



WELCOME

While we wait to get started,
use chat to ask questions or share any ideas

If I figured out Zoom technology, I have muted your audio and disabled your video.
However, I'm learning Zoom as most of you are.



Planned Giving in the Time of Coronavirus: Sharing Ideas from Your Peers

David Toll JD.

Senior AVP Gift Planning
Drexel University
and
Senior Consultant
Gift Planning Development

Viken Mikaelian

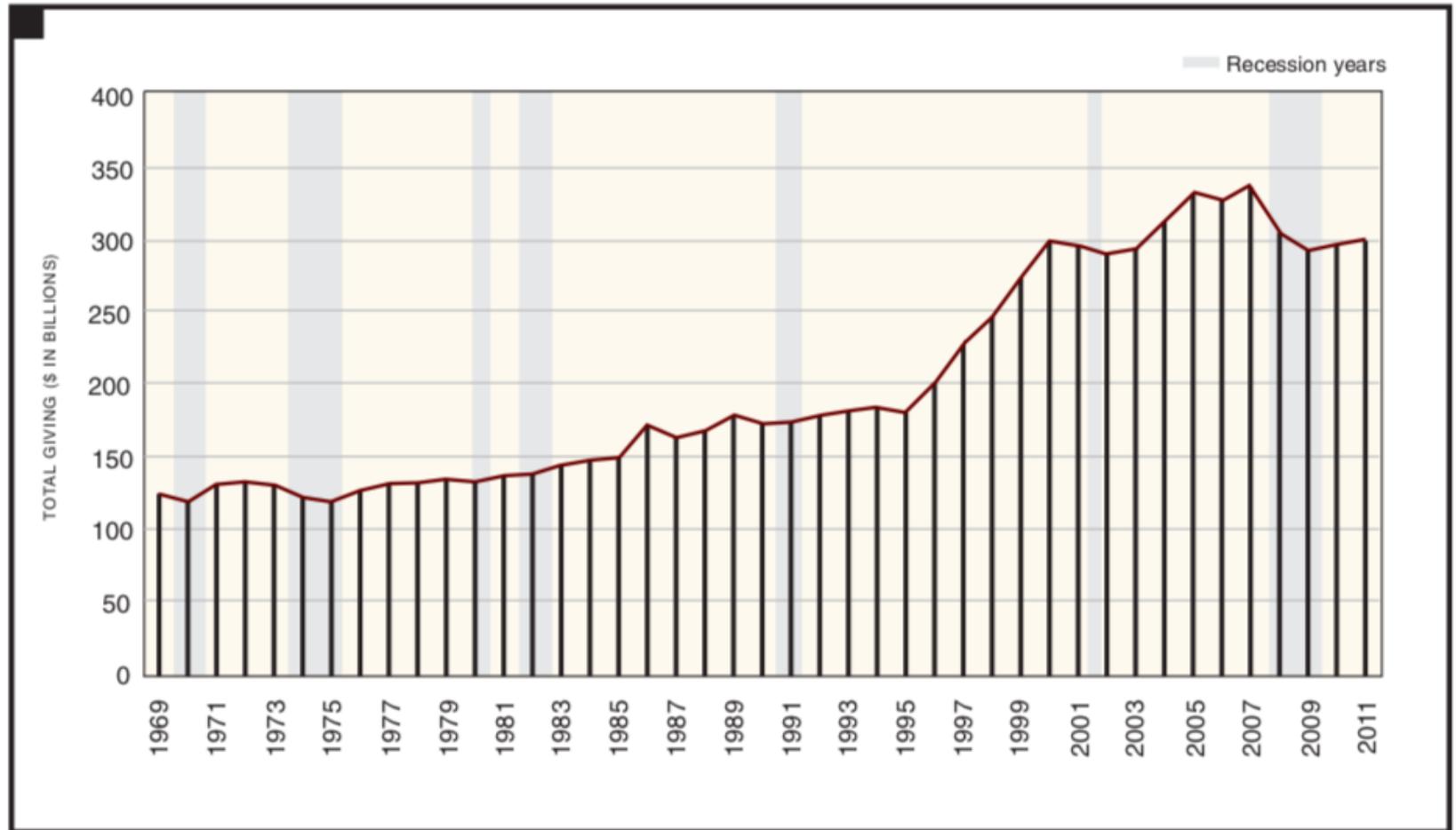
Founder & CEO
Plannedgiving.com



Although the effects of COVID-19 are unique, we do have experience from other economic downturns.

Planned Giving Council
of Greater Philadelphia

PGCGP



Source: GivingUSA Foundation



Trends after 2008 Recession

- Since the 2008 Recession ended, the total dollar value of donations in the U.S. has risen; however, the number of donors decreased significantly.
- In 2002, nearly 70% of Americans were donating regularly to charities.
- 2014, 56% of Americans were donating regularly.
- Many small-to-midsize donors stopped their giving during the recession and didn't start giving again.
- If the trend after the last recession continues, we will likely continue to see fewer people giving more.



Coronavirus Aid, Relief, and Economic Security Act

- **Temporary Universal Charitable Deduction** - would allow non-itemizing taxpayers to deduct charitable gifts of cash up to \$300 in 2020. (Gifts to supporting organizations and donor-advised funds would not be eligible for the deduction under this provision.)
- **Temporary Suspension of AGI Limitations** - would lift the Adjusted Gross Income limitations on cash gifts for 2020 (individuals could deduct up to 100% of their AGI in cash gifts). (Again, gifts to supporting organizations and donor-advised funds would not be eligible for the deduction under this provision.)
- **Suspension of required minimum distributions from IRAs for 2020.** This provision may impact IRA Qualified Charitable Distributions (QCDs).



Coronavirus Aid, Relief, and Economic Security Act

- Non-profits may have opportunities to secure more low-dollar (up to \$300) participatory gifts.
- Suspension of AGI limitations may be the best opportunity realize more outright gifts. It's important that you understand that issue clearly and know how to educate donors.
- Most IRA QCD donors give because they care about your non-profit, but this suspension and the loss in value of IRA funds will likely reduce the number and amount of such gifts this year.



Donor Calls and Visits



Visits

- CDC considers people over age 65 to be at risk for serious illness from COVID-19, with people over 75 at much higher risk.
- There are reports that suggest that social distancing may last six months or more.
- When the restrictions are lifted, many older donors may be reluctant to meet in-person for some time.



Connect

Don't put communications on hold.

- Have meaningful conversations over the phone, or via Zoom, FaceTime or Skype.
- It may not be the same as an in-person visit, but it shows your donors that you care.
- Check in on your donors and ask about how they – and their family members - are coping.
- Update them on how your organization is dealing with COVID-19.



Do you ask?

Share with your donors:

- What is your organization doing to address the problem?
- What are your organization's urgent needs?
- How are you trying to meet those needs?

Planned Giving Council
of Greater Philadelphia

PGCGP



Do you ask?



Dear Members of the Drexel Community:

As we chart a course through this extraordinary and challenging time together, I have been heartened at every turn by the understanding, cooperation and support from so many people in the Drexel community. There's a deep reservoir of goodwill that sustains this University, and we can look to this spirit to get us through the COVID-19 coronavirus pandemic.

The COVID-19 coronavirus pandemic continues to drive major changes in the way we conduct our work and lives. On Monday, Drexel made the decision to close all campus facilities to the public and shift most campus functions remotely. Our students must leave on-campus residences, and student clinical experiences and international activities, including co-ops abroad, have been suspended.

These are necessary steps to protect our community's safety, but they also place unexpected pressure on our students, some of whom struggle to cover costs such as travel and technology, whose co-op or other employment was canceled, or whose health and wellness is at risk.

[Several funds at Drexel exist for moments like this.](#) By supporting one or more of these emergency funds, you can help ensure a student has access to basic needs, as well as the resources to stay on track to graduation.

- The Student Emergency Fund: provides one-time financial support to students who experience an emergency situation
- Operation Graduation: emergency funding for juniors and seniors facing unexpected financial circumstances that might prevent them from graduating with a Drexel degree
- University Priorities (Unrestricted): flexible funding that enables Drexel to be nimble and provide students with critical resources when they need them

CINCINNATI
PUBLIC RADIO NEWS
91.7 | 88.5
WVKU | WPKS

Connecting You To A World Of Ideas

Listen Live - WVKU
The World

Home News Arts + Life Programs Podcasts Ways To Connect About Us Support

[CLICK HERE FOR THE LATEST UPDATES ON CORONAVIRUS IN OUR REGION.](#)

Museums, Libraries, Zoo Offer Online Programs During Coronavirus Closures

By TANA WEINGARTNER • MAR 16, 2020

Share Tweet Email

PBS WHYY NPR

Donate Today

Good morning, David,

As the host of *Morning Edition* at WHYY, I am used to working somewhat independently in the early morning. Of course, I have an editor on duty and a news producer. But on a typical day, most of my colleagues roll in around 8 a.m. and wave to me as they pass my studio. Now, with so many of my coworkers working remotely, I miss that morning parade. There are just a few of us in the building to keep our essential functions...well, *functioning*.



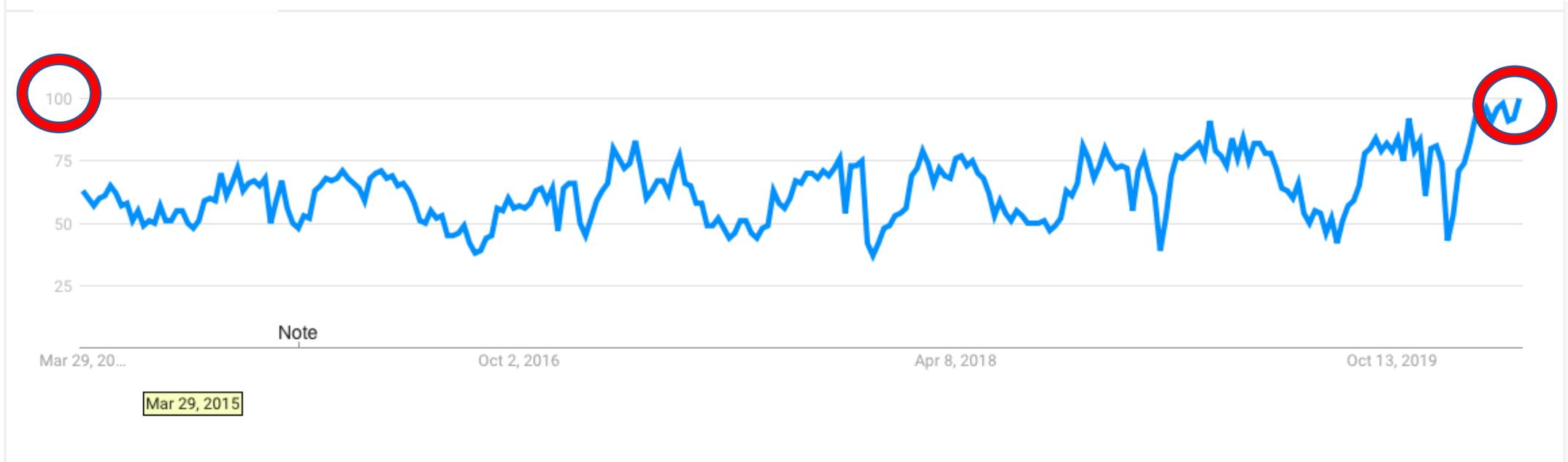
But I have you, the listener. You're here with me, tuning in, following along, [donating to keep this service strong](#) — and there's great comfort in that. This is a very important time to find safe ways to remain connected to each other, and radio offers social sanity!

We're all in this together, so I want to give you an update. A few times each year, we come to you and ask for your financial support. This week was supposed to be one of those times, but we've decided to postpone our critical Spring Member Campaign. We're keeping our radio schedule as flexible as possible, to make way for the latest updates on the coronavirus pandemic and how our communities are holding up here.



Do you ask for Planned Gift?

When people are faced with significant life events (like the one we are all experiencing right now), estate planning often becomes a priority for many.



Google Trend over 5 years "How to write a will"



Do you ask for Planned Gift?

New Conversations:

- This is not the right time for a legacy giving appeal, but it **is** the right time for you to report on impact and thank your donors profusely.
- This keeps your organization “top of mind” while your donors are revisiting their plans. Seek permission to continue any gift conversations that began before the crisis.
- Discuss any questions they have about their gifts (or potential gifts) and explain how the gift process may be affected by recent developments.
- If you sense that they are open to taking the conversation further, you may also could reinforce revocable gifts or explore options for life income-producing gift vehicles that currently make sense for them.



Do you ask for Planned Gift? Conversations already started:

Seek permission to continue any gift conversations you may have been having over the past several weeks or months.

“This is such a crazy time right now. I’ve been busy sharing with others how to be smarter about their giving with all of this volatility. Surprisingly, it’s actually opened up some new planning options that we didn’t have before. If you’re ever interested in learning more, just let me know.”

- Russell N. James III, J.D., Ph.D., CFP



Creative Contacts

- Video acknowledgement
- Hand-written thank you notes
- Text updates
- Phone calls from President/Board Members
- Provide content that donors can view online



Virtual Coffee Meeting



Good Morning David,

I hope this message finds you well, in good spirits, and at home with a happy and healthy family. We know these are very challenging times for many people and we want you to know that we are here for you. Last week in my video update, I shared with you that Marietta College wants to be there with you in this time of social distancing and isolation. This week, allow me to share with you some updates and ways we plan to stay connected with you and The Long Blue Line.

If you have been following us on social media -- you can find the links below -- you know that our students are our first priority. Rest assured we are going to be keeping them connected and busy over the next few weeks as they, and their fellow classmates, complete their spring coursework online. We were fortunate to have the capacity to rapidly move classes online for the remainder of the semester. While we have unfortunately had to postpone our commencement exercises, we are proud say our 2020 students will be graduating. We will keep you updated on our plans to recognize and celebrate their achievement, especially for those proud parents and grandparents.

Now that you know how we are keeping our students active, let's talk with about how we are going to be there for you and your family during this time. I can tell you, as someone whose job revolves around social interaction, I am already getting a little stir crazy and I know my colleagues are as well. That being said, we assume you might be feeling the same so we want to offer you a few options to connect and engage.

Join me for a virtual coffee meeting! We recognize that human interaction is going to be critical for everyone's mental health and well-being during this crisis. That is why we are opening a virtual café where you can schedule a one-on-one online coffee appointment or lunch. Just click the button below, select "Virtual Coffee Meeting," then select me, Steven Kleiber, and a time that works best for you from my schedule. Once you have scheduled, I will e-mail you a link and instructions on how to get set up. We set these meeting up using Zoom but if there is another way you feel more comfortable or are more familiar with using, like Google Hangouts, Skype, FaceTime, etc., we are glad to connect that way.

[**Click Here to Schedule a Virtual Coffee Meeting Today!**](#)

Watch for Group Café Hours Not only do we want to keep you connected to the College, but we want to help facilitate those valuable Pto-to-Pto connections. Whether it's an existing group of friends or a chance to reconnect classmates, teammates, or Greek brothers and sisters you lost touch with, we want to help bring friends together. These group cafés will be themed and can be open to several people or just a small group. If you have an idea for a group that would like to meet in our virtual café, please let me know and we will work to make it happen.

Keep an eye out for E-mails from our Alumni Office Dawn Werry, our Director of Alumni Relations, and the Marietta College Alumni Association are working on even more fun ways for you to stay active and engaged. I have been listening in on some of their ideas and I have heard everything from Netflix parties, to coloring contests for those with kids, to virtual brown bag lunch and learns with faculty members and alumni. Keep an eye on your e-mail for more announcements and let me know if you have any ideas you would like me to pass along to her and her team.



Events



Events

	0-3 Months	3-6 Months	6-9 Months	9-12 Months
Best Estimate:	Not Happening	Very Unlikely	Less than 50% chance	TBD
Action Step:	Cancel event	Make no purchases; prepare to cancel	Treat event as "Plan B"	Make no purchases' re-evaluate in 3 months

Patrick Schmitt, Co-CEO of FreeWill



Canceling Events

Get creative and think “outside the box”

- Stream the program online on the day and time that the event was originally scheduled.
- Online concerts
- Online Town Halls
- Virtual tours



Canceling Events with sponsorships/tickets

- Create a proactive narrative.
- Remind the sponsors and attendees about the important impact the funds raised would have on the people you serve.
- Ask if they would consider donating the cost of the event ticket rather than receiving a refund.



Marketing



Marketing

- Now is **not** the time to stop sending solicitations or communicating with donors.
- In past recessions, organizations that continued with their messaging found that it did not offend their donors. Instead, it endeared their donors to the charity's mission.
- **Carefully review your upcoming messaging.**



Marketing

Re-evaluate your messaging.

- Promote charitable gift annuities and charitable remainder annuity trusts that provide fixed income.
- Gifts of retirement funds, following the enactment of legislation that pertains to such funds, like the SECURE Act.
- People may be more willing to consider a revocable gift, such as a bequest provision or a beneficiary designation.



Don't Forget to Steward!

Example of CGA Stewardship email:

“We want to reassure you that you will continue to receive your charitable gift annuity income payments from _____ without interruption. Your gift is a testament to your commitment to us and we stand by our commitment to you. Your payments are backed by the resources of _____.”



Planned Giving Coronavirus Articles and Resources (Partial list as of 3/27/2020)

PlannedGiving.com
Vikem Mikaelian, Founder & CEO
My Apple Tree
https://plannedgiving.com/blog/?inf_contact_key=be9564e88b79e051956b1d9315e0757d

Russell James, J.D., Ph.D., CFP®
10 Strategies for Post-COVID Fundraising in Complex & Major Gifts
<https://www.linkedin.com/pulse/10-strategies-post-covid-fundraising-complex-major-russell/>

Nathan Stelzer
Stelzer
Addressing Today's Marketing Challenges
<https://www.stelzer.com/addressing-todays-marketing-challenges>

Patrick Schmitt
Freewill
Covid-19 Resource Page
<https://fp.freewill.com/planned-giving-coronavirus>

Joe ~~Tumolo~~, CAP
David Toll, J.D.
Gift Planning Development, LLC
How to Stay Productive During a Pandemic
<http://giftplanningdevelopment.com/>

PG Calc Blog
Andrew Palmer
Planned Giving Marketing and the Novel Coronavirus
<https://info.pgcalc.com/pg-marketing-during-pandemic>

Crescendo
The Crescendo Blog
Nonprofits Can Survive and Thrive
<https://www.crescendointeractive.com/blog/all-posts.html?RID=79512&SLID=1384>

Pentera
Claudine A. ~~Dopkian~~, President & CEO
Coronavirus: Recommendations About How to Interact with Your Donors in This Time of Uncertainty
<https://pentera.com/blog/coronavirus-recommendations-about-how-interact-your-donors-time-uncertainty>

Marketsmart
Greg Warner
Soon to be published: ~~MarketSmart's~~ *Strategic Guide to Marketing Major and Legacy Gifts in the Coronavirus Era*
<https://marketsmart.com/>

National Association Of Charitable Gift Planners
<https://charitablegiftplanners.org/>

Resources