

Planned Giving from the Inside Out

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Meet the S&W Team



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S&W Overview

Over 1000 nonprofit clients served



Arts & Culture



Community
Foundations



Conservation &
Environmental



Education



Health & Sciences



Social Justice /
Community Services



Zoos & Aquariums

Querying the Room

Do you have a formal or an improvised
Planned Giving program?

How would you rate your or your staff's
preparedness to handle PG engagement,
solicitation, and stewardship?



Are You Ready for Planned Giving?

1

Identify PG Prospects

2

Build an Infrastructure

3

Develop Marketing



Identify PG Prospects

Finding Your Best Prospects

Donor Behavior & Key Giving Indicators

Recency (Last Gift)
Frequency (How Many and How Often)
Monetary (How Much)

What paths have existing planned giving donors taken? Who are your most loyal donors?

Likelihood Modeling & Philanthropic Capacity Screening

Conduct prospect identification modeling through a trusted partner (e.g. DonorTrends) to determine who among your current donors is exhibiting giving behaviors that may make them more receptive to the PG conversation.

Take your list and screen them for capacity and philanthropic behavior through a trusted partner (e.g. DonorSearch, iWave) to develop a deeper understanding of your best PG prospects.

Donor Conversations & Donor Surveys

Who has already raised their hand and who is ready to raise their hand?



Case Study



The Challenge

Building a Planned Giving Pipeline

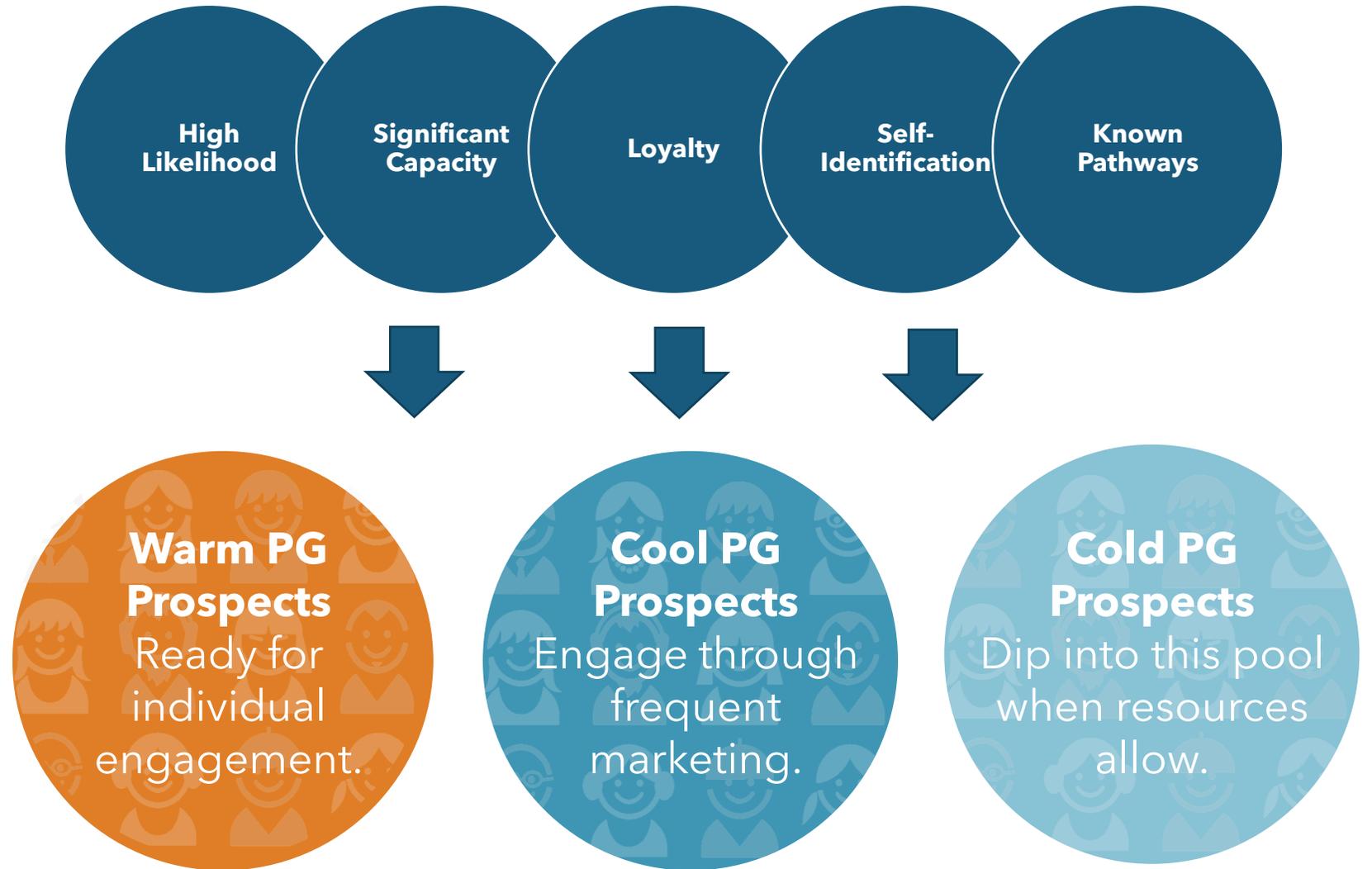
A local animal shelter had for years been the passive beneficiary of donor bequests.

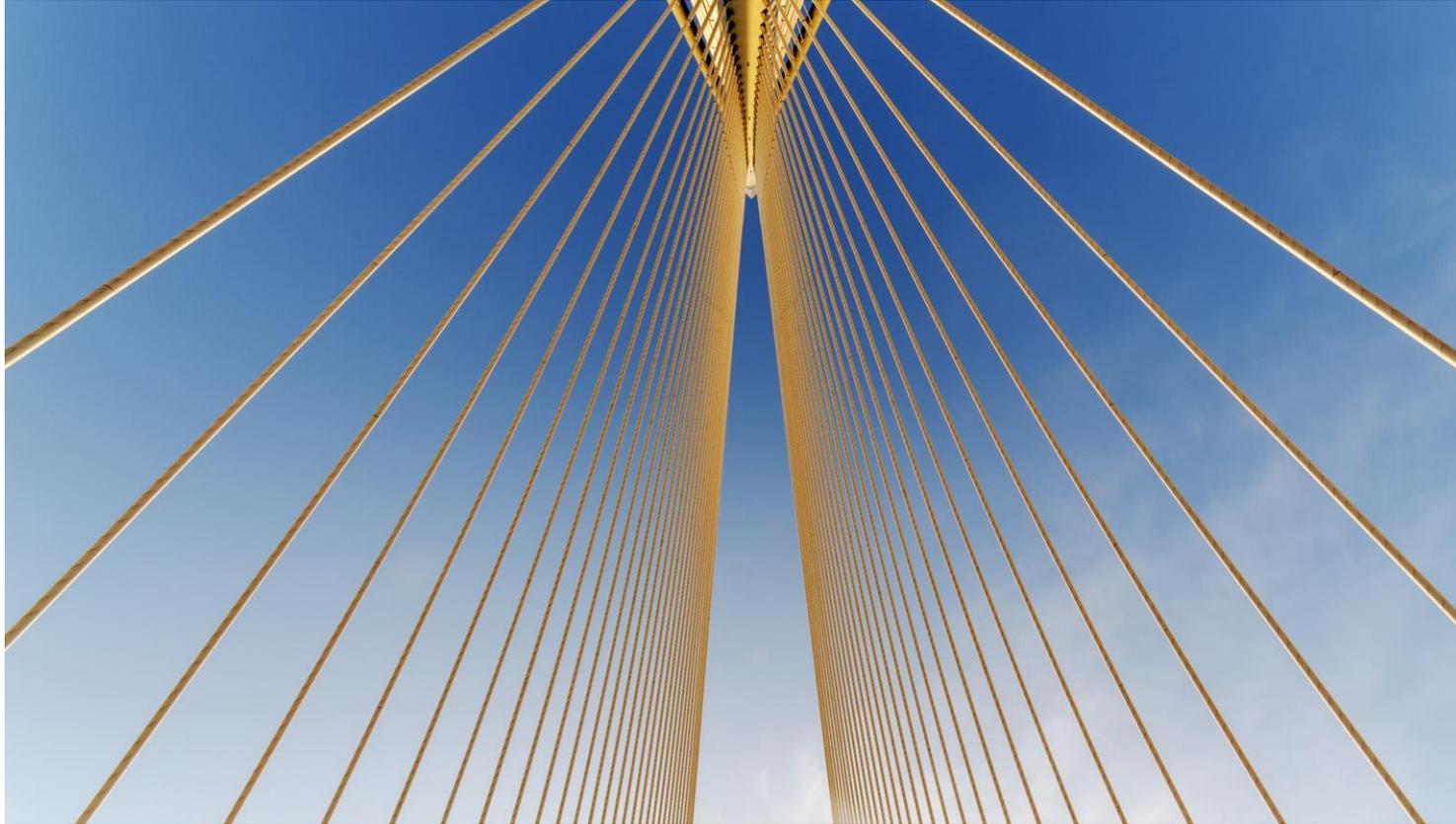
Through strategic planning, the organization recognized bequests as a key source of revenue for future growth.

With limited resources for fundraising, the shelter needed to identify its best planned giving prospects for targeted engagement and solicitation.

Case Study Solution

Through a combination of file analysis, likelihood modeling, philanthropic capacity screening, and a community survey, S&W identified planned giving opportunity from among the shelter's current supporters and developed prospect cohorts for targeted and strategic engagement.





Build an Infrastructure

PG Infrastructure Best Practices



Donor Database

Record and maintain Planned Gift data following standardized procedures—it has a home and a purpose!

Track realized Planned Gifts and identify the revenue and gift type.

Capture Planned Gift intentions and relevant donor information.

Manage Planned Gift prospect ratings, activity, relationships, and opportunities.

Develop reporting and analysis which supports and advances Planned Giving efforts.

Development Operations

Facilitate Planned Giving inquiries through multiple channels. Follow up promptly, provide relevant information and actionable next steps.

Acknowledge Planned Gifts in a way that reflects the importance of the gift to both your organization and the donor.

Steward Planned Giving donors and families in a manner consistent with recognizing and elevating the significance of the intended or realized gift.

Assign Planned Giving prospects and donors to fundraiser portfolios and manage these relationships actively.





PG Infrastructure Best Practices

Staffing

You do not need a PG expert on staff to grow a successful PG program.

Everyone on staff has a role in Planned Giving.

The majority of organizations will direct PG inquiries to the CDO or, in some cases, the MGO.

Learn one aspect of it at a time to deepen your understanding and build your knowledge base.

Find Trusted Partners

Reduce risk to your organization.

Allows you to offer PG opportunities in which you may not have expertise.

Allows you to choose the right advisors for your donors: marketing, legal, financial, etc.

Consider banks and community foundations as strong resources.

Case Study



The Challenge

Managing Planned Giving Data

A storied Philadelphia social service agency with 70,000+ active donors operated a complex Planned Giving program with multiple giving vehicles and thousands of prospects and donors.

The management of Planned Giving engagement, solicitation, and stewardship in Raiser's Edge was further complicated by a campaign which included bequests which would mature into an endowment.

Case Study

Solution

Good data is the basis for good donor stewardship—at any level and for any type of giving.

The database should reflect the level and complexity of the Planned Giving program.





Develop a Marketing Toolkit

Philanthropic Marketing

for Planned Giving



PG Brochure

- The information included in a PG brochure is by its nature dense and serious. Consider a multi-page brochure that provides room for the eye and the mind to rest.
- Personal testimonials are an important part of inspiring others to participate.
- The brochure should be easily accessible online and downloadable so that a donor can view it on a screen or print at home.
- The brochure's content should speak to Planned Giving in a way that is mission-centric and reflects your organization's long-term vision.

PG Society

- A Planned Giving society is a fundamental marketing instrument which connects the donor to the community of your planned giving supporters as well as to the larger mission and vision of the organization.
- The Society should be branded according to its significance to the your organization's community, mission, and history.

Philanthropic Marketing

for Planned Giving



Digital Marketing

- Planned Giving has its own page on your website which provides users with comprehensive information and instructions for making a planned gift.
- Staff contact information is readily accessible and a fillable form is available to request more information.

Showcase Planned Giving Everywhere

- Add to your email signature, hyperlinked to the planned giving section of your website: "Make a gift that costs nothing during your lifetime. Here's how."
- Include language on publications, appeals, etc.: "Have you included [organization] in your estate plans? We'd love to know!"

Case Study

Philanthropic Marketing for Planned Giving



PLANNED GIVING

Once you've assured your family's future, help secure Gesu's! A small fraction of your estate can transform a child's life. It's as simple as designating The Gesu School, Inc., in your will.

The Magis Society

Gesu's Magis Society recognizes donors who have used planned giving to do more for the greater good. Their generosity ensures the sustainability of Gesu School and our mission for years to come.

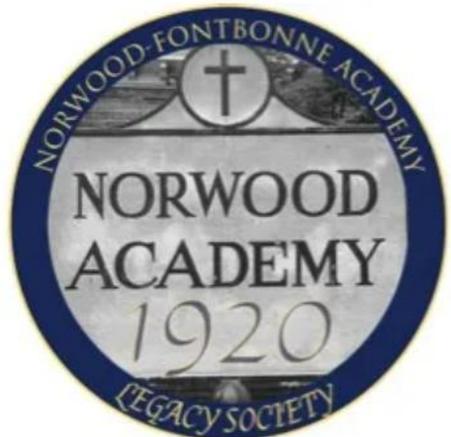
Meet Keith Pension, a Magis Society Member:

"When I first made a will 35 years ago, I had a fairly typical focus: my stepchildren and the grandchildren I presumed would follow. When I recently sat down to update the document, I realized that the ensuing years pointed toward a major change in focus. Why, I now questioned, continue to provide for those already so very well provided for? Instead, I'd like to help open up opportunities for those who have not been so amply endowed. Of the many causes I support in life and hope to support after my death, Gesu is most important of all. For this reason, I have designated Gesu a 50% beneficiary."

— Keith Pension

Case Study

Philanthropic Marketing for Planned Giving



Planned Giving

Turn your gift into an opportunity

If you would wish to extend your support of Norwood-Fontbonne Academy to make a permanent impact, there are several gift arrangements to choose from. A planned gift is one way to strategize for the future, manage your affairs, and make a lasting gift to the Academy.

Whether you wish to put your donation to work today or benefit us after your lifetime, you can find a charitable plan that allows you to provide for your family and support NFA at the same time.

The 1920 Legacy Society was established to honor individuals who have made such a commitment to the Academy. The 1920 Legacy Society is composed of alumni, parents, faculty, staff and friends who support the Academy through estate gifts, life-income gifts or the transfer of assets.

Donors of all income levels impact the future legacy of NFA through their participation in the 1920 Legacy Society. We invite you to become a part of this select group of individuals and ensure the mission of Norwood-Fontbonne Academy continues for

Ready to Engage and Steward!

Inspire

Donor decisions regarding end-of-life philanthropy will be influenced by their confidence and trust in your organization. An organization's reputation as a careful steward of resources, a steady partner with deep roots in the community, and a capacity for executing long-range strategic plans will be important factors.

Recognize

The individual acknowledgement of Planned Gifts, both promised and realized, is easy, public recognition should be thoughtful and in keeping with your organization's mission and community of supporters.

Invite

Keep Planned Giving prospects and donors engaged in the mission, vision, and values of your organization through annual events which recognize and motivate giving.

Share

Planned Giving testimonials tell a story and in telling a story make the concept of planned giving a reality: a real person, a real legacy, a real outcome.



Thank You!

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