



# Planned Giving in High Performing Non Profits

## Leading High Performing Planned Giving Operations in Non Profits



Definition of Planned Giving

Why High Performing Organization  
Prioritize Planned Giving

Determine the Revenue Opportunity

Build the Culture of Philanthropy

Find A Champion

Commit to the Strategy

Case Study: Girl Scouts

## What is a planned gift?



A **planned gift** is a contribution that is arranged in the present and allocated at a future date.

Commonly donated through a will or trust, **planned gifts** are most often granted once the donor has passed away.

(source:

DonorSearch.com)

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## What are the 3 types of planned gifts?



1. Outright gifts that use appreciated assets as a substitute for cash (jewelry, artworks, securities)
2. Gifts that return income or other financial benefits to the donor in return for the contribution
3. Gifts payable upon the donor's death

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## Four key data points about planned giving

1. Revenue from planned giving represents 9% of all charitable giving across non-profits.
2. The average bequest, nationally, is estimated at \$45,000.
3. GSUSA income from planned giving was \$1.76M in FY 2016 representing a 26% increase from FY 2015.
4. Return on Investment: the cost to raise a dollar from a planned gift is much less than the cost to raise outright gifts.

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## Why do planned giving donors give?

Every donor has his or her own personal motivation but most leave a planned gift with these ideas in mind:

**I was important!**

**I made a difference!**

**I was here!**

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## Why do planned giving donors give to Girl Scouts?

- Strong personal connection to the Movement (e.g. longtime volunteers, board, staff, and alumnae)
- Impact Girl Scouts has on girls and the world
- Confidence that Girl Scouts will be serving generations to come
- Desire to give back to organization that changed their life



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## What is the Juliette Gordon Low Society?

Recognition society to honor those that have made a planned gift to any Girl Scout entity.

Members receive special membership pin and are invited to educational and recognition events.



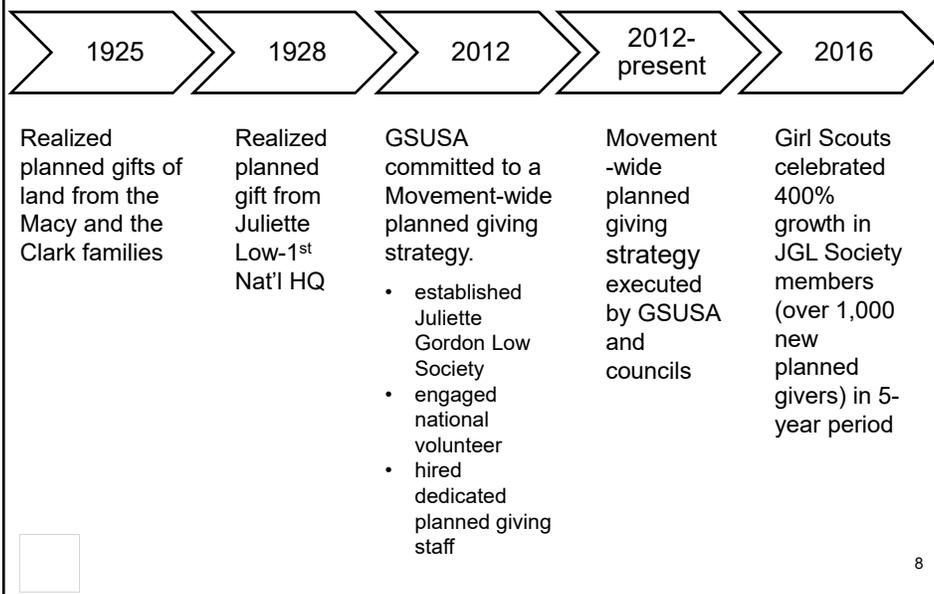
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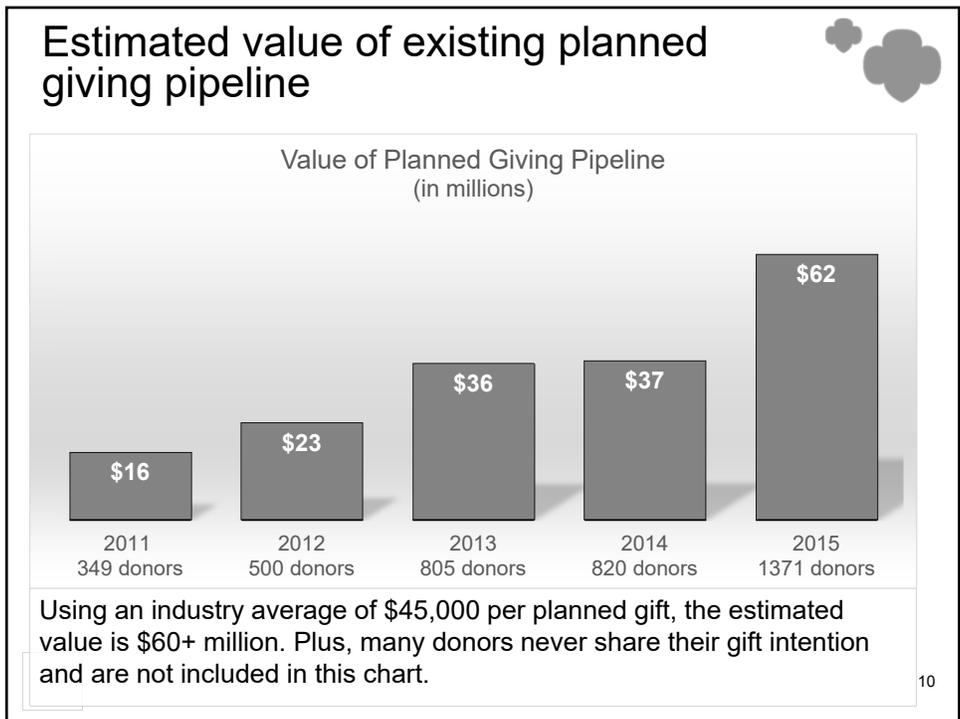
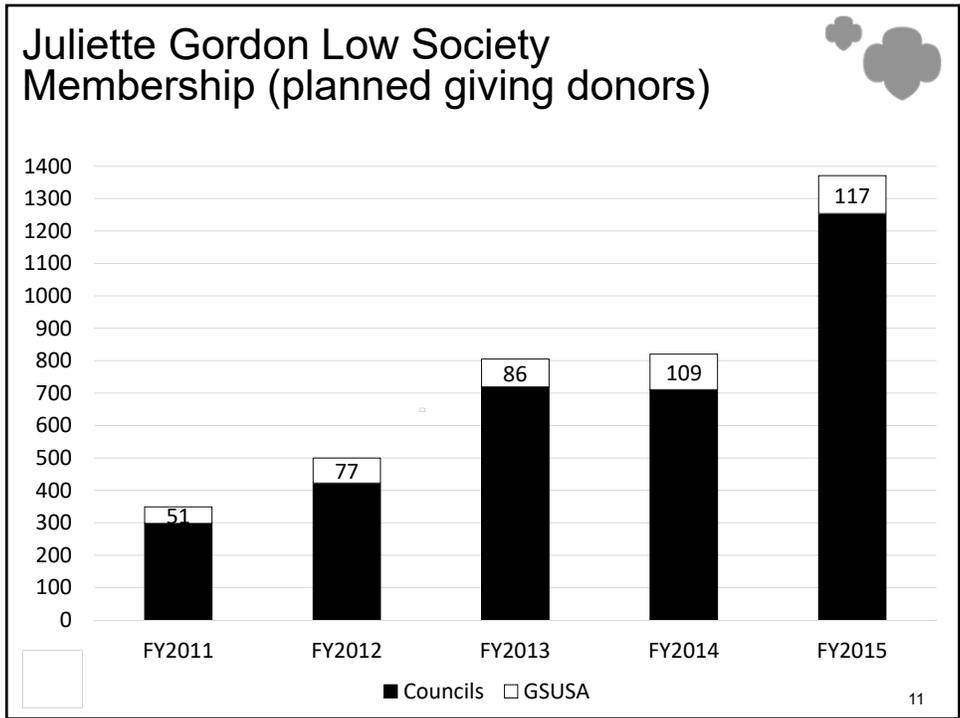
## Potential and Opportunity for Women



THE 2016 U.S. TRUST® STUDY  
 OF HIGH NET WORTH PHILANTHROPY<sup>1</sup>  
 CONDUCTED IN PARTNERSHIP WITH THE INDIANA  
 UNIVERSITY LILLY FAMILY SCHOOL OF  
 PHILANTHROPY

## A brief history of planned giving in Girl Scouting





## Goals and strategies



**Goal:** By 2025 Grow GSUSA Planned Giving Revenue from \$1.8M to \$5M

### Mass Marketing

- Continue Legacy Bridges newsletter to entice 17,000 lifetime members
- Market Charitable Gift Annuities via a quarterly mailing to qualified prospects
- Maintain donor-centered website that allows donors to explore gift options

### Donor relations

- Steward and leverage current planned giving donors as ambassadors at events, blogs, newsletters
- Coordinate with Alumnae Initiative to identify new planned giving prospects
- Retain and expand qualified planned giving staff

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## Goals and strategies (continued)



**Goal:** Grow council capacity to grow planned giving revenue

### Resources

- Provide regular training and consultation for council boards, CEOs and fundraising staff
- Provide comprehensive tool-kit and resources including CGA brochure, JGL Society brochure, JGL Society pins, newsletter, and other marketing materials

### Collaboration

- Leverage Founding Chair and other members of Juliette Gordon Low Society to promote planned giving at local events
- Provide national stewardship opportunities to council donors, e.g.:
  - Invitation to annual GSUSA investor call
  - Recognition on planned giving website, in GSUSA annual report and, in national planned giving newsletter

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## Thoughts from current GSUSA planned giving donors

*"Men have women in their lives that benefited from Girl Scouts. My wife's life and trajectory changed through her involvement in Girl Scouts."*

—Lawrence Calder

*"With more than 50 years as a Girl Scout, the major problem I see Girl Scouts solving is empowering girls and young women. In Girl Scouts, girls are doing things they didn't think they could otherwise do."*

—Betty

*"...It is bigger than just giving the money. It is also reflects the confidence we have in knowing that Girl Scouts is continuing the tradition of building our girls and instilling in them the good habits, and strong values that they need to be the leaders of tomorrow."*

—Dianne Belk, Founding Chair Juliette Gordon Low Society

*"By giving a percentage of my retirement account I was able to maximize my charitable gift and optimize the inheritance for my family and friends."*

—Debbie <sup>14</sup>