

**Resolution Endorsing the Planned Giving Program,
Establishing a Planned Giving Committee
and Legacy Society**

To gain the full commitment and support of your Board, it is suggested that your Board Chair or Planned Giving Champion propose to establish a planned giving program and corresponding Legacy Society through a resolution and the vote by the full board. This formalizes the program and lays the groundwork for keeping the board informed in the future. The board is also giving permission to discuss planned giving matters and membership in the Legacy Society with them.

CONCERNING the establishment of a Planned Giving Program _____ ; and
to benefit the _____

WHEREAS, through the establishment of a planned giving _____ ; and
program we are creating a structure for planned giving including
bequest policies, gift acceptance policies, procedures for processing
planned gifts, and recognition of those individuals who have made
the ultimate decision to include the (name of charity) _____

WHEREAS, we wish to inform and market to our various public _____ ; and
to consider the (name of charity) _____ in their will or estate plans

WHEREAS, we are committed to developing the staff expertise, _____ ; and
and providing the necessary resources for training, and an effective
marketing plan to have an successful planned giving program

CONCERNING the establishment of a Legacy Society to
recognize and thank individuals who have made the ultimate
decision to include the (name of charity) _____

<p>BE IT RESOLVED, that the Board of the (name of charity) _____ on this day of _____ establish a Planned Giving Program, along with a planned giving committee to oversee the program and</p>

<p>BE IT FURTHER RESOLVED, that the Board of the (name of charity) _____ establish a marketing budget sufficient to achieve the goals established for the planned giving program,</p>
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<p>BE IT FURTHER RESOLVED, that the Board of the (name of charity) _____ establish a corresponding Legacy Society for purposes of recognition of individuals who have made the ultimate gift by including the (name of charity) _____ in their will, trust, through charitable designations or estate plans to benefit the needs of the future generations of children we serve.</p>

● Planned Giving Building Blocks



Monthly Planning Calendar. Use this chart to keep your documents and months organized. Simply checkmark **✓** the column pertaining to the marketing that you plan to use each month.

Month/ Emphasis	Topic	Donor e-news (educational)	Advisor e-news (cases)	Postcard Mailing	Direct Mail Letter	Newsletter Article (testimonial)	Insert/ Buck Slip	Ad (for newsletter or in print)	Brochure/ Wills Guide	Board or Staff Training
January	Why have a Will									
February	Benefits of a Will									
March	Bequest Language									
April	Tax-wise giving									
May	Revocable Living trust									
June	Beneficiary Designations									
July	Why have a Will									
August	Benefits of a Will									
September	Bequest Language									
Oct Nov Dec	Tax-wise giving/end of year									

Note: Offer a simple way to respond or request more information. Offer information on your recognition society and how one can join. Have check boxes on your reply mechanism with the following: "Please send me more information on ____; I would like someone to contact me as I am considering making a gift; I have already including ____ for a planned gift." Add space for donor's name, phone # and/or email address.

PG Marketing Made Simple

Everything you want to know but are afraid to ask!



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Why is marketing for planned gifts important?

- Lets your supporters know you are in the PG business
- Identifies the “pre-disposed”, those who are interested in supporting your mission through a planned gift
- Makes it easier to make a call, get a visit and build a relationship
- “Marketing is the key to a successful PG program”

The Goal - acquire inquiries and set-up visits

- Inquiries
 - Send information if requested
 - Add to database with proper coding
 - Follow-up on all second inquiries
- Visits and Follow-up
 - Thank them and starts the conversation
 - Leave behind stuff, follow-up and get to “yes”
- Last Word
 - Educates supporters about importance of PG
 - Provides another option
 - Only 1 out of 4 will inform you

Get the support and structure right first!

- Is your Leadership (Executive Director and Board of Directors) supportive of a planned giving program?
- Do you have the infrastructure and resources needed to be successful? Specifically:
 - Do you have a budget for marketing PG?
 - The database of prospects?
 - The time/staff to make visits, asks, stewardship?
 - Do you have the right culture?

With support from your Leadership...

- Identify a planned giving “*Champion*” from the board to be the spokesperson for the program
- Use a *Board Resolution* to support a planned giving program and recognition society presented by the Champion
- This step furthers the commitment of the board leadership

Build your budget and database

- Create a policy that 10% of any unrestricted bequest or revenue from stock gifts goes to marketing budget for next year.
- Use the establishment of a Recognition Society as a marketing tool to acquire prospects and build your database

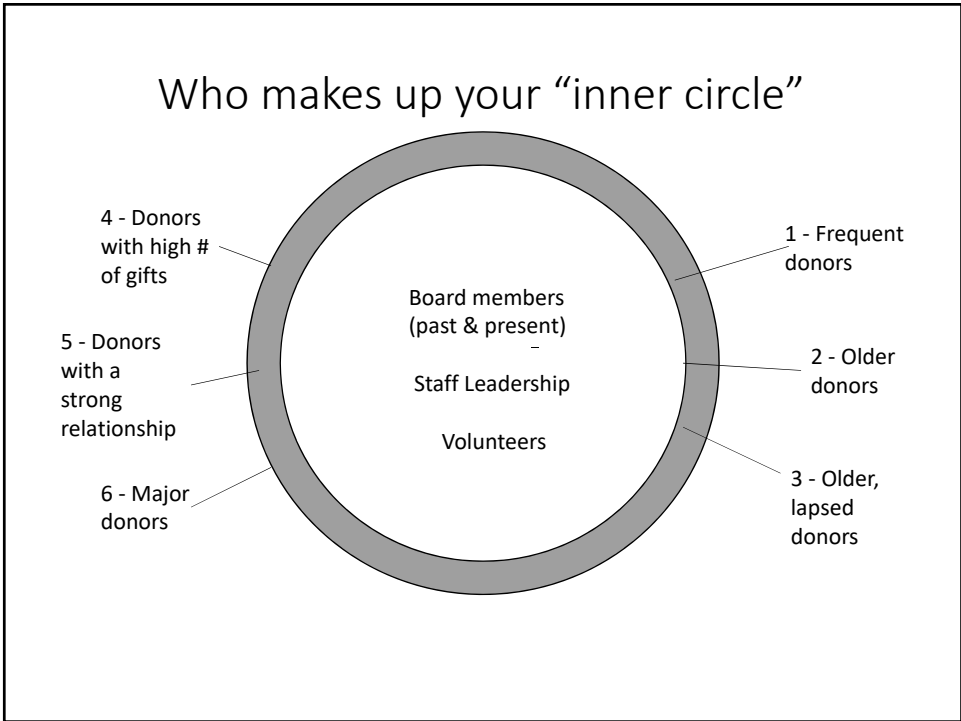
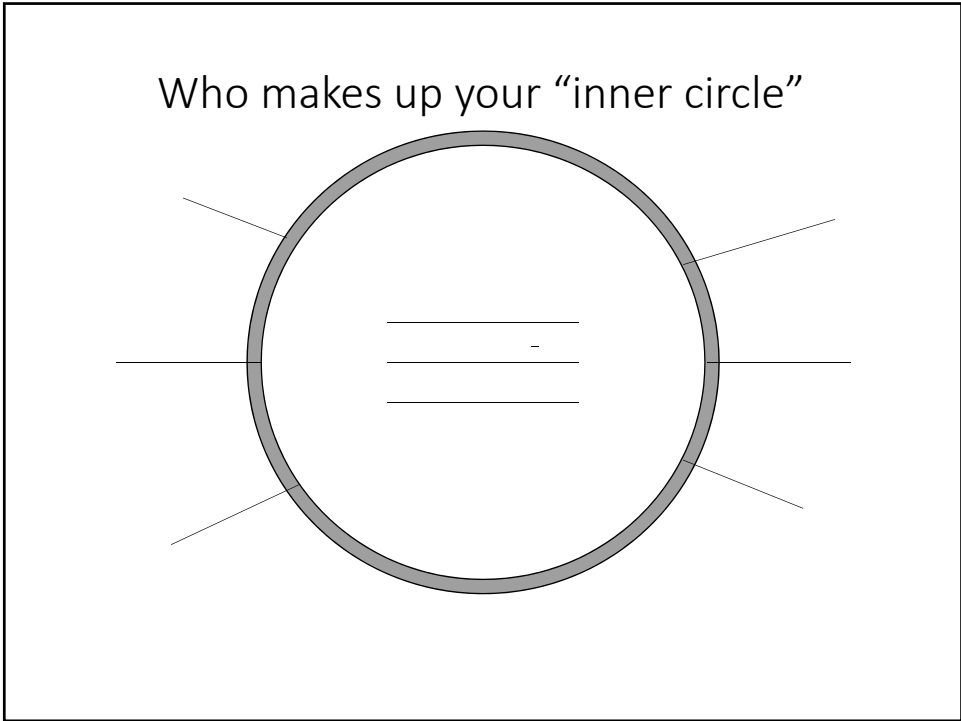
Build a Recognition Society

- 80-85% of all planned gifts are revocable. Therefore, you need to build a recognition society into your marketing plan to secure those gifts.
- Studies show that the #1 reason people change their minds is because they are not thanked
- Explore ways to use the recognition society in your marketing program

Who are you going to market to?

Start with your “inner circle”

- Who are in your “inner circle”?
- What are their characteristics?
- Who are your most likely donors, both internally and externally?



What are you going to market?

If you are starting out new:

- Start with your inner circle and move outward
- Make the case for planned giving and promote bequests and simple gifts (revocable)
- Use your recognition society for stewardship and marketing

Existing program:

- Assess the program. What's working? What's not?
- Conduct a donor survey

Work from your "inner circle" outward Market, Segment and Target

- Design your marketing materials#, test, re-design
- Segment your database* and keep adding to it
- Mail, call, visit, follow-up
- Market bequests, simple gifts and membership in the legacy society

- #consult vendors
- *frequency, longevity, # of gifts

Market outward to acquire new prospects

- Capture inquiries or requests for information in database management and code correctly
- Capture DOB and emails on reply card, at events, online, etc. if possible
- Segment by interest and market

Grow your planned giving prospects and acquire new donors

- Make it easy for people to respond
- Offer free information, without obligation
- Offer to visit, give advice, maintain confidentiality
- Rinse and repeat!

Tips and Tools

“Never-sleep” no cost Marketing

- Letterhead – “Have you considered. . . “
- Business Card – “Leave a Legacy”
- Newsletter – articles, testimonials, stories
- E-Newsletter – same as above
- Website – provide free brochures, articles
- Voice message/email signature
- Referrals

Use Technology

- Why? - Increases your Visibility
- Website* – drive supporters to it
- Create a “Donate” Link with one click
- Create a Planned Giving link*
- Use Social Media
 - Facebook
 - Constant Contact
 - Email video
- seek out vendors

Use Stories and Testimonials

- Why? - Increases your Credibility
- Emotion & Logic – heart and head
- Identifies self in stories/testimonials
- Memorable vs Technical/Benefits vs Features
- A story example

Use your Recognition Society

- Donors like to affiliate with a group and they like the special attention
- Create a brochure specifically about the society
- Feature stories/testimonials in publications
- Show the benefits of informing you

A Word About Print Style

- Contrast – white on black background or visa-versa
- Type style – at least 12 pt
- White space – make it easy to read
- Lettering - block letters are best, bold for emphasis
- Draw attention - a border or box, picture

A Word About Fact Sheets and Brochures

Create one-pagers using best practices of print styles

Theses have multiples uses:

- Can e-mail/mail to donors after conversation
- As a leave behind (on a visit)
- Can e-mail to advisor after phone call
- As a mail piece or downloadable directly
- Brand with website and contact info

A Word about Professional Advisors “Never-sleep” Referrals

- Make friends with professional advisors
 - Get started from existing bequests and board referrals
 - Get a list of all estate planning or tax attorneys
- Create a professional alliance
 - Partner with them to provide services to your donors
 - Host a breakfast meeting multiple times
 - Provide with info packet
 - Ask for free consult with referrals

Donor and Advisor sheets should include:

- Legal name and address of organization
- Telephone #, fax #, email contact
- Federal Tax ID #

- Bequest language
- Use Bullets for quick reference
- Create part highlighting the organization
- Answer the “why”, “how” and “what” questions

Next steps - low cost but effective approach

- Postcards – it's cheaper and more effective
 - Mail at least twice a year
 - February/March (Bequest or Beneficiary Designations)
 - September (Bequest)
 - November (End-of-year gifts or stock gifts)
 - Segment by frequency and longevity before you segment by age

* Send out 200 at a time

Budget item for consideration

Vendor Website (\$)

- Price is much more reasonable these days
 - Older Americans are doing their own research. Website can answer most donor questions
 - Can be designed to look exactly like your other parts of your website
 - Vendor maintains and rotates information to keep it current

*Save money and create your own but requires maintenance to change themes every few months

Budget item* - Age overlay and e-mail append for mass marketing

- Age overlay (\$)
 - Helps know who to market to
 - Cost is minimal but...
 - Minimum is usually 10,000 names-70% match rate
 - Creates a more effective overall marketing strategy
 - E-mail append – additional cost (\$)
 - Helps to reach more people with your message
 - Cost is again minimal-\$30/thousand
 - Creates a more effective overall marketing strategy
- * only if you have the funds

Marketing Principles

- Get your board and structure right first!
- Marketing must be constant and consistent
- Use Never-sleep marketing. Be patient.
- Prospects need to see marketing materials multiple times and in various ways
- Build alliances with professional advisors
- Visit prospects - face-to-face works best (STP)
- Respond to inquiries in a timely manner
- Remember – only know about 1 out of 4 gifts

Build a marketing calendar

- Create a monthly PG marketing calendar
 - Utilize different media
 - Rotate topics of wills/bequests, beneficiary designations and end of year gifts (stock)
 - Include stories and testimonials
 - Use professional advisors to write articles
 - Always include an easy way to reply or inquire for more information
 - Offer free stuff (brochure, pin, referral)

A Word about Measuring Metrics

- Track inquiries by type and measure response rates
- Track gift closures by type (legacy society)
- Track activity – visits, calls, letters, emails
- Enter information on prospect's constituent page
- Evaluate the results and make adjustments as needed

Questions?

