



Inspire Your Donors to Create Legacy Gifts

Earn Their Hearts and Their Support

Societal **CHANGES**





Mental



Social



Trust

Demo/Socio-graphic **CHANGES**



Matures (aka "the Silent Generation")

Born 1925-1945

Experienced WW2 - Beliefs framed by Great Depression

Fiscally conservative, deep trust in charity

Experienced emerging consumerism as parents rather than children

Grew up believing in the virtues of duty and service, particularly locally

Believe in family and traditional family roles. Sixty-four percent were married between the ages of 18 and 33.

Boomers

Born 1946-1964

Grew up in austerity but came of age in prosperity

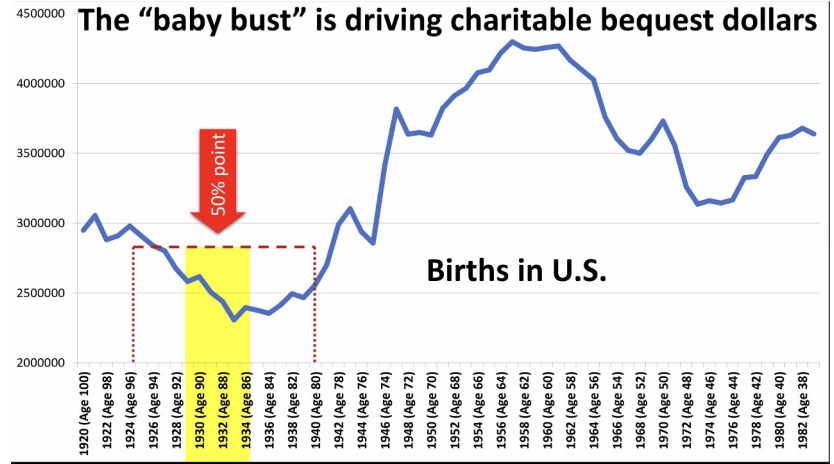
Challenge the status quo, "Never Trust Anyone Over 30"

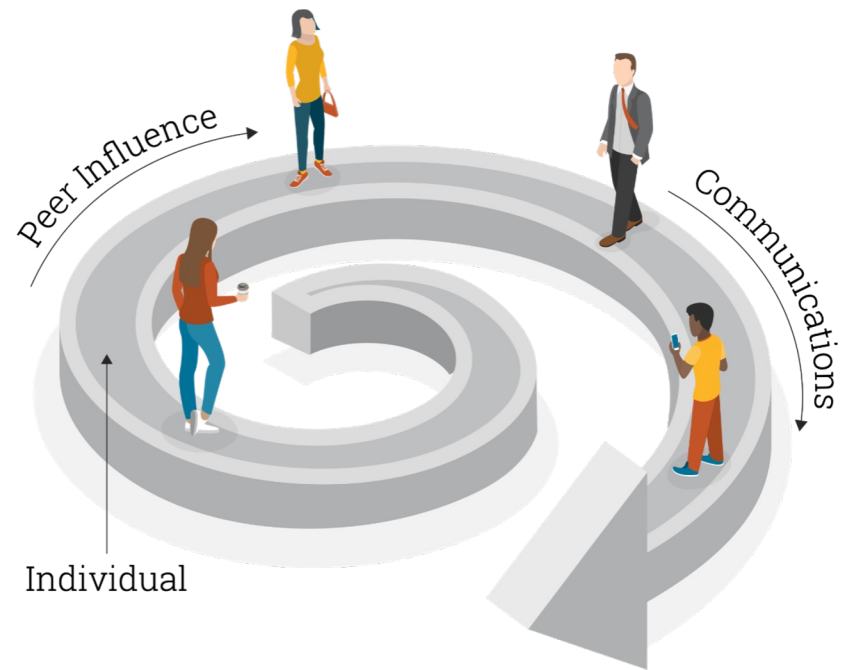
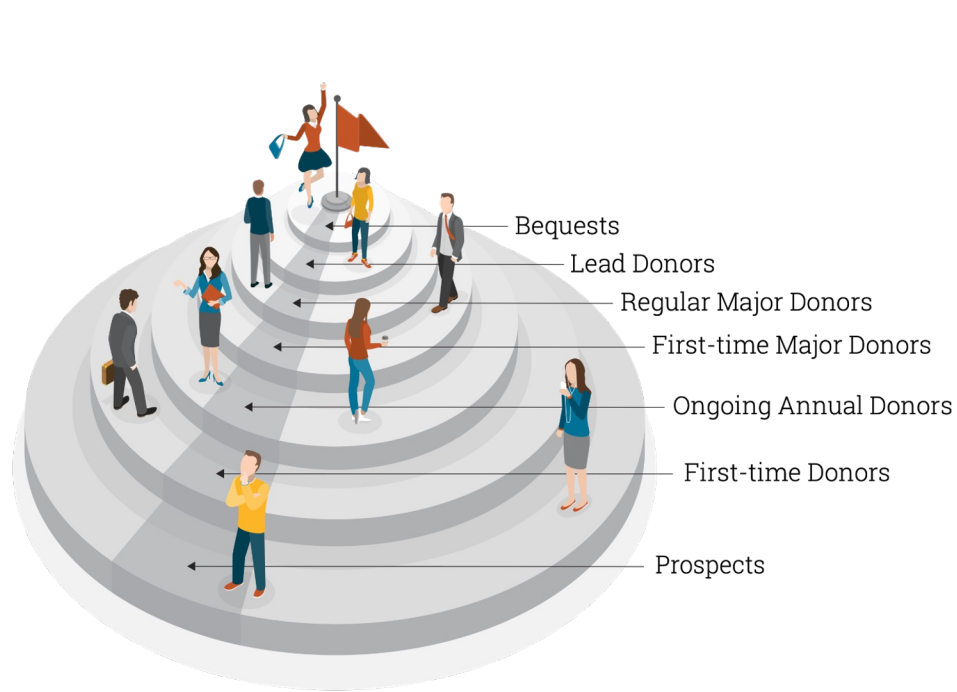
Benefitted from shift from blue collar to white collar jobs. Explosion of media/information consumption.

Enjoyed increasing individualism. The "ME" generation

More accepting of societal change and emerging family types. Marrying later in life and experiencing multiple marriages.

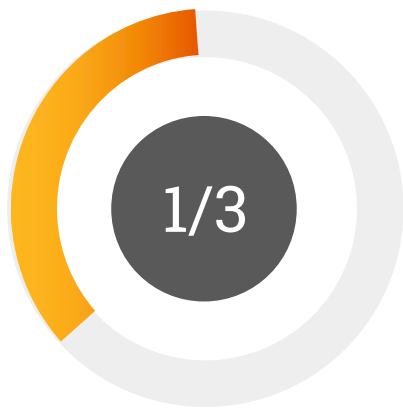
Giving **CHANGES**





← Measurement of Engagement & Ability to Influence Others →

Only $\frac{1}{3}$ of Planned Giving Donors Tell Us



Hand raisers

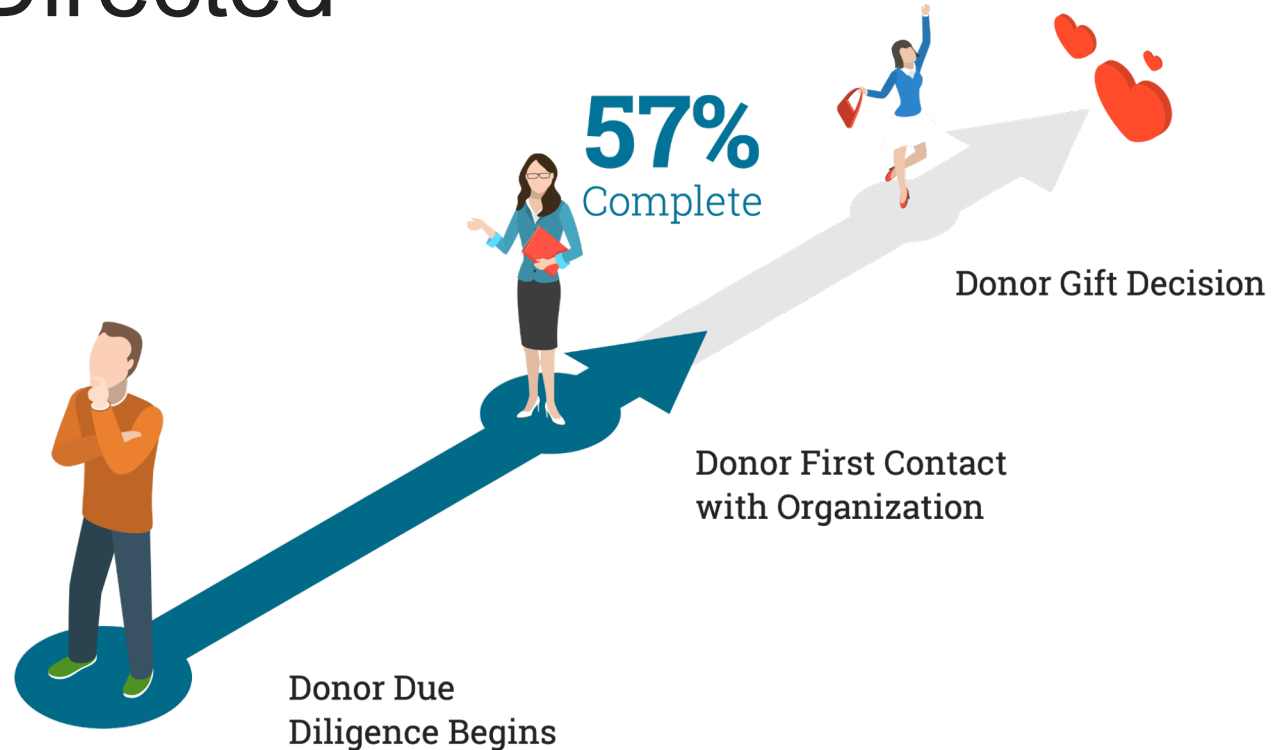


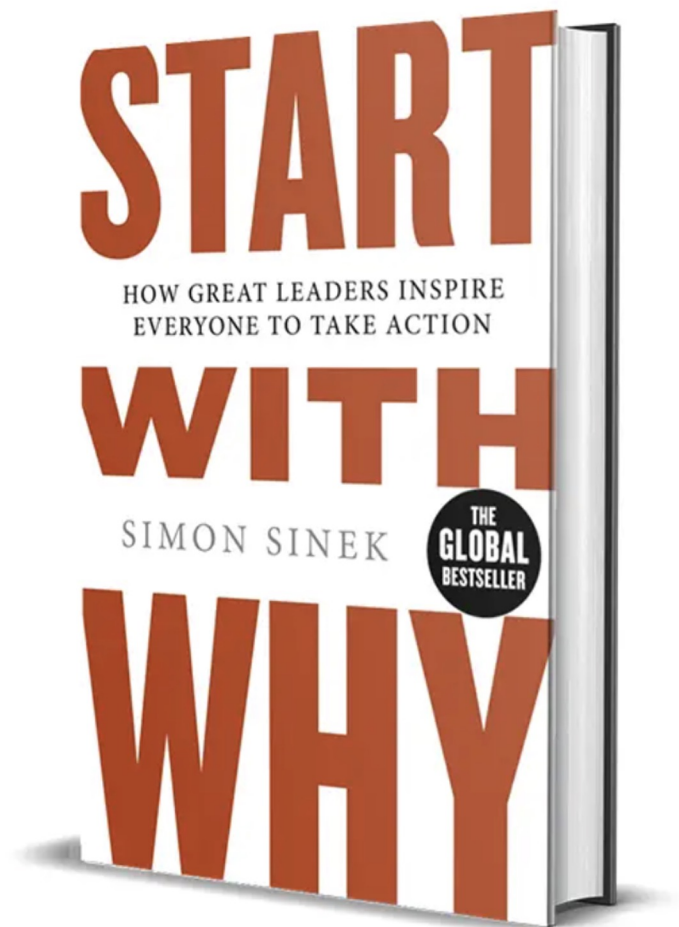
Secret keepers

Consumption of Information **CHANGES**



The Self-Directed Donor





The Golden Circle

WHAT

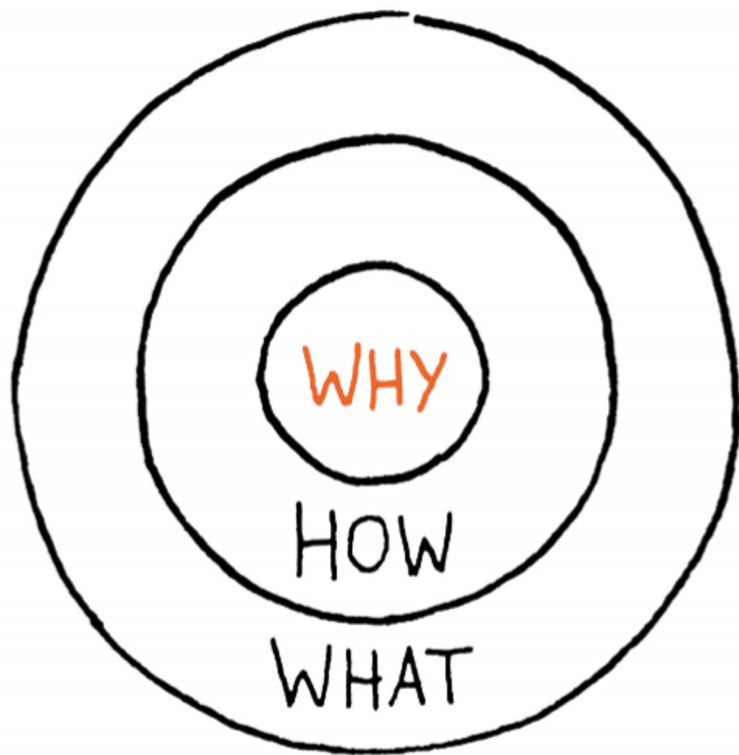
Every organization on the planet knows WHAT they do. These are products they sell or the services they offer.

HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.



①

Importance of
Trust/Transparency/
Authenticity

2

The Donor Journey

3

Loving Your Donors

What **YOU** Know



1. Your work
is important.



2. Your donors
are key to
your success.



3. Your organization
can make a
difference.

What **WE** Know



1. Your words
are important.



2. Your work
is valuable.

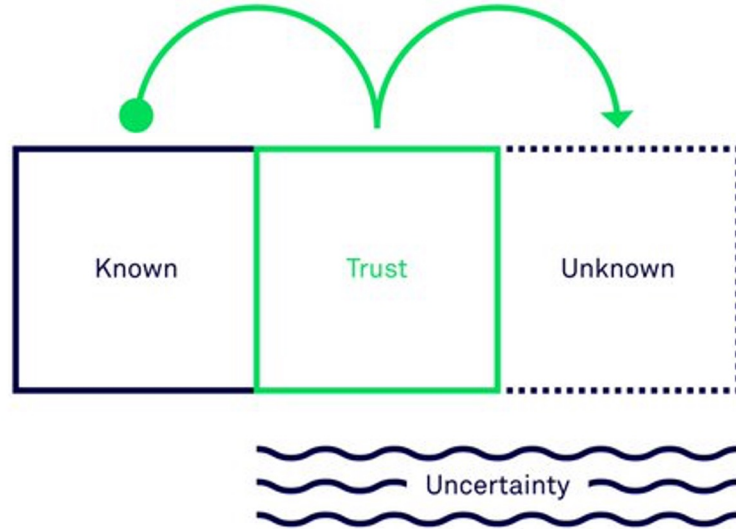


3. Your donors
are key to your
success.

Uncertainty's Impact on Trust

Reputation =
“Reflective”
measure

Trust =
“Predictive”
measure



A woman with dark hair, wearing a black blazer over a red top, is speaking at a TED event. She is holding a small yellow and black device in her right hand and gesturing with her left hand. The background is dark with large, stylized letters in blue and yellow. A large red circle is overlaid on the image, containing the text.

“Reputation is a currency that will become more powerful than our credit history. ... It will make the résumé seem archaic.”

– RACHEL BOTSMAN

TEDGLOBAL2012

WHAT IS REPUTATION?

“a shadow”

Abraham Lincoln



“an uncertain flame”

James Lowell



**“the immortal part
of myself”**

Shakespeare's Cassio



**“what people say
about you once you've
left the room”**

Jeff Bezos



REPUTATION

Perception

What people **say**

TRUST

Belief

What people **believe**

TRUSTWORTHINESS

Behaviour

How you **behave**

Two types of transparency



Blanket transparency



Intentional transparency

1

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How Do We Inspire?

We build bridges using multiple methodologies.

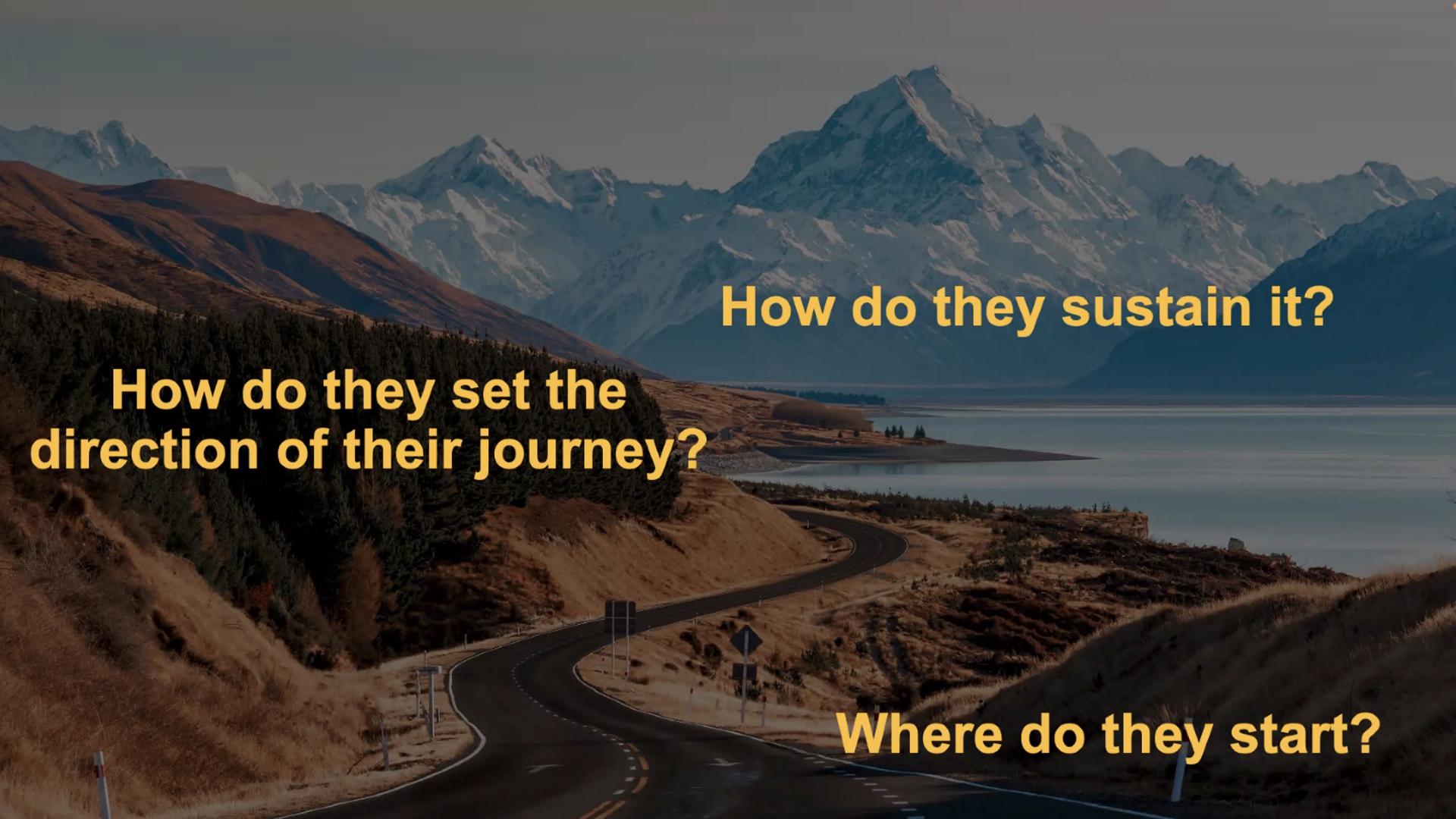
Using a unique mix of theories from:

- Institute for Sustainable Philanthropy
- Dr. Russell James
- 7 Donor Mindsets
- The Donor Journey
- Strengths-Based Messaging
- Research
- Polling
- Thought Leadership
- Direct Marketing Best Practices



7 Donor Mindsets

1. This work is important.
2. This organization is capable.
3. This organization is trustworthy.
4. I am connected to this work.
5. An estate gift is a smart choice.
6. People like me do things like this.
7. I need to share my intentions.

A scenic landscape featuring a winding asphalt road that curves through a valley. To the left of the road is a dense forest of evergreen trees. To the right is a calm body of water, likely a lake, which reflects the surrounding mountains. In the background, a range of rugged, snow-capped mountains rises against a clear sky. The foreground shows dry, brownish grass and some small shrubs along the roadside.

**How do they set the
direction of their journey?**

How do they sustain it?

Where do they start?

Legacy Giving Donor **Journey**



SUPPORTING



DISCOVERING



CONSIDERING

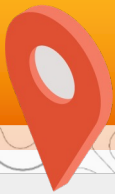


DECIDING



ACTING





PHASE 1 OF 5

Supporting

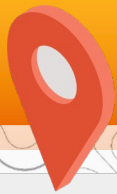
Waypoints

- Supports mission
- Receives thank-you messages and evidence of impact
- Deepens engagement

Watch for

- Increasing giving frequency or amount
- Engaging through advocacy or volunteer roles





PHASE 2 OF 5

Discovering

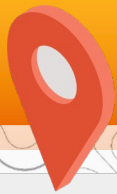
Waypoints

- Feels connected and appreciated
- Introduced to idea of planned giving

Watch for

- High engagement with nonprofit
- Reading introductory legacy giving articles





PHASE 3 OF 5

Considering

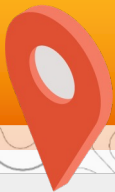
Waypoints

- Reflects on finances and plans
- Considers values and legacy
- Weighs priorities

Watch for

- Opportunities to strengthen identity formation
- Interest in nonprofit's vision and impact





PHASE 4 OF 5 **Deciding**

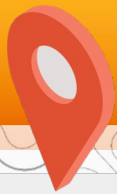
Waypoints

- Integrates nonprofit with identity
- Researches options
- Decides to make a legacy gift

Watch for

- Increased web traffic
- Gift vehicle research
- Contacting gift officer





PHASE 5 OF 5

Acting

Waypoints

- Assembles estate planning team
- Arranges gift
- Notifies nonprofit

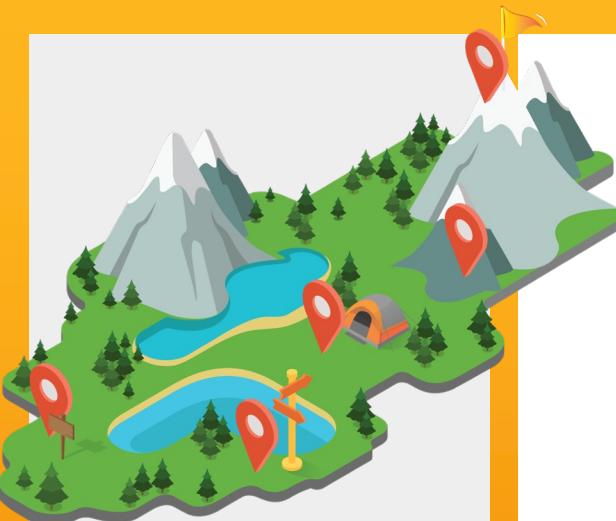





Watch for

- Requesting bequest language
- Completing gift notification form



Where do we develop mindsets?



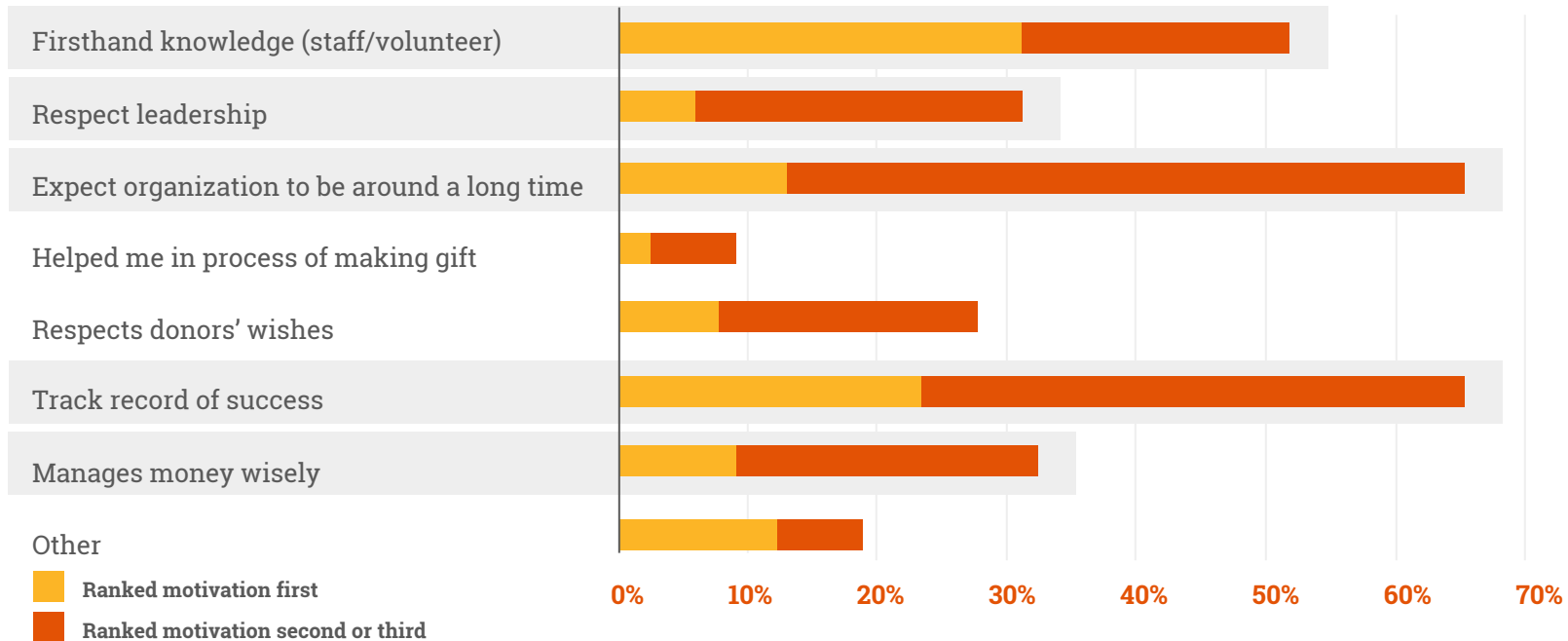
- 
-  **SUPPORTING**
 -  **DISCOVERING**
 -  **CONSIDERING**
 -  **DECIDING**
 -  **ACTING**



This organization
is trustworthy.

BELIEF THAT AN ORGANIZATION CAN BE TRUSTED
BELIEF IN AN ORGANIZATION'S LONGEVITY
BELIEF THAT AN ORGANIZATION IS FINANCIALLY SOUND

Top factors (besides mission) in choosing organization for largest gift





I am connected
to this work.

BELIEF THAT ONE'S GIFTS MATTER

BELIEF THAT AN ORGANIZATION IS PART OF ONE'S LIFE STORY



An estate gift is
a smart choice.

BELIEF THAT ONE WANTS TO BE REMEMBERED
BELIEF THAT A DONOR DOES NOT NEED TO LEAVE ESTATE TO HEIRS
BELIEF THAT ESTATE PLANNING IS VALUABLE

Stages of Psychosocial Development



Infancy

trust vs.
mistrust



**Early
Childhood**

autonomy
vs. shame
and doubt



Preschool

initiative
vs. guilt



**School
Age**

industry vs.
inferiority



Adolescence

identity
vs. role
confusion



**Young
Adulthood**

intimacy vs.
isolation



**Middle
Adulthood**

generativity
vs. stagnation



Maturity

ego
integrity
vs. despair

Stages of Psychosocial Development



Middle Adulthood

generativity vs.
stagnation



Maturity

ego integrity
vs. despair



I need to share my intentions.

BELIEF THAT SHARING INTENTIONS WILL HELP WISHES BE FULFILLED
BELIEF THAT SHARING INTENTIONS IS GOOD FOR THE NONPROFIT

Reasons donors choose not to disclose planned gifts

Q: Why did you choose not to tell them?

Did not want special attention/recognition	48.3%
Want to retain control over amount of gift	37.9%
Did not want to be asked for other gifts	34.5%
Felt that it was too personal to discuss	29.3%
Have not been asked by the nonprofit	12.1%
Concerned that the nonprofit would not respect my privacy	10.3%

1

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Loving Your Donors

FURTHER UNDERSTANDING THEIR JOURNEY

1

Show donors
they are
important
to you.

2

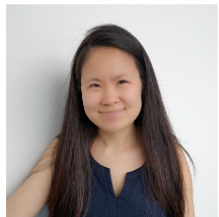
Demonstrate
that they
can make a
difference
with you.

3

Strengthen
their sense of
connectedness
to your mission.

4

Recognize
their
identity in
your work.



Professor Jen Shang, PhD

Co-Founder and Co-Director



Institute for Sustainable
Philanthropy

Jen Shang is the world's first PhD in Philanthropy. She is also the world's only philanthropic psychologist. Her research has been covered in the New York Times, BBC, The Guardian, the Chronicle of Philanthropy, Advancing Philanthropy and the Nonprofit Times. Jen has been published in numerous academic journals including, the Journal of Marketing Research, Marketing Science, the Economic Journal, Experimental Economics, Organizational Behavior and Human Decision Processes, Nonprofit and Voluntary Sector Quarterly, and Nonprofit Management and Leadership. Her research has been

Webinar: "How to Love Your Donors During COVID-19"

Scientific research project prior to and during COVID-19

- Studied over 4,000 adults in the US and other countries
- Measured about 30 feelings that people experienced on a daily basis

Lack of Connection

Authentic
connection

Genuine need to
connect

The Feeling, not the
Formality

Your donor is at the heart

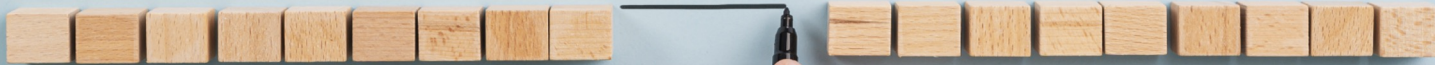


Build bridges that empower donors to recognize their identities in your mission.

**Build enduring,
emotional connections**
to the cause you
champion

**Help donors discover and embrace
their power** to create intrinsic
rewards that come from expressing
love through their giving

**Acknowledge that donors
are in control** of their
philanthropic decision to
support your mission



3 Basic Psych Needs - Connectedness

» **Potential questions to ask yourself:**

- Does this recognize the donor as a vital member of the NP's team?
- Does this make the donor feel engaged and part of the story?
- Does this package convey how they can extend or carry on their compassion by making a legacy gift?
- Does this package express how they will be joining with others by making a legacy commitment?

3 Basic Psych Needs - Autonomy

» **Potential questions to ask yourself:**

- Does this recognize them for choosing to support the NP with their past support?
- Does this present legacy gift choices to extend their commitment?
- Does this indicate options for next steps they can choose to make?
- Are we presenting how sharing their legacy gift intention allows them to ensure their legacy gift can extend their values as they wish?

3 Basic Psych Needs - Competency

» **Potential questions to ask yourself:**

- Does this convey how the donor is directly saving lives, spreading kindness, feeding the hungry, educating our future leaders, etc. by their past support? Are we expressing the effective outcomes that happen when they support the NP?
- Do we reinforce the NPs credibility and competency?

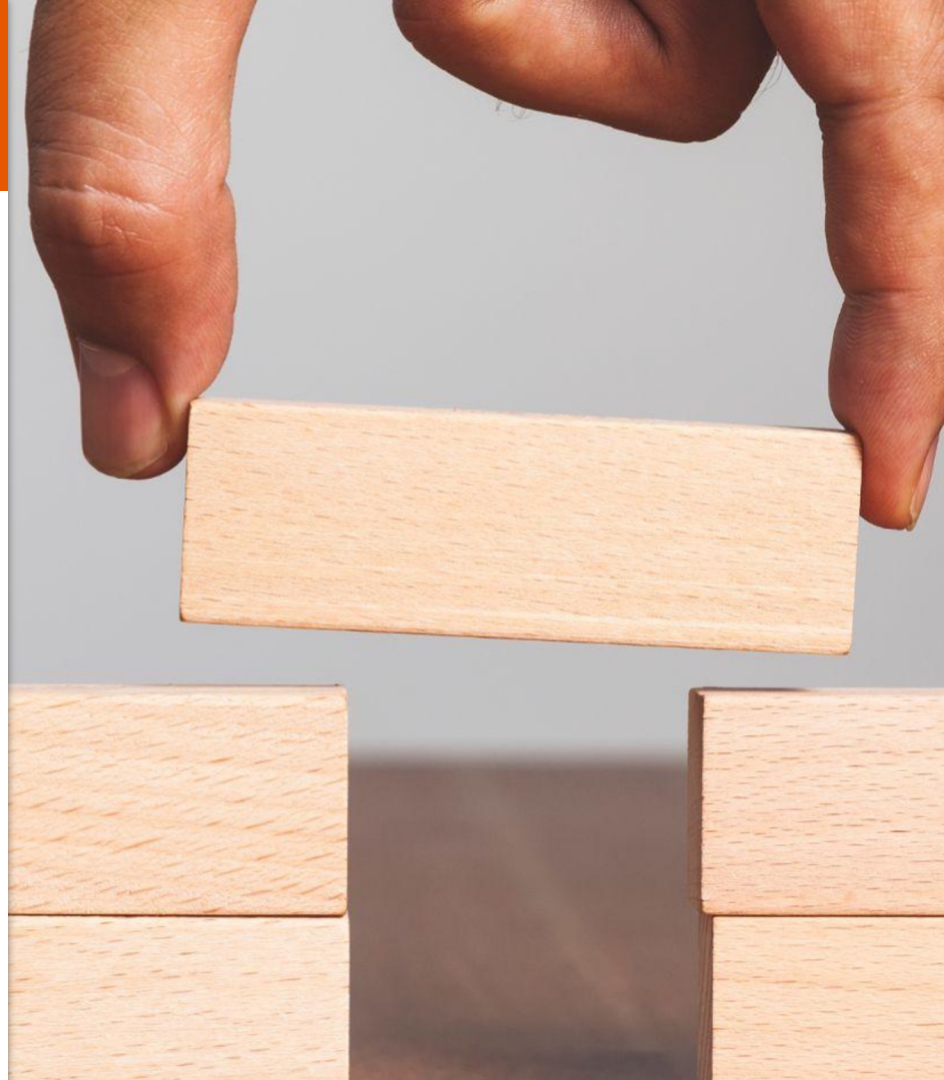
BUILDING THE BRIDGE...

YOU ARE CONNECTED

Connectedness

Creating connections between your donors and your mission that grow so deep and meaningful that they become part of their identity.

Example: As we begin the new year, one goal we set for 2024 is simple. We resolve to say thank you more often to **our loyal friends—like you.** By sharing your blessings, **you have helped countless neighbors in your community** overcome the hardships they face with dignity.



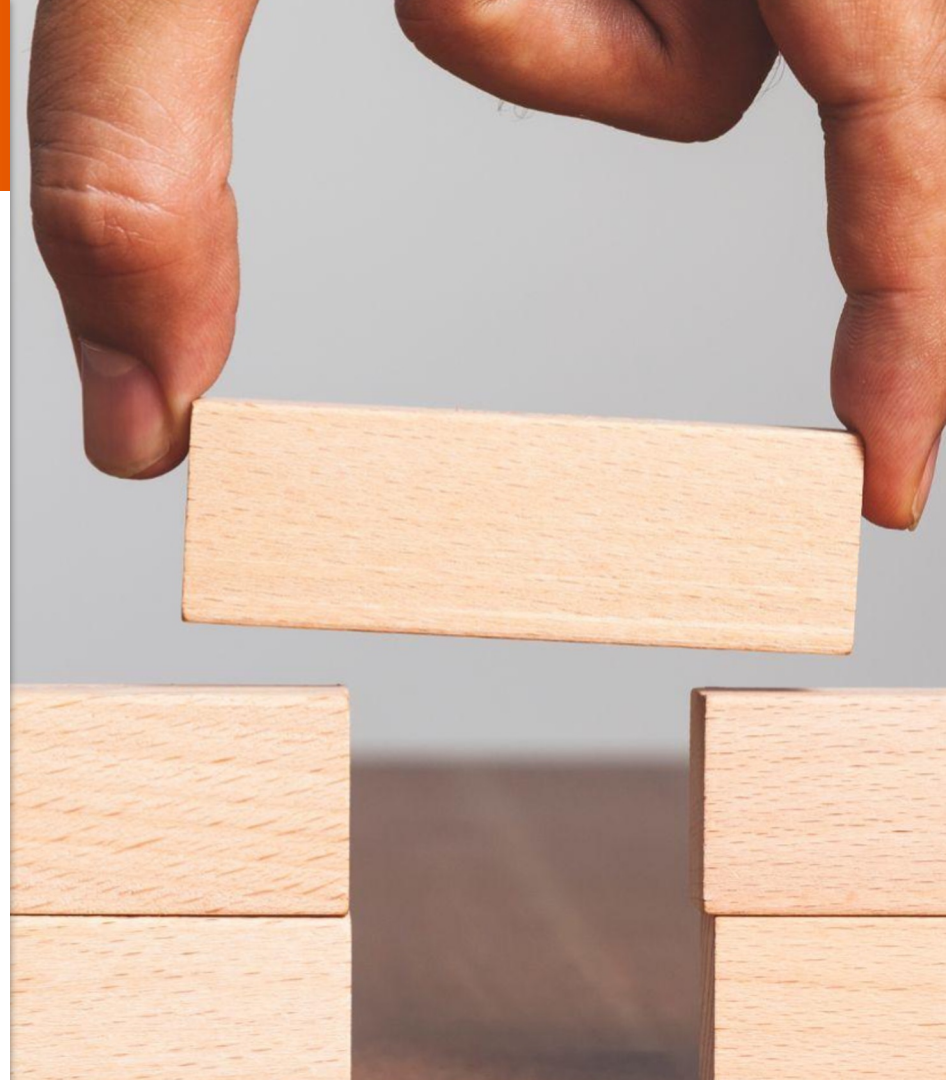
BUILDING THE BRIDGE...

YOU ARE CAPABLE

Capability

Empower donors to use their estate plans to make supporting your mission part of their immortal legacy.

Example: I hope you'll consider joining our group of supporters who channeled their passion for improving the lives of children through an estate gift. Our guide makes it easy to fit this into your plans. Of course, we are always happy to offer you a personal, confidential consultation with no obligation.



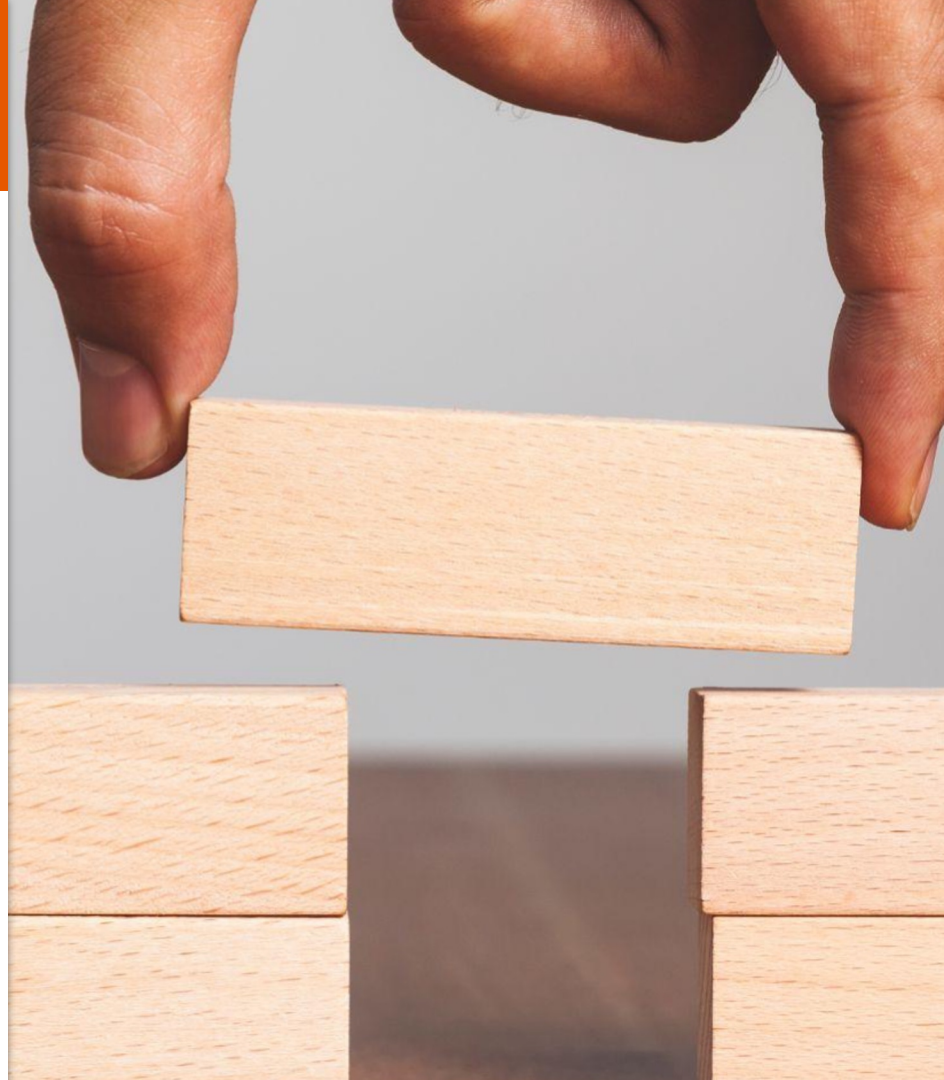
BUILDING THE BRIDGE...

YOU ARE IN CONTROL

Autonomy

Show donors we understand they are in control of their own philanthropic destiny.

Example: I've already chosen to preserve my passion for helping people facing crisis with a gift in my will or estate plan. Please send me benefits of joining the legacy society.



BUILDING THE BRIDGE...

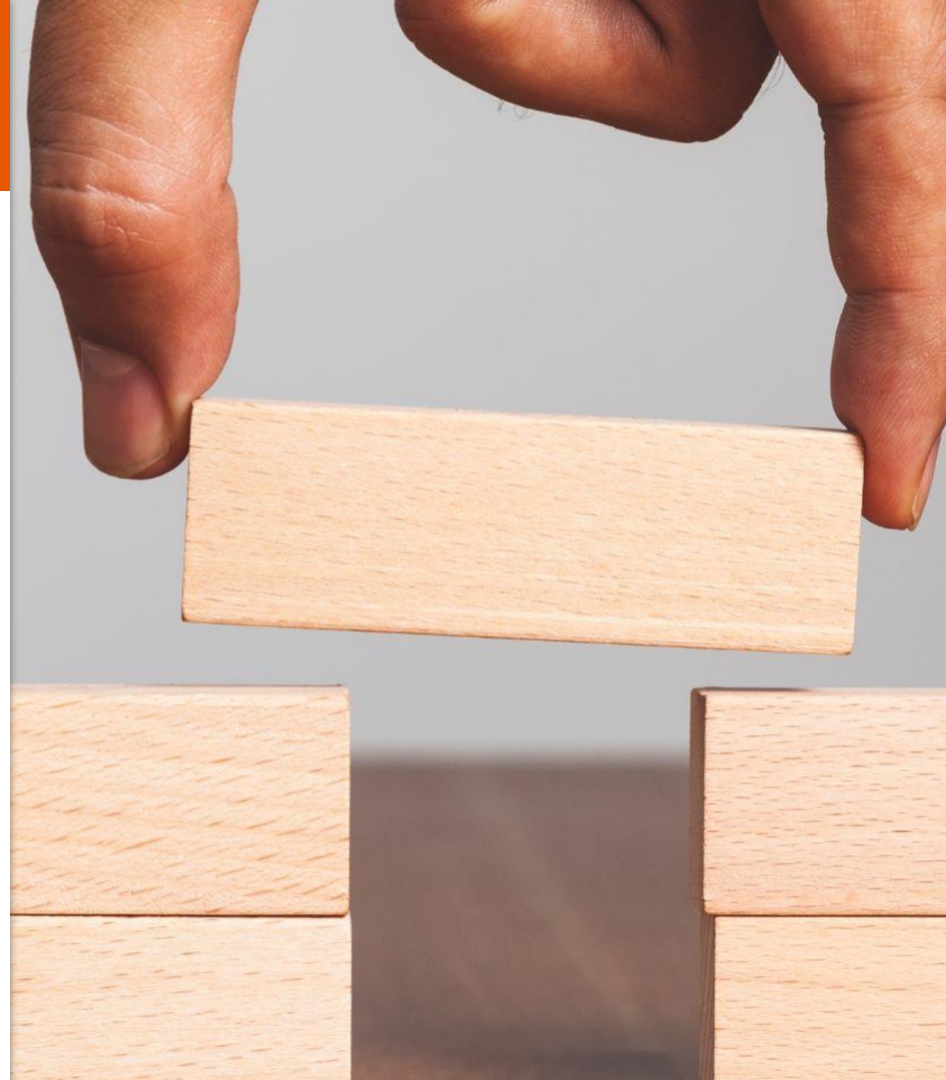
TO FIND IDENTITY

Identity

Help donors find moral identity by creating a moment where something big outside of themselves connects with something deep within themselves.

Example: Thank you for being a dedicated defender of the planet.

Our world is a better place because of your commitment to protecting everyone's right to a healthy environment today and for generations to come.



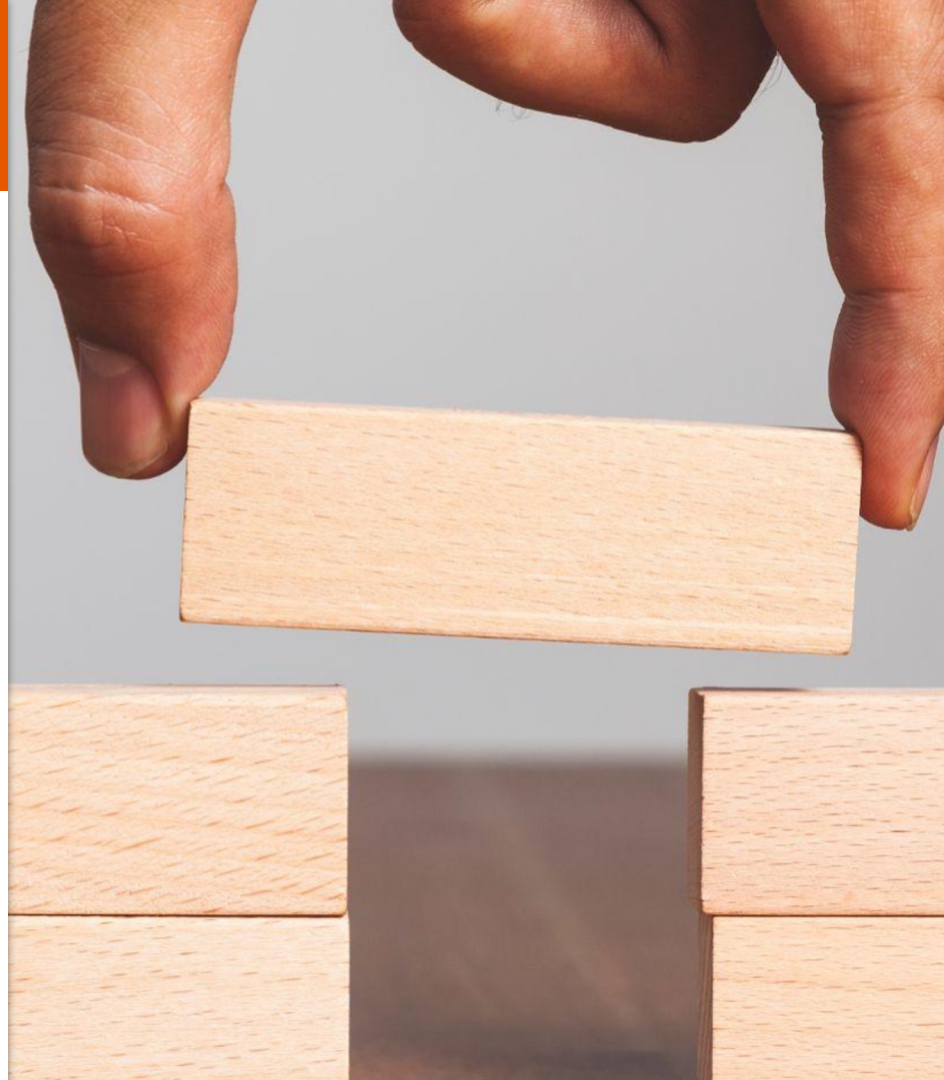
BUILDING THE BRIDGE...

TO EXPRESS LOVE

Love

Create opportunities to move from the compassionate love of an outsider to the more powerful companionate love of a group member.

Example: Because of **loving friends like you**, resilient families living in the world's most difficult places **will have hope** this year, too!



Understanding the Changes We and Our Donors are Facing

Be Aware of the Donor Mindsets During Their Legacy Journey

How Can You Better Understand and 'Love' Your Donors

Looking Forward



Thank you