Building A Legacy Program: Marketing, Messaging, Meetings

Joseph Richardson
Associate Director, Gift Planning
Boston College

Marketing

- Marketing Plan
- Segmenting Donors
- Word Graphics
- Crescendo e-Newsletter & Social Media
- Postcards & Hard Copy Newsletters
- Mission Video
### Marketing Plan

<table>
<thead>
<tr>
<th>Quarter</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>Focus on IRA Rollover-Plan Donor Event, Newsletter, (2x) Social Media, Intranet &amp; Social post, Work On Article</td>
<td>Newsletter, (2x) Social Media, Caring, Work On Article, Appeal Letter</td>
<td>Newsletter, (2x) Social Media, Publish Article, Plan To Host A May Legacy Giving Seminar</td>
<td>-Newsletter, (2x) Social Media, Buck Slip, Work on Article, Order Extended Postcards</td>
<td>-Newsletter, (2x) Social Media, Publish Article, Print &amp; Ship-Extended Postcard</td>
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<table>
<thead>
<tr>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
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<tbody>
<tr>
<td>Q2</td>
<td>Focus on Estate Planning/Bequests &amp; CGA-Newsletter, (2x) Social Media, Intranet &amp; Social post, Work On Article Host A Legacy Seminar</td>
<td>Newsletter, (2x) Social Media, Caring, Work On Article, Appeal Letter</td>
<td>-Newsletter, (2x) Social Media, Publish Article, Segment Legacy Giving Email</td>
<td>-Newsletter, (2x) Social Media, Buck Slip, Work On Article, Order Extended Postcards</td>
<td>Newsletter, (2x) Social Media, Publish Article, Print &amp; Ship-Extended Postcard</td>
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### Weekly Actions for Quarter

<table>
<thead>
<tr>
<th>Campaign week 1</th>
<th>Campaign week 2</th>
<th>Campaign week 3</th>
<th>Campaign week 4</th>
<th>Campaign week 5</th>
<th>Campaign week 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print/Mail Postcard</td>
<td>-E-newsletter</td>
<td>-Run Website Analytics</td>
<td>-Continue Donor Follow-up</td>
<td>-Ad In Print Newsletter</td>
<td>-E-Newsletter</td>
</tr>
<tr>
<td>Clean Newsletter List</td>
<td>-Facebook</td>
<td>-Donor Follow-up</td>
<td>-Social Media Post #2</td>
<td>-Clean Newsletter List</td>
<td>-Facebook</td>
</tr>
<tr>
<td>Write E-Newsletter</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-Write E-Newsletter</td>
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<tr>
<th>Campaign week 7</th>
<th>Campaign week 8</th>
<th>Campaign week 9</th>
<th>Campaign week 10</th>
<th>Campaign week 11</th>
<th>Campaign week 12</th>
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</thead>
<tbody>
<tr>
<td>Donor follow-up</td>
<td>-Donor Follow-up</td>
<td>-Ad in Print Newsletter</td>
<td>-E-Newsletter</td>
<td>-Donor Follow-up</td>
<td>-Donor Follow-up</td>
</tr>
<tr>
<td>Follow-up eblast</td>
<td>-Social Media Post #2</td>
<td>-Clean Newsletter List</td>
<td>-Facebook</td>
<td>-Run Analytics</td>
<td>-Social Media Post #2</td>
</tr>
</tbody>
</table>

### Donor Segmentation

- **Legacy Prospect List:**
  - Donors Age 60+
  - All past and present board members

- **Your Largest Donors:**
  - Age 60+ donors who have made a $1,000 donation at any time

- **Your Most Loyal Donors:**
  - Age 60+ donors with a record of 3-year consecutive giving
  - Age 60+ donors with a record of 10 year+ giving (nonconsecutive)
Word Graphics

Use pictures and planned giving messages to enhance your marketing. Place word graphics on your banner for each page of your website.

- Your Legacy Gift Will Prepare Our Scholars For Their Academic Journey
- Your Gift Ensures That Future Students Have Access To A Great Education
- Your Legacy Gift Will Teach Our Students How To Save Lives

E-Newsletter & Social Media

- Monthly or quarterly e-newsletter sharing educational resources for gift options
- Provide click-through link with gift options
- Encourage committee and donors to share
- Personalize e-newsletter with a word graphic banner & organizational content in header
- Utilize Crescendo blogs and content and link back to website
- Social Media post before or after e-Newsletter with same content linking back to website
Postcards

- Personalize Postcard on CresPrint
- Focus on minimum of 2 postcards annually highlighting 2 various gift options i.e., IRA Rollover or Charitable Gift Annuity
- Mail postcard to segmented donor list
- Follow up with phone call and appeal letter

Hard Copy Marketing Materials
- Lobby to have a legacy piece in every publication
- Include a buck-slip with the ask to join Legacy Society and interest in leaving an estate gift

Mission Video

- Script: Crescendo covers 20 lines. Consider creating a video for an introduction and closing with President/Board
- Photos: Have plenty of mission related photos for b-role
- Video: Have action shots for b-role to be in the background
Messaging

- Discovery Questions
- Donor Story
- Committee Members
- Donor Survey

Discovery Questions

Why, Why, Why: Reason Your Donor Gives

- What are you most passionate about with our mission?
- What philanthropic gifts have brought you the most joy in the past?
- Why did you first give to us and why have you remained so loyal?
- Ask the donors story and joy following up with an ask for the donor to consider a gift.
Donor Story

Ask permission to share donor’s story & let them know it will inspire others to give

- What part of our work is most meaningful to you?
- Please share your experience with our organization & inspiration behind your gift.
- What do you wish others knew about our organization?
- What is your hope and expectation for your generous gift & what area would you like to see it directed towards?

Committee Contribution

Partnering with Committee & Board Members

- Be able to articulate our organizations value to the community and represent the organization and its services to a variety of audiences
- Assist in the ongoing task of identifying, qualifying, cultivating, and soliciting potential donors with the capacity and inclination to make a legacy gift
- Identify prospective major donors and professional advisors
- Educate and cultivate
  - Invite prospects to cultivation events and promote Legacy Society
- Engage in solicitation
  - Participate in cultivation and solicitation meetings with prospects, as appropriate. Assist with marketing strategy of planned giving vehicles
- Meet quarterly to accomplish these objectives
- Committee Members shall also respect/maintain the confidentiality of all information relating to all prospects and donors
Donor Survey

Survey questions to ask your donors

- How do you engage with organization?
  - Donor
  - Volunteer
  - Attended event
- Which aspects of our organization’s mission and vision is most important to you? (List organization’s values)
- Which of the following specialties do you most care about? (List specialties of the organization)
- When thinking about future generations, how important is our work to continue supporting the community?
- Many supporters like to include gifts to our organization in their will to support causes that are most important to their lives. Have you considered making such a gift to our organization?
- If you have already left a gift to our organization through your will, trust, or beneficiary designation, please tell us about it:
  - Planned gift
  - Specific purpose fund
  - Organization can use gift wherever it will do most good
- How do we rank in comparison to other organizations you may support?

Meetings

- Solicitation
- Follow Up
- Stewardship
Solicitation

Build Case For Support Through The Donors Passion & Joy

- **Customize**: Build Crescendo Brief/Guide with case for support
- **Personalize**: Utilize images & language of your organization
- **Ask**: Have three major gift asks on the proposal at the end
  - Major Gift
  - Legacy
  - Blended Gift

Follow Up

- Thank the donor
  - Email
  - Handwritten note
  - Phone call
- Reach out to see if the donor needs additional information or had any question
- Stewardship is just as important as closing the gift. Multiple touch points are needed throughout the year.
Stewardship

Thank You, Thank You, Thank You
- Phone call
- Handwritten notes
- Letters
- Publication acknowledgments
- Donor Stories
- Events
PRACTICAL PLANNED GIVING CONFERENCE
SPEAKER EVALUATION

Date: __________________ Speaker: ________________________________________

Name (optional): __________________________________________________

Please rate the following:

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Good</th>
<th>Neutral</th>
<th>Fair</th>
<th>Poor</th>
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<tbody>
<tr>
<td>I. OVERALL</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Were your major objectives for this session met? Was the content of the session vital, timely, substantive?</td>
<td></td>
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</tr>
<tr>
<td>Comments: ____________________________________________________________________________________________</td>
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| II. RELEVANCE | 5    | 4     | 3    | 2    | 1    |
| Was the subject matter directly related to the requirements of your job? |
| Comments: ____________________________________________________________________________________________ |

| III. VALUE | 5    | 4    | 3    | 2    | 1    |
| Do you believe the benefits of this session were worth the time, effort and cost? |
| Comments: ____________________________________________________________________________________________ |

| IV. SPEAKER | 5    | 4    | 3    | 2    | 1    |
| How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic? |
| Comments: ____________________________________________________________________________________________ |

| V. MATERIALS | 5    | 4    | 3    | 2    | 1    |
| Were the materials clear and organized and appropriately helpful for the session? |
| Comments: ____________________________________________________________________________________________ |

Vi. What did you like the most about the session?
__________________________________________________________________________________________

VI. Any suggestions to improve future sessions?
__________________________________________________________________________________________

XII. How many years of gift planning experience do you have? _______