



PlannedGiving.com

# PLANNED GIVING INFOGRAPHICS

A Booklet of Infographics

[www.plannedgiving.com](http://www.plannedgiving.com)



## PLANNED GIVING INFOGRAPHICS

Planned Giving is a People Business.  
Not a Legal Business.  
It's also Serious Business.



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# 6 REASONS You Need a Planned Giving Website TODAY



## 2. Timing is Everything

A website makes you available to donors 24/7.



## 3. Your Prospects Are Online

73% of adults 65 and over use the internet and at least 42% of seniors own a smartphone.



## 4. Everyone is Stuck at Home

Since the pandemic, more people are at home more of the time.



## 5. Covid's Got Us Thinking...

Nothing is certain. The pandemic brought people face-to-face with our mortality.



## 6. Some Donors Don't Want to Meet With You

Even pre-covid, not everyone wants to meet for lunch. Some people are shy or private. They want to do their own research and quietly make estate planning decisions in the privacy of their home.



## 1. Instant Credibility

If you're not online, you don't exist.



**Betty & Bob Bequest** are planning an overseas trip and just realized they should update their estate plans before they leave. They already have your organization top of mind because of the cultivation you've been doing over the past 8 years. In between packing and organizing a pet sitter, they quickly search for your planned giving website, copy/paste the language to their attorney, and voila! You're in the will, and they're off for their Icelandic cruise.



**Patricia Prospect** noticed an ad in her husband's alumni magazine about IRA rollover gifts and wonders if she could do something like that for her alma mater, a small private college. She searches for the school website but can't find anything about planned giving. "Maybe I'll call the alumni office on Monday," she thinks. But life gets busy, Monday comes and goes, and Patricia forgets to call. Lost opportunity!

# 8 Emotional Triggers That Motivate People to Act



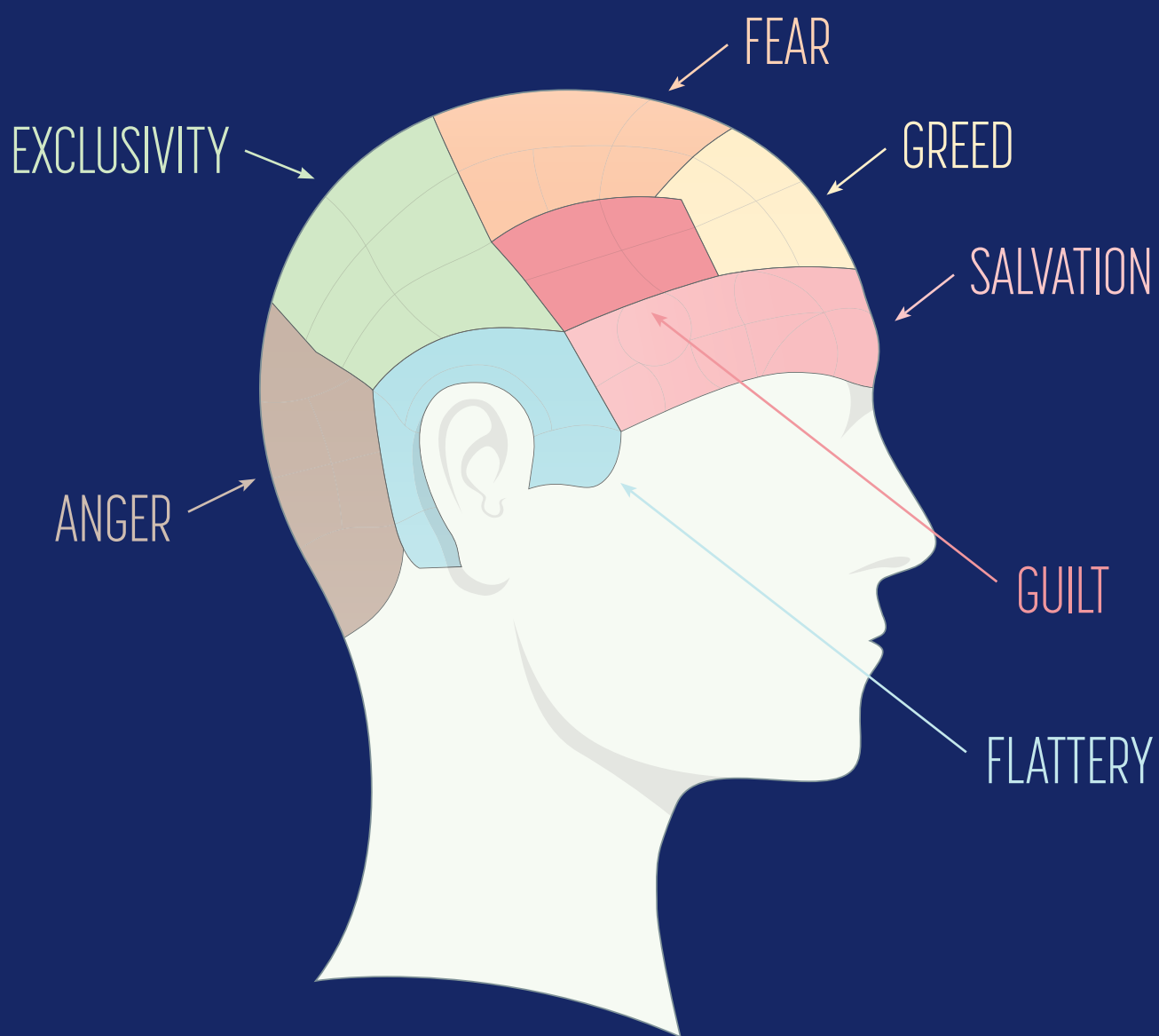
*\*This is a great one for appeals to older legacy donors!*

---

# 7 EMOTIONAL TRIGGERS THAT MOTIVATE PEOPLE TO GIVE

---

For better results make sure your stories  
evoke one or more of these emotions.



## 7 REASONS DONORS STOP GIVING

... and 7 Lessons for  
Nonprofit Leaders

1

### REASON:

"The charity no longer  
needs my support."

### LESSON:

Have you ever *not* needed support?  
This is clearly a communication  
problem.

2

### REASON:

"The charity did not  
inform me how my  
money had been  
used."

### LESSON:

Once again, a communication problem. If you  
ask for money, the giver deserves a report on  
how you used it.

3

### REASON:

"I do not recall  
supporting this charity  
before."

### LESSON:

If you do not communicate with your  
donors, you will be forgotten. At  
PlannedGiving.com we recommend  
"21 touches" in a year.

4

### REASON:

"The charity did not  
acknowledge my  
support."

### LESSON:

Oof. Can you say bad manners AND poor  
communication?

5

### REASON:

"I passed away."

### LESSON:

Hopefully you have been communicating  
all along with your donors about the  
opportunity to make an impact even  
after they pass away.

6

### REASON:

"I feel that other  
causes are more  
deserving."

### LESSON:

Your case for support needs help. There  
are a million charities asking for support.  
If you don't make your case powerfully  
and emotionally, of course your donors  
will find a "more deserving" cause.

7

### REASON:

"I could no longer  
afford to give."

### LESSON:

This reason is most often given by one-time  
donors explaining why they don't make a  
second gift. Once you make it past the hurdle  
of retaining that donor, you're less likely to  
hear this reason. And how do you retain the  
donor? Five words: Com. Mun. I. Ca. Tion.

How about that? It  
turns out there's only one  
lesson for nonprofit leaders:

**POOR COMMUNICATION  
MAKES DONORS  
LEAVE.**

# 6 ELEMENTS

## Your Donors Want to See in Your Donor Stories

### A TRUSTWORTHY NARRATOR

The reader's feelings about the storyteller influence their reaction to the story.

*"Earn my trust with authentic, consistent communication. Don't try to impress me. Talk to me like one normal person to another."*

### SETTING

When your reader can see, feel, smell, hear the place and time of the story, they engage more deeply.

*"Help me smell the autumn leaves on campus, hear the sound of squeaky shoes on the gymnasium floor, feel the garden soil under my fingernails. Transport me to a certain place and time, and I'm hooked!"*

### SIMPLICITY

Effective stories are simple stories

*"Please don't tell me everything about the donor's gift decision or give me a resume of their life. Capture my attention with the most relevant and interesting parts. We can get into the details later if and when I decide to make a gift."*



1



3



5



4



2



6

### DRAMA

Something has to happen in order for it to be a story.

*"I'm not interested in a biographical list of some other donor's life accomplishments. I'm interested in something happening."*

### EMOTION

Effective stories don't tell the reader how to feel, but they always result in the reader feeling something.

*"Show me why this person gave to you. I don't care so much about what they gave or specifically how they gave. I'll work that out for myself. The why is what's going to touch my heart."*

### RELATABLE CHARACTERS

The more your reader can identify with the characters in your story, the more likely they are to be influenced.

*"If I'm a middle class retiree, don't tell me stories about the big-wig corporate CEO who got his company to write a check. Tell me stories about people like me."*



Plan ahead:  
it wasn't  
raining when  
Noah built  
the ark.

CARDINAL RICHARD CUSHING

*Famed Fundraiser for the Catholic Church*

1

### INVENTORY YOUR ORGANIZATION'S CORRESPONDENCE

Alumni journals, newsletters, booklets, mass emails. Write it all down. You're going to infiltrate it with your planned giving messaging!

2

### PUT UP A PLANNED GIVING WEBSITE OR WEBPAGE

This can be super simple in the beginning. Just three essentials: talk about bequests and beneficiary designations; make sure your content is donor-centered; give a clear call to action with contact info.

## 7 ALMOST-FREE STEPS TO START A PLANNED GIVING MARKETING PROGRAM

3

### EDUCATE

Remember that list of your organization's correspondence? Start placing articles about planned giving in them. (PS: PlannedGiving.com has a massive library of content if you don't have time to write it yourself.)

4

### ADVERTISE

Create one or two planned giving ads and start rotating them into your organization's publications.

5

### CREATE AN EMAIL SIGNATURE

Make it short, simple and compelling. Not "Visit our website." More like "Make a gift and get guaranteed income for life."

6

### RECORD AN AUDIO SIGNATURE

Think about how many people hear your voicemail every week! Include a simple, donor-friendly message about planned giving on your voicemail recording.

7

### ADD A PLANNED GIVING MESSAGE TO YEAR-END GIFT ACKNOWLEDGEMENTS

*Something like this: Thank you for your generosity this year. Some of your peers are discovering the joy of making their generosity permanent with a gift in their will. It costs you nothing today—but impacts the world forever.*

## Messy and massive to-do lists

Keep a short, clear to-do list of no more than three MIPs (Most Important Priorities) for the day. All other tasks can be jotted into a notebook or on your phone or whatever your system is. Just keep that list out of sight until your MIPs are done. This helps you stay focused and go through the day with a sense of purpose.

• 01



### Saying “yes” to everything

You can't make every one happy and your job description does not require you to always say yes. If you simply don't have the time to lead that meeting, write that letter, or give that interview—just be honest and say you can't do it. (Your short, focused to-do list helps you know what to say “no” to.)

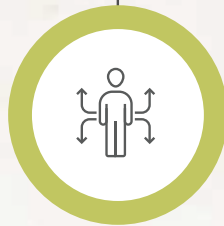
• 02

### Email

The average employee checks email 36 times an hour.<sup>1</sup> Most of us can't just ignore email and leave people hanging. But we can turn off notifications and limit checking email to certain times of the day.

<sup>1</sup> Inc.com

• 06



### Multitasking

Multitasking doesn't work. Stop trying. You will be more efficient and produce better quality work if you focus on one thing at a time. Don't believe it?

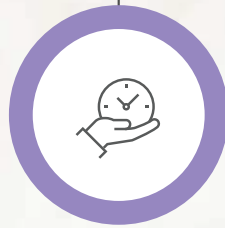
Take this two-minute test—[plannedgiving.com/stop-multitasking](http://plannedgiving.com/stop-multitasking)

• 05

### Procrastinating

Do the hardest thing first. Otherwise it's too easy to waste time finding ways to avoid unpleasant tasks—not to mention the emotional energy we waste worrying about it. Better to just get the tough stuff out of the way.

• 04



### Social Media

We spend on average 142 minutes per day on social networks and messaging.<sup>2</sup> Reclaim some or all of those minutes by using the iPhone's built-in Screen Time app (or something similar) to monitor and limit your time on social media

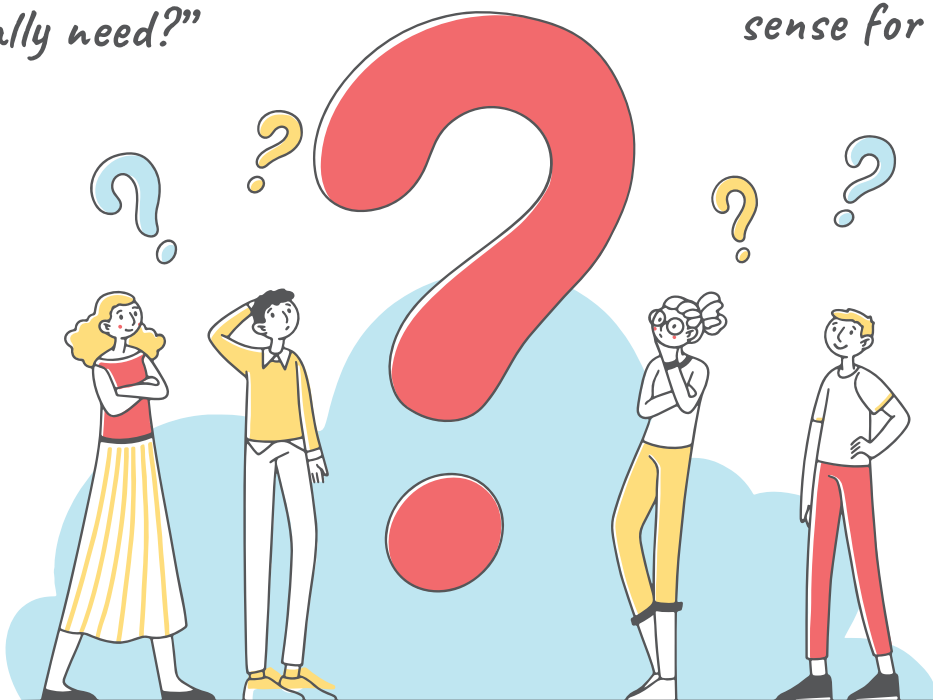
<sup>2</sup> Global Web Index Flagship Report 2018

• 03



# 14 QUESTIONS EVERY DONOR WANTS ANSWERED

1. "Why me?"
2. "Why now?"
3. "Why are you asking me?"
4. "Do I respect you?"
5. "Can I trust you?"
6. "How much do you want?"
7. "How much do you actually need?"
8. "Why your organization over another?"
9. "Will my gift really make a difference?"
10. "Is it easy to give?"
11. "How will I be treated?"
12. "Will I have a say over how you use my gift?"
13. "How will you measure results?"
14. "Are there other ways to accomplish your goal that make more financial sense for me?"



Adapted from Harvey McKinnon's *The 11 Questions Every Donor Asks and the Answers All Donors Crave: How You Can Inspire Someone to Give Generously*, with some additions from [PlannedGiving.com](http://PlannedGiving.com).

# 7 QUALITIES

## of a Good Donor Thank You Letter



### 1 IT ACTUALLY HAPPENS

Only 4 out of 10 donors say they always receive a thank-you letter after they make a donation... which means that the other 6 only get one sometimes or not at all.

*\*Source: The Christian Fundraising Consultancy*



### 2 IT'S PROMPT



First time donors who received a personal thank you within 48 hours were 4x more likely to give again. (That's a 400% improvement!)

*\*Source: Donor-Centered Fundraising, by Penelope Burk*



### 3 IT GETS RIGHT TO THE POINT

I skim, you skim, we all skim everything these days. Imagine the reader is going to spend four seconds glancing at your letter. Put the most important part of the message (the gratitude) at the top.



### 4 IT'S PERSONAL

Avoid Dear Donor or Dear Friend and hand sign it in non-black ink.



### 5 IT MAKES THE DONOR FEEL GOOD

A third of all donors who quit giving say they did so because they felt unappreciated.

*\*Source: Donor-Centered Fundraising, by Penelope Burk*



### 6 IT DOESN'T ASK FOR ANYTHING

Imagine you get a thank you note from a friend for the birthday gift you gave her... and it includes a request for next year's gift. T-A-C-K-Y!

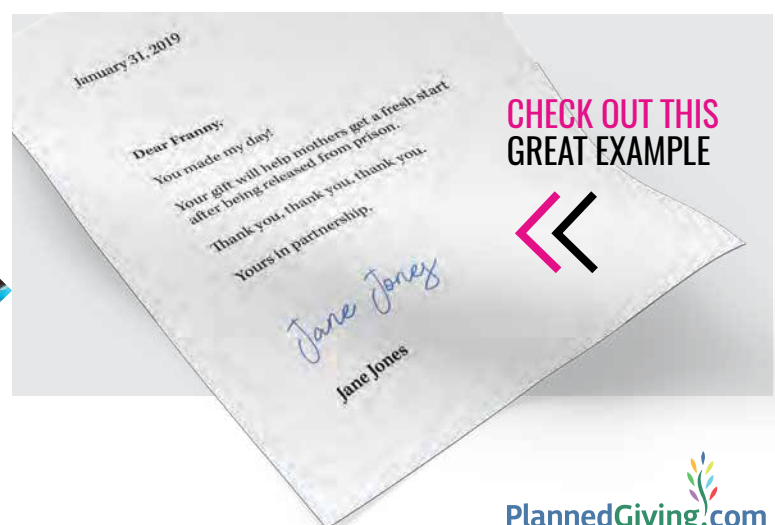


### 7 IT TELLS HOW THE DONATION IS HELPING

Connect the gift to the mission. (You know, the reason people give in the first place!)



### CHECK OUT THIS GREAT EXAMPLE



# ASKING STORIES

# IMPACT STORIES



**Are for donor appeals  
and proposals.**

---

**For donor reports and  
thank you's.**

---



**Make your donor the hero.**

---

You can help Lorenzo get a scholarship and be the first in his family to go to college.

**Make your client and/or  
your donor the heroes.**

---

Lorenzo is the first in his family to go to college—and you helped make it possible.



**Convey a sense of urgency.**

---

If the renovations aren't done by June 1st when school lets out, we'll have to turn kids away.

**Convey a sense of satisfaction.**

---

You did it! We renovated the gym just in time to welcome 450 kids for summer mentoring.



**Do not have an ending—  
because it's up to the donor  
to bring resolution.**

---

**Have an ending—and the  
donor gets credit for it.**

---



**Have obstacles.**

---

**Have victories.**

---



# 27 Estate Documents you need to put in one place\*



## The Essentials

1. Will
2. Letter of Instruction
3. Trust Documents
4. Financial Power of Attorney (POA)



## Marriage and Divorce

5. Marriage License
6. Divorce Papers
7. Military Documents (DD214)



## Health-Care Confidential

8. Personal and Family Medical History
9. Durable Health-Care Power of Attorney
10. Authorization to Release Health-Care Information
11. Living Will
12. Do-Not-Resuscitate Order



## Proof of Ownership

13. Housing, Land and Cemetery Deeds
14. Escrow Mortgage Accounts
15. Proof of Loans Made and Debts Owed
16. Vehicle Titles
17. Stock Certificates, Savings Bonds and Brokerage Accounts
18. Partnership and Corporate Operating Agreements
19. Tax Returns



## Life Insurance and Retirement

20. Life Insurance Policies
21. Individual Retirement Accounts
22. 401(K) Accounts
23. Pension Documents
24. Annuity Contracts



## Bank Accounts/Social Media

25. List of Bank Accounts
26. List of all User Names and Passwords
27. List of Safe-Deposit Boxes



# Now Thinking

# VS.

# Future Thinking



## Now Thinkers

"But we need the cash now!"

"Isn't that a contagious disease?"

"It's Doomsday!"

She takes credit for it, even though she didn't work here 10 years ago.

Is not enough

Chaos

Impatiently for the lottery gift

The latest new shiny star

Intimidated and resentful of them

Event planning party mode

Short term

Are on a hypothetical, someday-maybe to-do list

**On deferred gifts:**

**On CRUTs:**

**On the New Economy:**

**When a bequest planted 10 years ago comes through:**

**Her salary:**

**Thrives on:**

**Waits:**

**Always chasing:**

**Attitude towards wealthy people:**

**Modus operandi:**

**Thinks:**

**Planned Giving conversations:**



## Future Thinkers

"Within 5 years this will be cash now."

"I know exactly where to go for details if that seems to be a good fit for my donor."

"Any new opportunities?"

She celebrates briefly and thanks the family, but she's too busy planning and planting for the future to dwell on it.

Is higher than her counterparts

Strategic planning

Patiently for realistic gifts she's been cultivating

Better, deeper relationships with donors

Loves and respects them

Stewardship mode

Long term

Are part of her weekly interactions with donors

# 8 REASONS DONORS MAKE A PLANNED GIFT

## (AND 2 REASONS THEY DON'T)

THEY TRUST YOU.



THEY FEEL OBLIGATED TO  
GIVE (E.G. BY RELIGION).

THEY BELIEVE IN  
YOUR MISSION.



THEY WANT TAX BENEFITS.

SOMEONE THEY LOVE  
BELIEVES IN YOUR MISSION.



THEY WANT TO LEAVE THEIR  
MARK ON THE WORLD.

YOU HELPED THEM OR  
SOMEONE THEY LOVE.



YOU ASKED AND THEY  
DIDN'T WANT TO SAY NO.

YOU IMPRESS THEM WITH YOUR  
EXTENSIVE KNOWLEDGE OF  
TAX LAWS AND ESTATE PLANNING  
TERMINOLOGY.



YOU HAD ATTORNEYS ADD  
DISCLAIMERS AND FINE PRINT  
TO MAKE YOUR MARKETING DRY  
AS TOAST.

# 11-Point Checklist *for* Gold Star Stewardship



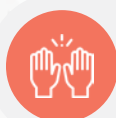
You have a system to ensure thank-you notes get mailed within 48 hours of receiving a gift.



You personally call donors on a regular basis.



Your CEO and board chair personally call donors on a regular basis.



Your donor communications use phrases like "Because of you" and "Look What you did!"



New donors get an especially warm welcome.



Your thank-you letters are personalized.



Your canned thank you letters get rewritten at least once a year.



You publicly thank donors and acknowledge their role in the mission.



You express gratitude to donors without asking them for anything else.



You tell donors what their gifts are accomplishing.



Your donor appreciation is so effusive you sometimes wonder if it's over the top.

# Direct Mail is Alive and Well

Direct mail is more expensive...  
...but has a much higher response rate!

## RETURN ON INVESTMENT



## RESPONSE RATE

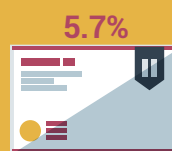


**Bigger  
is better**

Oversized envelopes have the greatest response rates.



Oversize



Postcard



Letter

Even young people  
**OPEN MAIL**



Direct mail response rate  
among people age 18-21 is **12.4%**



It's an investment, **not an expense**

For every **\$167** spent on direct mail in the U.S., marketers sell **\$2,095** in goods.



# 7 WAYS TO INSPIRE & ENGAGE YOUR BOARD



## TELL STORIES

*Remind everyone why they are a part of this.*

## SHARE THE LOAD

*Assign initiatives to pairs and not individuals.*



## DEVELOP SKILLS

*Invest in training that will benefit the organization.*

## EVALUATE

*Solicit regular feedback – internal and external.*



## HONOR PEOPLE

*Openly praise your board members in the community.*

## CLARIFY ROLES

*Ensure everyone knows their roles to avoid conflict.*



## LEAVE THE BOARD ROOM

*Take field trips and create hands-on opportunities.*

# 6 Essential Elements of An Effective Ad

## Catchy Headline

Your headline is the "ad for the ad."

## Good Photo

A quality image that represents your organization well, ideally one that includes a powerful moment.

## Donor-Centered Language

REMEMBER:  
"you" is advertising's most powerful word.

## Subheadings

These break up chunks of text and draw attention.

### INTERESTED?

Joe Smith  
Director of Planned Giving  
800-555-1000  
jsmith@university.edu

State University  
1100 Centre Street  
Anytown, USA 10000



Did you know when you designate retirement plan assets to your heirs, taxes can slice away as much as 65 percent before your loved ones see a penny?

But if you make University the beneficiary of your retirement plan, 100 percent goes to us tax-free!

Consider leaving other, less tax-burdened assets to your heirs and leave your IRA to University.

- » You make a gift to support education for future generations.
- » Your loved ones receive more from your estate.
- » Sorry, Uncle Sam. You've had enough already.

Contact us for more information about how to make your IRA count for education. All it takes is a simple signature.

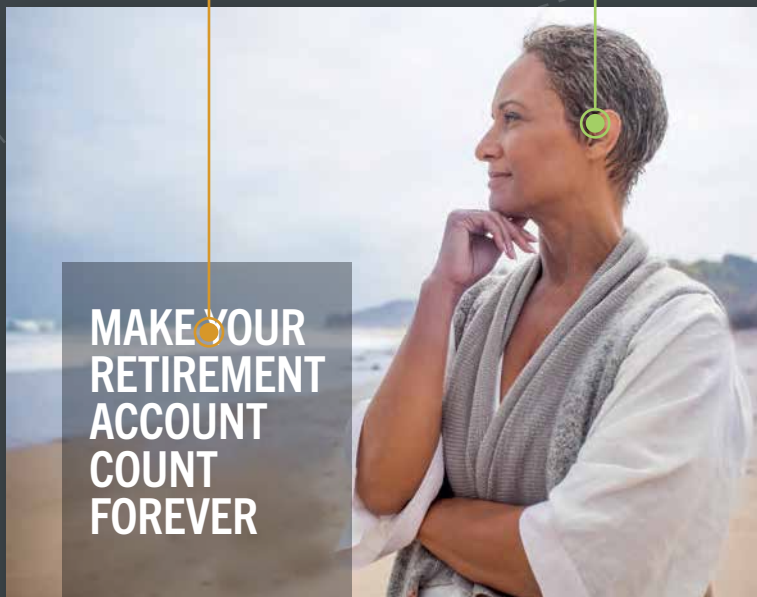
[UNIVERSITY.PLANNEDGIVING.ORG](http://UNIVERSITY.PLANNEDGIVING.ORG)

## Call to Action

Make it crystal clear what simple action step the person should take now.

## Highlights Benefits to the Donor

"Sell the sizzle not the steak."



**MAKE YOUR RETIREMENT ACCOUNT COUNT FOREVER**

**INTERESTED?**

Joe Smith  
Director of Planned Giving  
800-555-1000  
jsmith@university.edu

State University  
1100 Centre Street  
Anytown, USA 10000

**STATE UNIVERSITY**

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Contact us for more information about how to make your IRA count for education. All it takes is a simple signature.

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# WHAT'S HOT WHAT'S NOT

## PLANNED GIVING MARKETING IN 2021

Blended gifts.  
Start with the donor's goal and find the tool(s) that work.

Treating donors as investors and partners.

Informal philanthropy outlets (Kickstarter, GoFundMe).

Collaboration between all branches of development.

Virtual donor events.

Direct mail. It's still king.

Simple language the average person understands.

Language that elicits emotion.

Planned giving messaging on all outgoing communication from your organization.

True, authentic, emotional donor stories in print and video.

# HOT



Calls and Zoom meetings with prospective donors. Get that face time, even if it's virtual.

Multiple touches per year on your prospects. Aim for 21 touches.

Time to pay attention to Gen X-ers and Millennials.

Lengthy planned giving newsletters. (Switch to the Newslet!)

Jargon. Everyone is "making a difference." And stop talking about 'silos' unless you're a farmer.

Overwhelming lists of every conceivable gift plan.



# NOT

COVID. Time to stop framing everything around a virus. Focus on your mission.

Lifeless donor "stories" that read more like a news bulletin or resume.


Haphazard marketing. Make a 1-2 year plan now and stick to it.

Multitasking. It's proven to be less efficient.

D.I.Y. ("Do It Yourself") planned giving websites. Delegate tasks and trust the vendors you hire. Your time is too valuable.

The 40-40-20 Rule (which says the success of your marketing campaign is 40% your mailing list, 40% the offer, 20% the creativity). The new breakdown is more like 60-30-10.

Social media. The majority of people use it as a distractor and a time waster. If you're going to do it, outsource it.



Service to  
others is  
the rent you  
pay for your  
room here  
on Earth.

MUHAMMAD ALI

*Professional Boxer and Activist*

# NUMBERS THAT MAKE YOU GO HMM...



Higher performing charities spent an average of  
**11.5%**  
of their costs going towards administration.\*

Lower performing charities spent an average of  
**10.8%**  
of their costs going towards administration.\*



Median compensation package for a Stanford MBA at age 38:

**\$400,000**\*\*

Average salary for CEO of a \$5 million-plus medical charity in the U.S.:

**\$232,000**\*\*

Average salary for CEO of a hunger charity:

**\$84,000**\*\*



Between 1970-2009...

**144**  
nonprofits crossed the \$50 million annual revenue barrier\*\*\*

**46,136**  
for-profits crossed the \$50 million annual revenue barrier\*\*\*



In 2005...

Save the Children (one of the larger charity advertisers) spent about

**\$6.4M**\*\*\*\*  
on advertising

The Walt Disney Company spent about

**\$2.4B**\*\*\*\*  
on advertising

359x more!



Charitable giving in the U.S. in 1971

**2.1%**  
of GDP.\*\*\*\*\*

Charitable giving in the U.S. in 2016

**2.1%**  
of GDP.\*\*\*\*\*

National spending on health care in 1971

**7.1%**  
of GDP.\*\*\*\*\*

National spending on health care in 2016

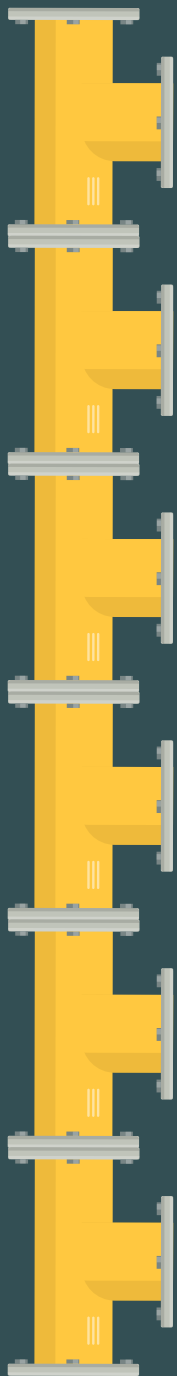
**17.9%**  
of GDP.\*\*\*\*\*



THANKS FOR THIS CONCEPT TO LEAH EUSTACE, FOUNDER OF BLUE CANOE PHILANTHROPY.

# How to Foster Teamwork to Build Your **PLANNED GIVING** PIPELINE

A helpful acronym for development directors.



**L**et everyone know  
you accept planned gifts



**E**xtract data to  
identify candidates



**G**et your donors educated  
about planned giving



**A**dd legacy goals to  
your strategic plan



**C**onsult with  
board members



**Y**ou need to  
drive this



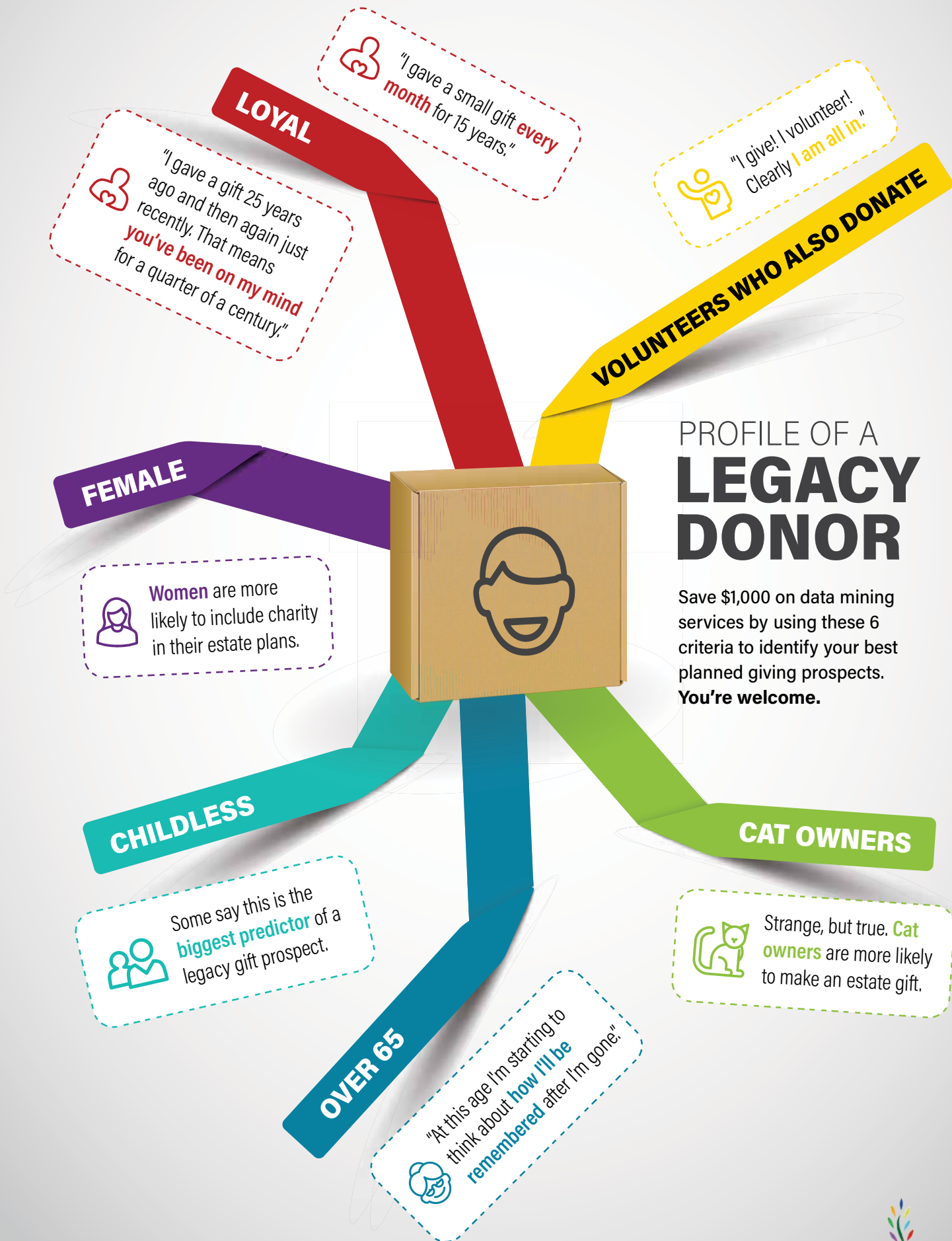
# 12 ATTENTION-GRABBERS

## *for your email subject lines*

Spend a little extra time on your email subject lines and get your message in front of the right people.



People's first impression of your email is usually formed by the subject line. If you only have room for one line of text in your email, make it count by tailoring it to your target audience.





# Goldilocks and the

## Three Types of Planned Giving Marketing

### Too Hot

1. **Offensive.** Show the piece to 10 people. If 8 or more wince, it's over the top.
2. **Spammy.** If you got this from another organization would you mark it as spam?
3. **Dishonest.** Fake donor stories, exaggerated stats... come on, you're better than that.

### Too Cold

1. **Booooooring.** Does your piece mention CRUTs and CRATs and Bequests? Nope. It's a marketing piece, not a legal document.
2. **Safe.** Show the piece to 10 people. If all 10 agree it's "fine," go back to the drawing board.
3. **Complicated.** If the copy reads at a 9th grade reading level or higher, rewrite it.

### Just Right

1. **Refreshingly different—maybe even a little edgy.** Show the piece to 10 people. If 8 say it's fine and 2 take offense, you've hit the sweet spot.
2. **Simple.** The copy is written at a 6th – 7th grade reading level.
3. **Evokes emotion.** It makes you smile or cry or get angry or feel flattered.



"You can play it safe, or you can be heard."

— Viken Mikaelian

AN EASY WAY TO LAUNCH A  
PLANNED GIVING CONVERSATION

# THE 4S

## APPROACH

### TELL A STORY:

*...The soccer team has a new coach and...*



**01**  
STORY



**02**  
STORY

### TELL ANOTHER STORY:

*...When we first broke ground for the new arts building...*

### TELL ANOTHER STORY:

*...Oh! And Susan Miller did a neat thing. Did you know Susan Miller? She graduated two years before you. No? Well, anyway. Susan spent her career helping other people get their finances in order. She recently signed a new will that one day would endow a permanent scholarship for our financial planning students.*

**03**  
STORY



**04**  
SHUT UP



*Be quiet and let the donor start talking.*

# 8 THOUGHTS THAT NEVER OCCUR TO DONORS

"GOSH, I HOPE I HANDLED THAT INTERVIEW WELL ENOUGH TO BE QUALIFIED AS A REAL PROSPECT."

"FORGET THE GREAT ISSUES OF THE DAY; I'D LIKE TO HEAR MORE ABOUT BUDGET RELIEF."

"I'LL BE DISAPPOINTED IF THE NEXT FUNDRAISER I HAVE TO BREAK IN ISN'T MORE METRICALLY DRIVEN."

"I CAN'T WAIT TO HEAR THEIR CEO GIVE THAT WE'RE-THE-BEST-KEPT-SECRET SPEECH AGAIN."

"WHAT A THRILL! THERE'S MY NAME IN SIX-POINT TYPE, WITH THOUSANDS OF OTHERS IN THEIR ANNUAL REPORT."

"THAT FUNDRAISER SHOULD TAKE CREDIT FOR RAISING MONEY FROM ME. I'D STILL BE A SKINFINT IF NOT FOR HIS POWERS OF PERSUASIVENESS."

"IF THEY THANK ME MORE, I'LL STOP ASKING WHAT THEY ACTUALLY DID WITH MY MONEY."

"A NEWSLETTER! AND ADMISSION TO YOUR LEGACY SOCIETY! THAT CINCHES IT. YOU'RE IN MY WILL."

Thanks to Jim Langley, President at Langley Innovations, for this content and for his permission to illustrate and print it here. You can find Jim on LinkedIn and get his book, *The Future of Fundraising: Adapting to Changing Philanthropic Realities* on Amazon.



1 Include something personal from the letter writer, especially in the opening.

2



Sign it in blue ink so it looks like a real signature.

3



Include a response card.

# 7 Magic Touches to Put on Your Donor Appeal Letters



7

Make sure the address is laser printed or, better yet, handwritten. Ink-jet printing screams mass-produced.



4 Don't add anything extra. Enclosures distract from the main point and usually reduce response rates.

4



6

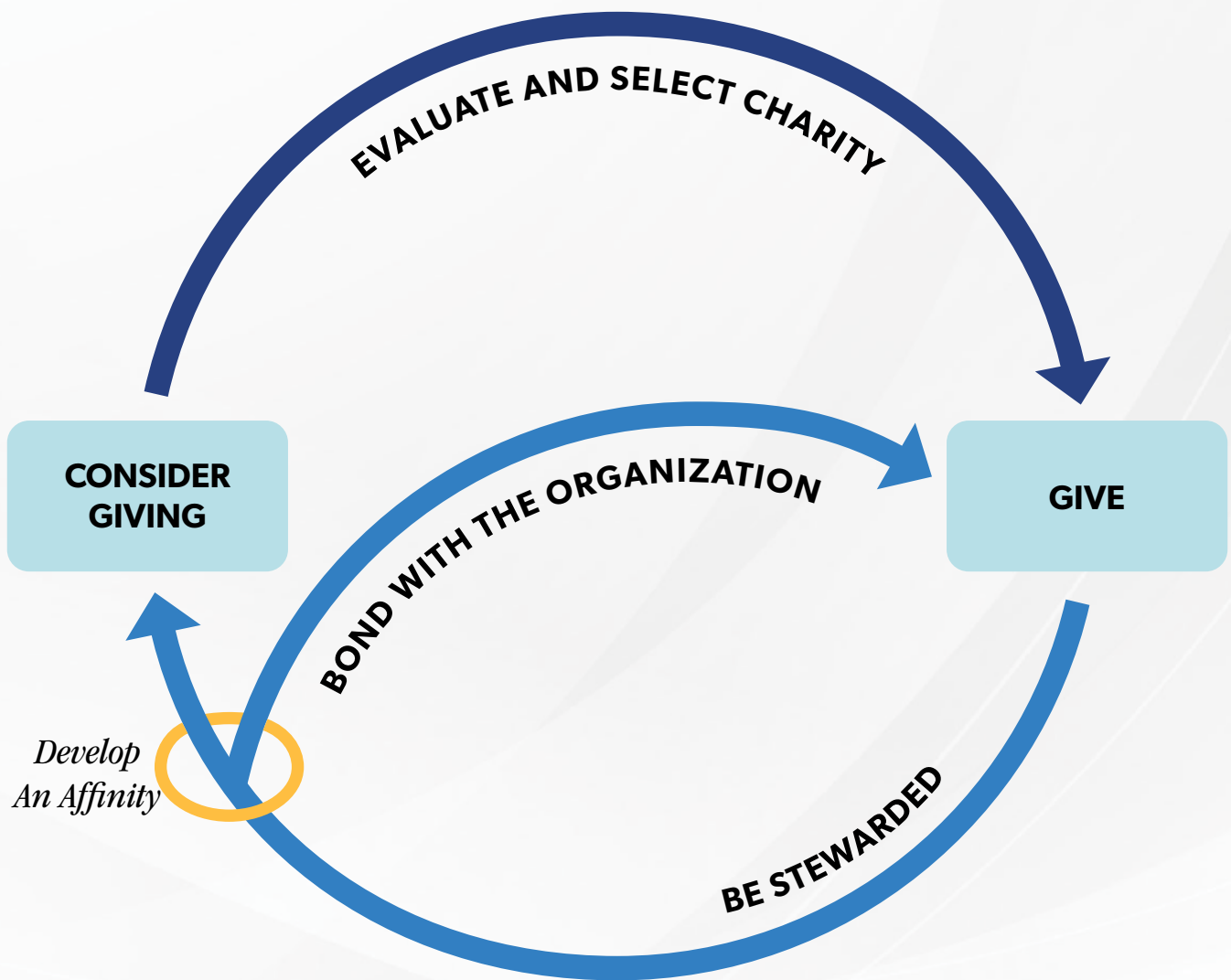
Add a "live" stamp (rather than a metered stamp). Two live stamps adding up to the proper amount are even better.



5

Stick a post-it on the letter with a note and your personal initials.

# THE DONOR DECISION JOURNEY



THANKS TO WYETH WATNIK, MS, FOR THIS CONCEPT.



# 5 TRICKS to Get Anyone to do Anything



## 1. Do them a favor.

When someone does something for us, we feel obligated to do something for them in return. Even tiny acts of giving often result in disproportionate acts in return.



## 2. Give them social proof.

We find safety in numbers. The more people are doing something, the more likely others are to follow.



## 3. Dress and act sharp.

Suits, uniforms, titles after names—it doesn't even matter if they are actually powerful or if their expertise is relevant. We listen to people who seem important.



## 4. Be likable.

People say yes to those they like. Build rapport and find things in common with people. The more likable you are, the more times you'll hear "yes."



## 5. Create scarcity and urgency.

We all want what we can't have. Set deadlines, create waiting lists, make yourself or your services hard to get and people will want it even more.



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Over 100 infographics at:  
**[pg.tips/infographics](https://pg.tips/infographics)**

# The Zoology of Fundraising:

More Chameleons, Fewer Peacocks



## Curious Chameleon

Mid-level introvert

More comfortable listening  
than speaking

Adapts to donors communication  
styles and sensibilities

Wins donors over with their  
patient, polite persistence

Listens to gain insight into donors'  
animating passions

Sees themselves as facilitators  
and orchestrators

Collaborates with colleagues

Eager to learn more, no matter  
how accomplished

Shares information to build  
shared knowledge base



## Posturing Peacock

Full-blown extrovert

Loves talking, uncomfortable  
with silence

Sees themselves as  
“educating” donors

Secures some gifts but  
sustains few relationships

Listens for what they  
want to hear

Fancies themselves as  
masters of persuasion

Resents others for intruding  
in their realm

Bristles at the mention  
of “training”

Hoards information to build  
personal power base

# 4 Prospect Engagement Levels

## 1. Informational

**Examples:**  
Brochures, speeches

**Upside:**  
Raises awareness

**Downside:**  
Offers no opportunity to  
react, opine or participate



## 2. Consumable

**Examples:**  
Galas, golf tournaments

**Upside:**  
Relationship building

**Downside:**  
Create their own following,  
don't strengthen affinity for  
sponsoring organization



## 3. Experiential

**Examples:**  
Onsite expositions,  
expert demonstrations

**Upside:**  
Showcases best people  
doing their best work

**Downside:**  
Participants are largely  
passive observers



## 4. Contributory

**Examples:**  
Boards, task forces,  
blue ribbon panels, problem  
solving, plan development

**Upside:**  
Allows talented people  
to lend their expertise  
to mission advancement

**Downside:**  
None



# 6 Tips *for* Powerful Planned Giving Stories

1



## Talk about one bequest donor

*One person's story makes a stronger impression than a summary of several stories.*

4



## Write stories in first person

*Let the donor's voice be heard: "I wanted my family to know what values are most important to me."*

2



## Make a bonus video

*Shoot a quick video with your phone so people can see and hear the storyteller.*

5



## Include details

*Be descriptive. Details of sight, sound, touch, smell and taste brings stories to life.*

3



## Keep it simple

*Avoid using Planned Giving jargons. Best to use normal, everyday language.*

6



## Add a call to action

*The story evokes emotion and piques interest—be sure to give people a clear action step.*

# YOUR IRA CAN HELP A FAMILY IN NEED TODAY!

70 ½ years or older? There's a simple way to benefit your community and get tax benefits in return!

## BENEFITS OF GIVING TO {ORG} FROM YOUR IRA

### SEE & FEEL THE IMPACT

Your gift gives thousands of people in your community hope and help.



### PAY NO TAXES



Give from \$500 to \$100,000 and pay no income taxes on the gift. Receive a tax benefit even if you do not itemize.

### SATISFY IRA DISTRIBUTIONS REQUIREMENTS

Your charitable distribution to {ORG} can satisfy all or part of the amount of your minimum distribution from your IRA.



### YOU CAN MAKE A DIFFERENCE

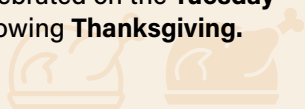
To learn more, contact your financial advisor or {NPO representative} at 800-555-1000 or [jsmith@npo.org](mailto:jsmith@npo.org)

# #GIVING TUESDAY



## WHEN

Celebrated on the **Tuesday** following **Thanksgiving**.



## WHY DID IT START?

A response to consumerism in the post-Thanksgiving season



## THIS YEAR:

November 28th. The 8th year of **Giving Tuesday**

## WHO

## STARTED IT?

New York's 92nd St. Y and the United Nations Foundation



150+ countries participate

## BIG TOTALS RAISED...



## THE BIGGEST FUNDRAISING PLATFORMS:

\$64m



\$60.9m

\$45m



\$27.7m

\$10.2m



\$XXm

## ...SMALL AVERAGE GIFT SIZE:

**\$105**

## YOUR OPINION:

Are you doing a #GivingTuesday campaign?



## [PLANNED] GIVING TUESDAY

#GivingTuesday is a good time to consider ways of supporting our future with a gift in your will or trust.



### Planned Giving subject line idea:

Subject: **Looking to the Future on #GivingTuesday**

Dear Donor,

The *Anatomy* of a

# Successful Planned Giving Marketing Person



He is constantly learning from how successful businesses and nonprofits do marketing.



Uses his mouth mainly to ask questions.



Regularly picks up the phone to call donors and community partners and writes personal thank-you notes.



Gets out of the office and meets with people face-to-face.



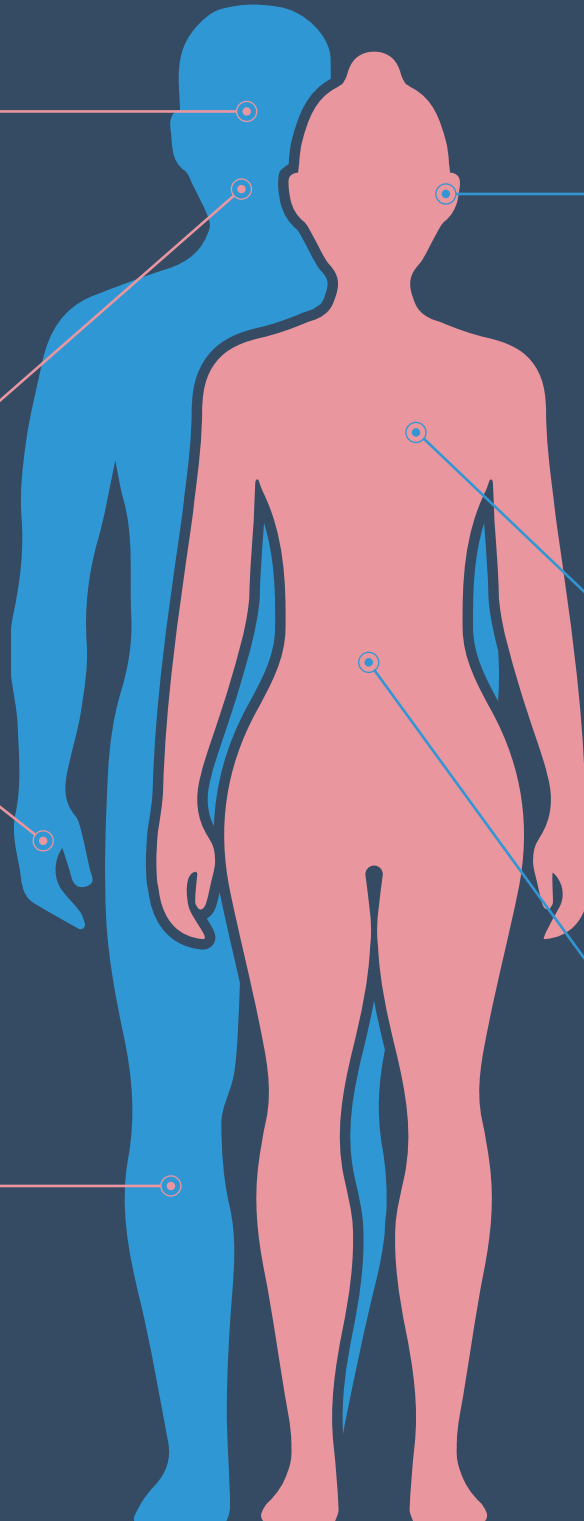
Listens more than she speaks.



Believes in the mission she is selling on an emotional level and knows how to connect with her donors' emotions.



Knows the marketing "rules" well enough to trust her gut instincts, even if it means breaking the rules sometimes.



**Change will not  
come if we wait for  
some other person  
or some other time.  
We are the ones we've  
been waiting for.  
We are the change  
that we seek.**

P R E S I D E N T   B A R A C K   O B A M A

We always say that in Planned Giving, people skills are far more important than technical skills. Why? Because people give to people, not to institutions.

Yet sometimes, even the most socially adept among us need a little help to get the conversation started. That's why we've developed these 15 conversation starters. Use them the next time you meet with a donor or prospect. They'll help break the ice, establish trust, and get you started on the path to building a meaningful, mutually beneficial relationship.

### Are you named after someone in your family?

1

This will give you a glimpse into the donor's family life, and give them a chance to talk about someone who may have been important to them. Side note: Be sure to write your donor's name down, and ask for the correct spelling.

### Where did you grow up?

2

People generally like talking about themselves, and a glimpse into their past can reveal a lot about their motives and beliefs.

### What is the biggest change you've seen in your lifetime?

3

This is an especially poignant question for older donors, but we've all seen something that's affected us and our outlook on life.

### Who knows you better than anyone else, and why?

4

This can show you who made a difference in your donor's life; who's truly important to them.

### Do you or your family have any favorite traditions?

5

This question will give you some insight into the most important events and people in your donor's life.

### What are you reading? What is your favorite book/ who is your favorite author?

6

This is a great question for folks who love to read, and their answers can reveal a lot about their personality and what's important to them. If they're not readers, that's OK—you just learned something else about them.

### What do you like to do to relax?

7

Believe it or not, this question can reveal a lot about your donor. You can learn whether they're a workaholic, if they enjoy getting outdoors, the arts, sitcoms, sports ....

### If you could change one thing about (situation that affects world, mission, etc.), what would it be?

8

By finding out what your donor values, you can find out how to help them create a legacy.

### What keeps you awake at night?

9

You might get the same answer as above, or you might learn something new.

### What drew you to (your organization)?

10

Good stewardship starts with finding out what's important to the donor or prospect, and why they might want to help your organization.

### How do you view your financial future as you age?

12

This will help the donor focus on the three finance "buckets": needs (needed to survive), wants (something useful or lacking, but not necessary), and desires (more like a goal). As each bucket fills, the runoff flows to the next bucket. Find out which bucket the donor's philanthropy falls into—wants, or desires.

### "Would you rather" questions. For instance, "Would you rather vacation in the mountains, or on the beach, and why?"

13

This off-beat question can reveal a little more about your donor's personality.

### What's the most important value you think people should hold? Honesty, kindness, empathy, integrity, something else?

14

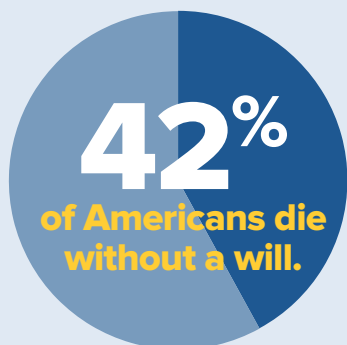
This is an opportunity for your donor to tell you exactly what they value.

### What do you want to be remembered for? What do you want your legacy to be?

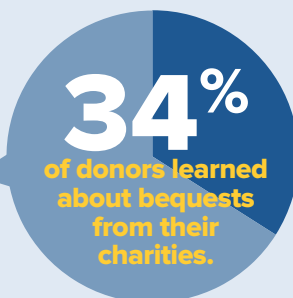
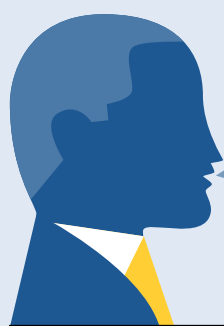
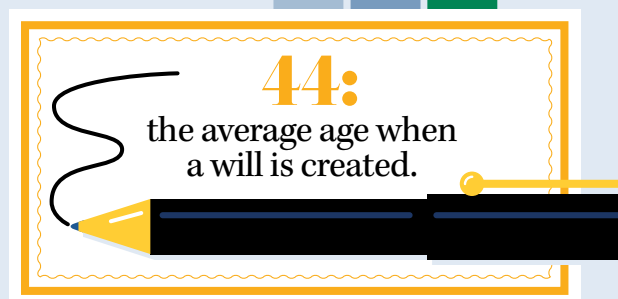
15

This will help your donor decide how they want to invest in their legacy.

# Anatomy of a Bequest

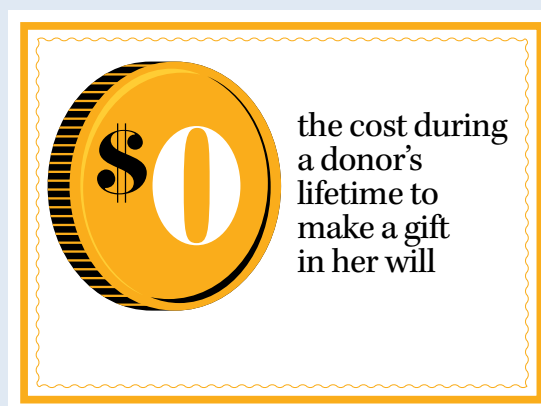
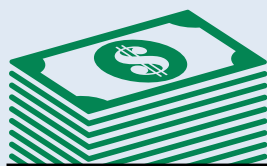


Only  
**1 IN 3**  
donors **told charity** about their bequest in advance.

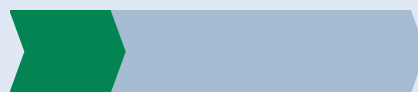


**21%**  
of bequest donors had no prior affiliation with the charity.

**85-92%**  
of all planned gifts are bequests.



While **69%** of donors change their wills...



...only **25%** change a gift in their wills.

# Please choose two.



Here's a list of 31 sample questions you can use in your own interviews, adapted from our white paper by Patrick O'Donnell, *31 Quality Questions to Ask Planned Giving and Major Gifts Donors and Prospects*.

Consider variations on these in the framework of the situation — the interview's purpose, the story you are writing, the donor's personality and life experiences, etc. *Context is everything.* These are not meant to be asked in any particular order, or even in every situation:



What led you to become involved with [ORGANIZATION]?  
What is something you'd like to see your gift [and/or the ORGANIZATION NAME] accomplish?  
What motivates you to stay involved with [ORGANIZATION]?

What inspired you to make your gift?



Has anyone else in your life played a role in supporting your dedication to us?



How did giving your gift make you feel?



Do you have any advice for people considering a gift to [ORGANIZATION NAME]?



Do you have any advice for people who want to [SOMETHING PARTICULAR TO YOUR MISSION]?



Where did you grow up?



How do you feel your childhood shaped you?



What is something you believed as a child that you view differently today?

Do you have any advice on life, learning, and success that you can share?  
What is the biggest change you've seen between [START OF PARTICULAR CAREER/HOBBY/TIME PERIOD] and today?  
What is the biggest change you've seen in your lifetime?



What do you do to relax?  
What are your hobbies?

Can you name something that your parents, or someone else important in your life, taught you that has served you well?

What advice would you offer for someone to follow in your footsteps as a [CAREER, TITLE, ACCOMPLISHMENT, ETC.]? (For example: "As the CEO of a Fortune-500 company, what advice would you give to those who wish to follow a similar career path?" or "As a woman who has balanced both career and family, what advice would you give for other working mothers?" )

If you could change one thing about [SITUATION THAT AFFECTS WORLD, MISSION, ETC.], what would it be?  
When you experienced [EVENT, VICTORY, TRAGEDY, ETC.], what were you thinking at the time? How were you feeling?  
What is your favorite memory of [CAREER, CHILDHOOD, EVENT, ETC.]?

What is something people would be surprised to learn about you?

How did you meet your spouse?  
Can you tell me a little about that?

Of all the places you've traveled, can you name three that really stand out, and what made them special or different?

What is something you wish [CHILDREN, THE CURRENT GENERATION, ETC.] learned today that you learned as a child?

What's your favorite food?  
What's your favorite drink?



Where did you go to school as a child?  
What were the circumstances that led to your attendance there?

What's your favorite color?  
What's your favorite smell?

What one piece of advice would you give to future generations?  
Can you think of any questions I missed? Are there any questions you would have asked if our roles had been reversed?

# Critical Elements in a Successful Story

Webinar With Lise Twiford and Viken Mikaelian

**Those who  
tell the stories  
rule society.\***

Plato



**They also  
raise a lot  
of dollars!†**



Viken

We process a story differently than a rational discussion. Studies show that the more emotional a story is, the more oxytocin, or empathy, it can produce and therefore the more captivating the story can be. We're just wired this way.

**01** Keep it simple

**02** Inject emotion & empathy

**03** Some tension

**04** Be personal

**05** Know it by heart

**06** Have a purpose

**07** Must have a hero

**08** Appeal to all 5 senses

**09** Use power of suggestion

**10** Deep humor if possible

\*True quote. †Another true quote.



# 9 QUALITIES OF A GOOD NONPROFIT LEADER

YOU'RE WILLING  
TO MAKE  
UNPOPULAR  
DECISIONS.

①

YOU ARE  
HONEST AND  
TRANSPARENT.

②

YOU LOVE  
WHAT YOU DO.

③

YOU  
RECRUIT  
HELP.

④

YOU THINK  
OUTSIDE  
THE BOX.

⑤

YOU  
TAKE  
RISKS.

⑥

YOU DO THE  
RIGHT THING.

⑦

YOU TRUST  
YOUR EMPLOYEES.

⑧

YOU HAVE  
STRONG BUSINESS  
PRINCIPLES.

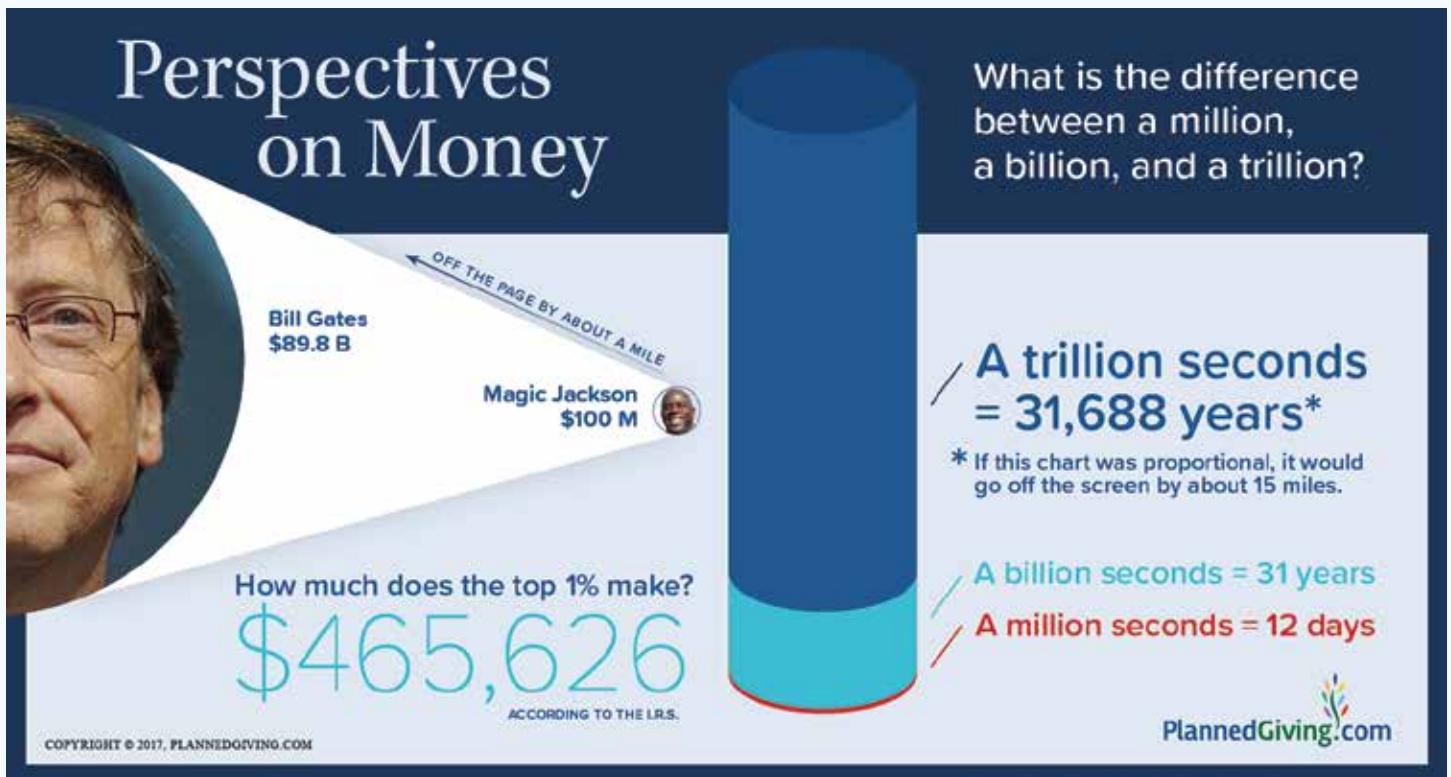
⑨

# DONOR GIFT FOLLOW UP CHART

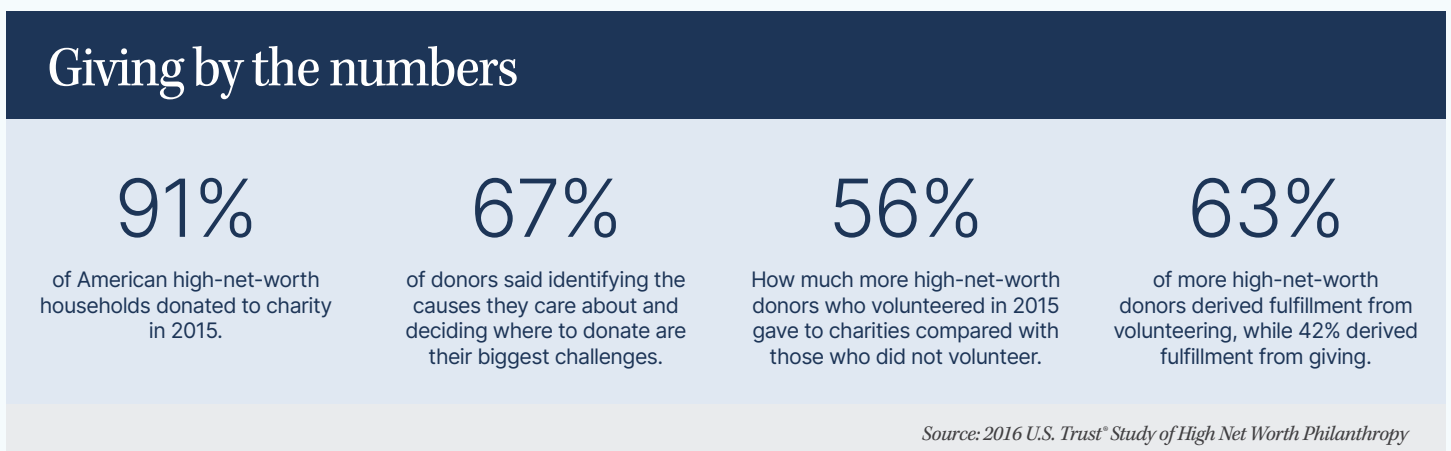
	\$99 or less	\$100- \$499	\$500- \$999	\$1,000- \$4,999	\$5,000 or more
Thank you email (within 24 hours)	✓	✓	✓	✓	✓
Personal note from a board member	✗	✗	✗	✗	✓
Invitation to recognition event	✗	✗	✓	✓	✓
Marketing piece	✗	✓	✓	✓	✓
Issuance of a tax receipt	✓	✓	✓	✓	✓
Letter from the CEO/President	✓	✓	✓	✓	✓

# If you ever hear someone mention a millionaire and a billionaire in the same sentence, they do not know what they are talking about.

An income earner of \$100,000 is closer to a millionaire, than a millionaire is closer to a billionaire. Study the chart below.



Know your numbers before you speak with a Philanthropist.



# If You Lose Your Advancement Job

THE DO'S AND DON'TS

## DON'T



**1.** Think of yourself as unemployed



**5.** Badmouth the organization that laid you off



**2.** Say you're "open for work" (sorry LinkedIn)



**6.** Use your former co-workers as a support group



**3.** Offer yourself as a consultant, providing the usual services



**7.** Assume "Oh, they'll never contract out for that"



**4.** Try to be something you aren't or make grandiose claims



**8.** Wait for things to return to normal

## DO



**1.** Think of yourself as a new business owner



**5.** Think of your last employer as your first client



**2.** Say you're "offering contract services"



**6.** Recruit your former co-workers to be your inside advocates



**3.** Describe the specific services you are able to provide



**7.** Remember downsized operations will outsource more and more



**4.** Offer to do what you've always done best



**8.** Get a jump on the new normal

# 7 Myths

## Your Planned Giving Prospects Might Believe

1

*"My estate isn't big enough."*



2

*"I need to provide for my family, so I can't leave a charitable gift in my will."*



3

*"I need to provide for my family, so I can't leave a charitable gift in my will."*



4

*"Estate planning is for old people."*



5

*"Creating a will is complicated and expensive."*



6

*"I must have a will in order to leave a planned gift."*



7

*"I need to have all the answers now."  
(Planned giving officers are also guilty of believing this one!)*



# 21 Touches on a Planned Giving Prospect

1.



SHE SEES THE PAGE ON YOUR WEBSITE WITH STORIES OF PEOPLE JUST LIKE HER WHO HAVE MADE PLANNED GIFTS.

2.



SHE GETS AN EMAIL FROM YOU WITH A HELPFUL ARTICLE ON ESTATE PLANNING.

3.



SHE SEES A PLANNED GIVING AD WHILE FLIPPING THROUGH YOUR ORGANIZATION'S NEWSLETTER.

4.



SHE RECEIVES AN INVITATION TO A DONOR EVENT.

5.



SHE GETS A FRIENDLY JUST SAYING HI EMAIL FROM YOU.

6.



SHE RECEIVES A HAPPY THANKSGIVING CARD.

7.



SHE ACCEPTS THE INVITE TO LIKE YOUR ORGANIZATION'S FACEBOOK PAGE WHERE PLANNED GIVING MESSAGES APPEAR AT LEAST WEEKLY.

8.



SHE UNEXPECTEDLY RECEIVES A HAPPY HALF BIRTHDAY CARD.

9.



SHE NOTICES YOUR EMAIL FOOTER: "A GIFT THROUGH YOUR WILL COSTS YOU NOTHING DURING YOUR LIFETIME."

10.



SHE RESONATES WITH A STORY YOU MAILED WRITTEN FROM THE POINT-OF-VIEW OF ONE OF HER PEERS WHO MADE A PLANNED GIFT

11.



SHE GETS AN EASY WAYS TO GIVE POSTCARD TOWARDS THE END OF THE YEAR.

12.



SHE APPRECIATES GETTING A PHONE CALL FROM SOMEONE INFLUENTIAL AT THE ORGANIZATION.

13.



SHE LOVES THE HANDWRITTEN THANK YOU NOTE THAT CAME AFTER HER LAST DONATION.

14.



SHE IS HONORED TO BE ASKED TO TELL HER STORY OF BEING A SUPPORTER.

15.



SHE APPRECIATES THE FREE BOOK ON ESTATE PLANNING YOU SENT HER.

16.



SHE SMILES AT THE VALENTINES DAY POSTCARD SHE GETS "ARE YOU OUR SECRET ADMIRER?"

17.



SHE READS ALL OF THE INFORMATIONAL ARTICLES YOU SEND DURING NATIONAL ESTATE PLANNING AWARENESS WEEK

18.



SHE ACCEPTS YOUR INVITATION TO TAKE HER ON A TOUR OF YOUR ORGANIZATION'S NEW FACILITY AND OUT TO LUNCH AFTERWARDS.

19.



SHE LAUGHS AT THE CARTOON ABOUT WRITING YOUR WILL ON YOUR FACEBOOK PAGE.

20.



SHE GOT TEARY EYED WATCHING THE VIDEO YOU SENT HER WITH AN ELDERLY MAN TALKING ABOUT THE LEGACY HE WANTED TO LEAVE TO HIS FAMILY AND THE CAUSES HE CARED ABOUT.

21.



SHE NOTICES THE MESSAGE PRINTED ON HER MONTHLY GIVING RECEIPTS: "PLEASE CONSIDER MAKING US PART OF YOUR LEGACY WITH A GIFT IN YOUR WILL."

Then one day, she finds herself sitting in her attorney's office to update her will. She says, "There's a charity I'd like to include in my will..."

# MAJOR GIFT FUNDRAISING CYCLE



# **11** OPEN-ENDED QUESTIONS TO ASK DONORS



**1**



What is something you'd like to see your gift accomplish?

**2**



What inspires you to give to charity?

**3**



How did giving your gift make you feel?

**4**



Do you have any advice for people considering a gift to our organization?

**5**



What is something you believed as a child that you view differently today?

**6**



What is one of the biggest changes you've seen in your lifetime? Would you say it's overall a positive change or negative?

**7**



Tell me about something your parents, or someone else important in your life, taught you that has served you well?

**8**



If you could change one thing about the state of the world what would it be?

**9**



How did you meet your spouse?

**10**



What is something you wish today's youth learned that you learned as a child?

**11**



Can you think of anything I missed? What questions would you have asked if our roles were reversed?

# 6

## ELEMENTS OF EXCELLENT DONOR STEWARDSHIP



01

Send a  
prompt  
tax receipt

Give a prompt  
and personal  
“thank you”

02



03

Acknowledge  
donors publicly

Inform donors  
about the  
mission

04



05

Show outcomes

Invite them  
to give again

06



“If I can show you a way to redirect your taxes to benefit your family, your community and our mission, will you give me a half an hour to discuss that with you?”

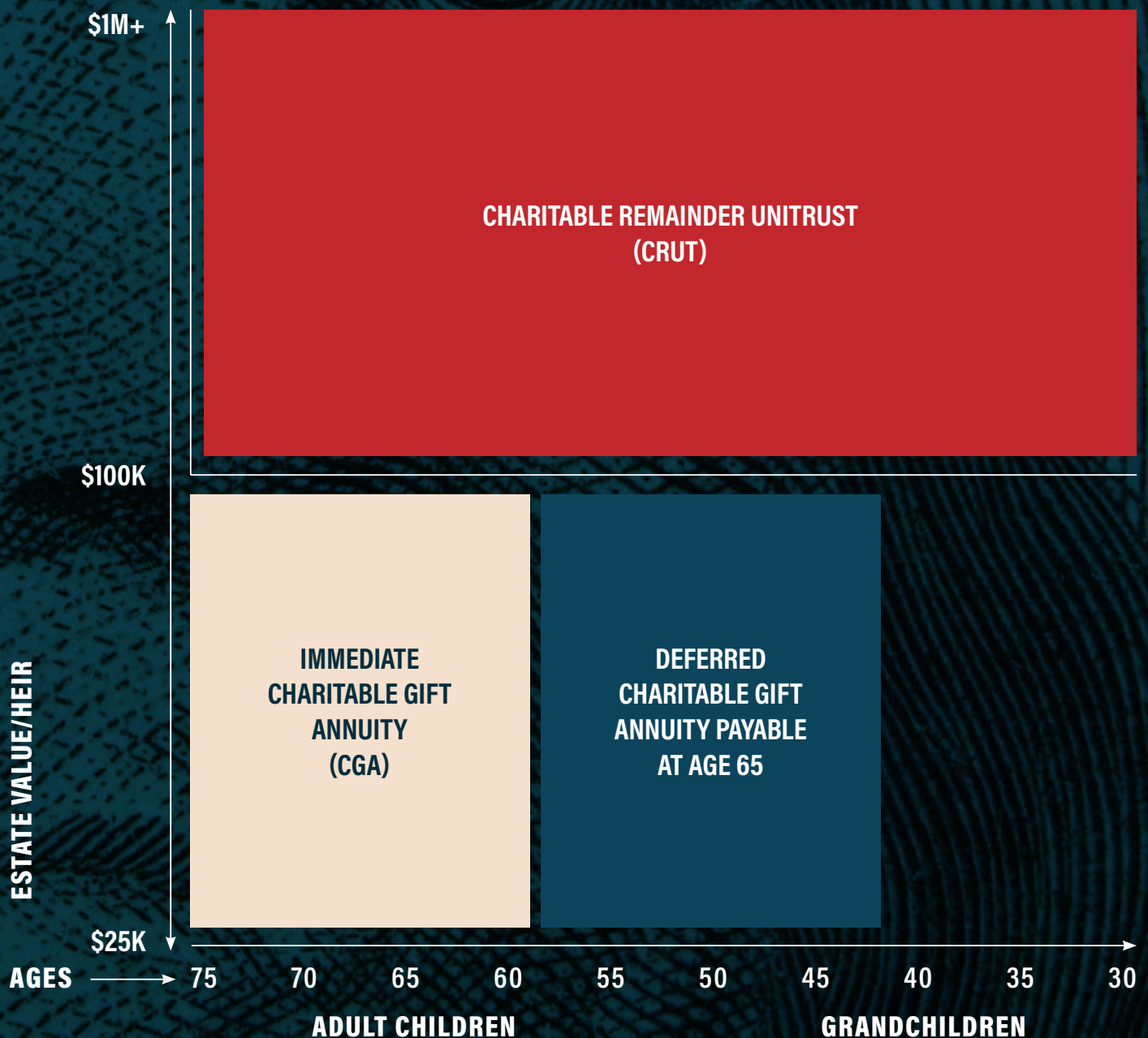


**Courtesy of Jack Miller**

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# Replacing the “Stretch IRA”

(LIFETIME INCOME FOR YOUR ADULT CHILDREN)



# 14 Conversation Starters

Who are you named after?

Where did you grow up and what was it like?

What is the biggest change you've seen in your lifetime?

Who knows you better than anyone else?

What are some of your favorite family traditions?

What are you reading these days?

What do you like to do to relax?

If you could change one thing about (situation that affects the world, mission, etc.) what would it be?

What keeps you awake at night?

What drew you to (your organization)?

How have your views on finances changed as you've gotten older?

Would you rather vacation in the mountains or the beach? (And why?)

What are your top three most important values?

What do you want to be remembered for?




## NOTES

[illegible]

“A society grows great when old men plant  
trees in whose shade they shall never sit.”

GREEK PROVERB



  
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