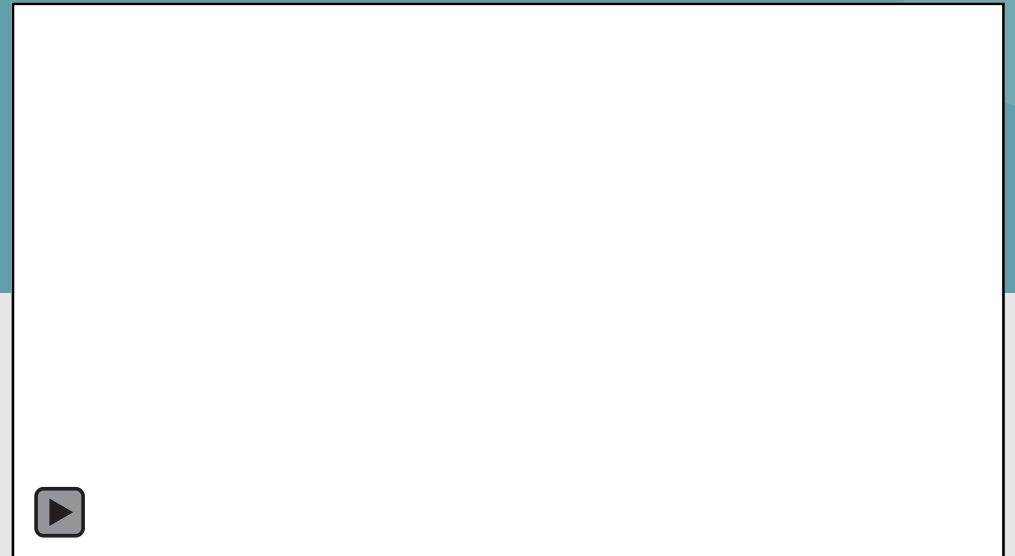


# Metrics Made Manageable: Making Planned Giving Data Work for You

Stacy B. Sulman

Chief Legal Officer

American Committee for the Weizmann  
Institute of Science



# Planned Giving Is Full of Uncertainties

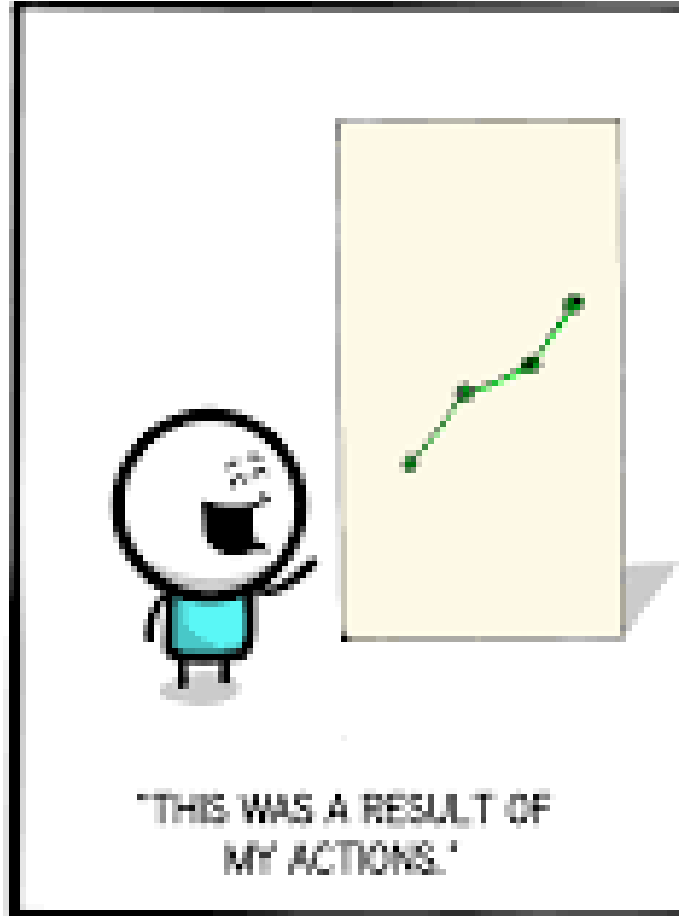
WHEN WILL  
GIFT BE  
REALIZED?

HOW MUCH  
WILL IT BE  
FOR?

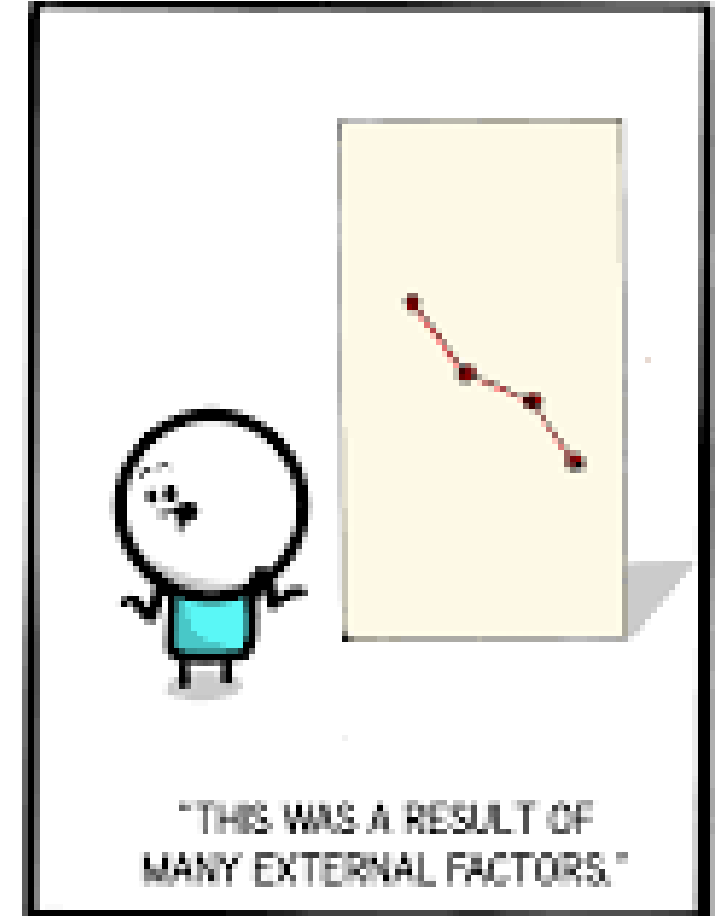
WILL DONOR  
KEEP US IN  
HER ESTATE?

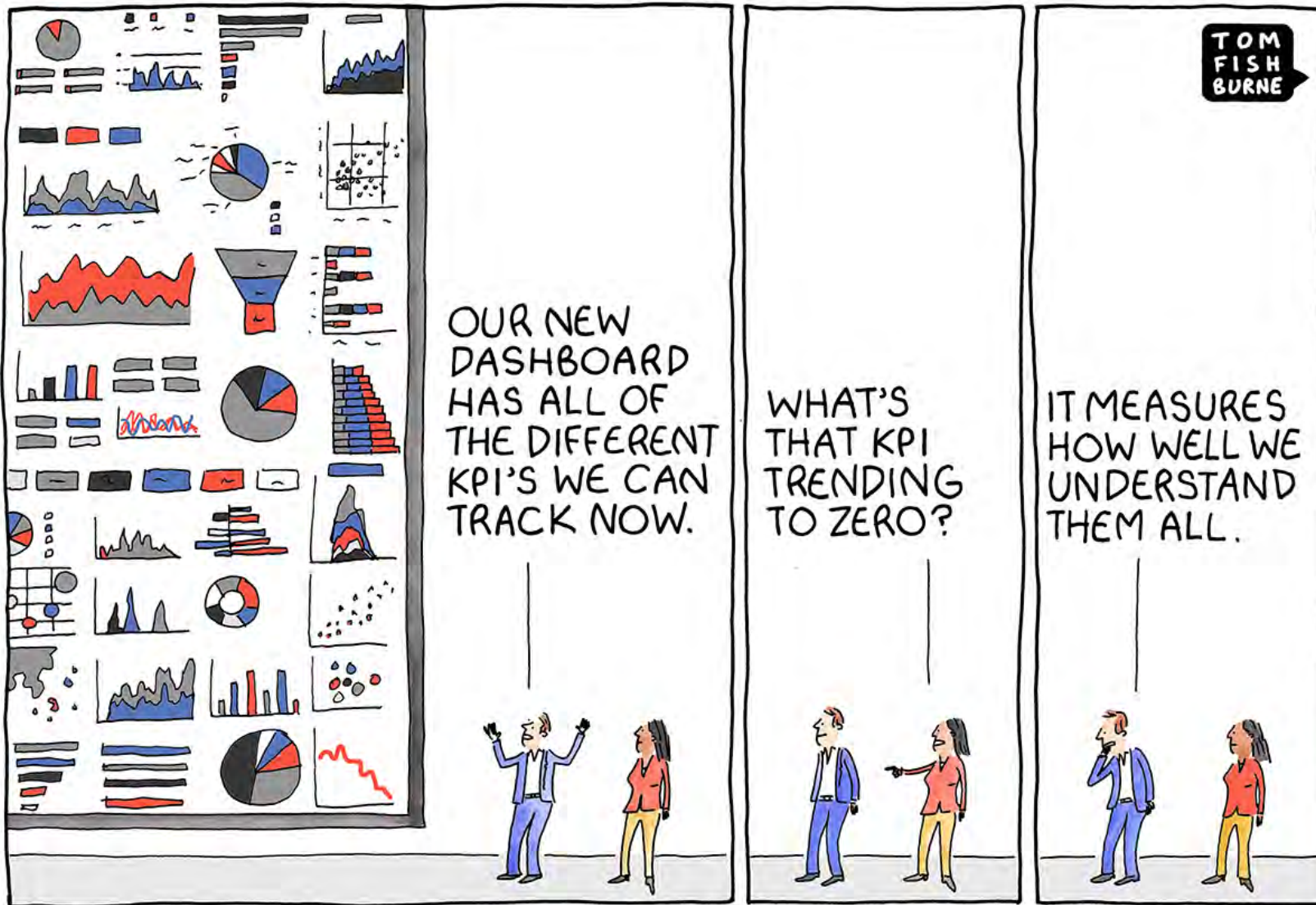
How do you demonstrate success amidst the uncertainties?

WHEN METRICS GO UP



WHEN METRICS GO DOWN







# National Guidelines for Reporting and Counting Gifts

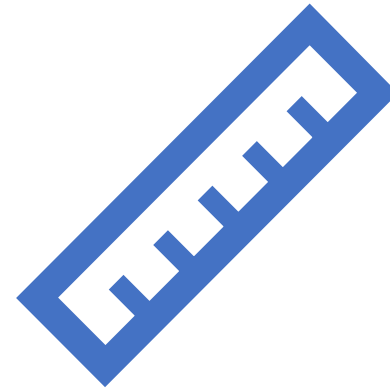
## Three Categories...

- **Category A:** An outright goal for gifts that are usable or will become usable for institutional purposes during the goal-defined camp
- **Category B:** An irrevocable deferred-gift goal for gifts committed during the goal-defined campaign period but that may become usable by the organization at some point after the end of the period
- **Category C:** A revocable deferred-gift goal for gifts solicited and committed during the goal-defined campaign period but in which the donor retains the right to change the commitment and/or beneficiary

# Other Standards



CASE



Different institutions different  
measurements

# Key Definitions



Data – facts and statistics

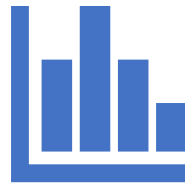


Metrics – method or results of measurement



Trends – general direction

# 5 Steps to Manageable Metrics



# 1. Know your audience

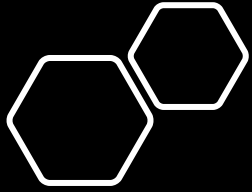


What is their  
motivation?

What story  
do they want  
to hear?

# Who cares

- CEO
- CFO
- Board
- Beneficiary
- Donor



2. What is  
their bottom  
line?

Return on investment formula

$$\text{ROI} = \frac{\text{Net investment gain}}{\text{Cost of investment}} \times 100$$

INSIDER

What does that  
individual or  
body care about?

What do they  
want to see?



### 3. Identify your resources

- What data do you already have:
  - Number of responses to mailings (by type)
  - Program attendees
  - New legacy donors



# What Data Do you have already?



In your CRM

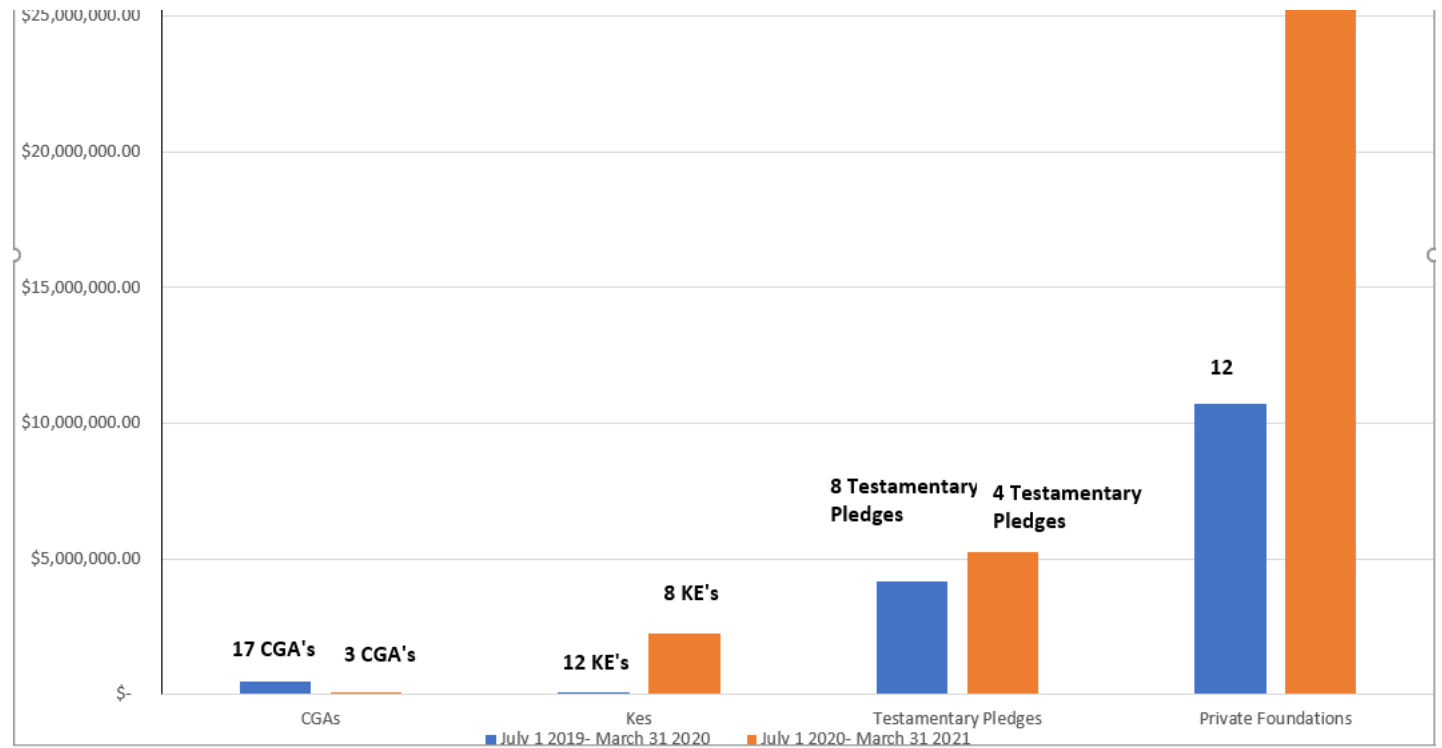


What are you already  
collecting

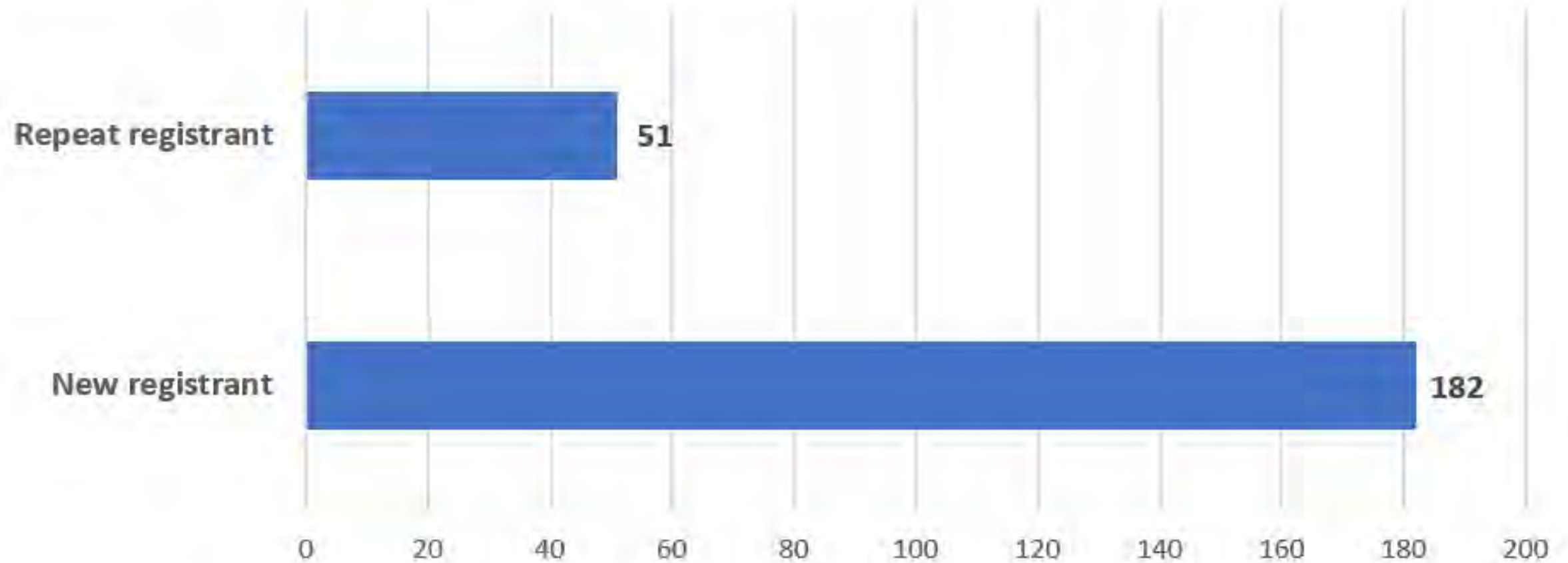


Start with what you have

4. Looks for ways to compare or show change

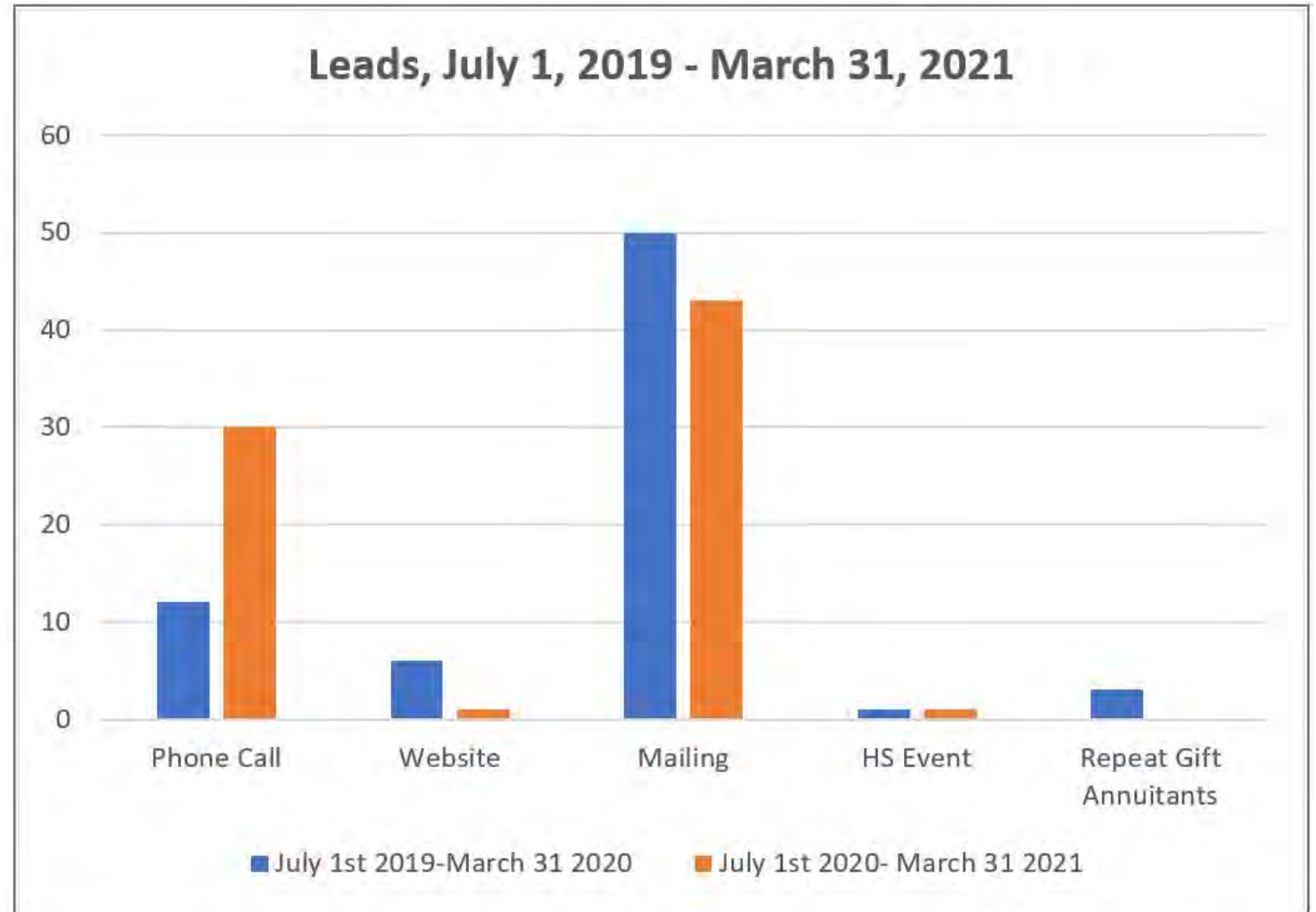


## Legacy Society Events - New or Repeat Registrants

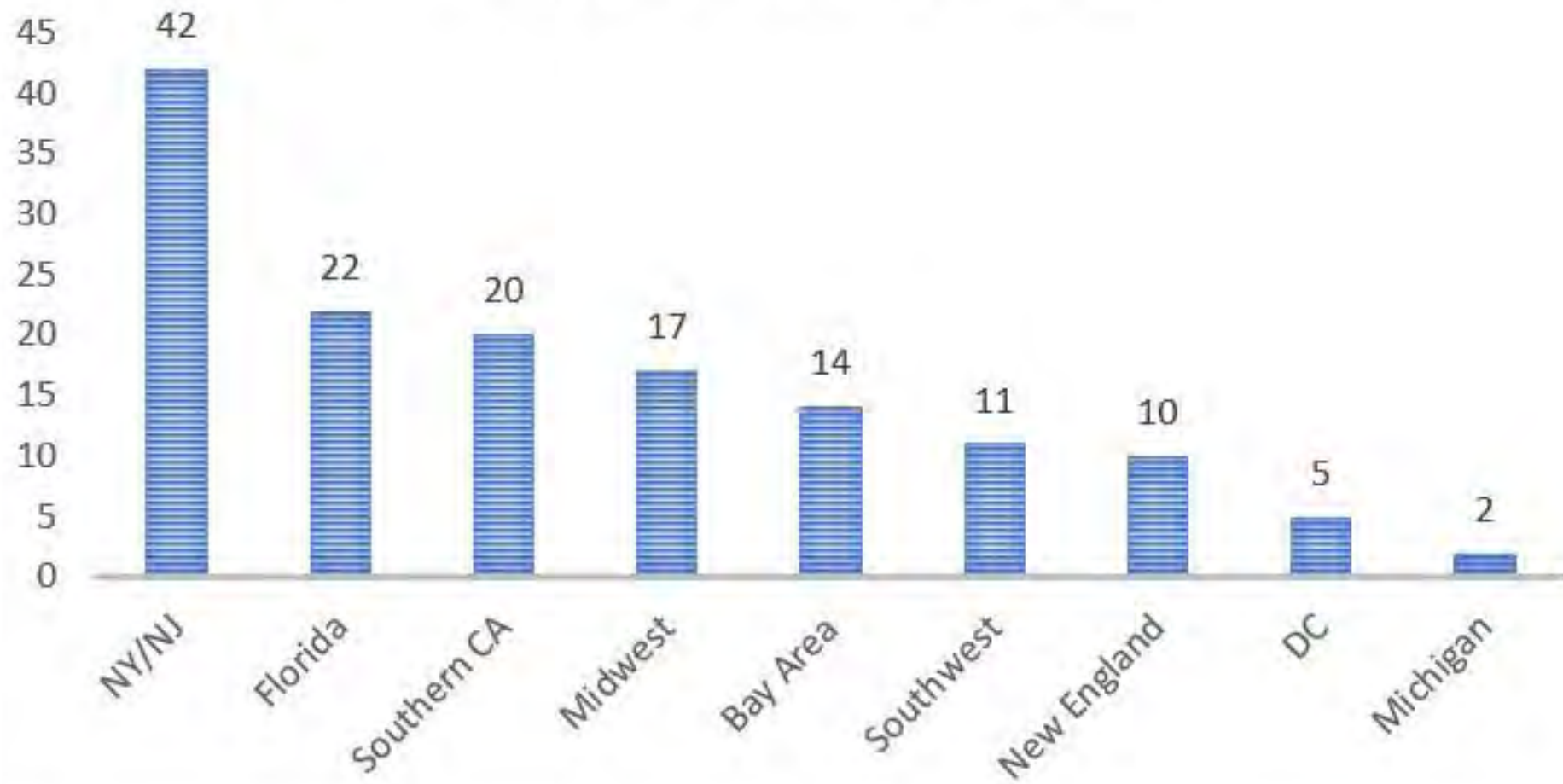


# Responses to Outreach

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## RSVPS BY REGION



## Popular Pages: Dec 2019-Dec 2020



## 5. Demonstrate effectiveness





# Sample questions to answer ...

How do we demonstrate success of legacy programming?



```
graph TD; A[How do we demonstrate success of legacy programming?] --> B[What's the ROI from our direct mail?]; B --> C[Do our planned giving efforts work?]; C --> D[Is our website reaching prospects?];
```

What's the ROI from our direct mail?

Do our planned giving efforts work?

Is our website reaching prospects?

# Summary: Five Steps to Manageable Metrics

- 
1. Define the Relevant Audience.
  2. Identify that Audience's Question and Bottom Line.
  3. What Raw Data Do You Have at Your Disposal?
  4. Develop Simple Metrics That Can Be Used to Compare or Show Change Over Time.
  5. Demonstrate Results – Show Where and How You Are Effective.



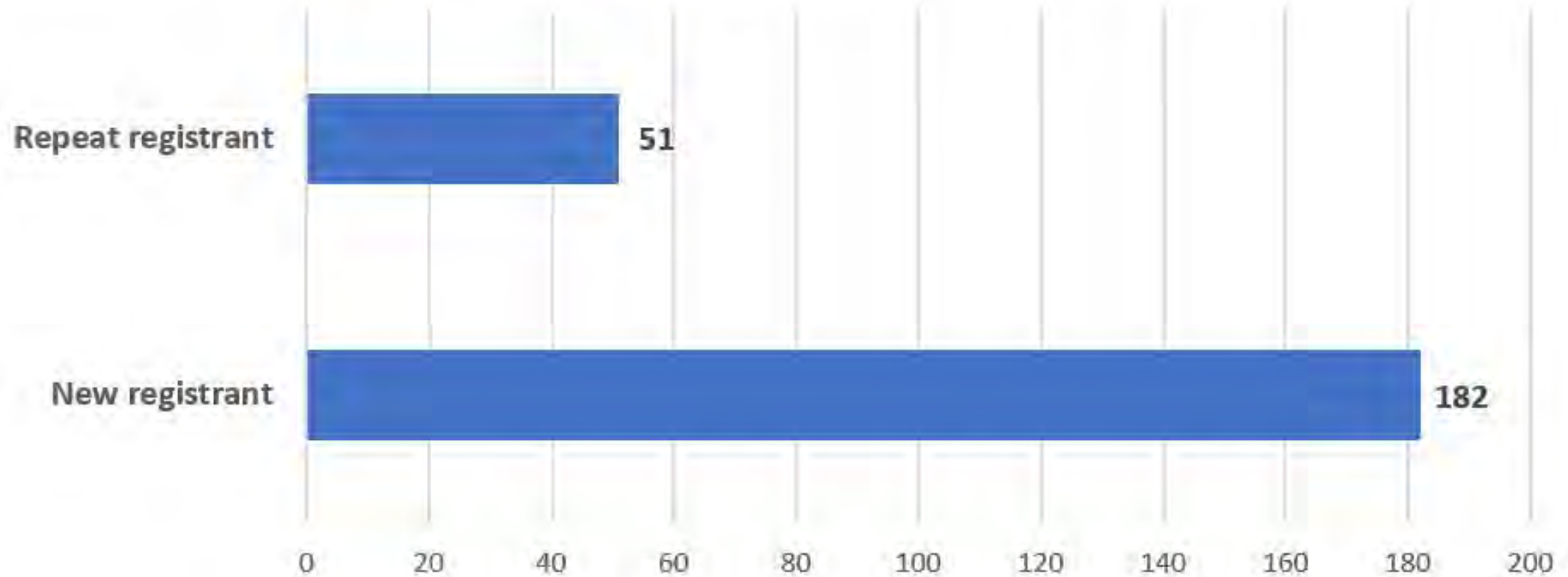
# Case Study 1:

Your chief development officer wants to know whether your legacy society programming is worth the time and expense. She is looking at the bills for travel, invitations, and lunch as well as the time spent in planning and follow-up. Using metrics and explanations, how do you make your case to her?

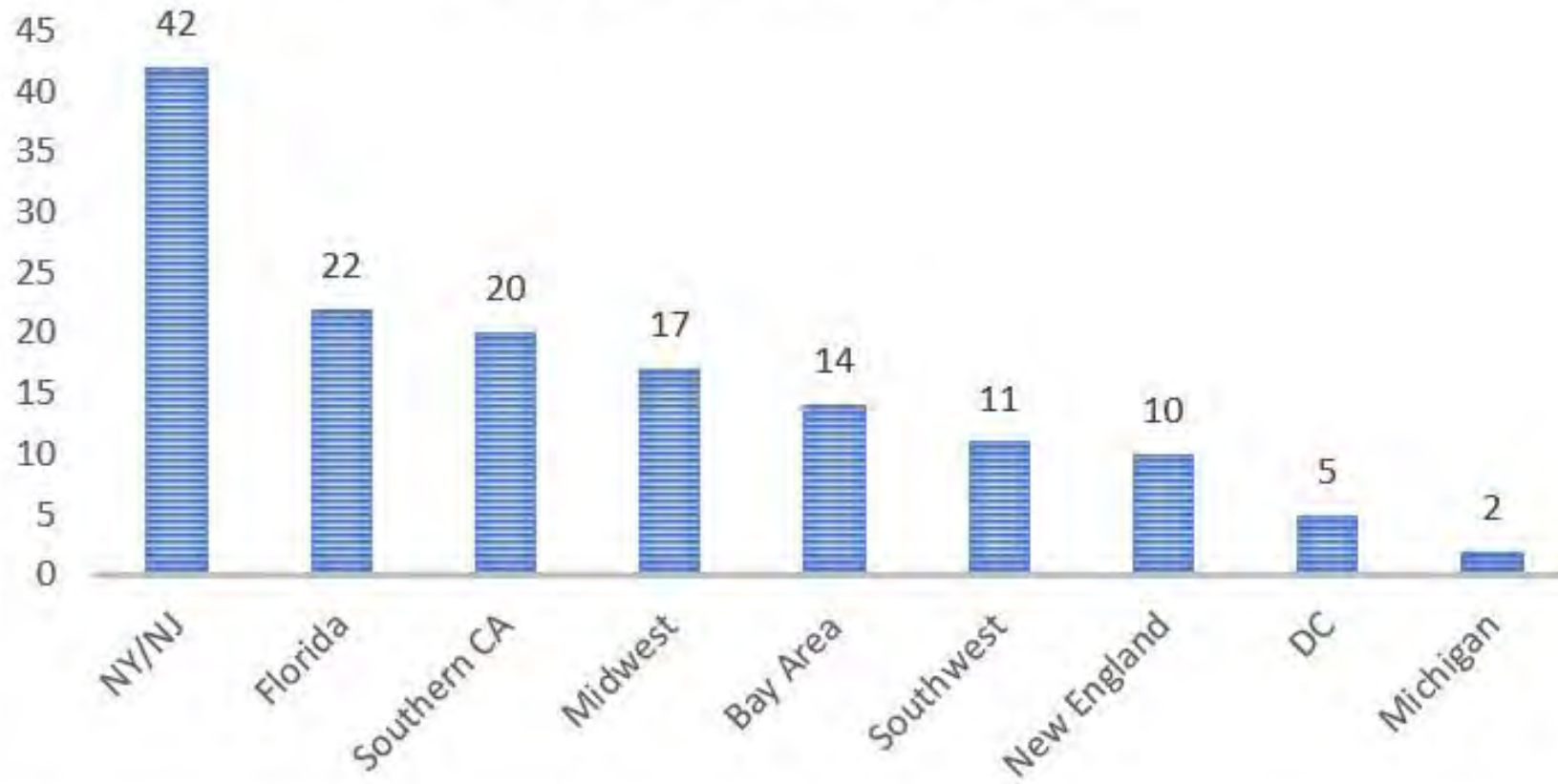
*Suggestion: You may want to compare in-person to virtual events.*



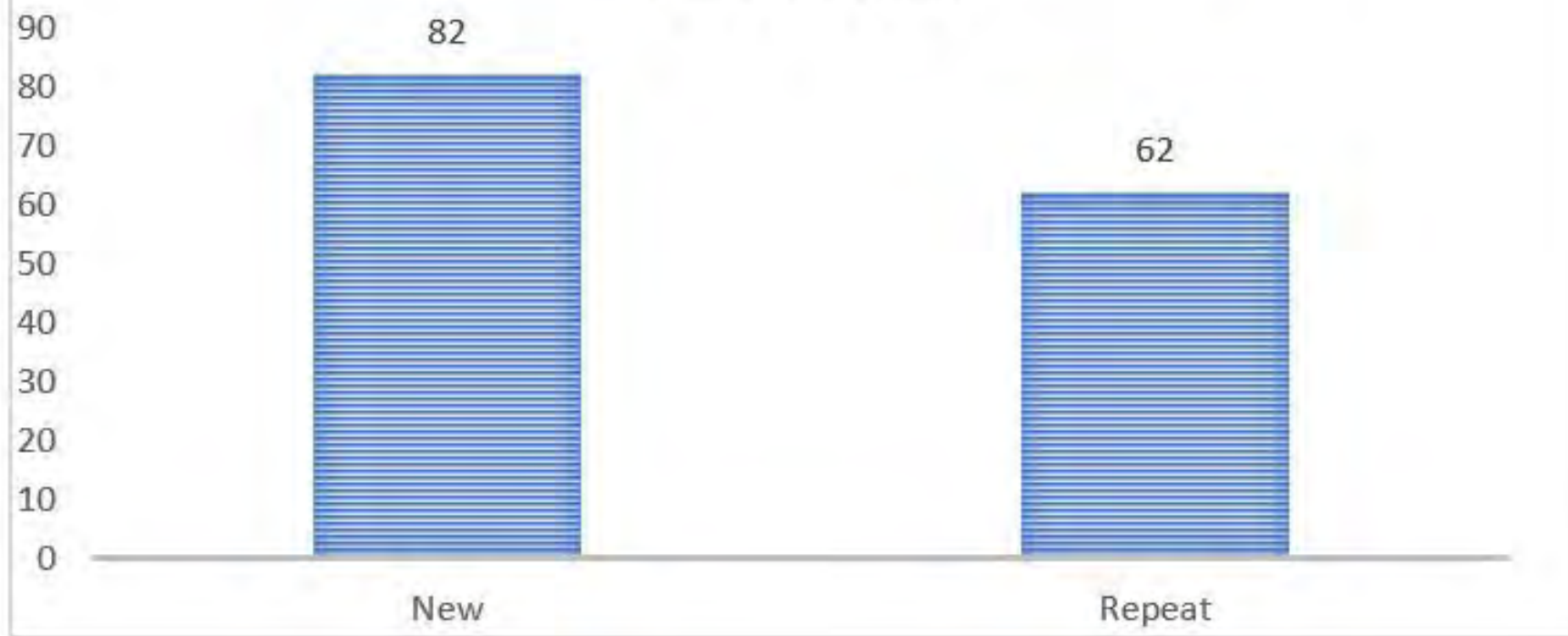
### Legacy Society Events - New or Repeat Registrants



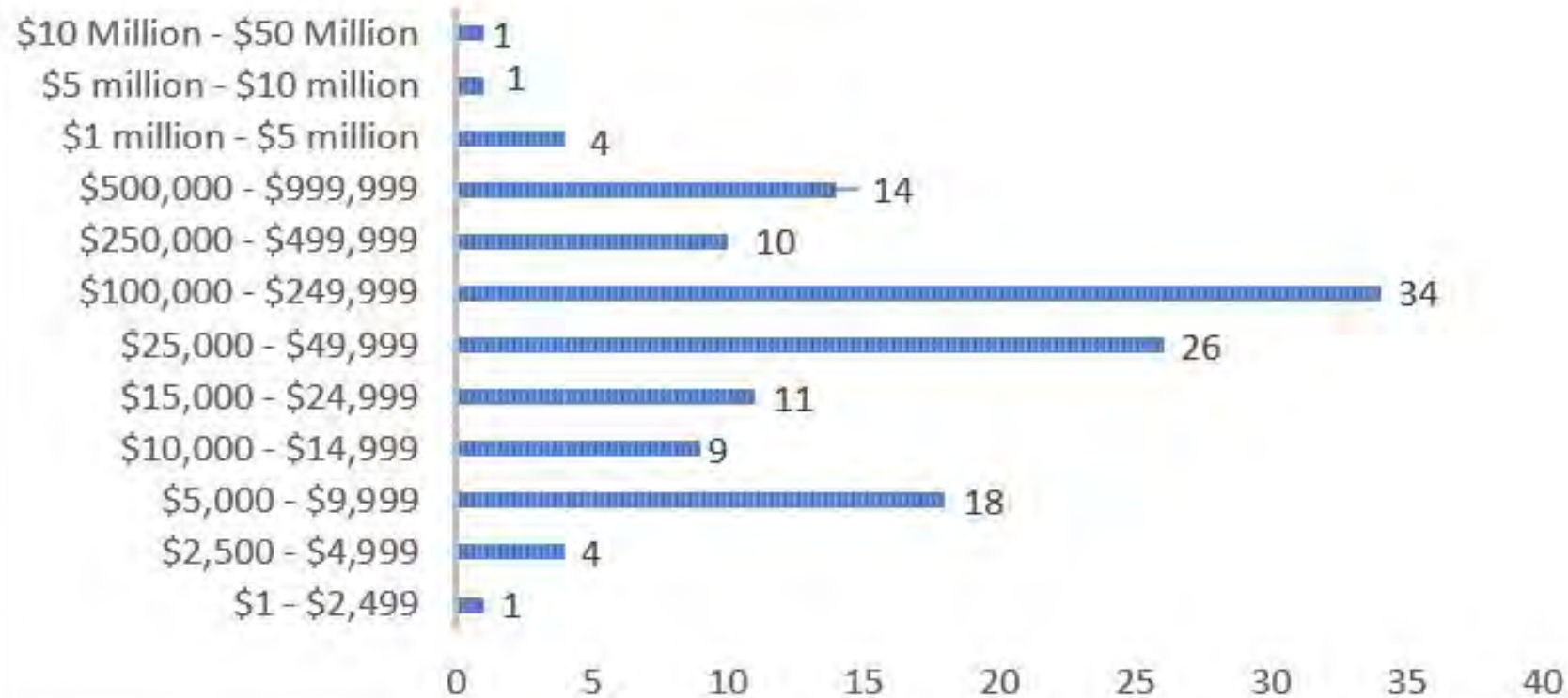
## RSVPS BY REGION



# TOTAL COUNT OF THOSE WHO RSVPED TO OTHER VIRTUAL EVENTS IN THE PAST YEAR



## ESTIMATED WEALTH CAPACITY OF RSVPS





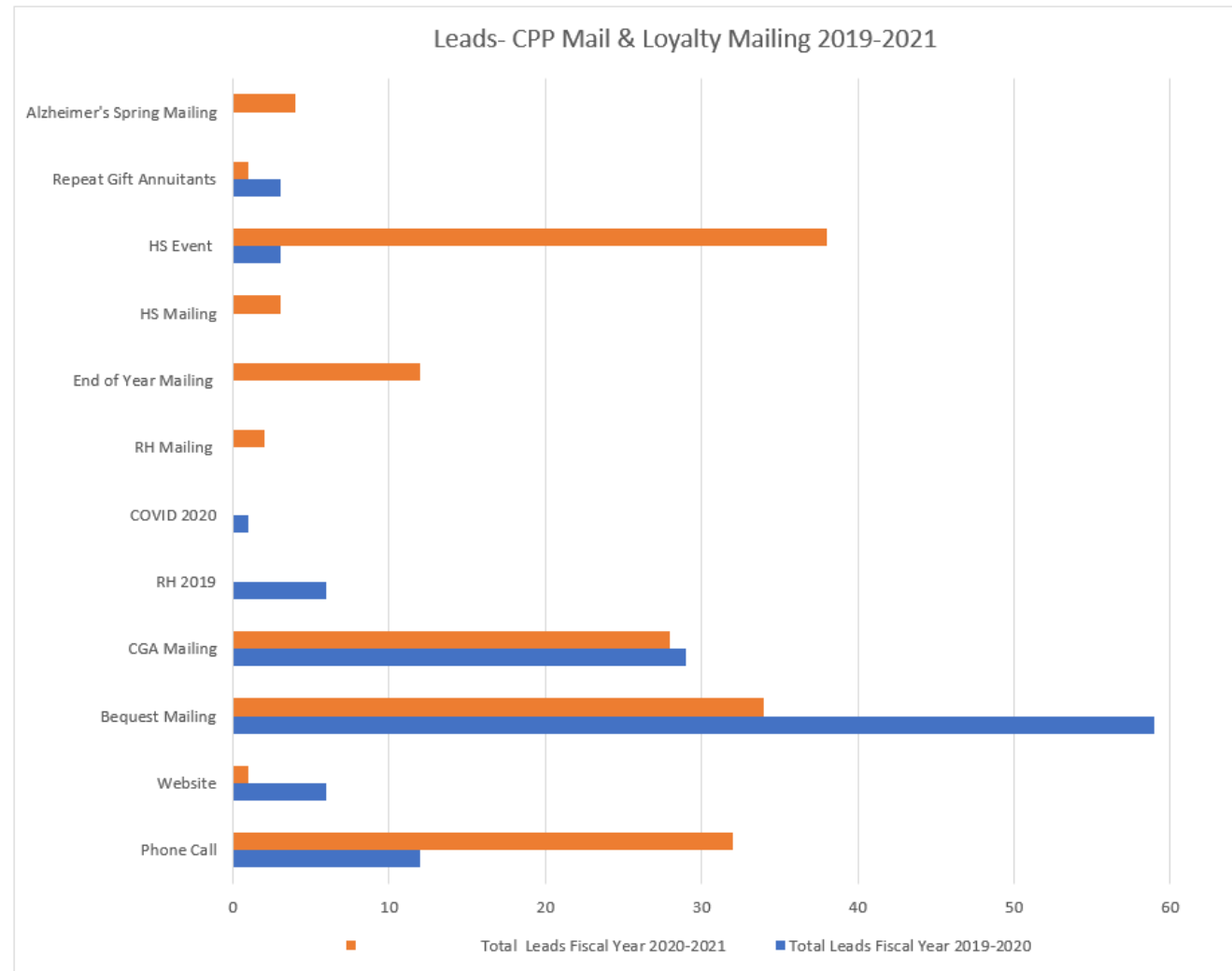
## Case Study 2:

Your chief financial officer would like to know if your planned giving direct mail program is working. She finds the program expensive and wants to know the ROI. Mindful that most of your gifts will come many years from now, make the case to support the expense of direct mail.

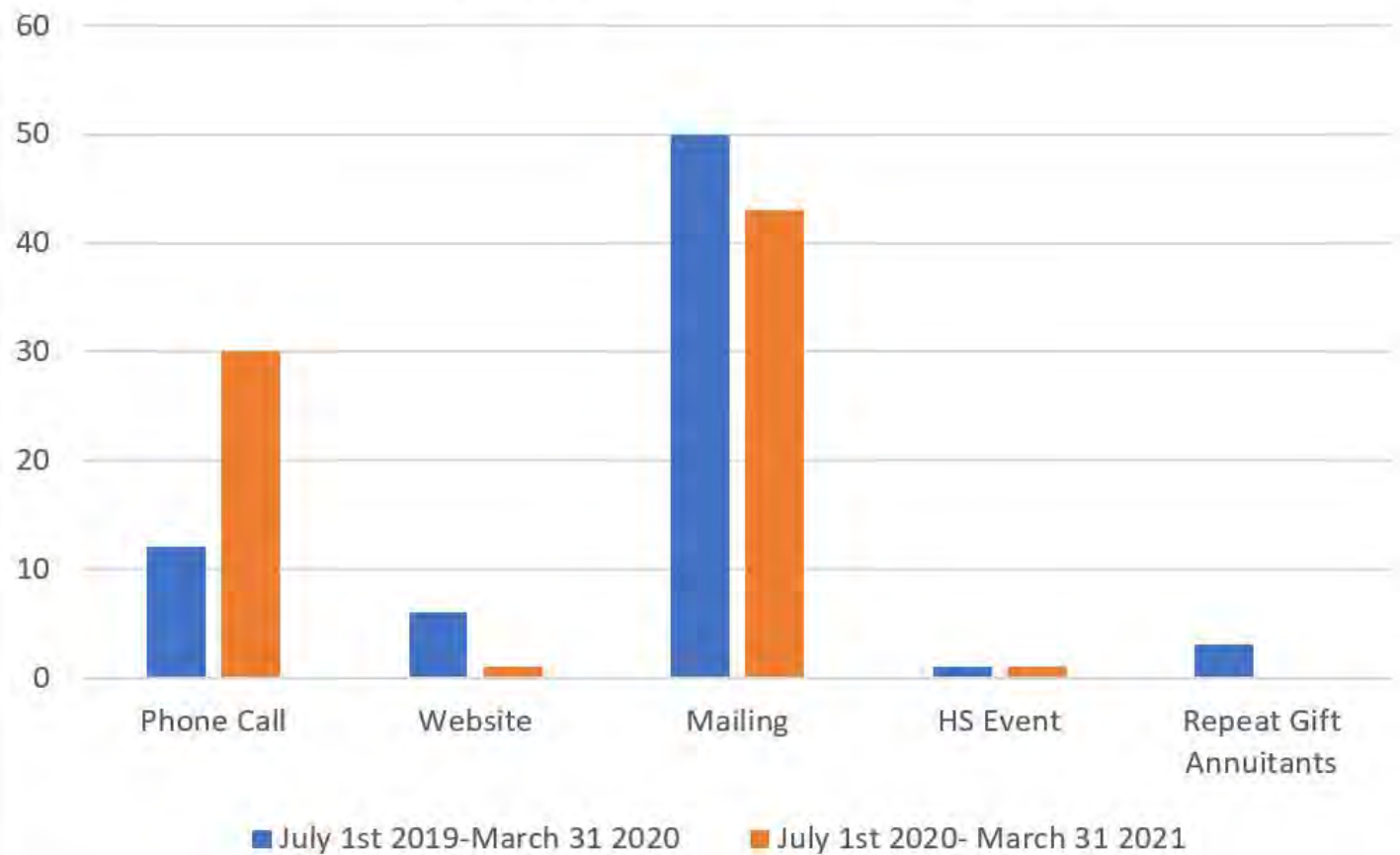
*Suggestion: You may want to discuss the value of legacy donors, the recipients, more broadly.*



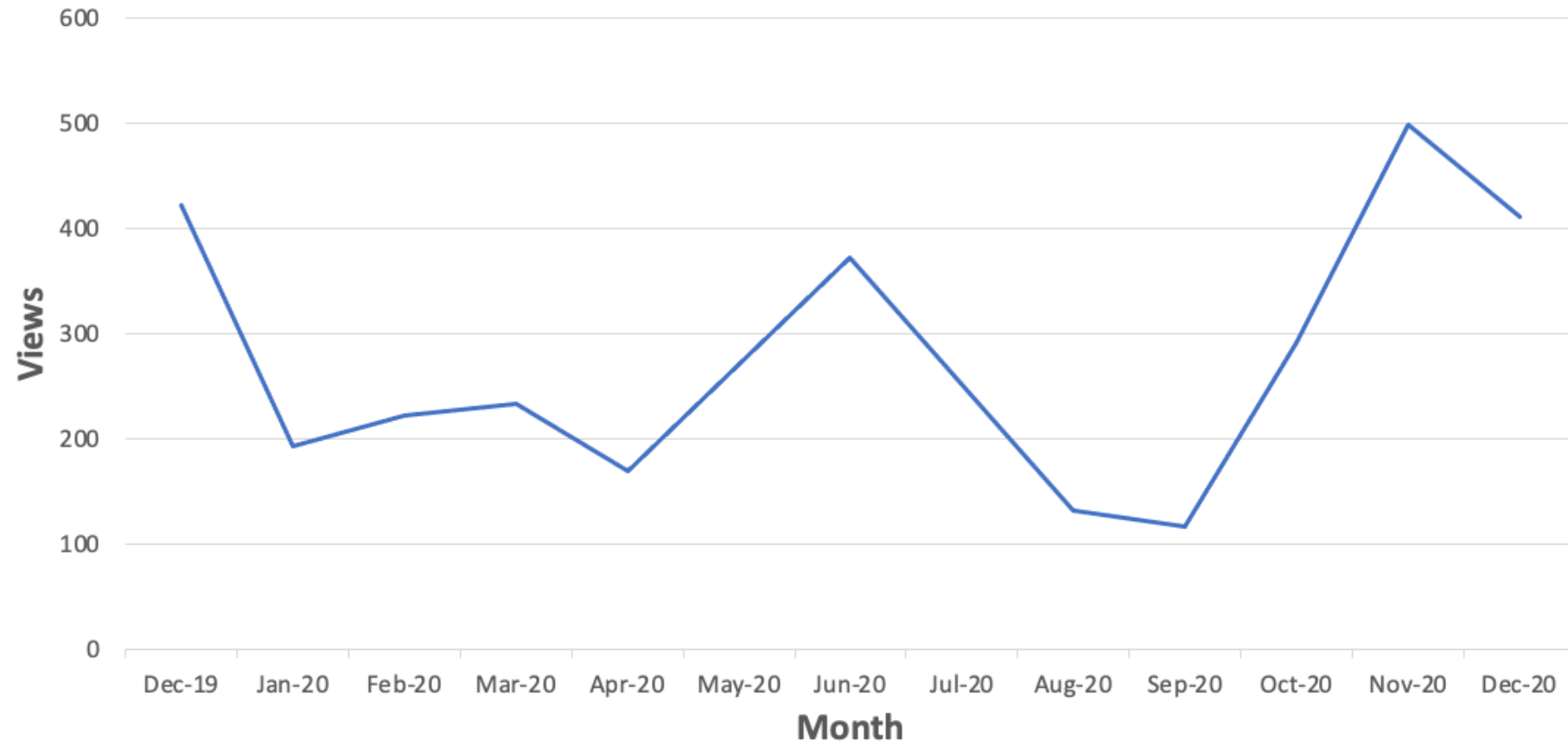




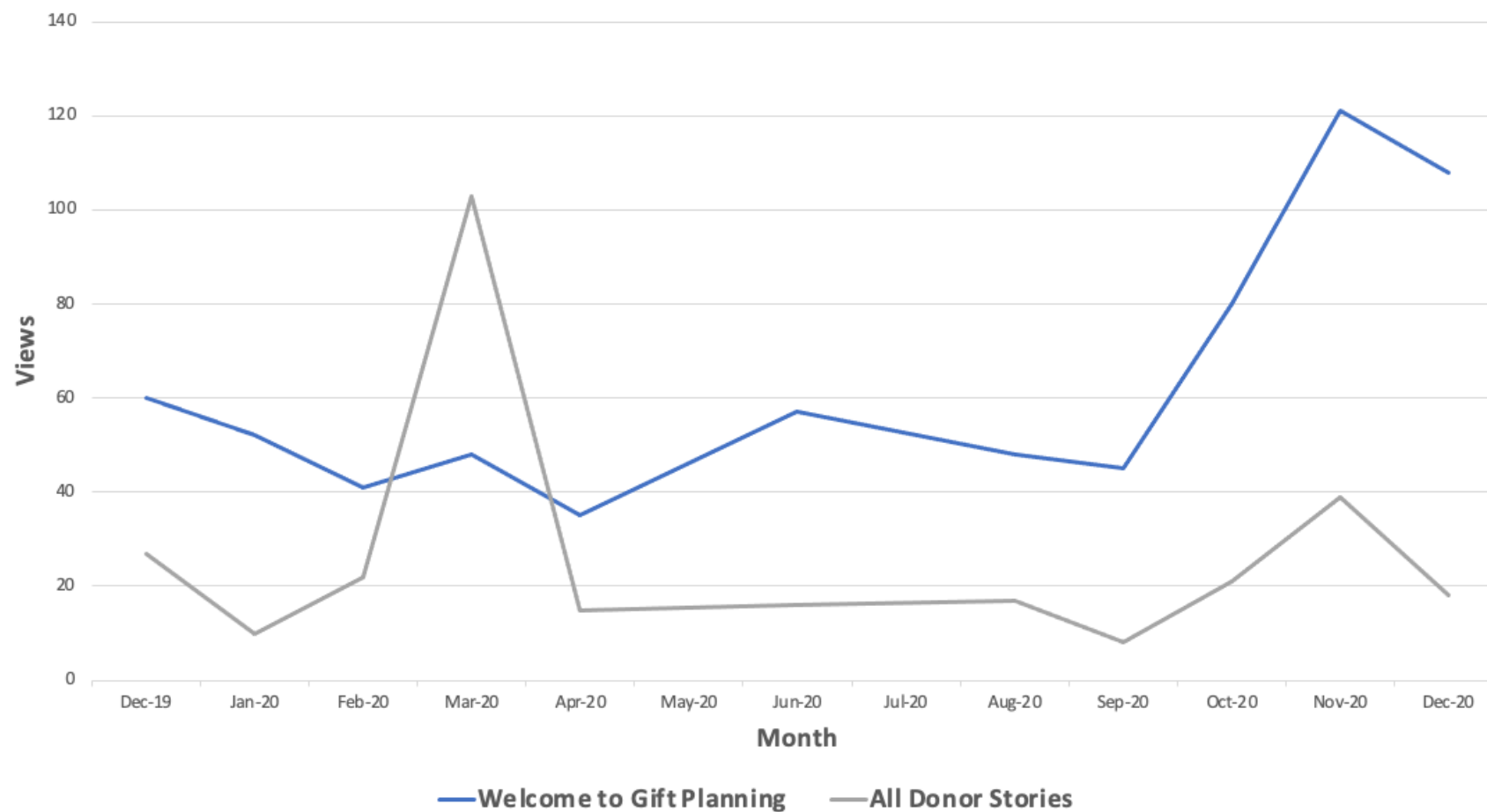
### Leads, July 1, 2019 - March 31, 2021



**Pageviews from Dec 2019- Dec 2020**



**Popular Pages: Dec 2019-Dec 2020**



# Case Study 3:

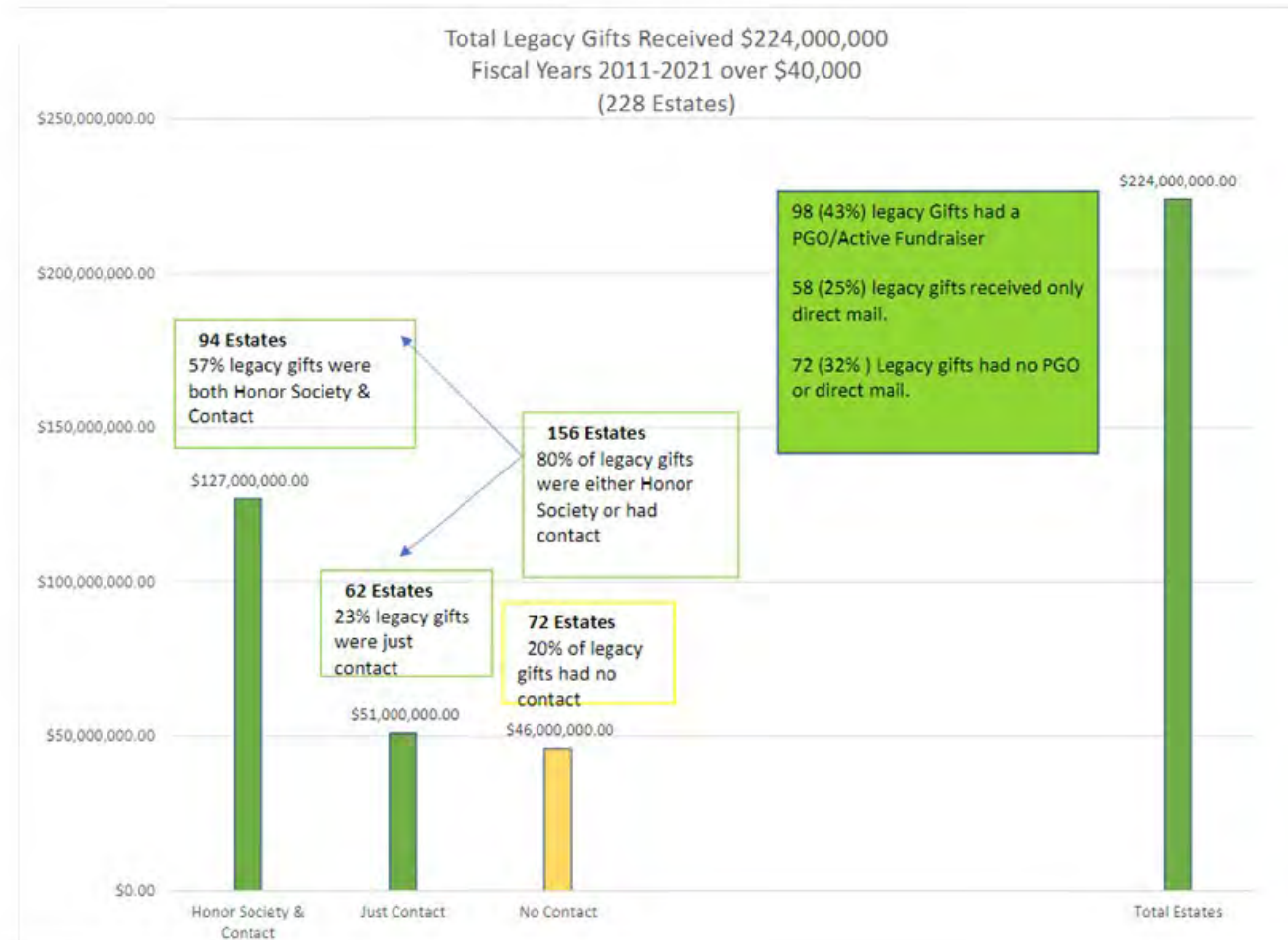
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You have been asked to put together a presentation to your board to show the results of your planned giving department. Your board members are very focused on bottom line and campaign totals. What can you show and say to make them understand the impact of your work?

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*Suggestion: A reference to the National Guidelines for Reporting and Counting Charitable Gifts may be helpful.*

	Planned gifts (bequest, CGAs, testamentary pledges)	Campaign total
<b>2016</b>	\$31,772,894 (44%)	\$71,000,000
<b>2017</b>	\$26,986,034 (34%)	\$80,000,000
<b>2018</b>	\$39,974,180 (44%)	\$90,116,000
<b>2019</b>	\$23,279,394 (30%)	\$78,000

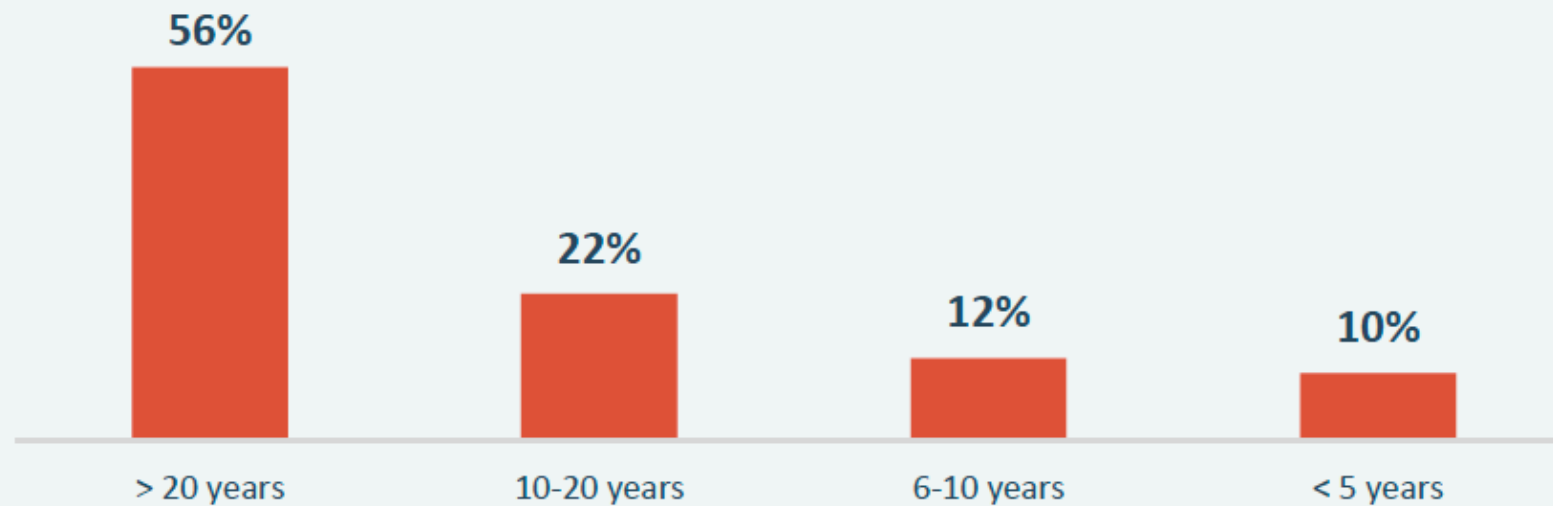


GIVING BY BEQUEST, 1980-2020

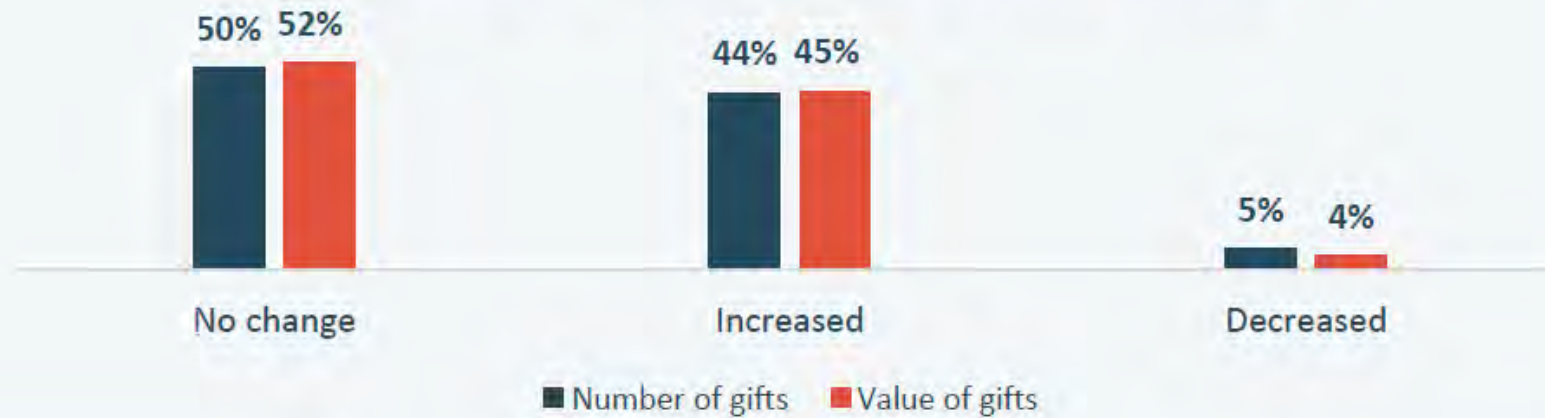




**LENGTH OF TIME DONORS HAVE SUPPORTED THE NONPROFIT THAT  
WILL RECEIVE THE DONORS' LARGEST DEFERRED GIFT**



### CHANGES TO PLANNED GIFTS OVER LIFETIME



From: CCS Fundraising, Snapshot

Using Data to  
Move your  
Leadership  
constructively





**"JOAN, I NEED YOU TO PREPARE AN OBJECTIVE ANALYSIS  
PROVING I'M CORRECT."**

# Conclusion – The Value of Metrics

- Transparency
- Accountability
- Willingness to look at weakness and to grow
- Adaptability
- Help your leadership grow in its understanding of planned giving
- Making the Case for National Standards



# Ultimate Goals

Make the case for  
national standards?

Find appropriate  
standards for your  
organization

Thank  
You

Stacy B. Sulman

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