

**PPGC 2024**  
SAN DIEGO

**Keeping the Faith: Promoting  
Planned Giving for Unparalleled  
Campaign Success**

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Integrated Marketing for Planned Gifts

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Thank you  
for being  
here!

Faith is taking the  
first step even when  
you don't see the  
whole staircase.

—Martin Luther King, Jr.

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## Let's Talk Campaign Success!

- Opportunities & challenges
- Education & customized strategies
- Nuances among recipient types
- Including planned giving

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We are  
honored!

Your  
experience in  
fundraising &  
planned  
giving

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Why is planned giving important to an organization, and in a campaign?

What challenges do you encounter?

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Advocate education & customized strategies lead to campaign and planned giving success.

Who is involved, and what do they need to know?

What strategies might we use?

How do we encourage planned giving?

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Who is involved?

Leadership, Team, & Program Executors  
Direct Responsibility

Decision-Makers  
Board & Administration

Advocates & Influencers  
Volunteers Leaders

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Who is involved?  
What do they need to know?

Cues  
Leadership, Team, & Program Executors  
Direct Responsibility

Decision Makers  
Cures  
Board & Administration

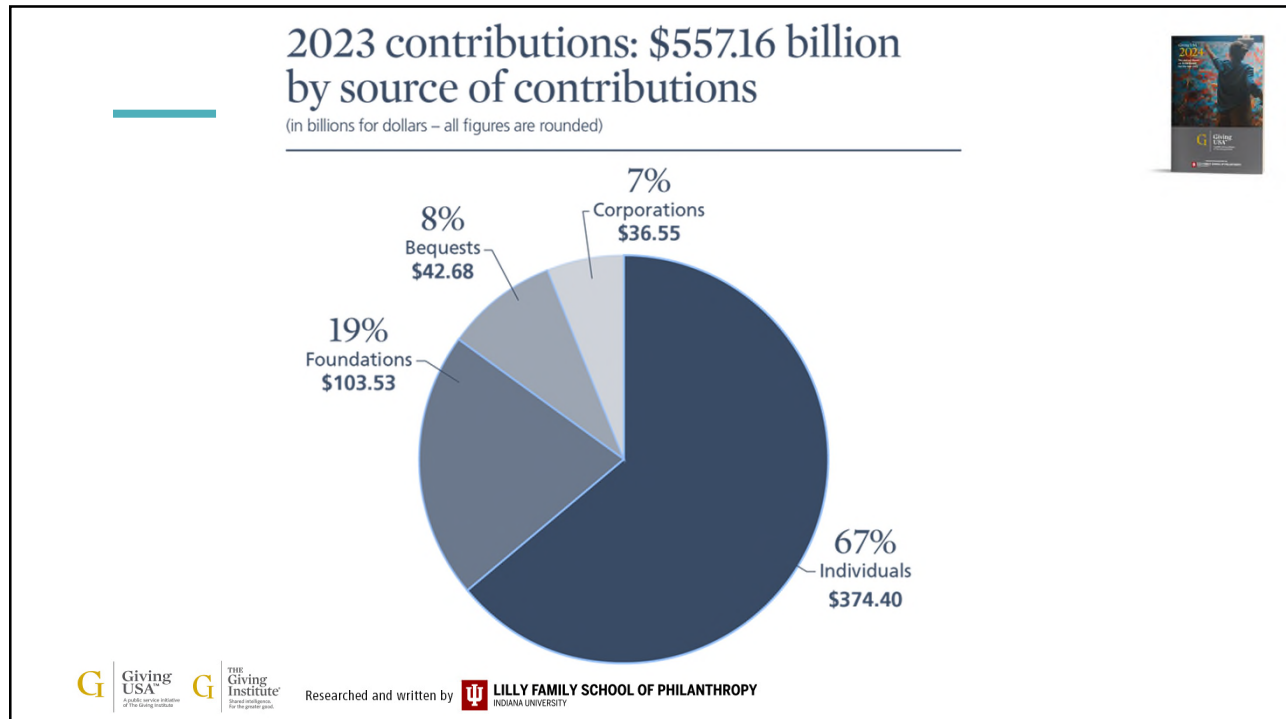
Advocates & Influencers  
Care  
Volunteers Leaders

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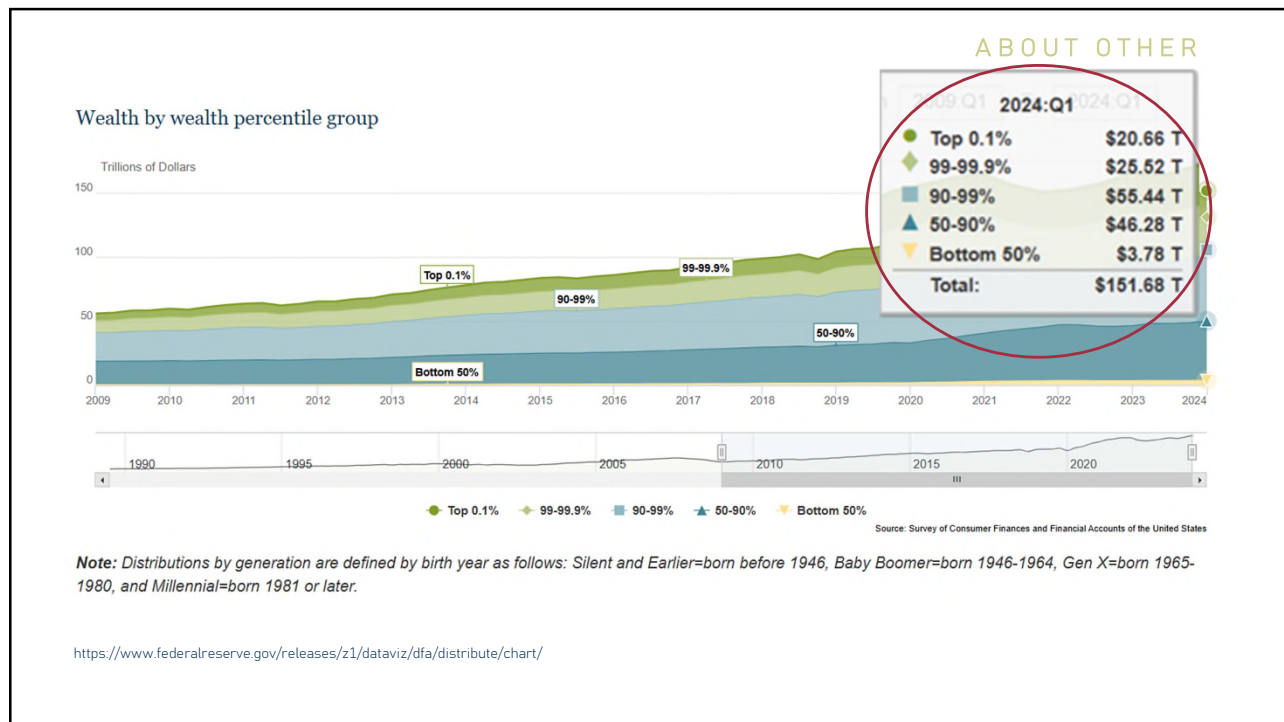
## Strategy starts with education: knowing where to look and what to emphasize.

Individuals	Noncash Assets	Planned Giving
<p><i>GIVING USA 2024 &amp; FEDERAL RESERVE (Q1 '24)</i></p> <ul style="list-style-type: none"> <li>• \$557.16 billion in 2023 with 64% from individuals</li> <li>• Give or influence approx 83% of gifts including bequests &amp; family foundations</li> <li>• Top 10% holds 67% of the nation's wealth</li> <li>• HNW individuals volunteer as ways to make impact</li> </ul>	<p><i>RUSSELL JAMES, III</i></p> <ul style="list-style-type: none"> <li>• Organizations that promote non-cash gifts experience exponential fundraising growth</li> <li>• Cash only – 11%</li> <li>• Any noncash – 50%</li> <li>• Appreciated securities – 66%</li> <li>• Applies to all nonprofits at every program size and level</li> </ul>	<p><i>Chronicle of Philanthropy, Cerulli Associates Research, &amp; Knight Frank</i></p> <ul style="list-style-type: none"> <li>• Some \$97 trillion expected from estates by 2067</li> <li>• \$75 trillion in American net worth in 2017; 57% held by baby boomers</li> <li>• 2021 estimates: \$84 trillion by 2045, <i>Cerulli Assoc. Rsch.</i>)</li> <li>• Some \$11.9 trillion to charities</li> <li>• \$90 trillion in next 20 years (<i>Knight Frank, 2024</i>)</li> </ul>

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Planned giving should be an important part of your campaign strategy. Here are a few options.

- Challenge opportunities
- Dedicated PG campaigns
- Blended gift opportunities
- Legacy societies
- Estate planning guide
- What else?

Culver's Batten Leadership Challenge in 2008:

- Match of face value to the endowment (up to \$50k)
- Over \$50k, match to endowed fund of choice
- Bump of 1% standard rate if coupled with irrevocable estate commitment of same amount
- 35 contracts for \$5,530,033 (comp. to 2 written in prior year)
- Nearly doubled contracts in one year: from 37 to 70

Pentera.com

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## What most applies for your institution or organization?

	Small or New Program	Mid or Existing Program	Large or Strong Program
Estate Planning Guide	★	★	★
Blended Gifts	★	★	★
Legacy Society		★	★
Challenge Opportunities			★
Dedicated Campaigns			★

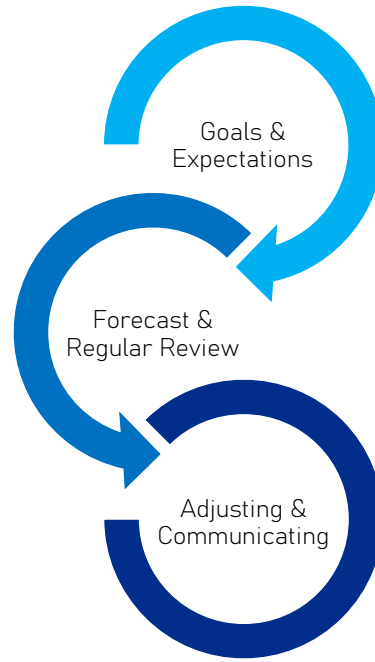
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## Campaign readiness impacts strategy & cadence. Here's a tailored example.

	PHASE 1: FY 2020	PHASE 2: FY 2021	PHASE 3: FY 2022	PHASE 4: FY 2023
<b>CAMPAIGN PHASE</b>	Final year – silent phase (1)	First year – public phase (2)	Middle year – public phase (3)	Final year – public phase (4)
<b>KEY FOCUS</b>	<ul style="list-style-type: none"> <li>•Closing large &amp; early commitments</li> <li>•Solidifying leadership and volunteer structure</li> <li>•Planning campaign launch</li> <li>•Major and planned gift identification</li> </ul>	<ul style="list-style-type: none"> <li>•Inviting everyone into the campaign</li> <li>•Strong push in campaign marketing and communications efforts</li> <li>•Major gift cultivation and solicitation</li> <li>•Planned gift identification</li> </ul>	<ul style="list-style-type: none"> <li>•Activity focus on cultivation, solicitation, and closing strategies</li> <li>•Mar/Comm focus on campaign outcomes and greatest needs and priorities' gaps</li> <li>•Second commitments and planned gift solicitations</li> </ul>	<ul style="list-style-type: none"> <li>•Leveraging matching gift strategies and push for planned giving</li> <li>•Final campaign documentation effort</li> <li>•Closing and big gift announcements</li> </ul>

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Evaluating your plan at regular intervals is important and allows for adjustments in strategies.



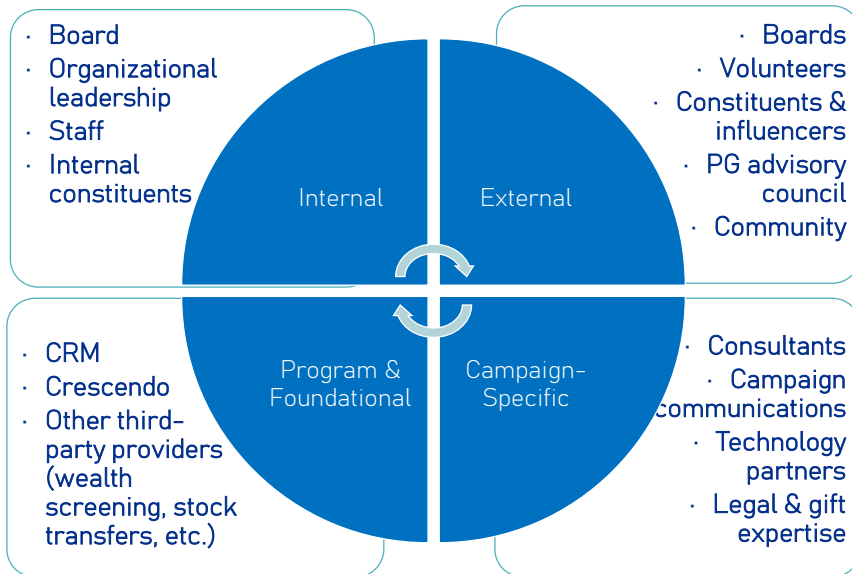
Quarterly?

Semi-annually?

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Partners amplify your power.

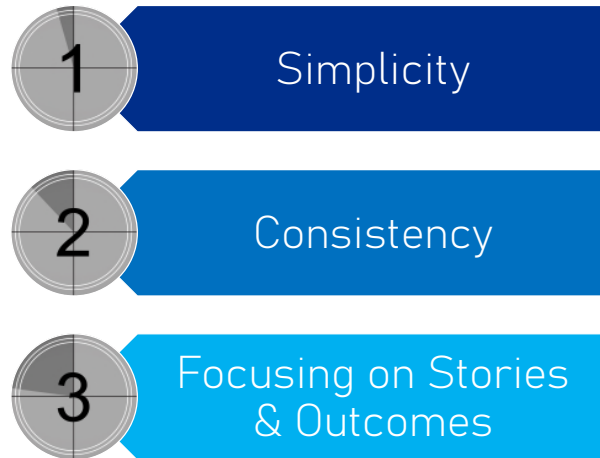
*You don't have to go it alone!*



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Executing your planned giving strategies relies on effective messaging.



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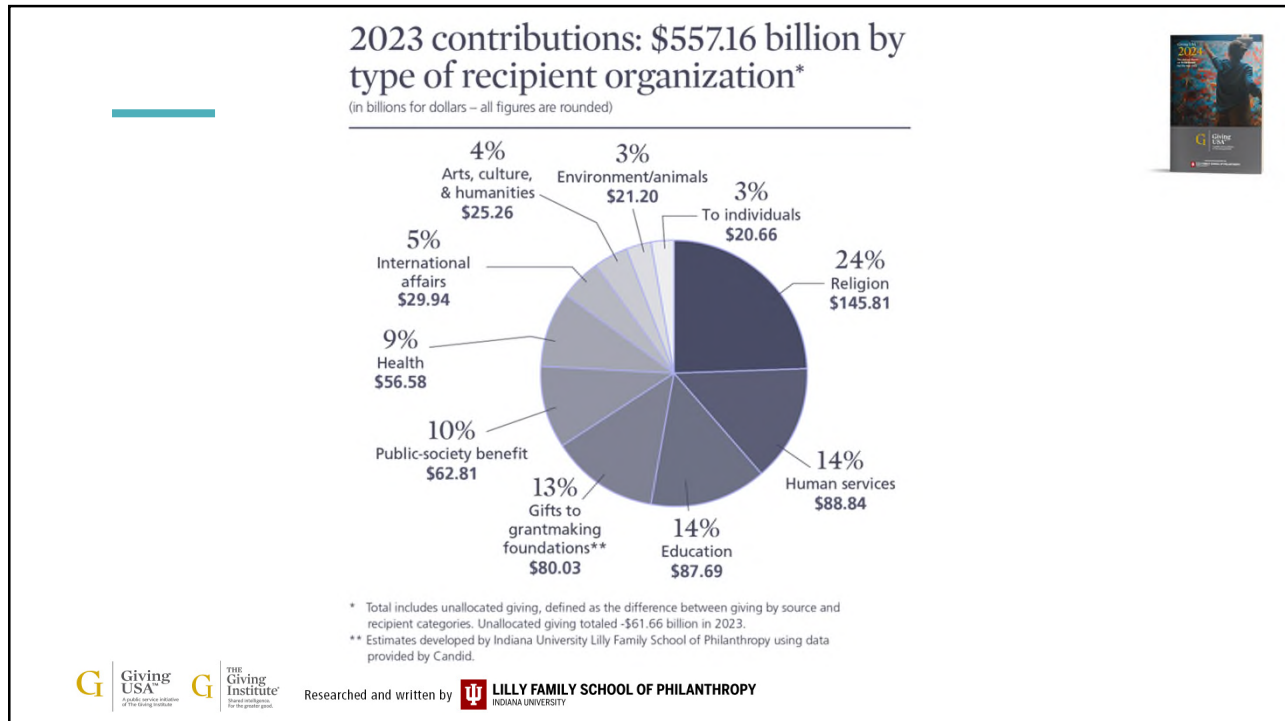
## Industry Idiosyncrasies

*How does fundraising differ between recipient organizations?*

*How might this impact planned giving strategies?*

Religion  
Human Services  
Education  
Public-Society Benefit  
Health  
International Affairs  
Arts, Culture, and Humanities  
Environment/Animals

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## Religion – Seminary

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Theologically predisposed to be habitual givers, deeply scripted with the idea of reciprocity and an embedded concept of stewardship. Committed to social justice and community outreach.	Motivations come from a hypersense of stewardship, giving decisions come out of devotional time, often give to church and multiple other causes. Donors are uncharacteristically optimistic.	People of faith are consistent and usually very generous. Alumni who have pursued ministry often see themselves as not having many resources during their careers.	Often give to church first. Reason for the decision to give or not is that it's what they "feel led to do." If they don't feel led to give, it doesn't mean they won't the next time.	Board referrals, awareness events, through testimony of others engaged with the organization, and review of organizations with similar missions.	Appeals and messaging that focus on impact of the work, and the possibilities that can be achieved can be more appropriate for those who see themselves as change agents for good.	Personal call or handwritten notes are most appreciated, naming and lists are less important, opportunities to witness impact in person (site visits, etc.) are appreciated.

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## Human Services – Longtime Disability Services Organization

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Someone directly impacted by our work, or a community leader who understands addressing our mission strengthens community as a whole.	Some high-net-worth individuals who support, but the majority of individual donors make smaller gifts on average.	We can put a face to our mission and show donors who they are helping; the opportunity for donors to see and hear first-hand how their gifts make a difference.	Lack of name recognition; people can't support if they don't know. Smaller orgs have to prove they are credible.	Leveraging connections in the business industry; interaction with current supporters; ask orgs to share the mission with employees.	Building a connection with current and potential donors is critical. We help them realize they, or someone close to them, has likely been impacted by our work.	Timely, personal acknowledgment of their gift and how it was used by our organization.

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## Education – Mid-Sized Liberal Arts Institution

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Alums who Attended and/or graduated from the institution.	There is a passion for the personal experience; there are some gender differences (males more likely to repeat giving; females less likely without results).	Higher-ed has a built-in constituency. Fond feelings about the benefits received encourage some to pay it forward.	Perception of "wealth" or "paid for" commodity; also, hard to engage non-alums or partners who attended elsewhere. Recently, negative media re: value.	Board members provide great assistance engaging non-alum funders; activating the alumni army as influencers; occasional parents or grands.	Institutional pride; repayment of benefit received; belief in the vision for the future and the difference the institution makes in the world.	Varied and challenging as a result; ranging from no recognition beyond receipting and thanks to desire for gifts and individualized attention.

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## Public-Society Benefit – International Refugee Organization

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
The typical donor is a woman, older, Christian, white, living in the Midwest, Facebook.	Strong support of mission; donors with lived experience, former refugees, and those who support them.	Responsive to urgent appeals and emergencies. Also, earned media is significant and important.	Politically charged as the reported #1 political issue. Hard to reach new donors when not in the news.	Earned media and hosting events. Also advocacy lists, volunteers, donors, Board influence and digital advertising.	Stress success stories (clients, staff) and also urgency. Also, video, website, and social media posts focus on stories.	Humble, not interested in public recognition. Respond to appeals that also benefit those served (i.e. get a keychain, give a keychain).

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## Public-Society Benefit – County Library System

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
A person who loves public libraries, loves to read; estimate most of our donors are female over the age of 45.	We don't have a built-in constituency, like school alums or church parishioners.	I don't think it's ever easy!	Library system benefits from tax levies, which makes some prospects less likely to donate.	Ask Board members for referrals; outreach at events where we talk about our foundation.	We talk about how donated dollars allow the library to do innovative programming outside of what their tax dollars can do.	The Thank-a-Thon we do each year around Valentine's Day is appreciated with many donors/volunteers.

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## Health – Large, Midwest Hospital System

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Often a grateful patient or patient's family; individuals or institutions who see the value of their local hospital as a key asset for the community.	Grateful patient donor may not have had good outcomes; also, tends to be a short window of time during which a patient is grateful for a significant health event.	Case for support is incredibly powerful; the missions we represent save lives every day – and our organizations are open every minute of every day; core values.	Medical care is expensive, leading to critique; also, healthcare financing is an incredibly complex field often missing the impact of pharma and public or private insurance.	Care team referrals at patients' request; affiliated fundraising organizations limited access to some of patient information with patient consent.	Focus on the essential service they provide to community (research, acute care); also focus on the impact that past gifts have made in making a difference (for all).	Personalize stewardship as much as possible; gifts to needy patients (e.g. blankets to cancer patients) with note that gift was given in donor's honor.

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## Arts, Culture, & Humanities – Strong Regional Theatre

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Arts and culture appreciators who view performing arts as a critical part of our city's vibrancy and vitality.	Donors are influenced by peers and like to "see and be seen"  Patrons are typically high-net worth and understand philanthropy.	We see our donors regularly so there are many opportunities for them to think and talk about their giving with visual, tangible impact.	When compared with social services or healthcare (especially pandemic), our cause is seen as less critical.	Online giving campaigns have been great at acquiring new donors. Donors and board members are also encouraged to invite friends to shows.	We stress the nonprofit status of the theatre and the educational programs and services we provide beyond performances	Online donor recognition, posted donor recognition on-site. Top donors receive special invitations to events and occasional gifts.

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## Arts, Culture, & Humanities – Bi-Coastal Performing Arts Organization

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Pro-Israel, avid classical music lover, concert goer. Young professionals wanting engagement with the Jewish/Israel community without it being religious; mature donors who have worked for 30+ years, have DAFs, a Fdn. or respond to friends asking them to support this world class orchestra.	These donors are socially distinguished as philanthropists.  Donors that understand the need for contributing to the performing arts, and in our case, an orchestra that is an ambassador for Israel.	It used to be that it was a niche organization for those who cherished performing arts and Israel, now it attracts those who have philanthropic missions that also include programs for children and the underserved.	The current situation in the Middle East, the growing belief that Israeli's not Americans should support the Orchestra, the international touring which is a part of the orchestra's mission has been thwarted by anti-Israel sentiment or boycotts (e.g. China).	Research those who respond to digital outreach and further we research those with capacity. Utilize Fdn. Ctr. Identifying someone with a proclivity for our mission – means creating a cultivation plan that will get their attention and eventually offer the opportunity to solicit support.	We try to be appropriate, given the demands for dollars in support of other Israeli institutions that are critical. We stress that the Israeli audiences and students touched – value the orchestra, its members and its music and that we welcome their support to help secure the future.	There seems to be less interest in naming or listing and more in access. Access to backstage, access to exclusive events, and to reserve tickets in Israel.

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## Environment/Animals – Conservation Organization

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition
Committed to environmental or conservation work, prioritize climate change concerns and its impact on humans. Tend to be active volunteers in social justice causes and give to a number of organizations.	Generous while often not deeply engaged. Alumni give at a very low percentage (about 1%), but are very engaged in interacting with us and volunteering. Donors may give for many years without any contact.	Our program participants (alumni) can articulate the impact of our work on them personally in very compelling stories. This helps us share our story and inspire giving.	Environmental causes are prone to donor distractions in global or political events, or other progressive causes that develop pressing needs. These pressures make our giving income sometimes volatile.	Through a robust direct response program that targets a profile of donor compatible with our mission. We also engage our alumni and parents in ongoing cultivation.	We use impact stories of our work transforming the lives of young people and inspiring them to develop a love for nature. These stories coupled with compelling outcomes inspire donors to give.	Our donors love a handwritten note. They also appreciate stories from current members (in email or print) that describes the impact of their gift in the words of the people most impacted.

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How do unique attributes shape planned giving strategies?

*What does the chart look like for your organization?*

*How do your organization's unique attributes shape your planned giving strategies?*

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## YOUR ORGANIZATION

Typical Donor Profile	Donor Differences	What makes fundraising easier?	What makes fundraising harder?	How do you find new prospects?	Messaging and Appeals	Thanks and Recognition

*How do these answers shape your PG strategies?*

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## Thoughts & Questions

*Blessed is he who  
plants trees under  
whose shade he shall  
never sit.*

Indian proverb

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## Special Thanks

*To Our Industry Experts*

Rosie Blankenship, Annual Fund Director, The Student Conservation Association, Inc.  
 Lisa Lintner, Director, Johnson County Public Library  
 Heather Perdue, Vice President, Campaigns and Philanthropy, IU Health  
 Jenny Pfeil, Director, Fund Development, New Hope of Indiana  
 Suzanne Ponsot, Director of Philanthropy, American Friends of the Israeli Philharmonic  
 Andrew G. Steele, Chief Development and Mobilization Officer, Refuge International  
 Karrie Zuccarello, Development Consultant, The Cabaret Theatre

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Thank you for making this a priority!

Kristin Perks Champa, DMA, Vice President for  
Advancement, Christian Theological Seminary  
Melanie J. Norton, CFRE, MBA, Founder and CEO, Norton  
Philanthropic Counsel

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SAN DIEGO

# SPEAKER EVALUATION

**COMPLETE THE SURVEY**

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

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