

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS



Marketing Testamentary Transfers

Date: July 28, 2022
 Time: 1:00 pm – 2:30 pm EDT
 Presenters: Carmen Tordiglione
 Sam Samuels

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Take Away**

Steady Drumbeat

- Planned gifts are NOT like annual gifts
- Not often the result of one solicitation
- Steady, consistent, persistent communication over a period of years – or a lifetime

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#1: Annual Fund Reply Slip/Online Giving Forms**

- Paper slips
- Online gift form
- Special appeals
 - #GivingTuesday
 - Department/division



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#2: Ads in Publications

- Far Reaching
 - Embedded in a publication your constituents are likely already reading
- Flexible
 - Donor profiles
 - Ads on certain giving vehicles
 - Repurpose stories
- Steady Drumbeat
 - Unlike annual gifts, planned gifts may take many years of consistent, repetitive messaging - ads deliver that

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Ad Examples

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Ad Examples

A Gift—and Sage Words—to Students

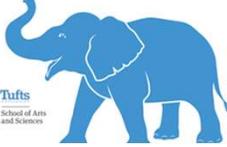
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#5: Postcards

Jumbos, raise your trunk if ...



Pros

- Simple
- Quick
- Cost-effective

Cons

- No reply device

... you included the School of Arts and Sciences in your giving plan

Let us know how you'd like to give. We'll make sure you get it done right.

... you want to support the future of the School of Arts and Sciences

Explore different options

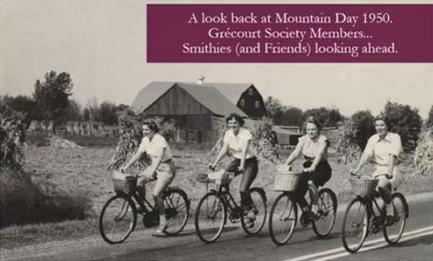
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Postcards

A look back at Mountain Day 1950. Grécourt Society Members... Smithies (and Friends) looking ahead.



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#6: Direct Mail

Reports on paper's death are grossly exaggerated.

Pros of paper

- Trackable
- More eyeball time
- Durable
- Flexible

"I tucked it away."
- Newest CGA donor

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#7b: Legacy Challenges – People Goal**

- Easy
 - To create
 - To talk about
- Age inclusive
- PG voice at the table in high-profile meetings
- Extends Planned Giving Office's reach

Promote, promote, promote!

New Charles Tufts Society Members during the campaign

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#8: Development Officer Partnerships/Training**

Major, Principal and Annual Fund Officers

- Extend the reach of the Planned Giving Office
- Serve as the eyes and ears on the road
- Have built trust with their donors
- Motivated to close gifts – share credit
- Develop clear protocols for who communicates with prospects

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#8: Development Officer Partnerships/Training

**Yesterday, Today, Tomorrow:
The Time for IRA Gifts is Now**

- Virtual or in-person

Property to Possibility

- Two Flavors of Training
 - Full-size workshops
 - Mini-workshops

Assets that Go Bump in the Night

- Marketing workshops to Development Offices is similar to marketing planned gifts to donors

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#9: Webinar

- Offer to lead webinars
- Work with constituencies or subgroups
 - Higher ed – classes and class clusters
 - Special groups
 - Boards, member groups, etc.
- Can be broad or specific topics
 - “Estate Planning 101” vs. “A Deep Dive into Annuities”

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#10: Peer-to-Peer Solicitations

- Volunteer network can include planned giving volunteers
- In education, can have class-based education structure
- Call upon volunteers as ambassadors
- Volunteers can:
 - Raise awareness in class newsletters (or equivalent for non-education)
 - Be signers in letter campaigns
 - Spread awareness through informal channels

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#11: Surveys**

- PG Calc published white paper in Spring 2021:
 - Called Donor Surveys the "Foremost Planned Giving Lead Generation Technique"
- Well-designed survey includes perhaps half-dozen questions, of which only one or two deal directly with planned giving
- Ask meaningful questions that get at what is important to donors
- Bring to mind memories
- Emphasize lasting impact
- Be sure survey works on computer, tablet or phone

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#11: Surveys - Case study, questions**

Liberal Arts College asked the following survey questions of 8,181 alumni:

1. Was there a person who inspired you to come to _____?
2. Many alumni, faculty, parents, and friends have chosen to make a future gift to the college that will allow future generations of students to benefit from the _____ experience. Would you consider a future gift in your estate plans (retirement account, will, trust, etc.)?
3. What do you think is most important to the future of the college?
4. Would you consider a gift guaranteed by _____ that would provide you with annual payments for life?
5. What stands out most to you about your _____ experience? _____

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#11: Surveys - Case Study, results**

- 2,228 responded (27% response rate)
- 70 became legacy society members
- 45 expressed interest in making a bequest
- 62 expressed interest in a life income gift
- 198 intend to make a bequest
- 5 intend to make a life income gift

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Bang for your buck!

- Define success
- Ask questions
 - Is there a certain format that resonates?
 - Are there certain times of year that produce better results?
 - If you did A/B testing, did a subject line perform better than another?
- Admit success (and failure)

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **#12: Tracking Results**

- Source coding
 - Tracks source (when known) of an inquiry
 - e.g.: direct mail, gift officer referral, etc.
 - Helps identify highest ROI activities

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PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS **Have Fun and Be Creative!**

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Thank you!



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