TOP 10 IDEAS TO GROW YOUR PLANNED GIVING PROGRAM

OR HOW TO PROVIDE SUSTAINABILITY FOR YOUR ORGANIZATION WITHOUT HAVING TO SELL A KIDNEY OR TWO

What is Planned Giving?

- Planned giving is defined as “the process of making a significant charitable gift during a donor’s life or at death that is part of his/her financial or estate plan.”
- As a practical matter, a planned gift is a major gift that a donor makes during their lifetime but the charity doesn’t receive until after the donor’s death.
- In many organizations, funds raised from bequests and other planned gifts are an increasingly important income stream.

Planned Giving or Gift Planning: WHY?

- Planned or deferred gifts are often much larger than lifetime gifts.
- Statistically, this will be the **largest** gift your donor makes.
- A sign that your donor holds your organization in the highest regard. They place you where normally a family member goes.

- **So how do you get these amazing gifts/donors…..**

10. Change the narrative: Don’t be afraid of the D-Word

- These are not conversations about death or dying. It’s about LEGACY
- Frame the conversation that way,
  - Leaving a legacy for the future/future generations
  - “Tax smart” ways to make a gift without incurring the interest of the IRS
  - Everyone has some form of an estate—trust, probate estate, beneficiary designations—so anyone can make this kind of gift.
- This is your donor’s opportunity to make a larger and more impactful gift than they ever thought possible.

9. KISS or Keep It Simple Stupid

- At our organizations 90-95% of all planned gifts are bequests made through a will or trust.
- FOCUS ON THESE GIFTS!
- They are usually a specific dollar amount or a % of the residuary

  (lead with residuary gifts as they tend to be larger)

If you do get asked about something more complicated, ask an expert

- NCGPC/AFP list servs and councils
- Connect with peers – local and national organizations
- Call one of us. We love to talk about this stuff

8. Legacy Societies – if you don't have one – launch one!

Great way to identify, recognize and thank planned giving donors

Again, think KISS--Simple Benefits

- Thank You!
- Pins or other swag
- Magazine/calendar
- Invites to events and webinars
- Targeted communication plans (Legacy Society e-newsletters are actually easy)
- WWF—LC survey and affinity groups

WWF—Legacy Circle ; 12,400 members

WWP- Honor & Empower Legacy Society; 600 members (and growing)

7. Gift Acceptance Policies – Mind the GAP!

- If you don’t have some, get some.
- If you have them, review them 3-5 years for accuracy.
- Review or initiation of a GAP will often involve senior leadership and colleagues in accounting/finance and legal.
- The discussion surrounding GAP’s is a great way to get nondevelopment people (esp. leadership) to think about these gifts and their value to the organization.

6. Leadership support

- It is imperative that you get senior leadership, both volunteer and staff on board with supporting your planned giving efforts
- Volunteer Leadership:
  - Do a board presentation about the value of PG now and in the future—lean into
    - "greatest transfer of wealth" conversation
    - low cost of fundraising
    - high average gifts
  - Find members who can be champion for PG – they can make a gift, announce it and cause a chain reaction to inspire others
- Staff Leadership:
  - It's vital that you get colleague buy in, especially in Finance and Legal
  - Staff can a planned gift—from their benefits

5. Data Analytics: Use ‘em or Lose ‘em (please use them…..)

- Use your database as an integral part of your outreach efforts.
- The information in your database is vital to being strategic in your efforts.
  - Age
  - Frequency and length of time giving
  - Single/never married
  - Children or childless
  - Track attendance at events and participation at webinars
  - Don’t forget about lapsed DM donors
- Use that data to determine your best prospects to cast not a wide net but a very strategic and focused one with a limited budget.

4. Marketing: Just like hot sauce, put that stuff everywhere

Put PG related content EVERYWHERE!

- Website – landing page, donation page, PG website!
- Social Media – Facebook (71% of respondents ages 50 and older reported using Facebook, up from 68% a year previously – AARP)
- Share PG donor stories and quotes for inspiration
- Will language on the back of your business card!
- Ads in magazines/publications
- Buckslips in gift acknowledgements
- At the bottom of any acknowledgement letter
- Bottom of your email signature

3. Collaboration is key (or play nice in the sandbox)

- Use other frontline fundraisers. To a donor, a gift officer is a gift officer, not major or planned giving officer. Leverage those relationships for a blended opportunity!
- Be sure your colleagues understand planned giving basics and are comfortable with the conversation about a planned gift. No need to be an expert – if they get a question they can't answer (see #9) it's an opportunity to talk to the donor again!
- Most importantly, make sure they ask for the gift. (no ask-y, no get-ty)
- Think about starting with a low stress shared metric

2. Estate Administration--"realizing" the bequest

It is important to have an individual(s) tracking any incoming bequests and staying on top of the estate administration process.

- While preferably a development position, it could be housed in the General Counsel's office or even Finance.
- Actively following up with attorneys, executors and trustees to ensure that the bequest comes to your organization in a timely manner. (it's what your donor wanted!)
- There are companies/consultants that will do this for a fee so outsource if you need to.

1. Stewardship
Once you have ‘em, you need to keep ‘em

- Most planned gifts are REVOCABLE—donor’s can change their mind about you.
- Stewardship is a VITAL part of your planned giving program.
- Make them feel part of your organization’s “family’—they belong!

- Stewardship Ideas:
  - Legacy Society (#8 above)
  - Communication strategy—digital, print, phone, visits
  - Get to know your donors and check in
  - Surveys
  - Affinity Groups
  - Birthday/Holiday cards
  - Event Invites
  - Program updates
  - Any others?

Idea you can use:
WWF’s Anniversary Mailing

- WWF does a mailing each year to donor’s who have given for the last 20 years
- It’s a thank you card with a note from the CEO
- Simple call to action is “Many longtime members like you have named WWF in their estate plans but have not had the chance to tell us. Please let us know”
- HUGE RESPONSE: received over 200 new intentions from the last mailing in June 2023
- DO THE MATH: That results in over $19 million in potential future revenue

Thanks
to you,
nature
has a voice.

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WWF Anniversary Mailing:
Note from CEO and reply card

THANK YOU!

Thank you for being such a loyal friend to WWF. You are part of a truly special group: dedicated nature lovers who have been WWF members for more than 20 years!

All of us at WWF want to let you know what your support means to us. It means that wildlife has a voice. It means that wild places are not forgotten. In short, we couldn't do what we do without you.

Carter Roberts
President and CEO

WWF

Salutation, many longtime members like you have named WWF in their estate plans but have not had the chance to tell us. Please let us know.

- ☐ I have already chosen to carry on my love for wildlife by including a gift to WWF in my will or estate plan.
- ☐ I am actively considering a gift to WWF in my will or estate plan.

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1250 24th Street, NW | Washington, DC 20037
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You have your assignment-- Any questions?

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