

Keep Analyzing Your Planned Gifts Approach

Is it time to rethink your planned giving approach?

“Quite often, an organization’s planned giving program is not in need of a complete revision or overhaul but would be greatly enhanced by rethinking the audience being marketed to, the message involved in reaching out to that audience and the methods or approaches employed,” says Elizabeth Mobley, associate director of planned giving for Furman University (Greenville, SC).

The beginning point, Mobley states, is the establishment of a planned giving committee with oversight over the program and charged with developing a five-year plan with achievable goals for cultivating planned gifts.

“Many charitable institutions tend to focus on major gifts, annual giving and large-scale fundraising campaigns, and the first step in engaging planned gift donors and enhancing the program is to formalize a structure with specific goals that can be both reviewed and updated as needed,” says Mobley.

Once a structure for the planned giving program is in place, messaging is key, according to Mobley, and messaging and content should tell a compelling bequest story or series of stories. “People are motivated to give when they are personally impacted and connect to how their bequest or estate planning gift can help people and make a difference in real terms,” Mobley says. She recommends the following to tell a compelling bequest story:

- ❑ Show prospective donors the impact of personal and everyday philanthropy. “Tell your story and include in your content the kinds of details that will help people to relate, such as, ‘Jill, a retired elementary school teacher, saw the need to ...,’” says Mobley.
- ❑ Create opportunities for planned giving officers, institutional leaders and board or committee members to talk about their own planning. Leading and motivating by example works and is a great way to introduce the concept of estate planning to donors. It’s helpful when prospective donors realize that people in positions just like theirs — not just wealthy people — can and have made charitable bequests.
- ❑ Tell a story about people, not the institution. The experiences of real people and the decisions they have made to leave a lasting legacy are meaningful and more compelling than dry descriptions of the institution’s long-term plans.
- ❑ Emphasize privacy, discretion and intent. Planned giving donors are often concerned with how their gifts will be used when they are gone, and storytelling can emphasize the institution’s adherence to donor intent and concerns about privacy.

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Is the Phonathon Still Worth Doing?

By Kerry Nenn

Landlines seem to be going the way of the dinosaur. Should phonathons do the same? Kelly Purcell Stratman, associate director of advancement at Saint Xavier High School (Louisville, KY), says phonathon efforts can still be effective. You simply need to enhance them with the right strategies.

For a successful phonathon fundraiser, Stratman says the following five aspects are most important:

1. **Recruitment:** “Getting volunteers is the biggest challenge,” Stratman admits. She strategically recruits alumni for her phonathon. “I wait until after a class has a five-year reunion before bringing them into the fold. I assign a volunteer from each of the graduating classes from 1955 to 2014 to recruit callers. That volunteer is almost always the class agent.”
2. **Reminders:** “Once I have volunteer names, I mail a postcard reminding him of the date/time,” says Stratman. “On the day of the calling session, I make personal phone calls to each volunteer thanking him for agreeing to help and reminding him of when and where to report.”
3. **Rewards:** Stratman advises, “Incentives are extremely useful for not only recruiting volunteers but also for enhancing the calling experience. I reward each class agent who gets eight callers to show up. A popular incentive for the class agent is playing in our alumni golf outing free of charge. I also incentivize the callers who show up. Each caller automatically receives a t-shirt (that cannot be purchased in the campus store), and I reward him with a \$10 gift card every time he gets a pledge/gift from either a first-time donor or an alumnus that hasn’t made a gift in the last three years. Additionally, I have end-of-night drawings for callers who collect credit card payments or secure 10 or more pledges. Historically, my \$10 gift cards are for Starbucks or Chick-fil-A. The value of my prizes for both credit card payment and 10 pledge drawings is \$25.”
4. **Restructuring:** “To adapt with technology, we let volunteers solicit classmates with text messages,” Stratman explains. “I first ask them to make the phone call. If no one answers, then the caller can follow up with a text message.”
5. **Retainers:** “If you have an opportunity to obtain a matching gift from a benefactor,” says Stratman, “it’s advantageous to include this in prepared scripts for each volunteer caller. For our 2019 phonathon, we were fortunate to have an alumnus offer to match up to \$100,000 for all phonathon pledge payments made by the end of the month-long campaign. We saw a 30 percent increase in pledge payments. And we surpassed the \$100,000 mark.”

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