

# Planned Giving Internal Marketing: It's Necessary to Brag

## Outline

### Global overview:

- Most \$\$ from bequests, not fancy trusts
- 8% of bequest \$\$ nationally – figure out what your organization is getting
- 10-13% of all charitable gifts are planned gifts
- The low cost to raise a planned gift dollar
- Large gifts come from small donors

### Marketing planned giving (PG) is not just your donors. Defining your internal markets:

- **Executive Leadership** – makes or breaks your program
- **Legal and Finance** – views PG from a risk/reward/investment perspective, Legal & Finance often hold these keys
- **Human Resources** – key if staff retention or new staff are issues for you
- **Volunteers** – your best advocates
- **Frontline Staff** – your eyes and ears

### Executive Leadership/Management:

Even when executive leadership supports a planned giving program, it is necessary to give continual reminders about the wisdom of having invested in a PG program. Support shows up in budget & staffing, not lip service. Methods for doing this include:

1. Using PG Reports
  - Year by year summary, going back 10 years
  - Running gift size averages for at least 7 year periods
  - Reduce/eliminate impact of very large gifts to show growth trends
  - Use both numbers & bar graphs to show results
  - Compare average bequest size with average lifetime gift of donor
  - Show how bequests are 300-1,000 times average lifetime gift
  - Show how 25% or so of bequests are from non-donors
  - Constantly showing long term metrics/statistics in all reports
  - Share with executive leadership—even if not in your line of authority
2. Do a regular analysis of how you are doing compared with those of other, somewhat similar groups
  - Most groups are willing to share information for internal uses of this sort
  - Each group will benefit
  - Adds to credibility
  - Generates competitive juices
  - Enables you discuss long term investment level versus current investment
3. Your brand is for your internal markets too
  - Use your external marketing materials to brand yourself internally
  - Use your Webpage and newsletters as part of your branding

#### 4. Post Your PG Facts, Figures, Charts & Stats Boldly

- Post on corkboard board outside your office for all to see

**Legal and Finance Offices:** Support of Legal and Finance are essential to preventing roadblock to your program.

##### 1. Cultivate Legal

- Teach about process of PG risk analysis & decision making  
Example: Bargain sale concept for mortgaged property CRTs
- Meet regularly to discuss actual and potential issues & possibilities  
Don't wait until crisis or final approval to bring in Legal
- Make sure Legal has confidence in outside PG consultants  
Discuss specialty legal counsel in advance
- Be a probate partner with legal, but don't let them control it

##### 2. Cultivate Finance

- Stay in touch, cultivate good working relationship
- Explain CGA underpinnings, spreadsheets until they are comfortable
- Discuss possible risk/reward gift concepts
- Secure conceptual agreement on types of gift possibilities
- Invite your CFO to council meetings

##### 3. Share reports broadly, not just with Development VP, Executive Director etc.

- Share all reports to Finance and Legal
- Make sure they understand PG potential, accomplishment & ROI;  
understanding creates long term allies
- Include Finance & Legal on your policy making committees
- Encourage both Legal and Finance to become advocates

#### **Human Resources (HR):**

HR's support is essential to attracting and keeping qualified planned giving staff in a competitive market. High staff turnover is one of the biggest enemies of the successful planned giving program. Methods for working with HR include:

- Share with HR PR marketplace salary information
  - Share information regularly, not just at annual review time
  - Absorbable facts, not pressure
- Educate HR about the qualifications needed for HR staff
  - HR often compares PG inappropriately with other jobs internally
- Clip PG job postings regularly and share with HR
  - Follow up after the fact on postings & share with HR
- PG Today Annual Salary & statistical Reports
- Strike a deal prior to hiring when needed
  - Important when hiring those with limited PG background

#### **Volunteers:**

Volunteers can be your best advocates. Utilize volunteers not only to represent you with the external community, but with your executive leadership.

- Be candid with your volunteers about the strengths and weaknesses of your program
- Engage your volunteers – let them know they can help
- Use your volunteers to promote your ideas

**Frontline Staff:**

Unless the organization is small, it is impossible for a planned giving officer to get to know all of the planned giving prospects. Frontline staff are the eyes and ears of any successful planned giving program.

1. Tell stories at meetings
  - Tell funny, humorous stories about donors (“Sandie the Cat”)
  - Get at motivations when possible
  - Joke about “Actuarial inevitability, Maturing, Fully Maturing, etc.”
  - Make donors come alive
  - Reiterate stories of big gifts from very small donors and non-donors
  
2. Make presentations
  - Use staff meetings as the opportunity to educate staff about PG
  - Get them comfortable with PG & ultimate death of donors
    - PG Donors outlive tables, want to make a difference long term
  - Highlight success stories
  - Share info on gifts prior to death
    - Unknown does not mean unrelated to marketing efforts
  
3. Develop relationships with program staff
  - Start small and prioritize efforts where staff is most receptive
  - Build on successes
  - Share successes with collaborators’ bosses