

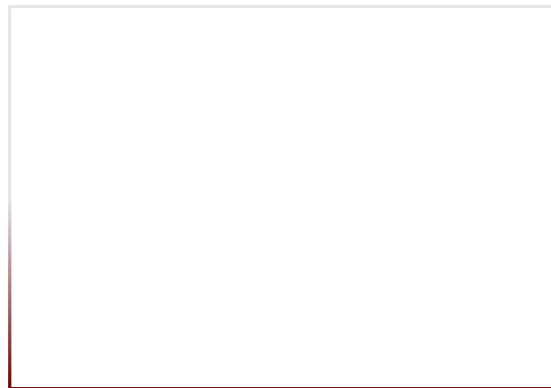
Building A Legacy Program: Marketing, Messaging, Meetings

Joseph Richardson
Associate Director, Gift Planning
Boston College

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Marketing

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



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Marketing Plan					
January	February	March	April	May	June
Q1 Focus On IRA Rollover-Plan Donor Event, Newsletter, (2x)Social Media, Intranet & Social post, Work On Article	-Newsletter, (2x)Social Media, Caring, Work On Article, Appeal Letter	-Newsletter, (2x) Social Media, Publish Article, Plan To Host A May Legacy Giving Seminar	Q2 Focus on Estate Planning/Bequests & CGA-Newsletter, (2x)Social Media, Intranet & Social post, Work On Article Host A Legacy Seminar	-Newsletter, (2x)Social Media, Buck Slip, Work on Article, Order Extended Postcards	-Newsletter, (2x) Social Media, Publish Article, Print & Ship-Extended Postcard
July	August	September	October	November	December
Q3 Focus on End of Year Gifts/Appreciated Assets-Newsletter, (2x)Social Media, Intranet & Social post, Work On Article	-Newsletter, (2x)Social Media, Caring, Work On Article, Appeal Letter	-Newsletter, (2x)Social Media, Publish Article, Segment Legacy Giving Email	Q4 Focus on Charitable Gift Annuities & IRA-Print and Mail Extended Postcard, Newsletter, (2x)Social Media, Intranet & Social Media post, Work On Article,	-Newsletter, (2x)Social Media, Buck Slip, Work On Article,	Newsletter, (2x) Social Media, Publish Article
Weekly Actions for Quarter					
Campaign week 1 -Print/Mail Postcard -Clean Newsletter List -Write E-Newsletter	Campaign week 2 -E-newsletter -Facebook	Campaign week 3 -Run Website Analytics -Donor Follow-up	Campaign week 4 -Continue Donor Follow-up -Social Media Post #2	Campaign week 5 -Ad In Print Newsletter -Clean Newsletter List -Write E-Newsletter	Campaign week 6 -E-Newsletter -Facebook
Campaign week 7 -Donor follow-up Follow-up eblast	Campaign week 8 -Donor Follow-up -Social Media Post #2	Campaign week 9 -Ad in Print Newsletter -Clean Newsletter List	Campaign week 10 -E-Newsletter -Facebook	Campaign week 11 -Donor Follow-up -Run Analytics	Campaign week 12 -Donor Follow-up -Social Media Post #2

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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)

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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

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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

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Postcards

Post Card

- 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

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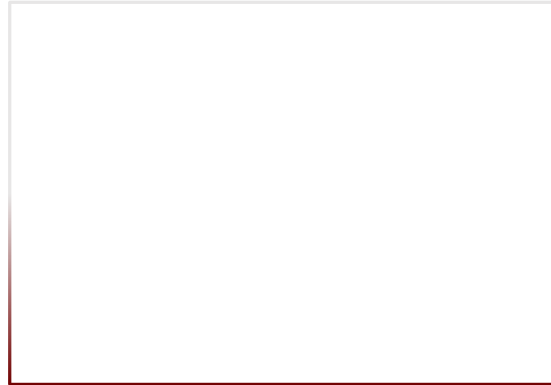
Mission Video

- 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

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Messaging

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



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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.

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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?

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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

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Donor Survey

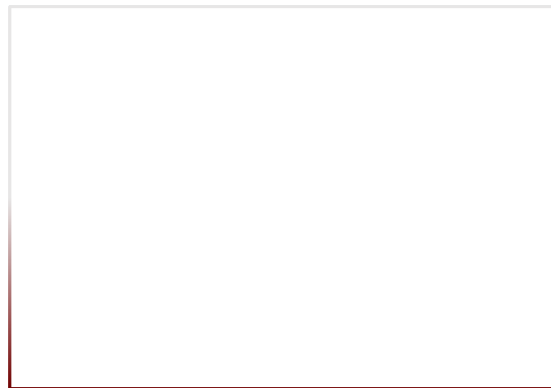
Survey questions to ask your donors

- 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?

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Meetings

- Solicitation
- Follow Up
- Stewardship



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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

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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.

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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:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1
Were your major objectives for this session met? Was the content of the session vital, timely, substantive?					
Comments: _____					

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? _____