



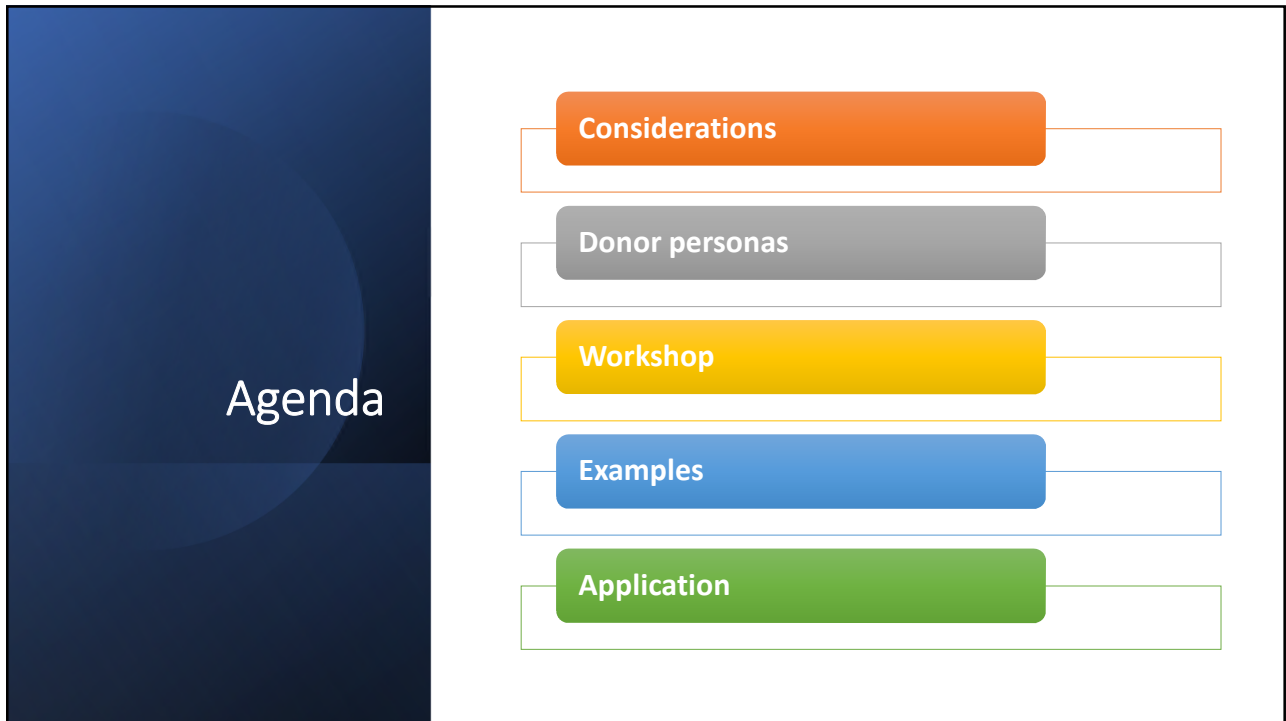
PPGC 2024
SAN DIEGO

**Understand your Legacy Donors
to Better Predict your Prospects**

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Crescendo
Integrated Marketing for Planned Gifts


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Agenda

- Considerations
- Donor personas
- Workshop
- Examples
- Application

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- Feeling stuck with the same old leads?
- Can't afford AI/tech firm costs?
- Can't get buy in from other fundraisers?
- Low marketing responses?
- Simply need a refresh?



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Key Considerations



- Use resources and data you have
- Be honest about where you are
- Forget everything you assume you know
- Involve colleagues from other teams
- Be willing to give change a chance
- Make it work for you



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What is a donor persona?

Gender, age, race	Family status	Capacity	Affinity
Interests	Motivations	Key relationships	Behaviors
Values	Needs	Fears	Legacy


 

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Workshop



1.
DEVELOP WORKSHEET




2.
CHOOSE YOUR GROUP






3.
SCHEDULE 3 SESSIONS

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Workshop: Worksheet

- What is planned giving?
- Words that describe planned giving
- Why do planned giving donors give?
- Why would a donor not make a planned gift?
- How can our organization relieve these barriers?
- What happens why you make a planned gift?






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Workshop: Group Selection

- Choose up to 3-5 participants
- Across teams (major giving, annual giving, etc.)
- Active participants
- Willing to commit a minimum of 3 hours






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Workshop: Sessions



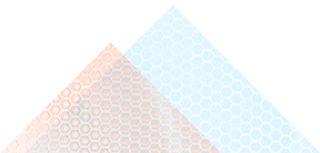
- 1.5-hour introduction and kick-off session
 - Set tone
 - Pull from donors, people, friends, and assumptions you know
- 1.5-hour wrap-up of exploration
 - Walk through progress made so far
 - Ensure completion of full worksheet
- 1-hour debrief of findings and defined next steps
 - Develop summarized profiles
 - Align with institutional historical and current data




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Pattie Sue the Planned Giver






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Pattie Sue: Background

- Age 65; widowed unexpectedly from her husband of 45 years
- Texas native; born and raised in Dallas
- Has **3 children and 4 grandbabies**, all of whom attend(ed) public school like their mom
- Her eldest was a **patient in the NICU** and she maintains strong relationships with CHST staff, both new and old
- Owns her original ranch house **debt-free** in Preston Hollow, with a lake house in Cedar Creek, where she enjoys hosting family during the summer months
- Receives **stable income** from social security, mineral interests, and her husband's pension
- Trusts her **accountant and attorney** to manage her funds for her with little oversight, both of whom pay house visits








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Pattie Sue: Values & Giving

- She started **volunteering** at Children's Health as a candy striper in high school; now continues to volunteer 3 days/wk
- Outside of volunteering, she plays Mahjong and pickleball with her **close friends**, advocates for the League of Women Voters, and goes to church, but also enjoys time in her garden
- Faith, family, health, and her community are most important
- She instilled her **passion for philanthropy** in her children by doing blanket drop-offs for the NICU during the holidays
- With her husband gone, she is frugal with her spending, but makes sure to give **annual gifts** to her favorite charities.
- Her family takes priority in her will planning, but Children's and several other charities are **included as percentages** to make sure everyone gets something in the end.


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Emily and Brad Ford the Planned Giving Prospects






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Emily and Brad Ford: Background

- Ages 38 and 43, respectively; married for the last 10 years
- **Moved to Plano** from CA to TX to build a family
- Emily and Brad both studied Business at USC; Emily has high school friends who attended SMU and still live in the Dallas area, one of whom is a **WAX member**
- Have a 2- and 4-year-old, both born in TX after they moved
- Emily also works full-time to **help pay off loans** on their home, cars, and schooling; current priority is to **save money** for kids' college and long-term health care needs
- Their first encounter with Children's Health started in the **Emergency Department** with their youngest who had a severe food reaction and are now visiting the Plano campus frequently in the food allergy program



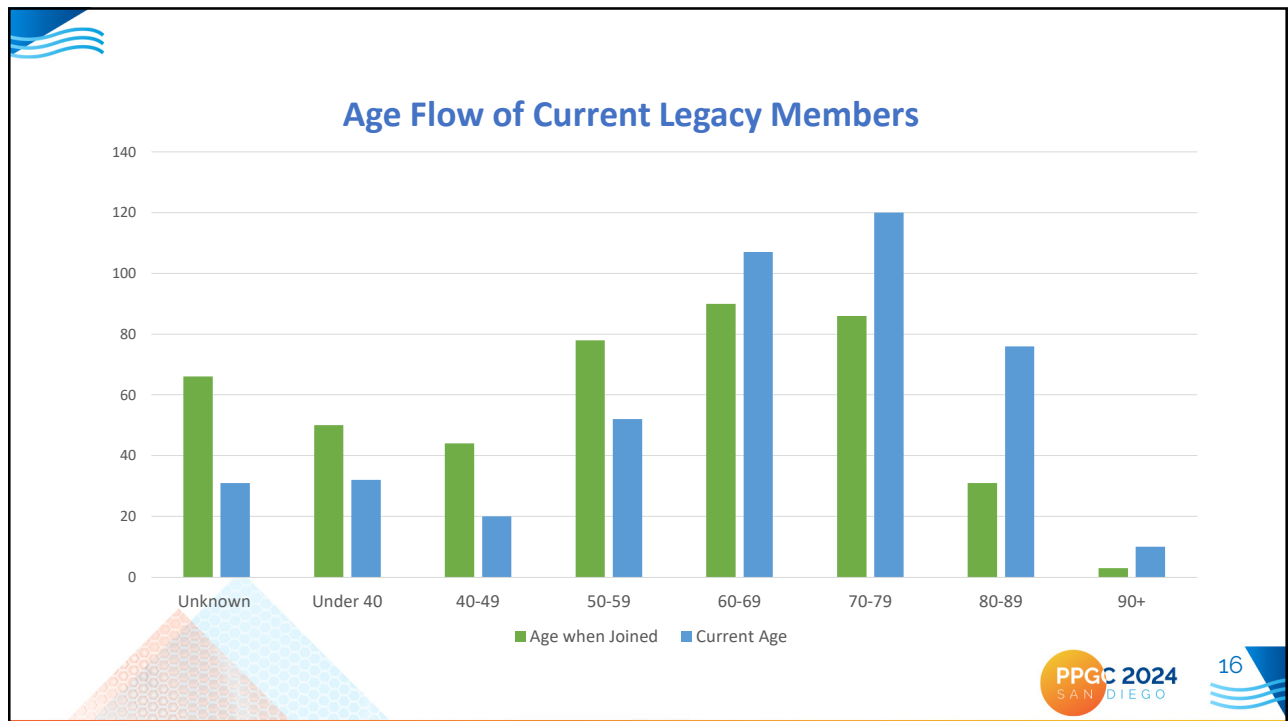
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Emily and Brad Ford: Values & Giving

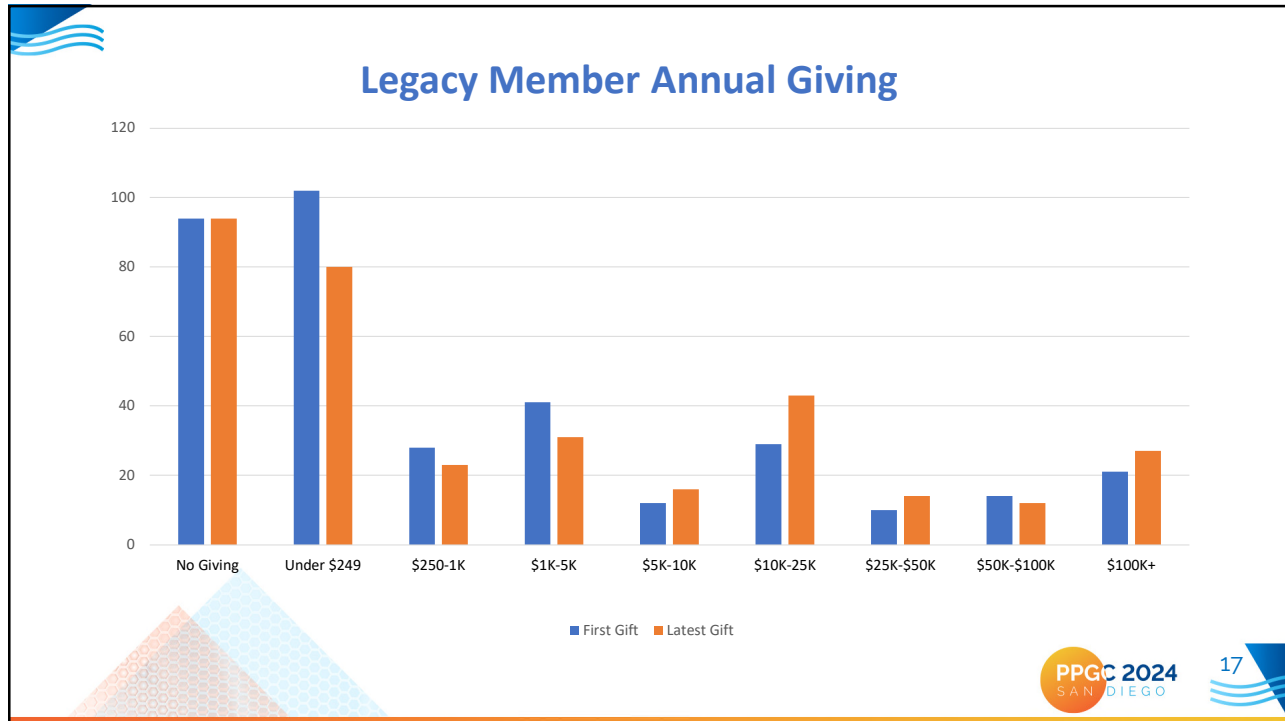
- Health, education, **financial stability**, and family are all areas they currently value
- Emily and Brad’s philanthropic values were instilled in them by their own parents’ dedication to their church and their community, creating **multi-generational** involvement
- They hope to **set an example** for their children on ways to give back to their community by paying it forward in support of other children and patients families
- Looking for ways to give that won’t impact their current cash value and have the **flexibility** to change in the future, but where they can have some **recognition** now
- As they learn more about the needs of Children’s Health, they hope to **increase their impact** over time

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Other data of interest

Where our members live

- 50% have a Dallas home address
- 10% live closer to the Plano campus
- 15% live out of state
- 4% donors live in Tarrant County


How our members give

- 50% included CMCF in their will
- 33% of membership is endowments
- 5% planned giving donors made gifts other than bequests (CGA, CRT, IRA, LI)

Where our members give




- 50% support mission/specific funds (“other”)
- 20% made unrestricted bequests donors
- 8% designated to research
- 1% donors support mental health

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Prospect Pool

- Age 40 and over
- Home address
- First gift date
- First gift designation
- Latest gift date
- Latest gift designation
- Total number of gifts
- Consecutive years of giving
- Planned giving likelihood

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Who can your new prospects be?

Gender, age, race	Family status	Capacity	Affinity
Interests	Motivations	Key relationships	Behaviors
Values	Needs	Fears	Legacy








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Jasmine: Background

- Age 33, single, but hoping to build a family of her own
- Studied at TWU and was **recruited** to work at CHST
- Still has some **student loan debt** and rents her apartment
- Has worked as a nurse in the heart center for 8 years
- She is **active in her community** as member of Junior League and the National Black Nurses Association, Dallas chapter, and is training to run the half-marathon.
- She connects with her college friends for brunch, cocktails, and karaoke nights, but spends most of her time hanging out with **family**, specifically her nieces, when not working.
- She has a true passion for **advocacy and outreach** on equity in healthcare, specifically in pediatrics.








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Jasmine: Values & Giving

- She sees her career at Children's Health as a **life-long** endeavor, hoping to get an advanced degree to make **meaningful change** on the administrative side.
- Intentionally putting in a lot of hours and **saving** her hard-earned money, with the help of resources from her **CHST benefits**.
- Creates a Red Balloon League **peer-to-peer fundraising** page every year, raising money for the heart center
- Inspired by reading CMCF **donor stories** and wants to learn more about what she could do to help inspire even more people

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Target opportunities

Jasmine – employee, 33, Dallas, no giving



- Target opportunity:
 - FreeWill

Emily and Brad – grateful family, 38/43, Plano, no giving (yet)


- Target opportunity:
 - Beneficiary designations
 - Percentage in their will

Pattie Sue – volunteer/grateful family, 65, Dallas, GIK/annual donations

- Target opportunity:
 - Mineral interests
 - Real estate-funded CRT






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How we speak about planned giving

- Communicating your **values** through building a legacy
- Giving **smarter** by looking beyond your bank account
- Leading the way by supporting the **future** of Children’s Health
- Being **recognized** for your commitment to your community
- Creating **flexibility** in your giving to allow for the unexpected
- Planning for your **loved ones** and the causes you care most about
- Increasing your support without affecting your **lifestyle**
- **Paying it forward** to make life better for children

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Final Step: Into Marketing Practice



Outcome (hook):

- The problem:
- The solution:
- The result:

What steps would a donor take to make a planned gift with CMCF?


1. First
2. Second
3. Third

Miller, Donald. *Marketing Made Simple: A Step-by-Step Story Brand Guide for Any Business* (2021).





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Key takeaways

1. Get back to basics
2. Let others be part of the process
3. Let assumptions tell their own story
4. Overlap with your data
5. Push towards who your prospects could be
6. Design segmented groups and targeting messaging
7. Determine your tone
8. Start—and then keep revisiting



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SPEAKER EVALUATION

COMPLETE THE SURVEY

Please fill out the speaker evaluation by using the QR code.

Powered by CresSurvey:

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The graphic features a large QR code on the left side. To its right is a blue-themed banner with white and yellow text. The banner includes the event name 'PPGC 2024 SAN DIEGO', the title 'SPEAKER EVALUATION', and a call to action 'COMPLETE THE SURVEY'. Below this, it asks the user to complete the evaluation using the QR code. It also mentions 'Powered by CresSurvey:' and features the 'Crescendo' logo with the tagline 'Integrated Marketing for Planned Gifts'. The background of the banner shows silhouettes of people in a professional setting.