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A. What is Planned Giving?

- The process of helping a donor achieve their (a) personal, (b) financial and (c) philanthropic goals
- Business translation: if a. and b. are accomplished, the donor will address and maximize c.

B. Why use Planned Giving marketing (aka, what is the goal)?

- Increase the likelihood of meeting with the donor
- Better educate the donor about meaningful and tax effective ways to give to inspire a meeting with the donor. Better education without increased communication is a booby prize.

C. What approaches should we use:

1. Piggyback/be a parasite/collaborate

a. Reply Cards: add a Magic Box to learn about donor estate plans and planned giving intentions

b. Organization-wide newsletter:

- Insert a Development section (donor story, promote overall campaign or periodic push like Giving Tuesday, Make a Will month, Matching gift offer), tax-tip (opportunity to designate your gift, IRA Giving, give with stock)

- Bring the section to life:

- make the tax tip be “what the profiled donor did and a quote)”
- offer an unrelated donor quote
- show a picture of the donor
- Show a box of a real-life example

- reinforce the message in the CEO/ED?President’s opening remarks

c. Be part of an ongoing event

- Speak at a reception/homecoming party/organization tour/thank you event (for volunteers, before a football game)

All actions reinforce the goal stated in B. above

2. Create your own development/Gift Planning Newsletter

- a. 4 page: director's message, donor profile, pictures and captions about recognition events and tax tip (same as those used in piggy-back mrktg)
- b. Email only, periodic hard copy that has a Ways to Give Insert (becomes a "keeper")
- c. Look nostalgic (see Stanford, University of Oregon)

3. Brochures

- a. Start with your legacy society (mention the legal wording to include the organization)

Why

- Way to promote the overall message of learning if you are in their estate/inspiring others to do so/value of meeting with Development team;
- Helps make sure that donors don't change their minds (like 50% do within their last 5 years)
- Estate donor is the best major giving donor (have affinity, increase annual giving by 75%)
- Gives your organization legitimacy that you have a plan

Make sure it has value

- Provide real value of an annual event and insider treatment
- ### **Use it or lose it**
- Must promote it or it is not worth it (see above and below)

- b. Other brochures - meh

- Gives additional credibility to your program and value to meet
- Actively use them as inserts into discussion of gift planning options
- *Have them spend less time on definitions and more time on demonstrating how they fit into an overall giving plan (provide situational examples)*
- If they are attractive enough to be kept, they will be a reminder to a donor to meet with the development officer

4. Presentations (old school with a new school approach)

- Without actively incorporating into the message (dev. Team has value, meet with them), low attendance.
- With active promotion, a reasonable amount attend (always 10% are newly discovered prospects) AND the message of the value of meeting is amplified
 - o Ways to promote – take a video clip of discussing a tax tip (give from your IRA) and insert into social media, EBlasts, E Newsletter, newsletter, promote at Legacy Society and Annual Giving events
- You don't need to be an expert (bring in an adviser), but **insert yourself** to amplify the value you do add (helping with designations, etc.)
- Supporting material is optional, but can include Estate Planning Inventory questionnaires, separate Will/Living Trust brochure

5. Websites

Be easy to navigate and promote active engagement

- No need to be Wikipedia, put links in the body (highlighted by quotes or donor pictures of headings),
- Make it easier to navigate - too often on the side and using “terms of art” unknown to donors – ie “Instead of Planned Giving, use estate giving, diversifying stock and real estate without tax, increasing income, getting bigger tax deductions, reduce inheritance taxes”
- Use situations to grab donors
 - o Organize by options for various age ranges
 - o Organize by asset holdings
 - o Tantalize with teaser alerts to donor stories (Bill and Jane were tired of holding their rental property and wanted to sell it tax free, Sally was seeking more income after she retires in 10 years)
- Find some websites you like (Oregon Health and Science Univ., The Ohio State) and reduce the content by 80% - keep it simple

6. Old fashioned letters and emails

Personalize through segmenting

Ultimate message is that you have value, not that you are “selling” a PG product

- Mail merged letter with CGA rate based on age or age range
- Mail merged letter about the Legacy Society and the value of designating estate gifts
- **Take the time to add a handwritten personal note to letters and a personalized intro sentence to emails.**

7. Private Vendors

- a. There are private services to call all segmented donors to ask if you are in your will
- You could do it yourself with trained volunteers or student callers
- b. Free Will – great product to promote DIY wills, ok product to promote IRA and stock gifts
- Great product to incorporate into your broader message of get your estate in order (and that attorneys and conversations with your organization can help their overall planning)

D. Marketing to Professional Advisors

8. Hosting a Professional Advisors Council

Why;

- Makes it front of mind for advisors to remind their clients of your organization
- Can cement you as a resource for advisors

How: Make it a meeting that is worth their time

- Bring in an expert in a field
- Facilitate open discussion of cutting edge or pressing professional questions
- Opportunity to get a behind the scenes view of your organization
- Food
- Cont. Ed. Credits (requires an outline and an application with the certifying org.)