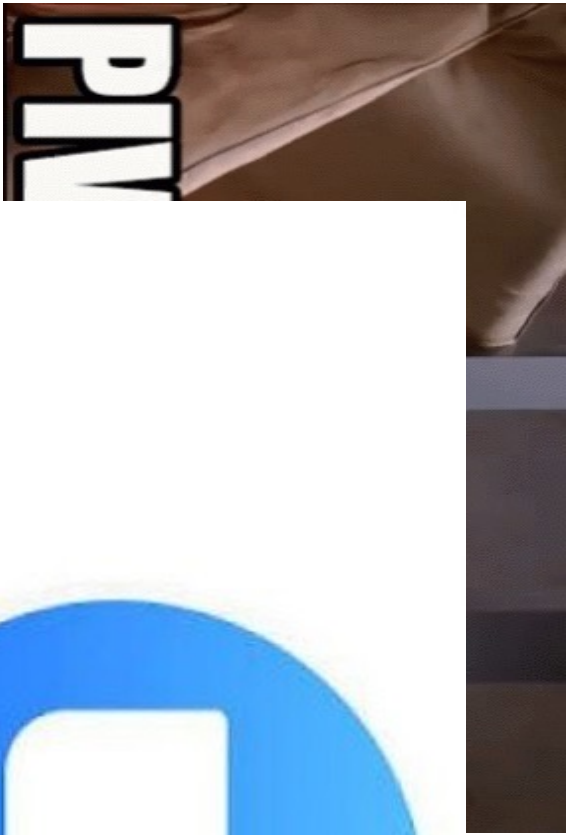
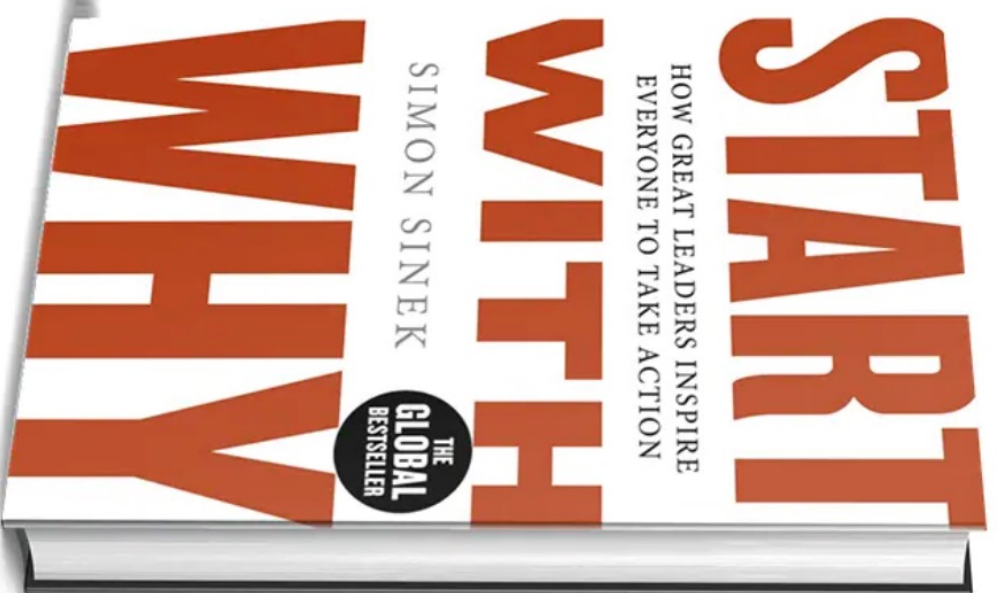




How a Pandemic Magnified the 'Why' in Planned Giving

And What It Means to Your Donor Engagement





The Golden Circle

WHAT

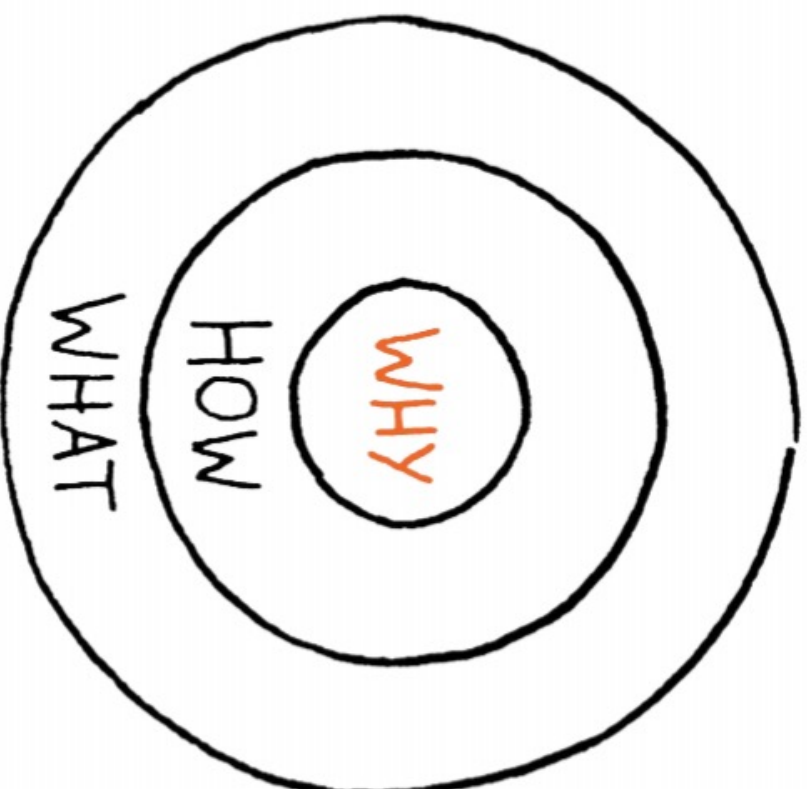
Every organization on the planet knows WHAT they do. These are products they sell or the services they offer.

HOW

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

WHY

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. WHY is a purpose, cause or belief. It's the very reason your organization exists.



1

The Shifting Playing
Field

2

7 Donor Mindsets
that Impact the 'Why'

3

Engagement &
Stewardship

Shifts Happening Pre-Pandemic



Demographic

Technology

Giving Trends



THE BIG *BOOM*

Matures (aka “the Silent Generation”)

Born 1925-1945

Experienced WW2 - Beliefs framed by Great Depression

Fiscally conservative, deep trust in charity

Experienced emerging consumerism as parents rather than children

Grew up believing in the virtues of duty and service, particularly locally

Believe in family and traditional family roles. Sixty-four percent were married between the ages of 18 and 33.

Boomers

Born 1946-1964

Grew up in austerity but came of age in prosperity

Challenge the status quo, “Never Trust Anyone Over 30”

Benefitted from shift from blue collar to white collar jobs. Explosion of media/information consumption.

Enjoyed increasing individualism. The “ME” generation

More accepting of societal change and emerging family types. Marrying later in life and experiencing multiple marriages.



Why Boomers?

- Comprise 39% of US adult population
- Control 80% of the wealth in the US
- Give 50% of individual philanthropic giving
- Are one-third more generous than Matures at the same age
- Will maintain wealth inequity for the next 20 years (don't retire at 65)

Financial Concerns Plague Boomers

- » Boomers are first 'sandwich generation'
- » Less than half of Boomers believe they will have enough money to meet their financial obligations after retirement
- » Both Matures & Boomers fear outliving their savings – But for very different reasons



IMPACT OF TECHNOLOGY

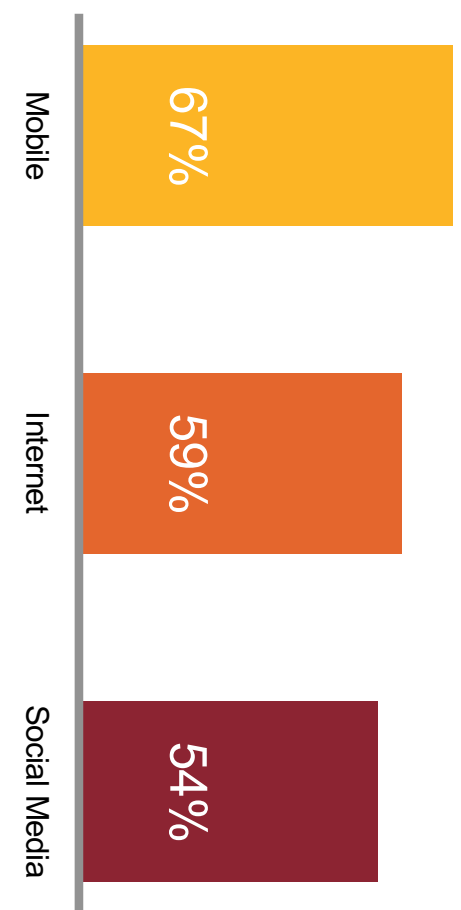
The Digital Landscape

2021 Digital Use Worldwide

.....

Takeaway:

The world is online



Total Population = 7.8 billion

Mobile users = 5.2 billion

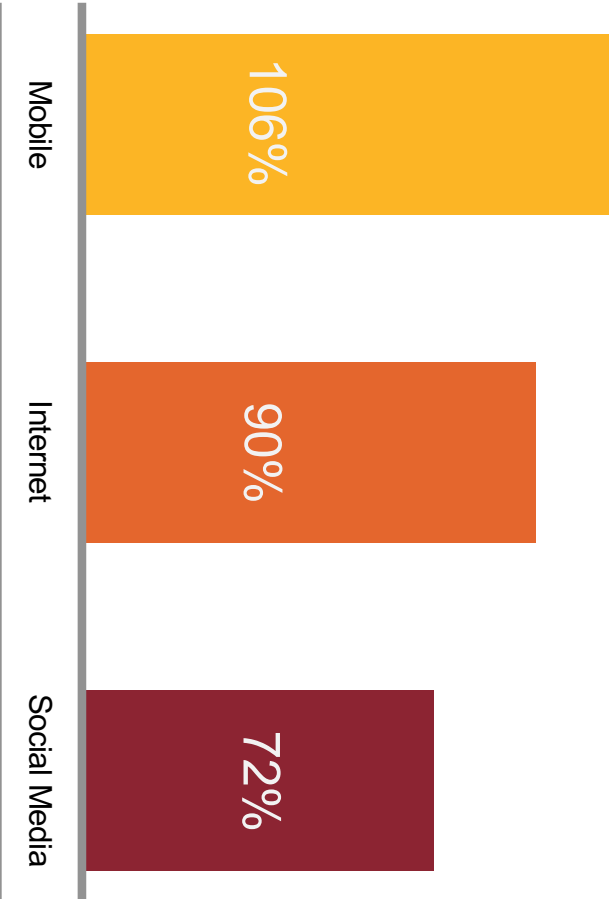
Internet users = 4.6 billion

Social Media users = 4.2 billion

2021 Digital Use In The U.S.

.

Takeaway:
The U.S. is a mobile country



Total US Population = 332 million
Mobile subscriptions = 353 million
Internet users = 298 million
Social Media users = 240 million

THE DATA

Screen time is surging

Overall content consumption:

+60%¹



TV VIEWING

+11%²



STREAMING TV

+13%³



WEB TRAFFIC

+24%⁴



SOCIAL MEDIA

+66%⁴



INSTAGRAM
IMPRESSIONS

+22%⁴



SOCIAL FOLLOWS

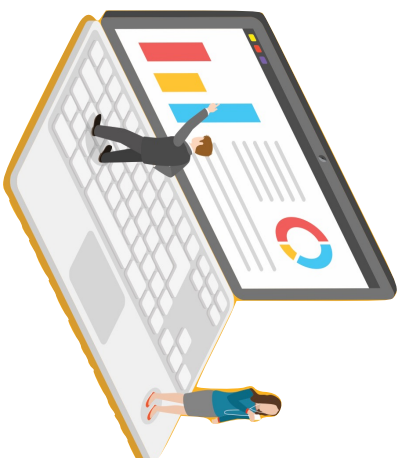
+14%⁴

¹ <https://www.nielsen.com/us/en/insights/article/2020/sleeping-pot-consumers-forced-indoors-choose-to-spend-more-time-on-media>

² <https://www.comscore.com/Insights/Blog/Media-Consumption-during-the-Coronavirus-Pandemic>

³ <https://tune.com/5806060/coronavirus-movie-theaters-streaming/>

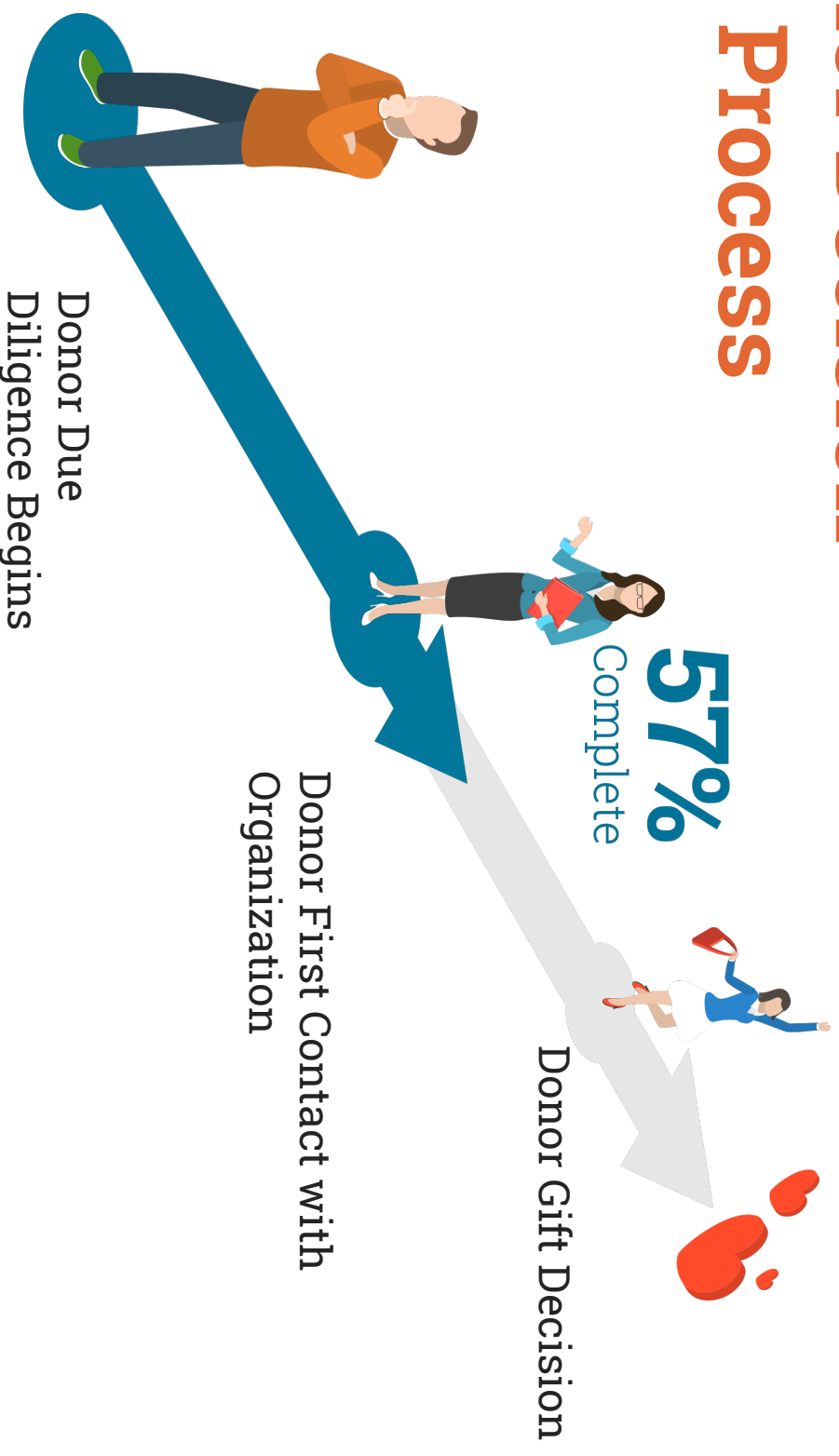
⁴ WorldData, Key metrics from March 5 to 16



THE

“Self-Directed” Consumer Donor

The Donor Decision Making Process



Giving More to Fewer



Planned Giving Considerations: Q: If you were to consider leaving a gift to a charity in your will, which of the following would you be likely to do?



Millennials

20% 100% to One Org.
54% Split Gifts
26% Would Not Give



Gen X

15% 100% to One Org.
47% Split Gifts
38% Would Not Give



Boomers

13% 100% to One Org.
39% Split Gifts
48% Would Not Give



Matures

13% 100% to One Org.
33% Split Gifts
54% Would Not Give

Gift Intention: Q: Of those who would split gifts, if you were to sign a will in the next 6 months, how many charitable organizations would you be likely to include?



Millennials

20% One
~~42%~~ **Two**
 29% Three
 9% > Three



Gen X

19% One
~~45%~~ **Two**
 27% Three
 9% > Three



Boomers

19% One
~~39%~~ **Two**
 30% Three
 12% > Three



Matures

4% One
~~51%~~ **Two**
 32% Three
 13% > Three

The REAL Impact of 2020



Mental

Social

Trust

Navigating the Unknown

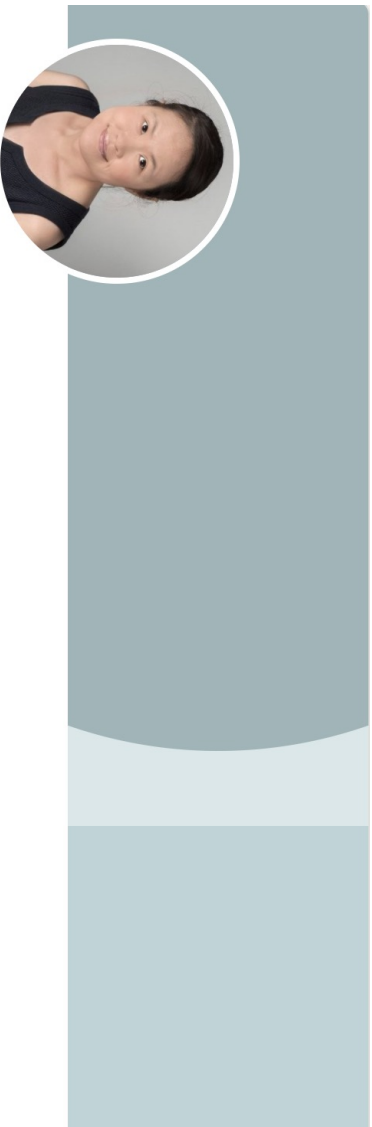
Rollercoaster of emotions

Anxiety and impact
on trust/decision
making

“Waiting for the next
shoe to drop”

Grief arises from the loss of one or more deep-seated human needs.

Loss of attachment—who am I connected to?	I need to feel connected, bonded, secure, or included.
Loss of territory—where do I belong?	I need to feel a sense of belonging or grounding to a place or a home.
Loss of structure—what is my role?	I need to feel important, involved, and valued.
Loss of identity—who am I?	I need to know who I am as an individual, what I stand for, what my values are.
Loss of future—where am I going?	I need to know my direction and have hope and positive expectations.
Loss of meaning—what is the point?	I need to find meaning and purpose in all situations.
Loss of control—I feel overwhelmed	I need to feel in control of the situation or my destiny.



Jen Shang · 1st

Co-Founder and Co-Director at Institute for Sustainable Philanthropy

Greater Plymouth Area · [Contact info](#)



Institute for Sustainable Philanthropy

Indiana University

Webinar: "How to Love Your Donors During COVID-19"

Scientific research project prior to and during COVID-19

- Studied over 4,000 adults in the US and other countries
- Measured about 30 feelings that people experienced on a daily basis

Lack of Connection

Authentic connection

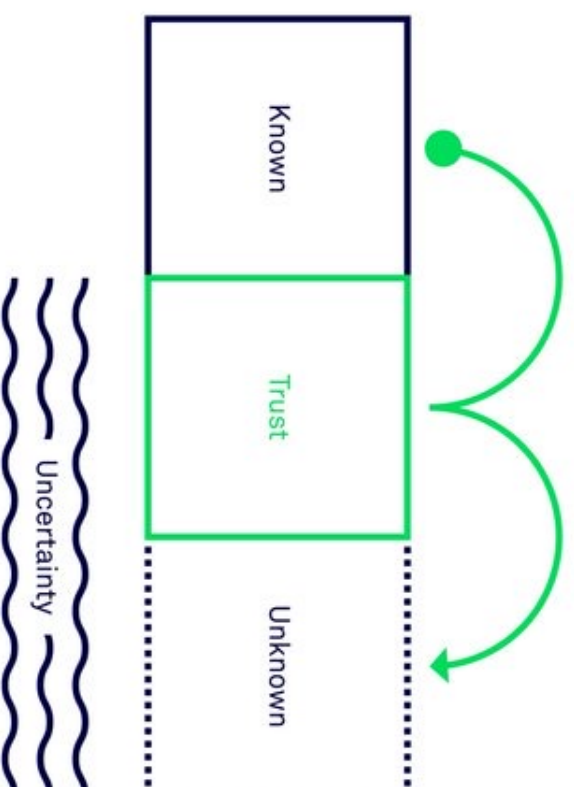
Genuine need to connect

The Feeling, not the Formality

Uncertainty's Impact on Trust

Reputation =
“Reflective”
measure

Trust =
“Predictive”
measure



New Marketing/Engagement KPI?



“Humanity”

1

The Shifting Playing
Field

2

7 Donor Mindsets
that Impact the 'Why'

3

Engagement &
Stewardship



7 Donor Mindsets

-
1. This work is important.
 2. This organization is capable.
 3. This organization is trustworthy.
 4. I am connected to this work.
 5. An estate gift is a smart choice.
 6. People like me do things like this.
 7. I need to share my intentions.

Planned Giving Donor Journey

Supporting	Discovering	Considering	Deciding	Acting
<p>Supports nonprofit's mission</p> <p>Nonprofit demonstrates competence: receives timely thank-you messages and evidence of impact</p> <p>Continues to support nonprofit, deepens engagement</p>	<p>Feels connected to nonprofit (feels appreciated, autonomy, my gifts matter)</p> <p>Introduced to idea of planned giving: way to give that maximizes impact, extends support</p>	<p>Reflects on finances and long-term plans</p> <p>Considers values and legacy</p> <p>Weights nonprofit against other obligations and charitable causes</p>	<p>Integrates nonprofit with identity</p> <p>Researches options:</p> <ul style="list-style-type: none">• Conversations with family and advisors• Self-directed research• Consultation with nonprofit <p>Decides to make a legacy gift</p>	<p>Puts together estate planning team</p> <p>Arranges gift:</p> <ul style="list-style-type: none">• Creates will or codicil• Updates beneficiary documents• Initiates asset transfer
<p>This work is important to me.</p>	<p>My gifts can make a difference.</p> <p>This organization is part of my life story.</p>	<p>People like me do things like this.</p>	<p>This gift is a way that I can live on.</p>	<p>I want to make sure my wishes will be fulfilled.</p>

Legacy Giving Donor Journey



SUPPORTING



DISCOVERING



CONSIDERING



DECIDING



ACTING





PHASE 1 OF 5

Supporting

Waypoints

- Supports mission
- Receives thank-you messages and evidence of impact
- Deepens engagement

Watch for

- Increasing giving frequency or amount
- Engaging through advocacy or volunteer roles



**7 Donor Mindsets**

No Focus



High Focus

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Donor Phase: Supporting**Goal: Strengthen connection to nonprofit****Key Messages**

- Flattery: Thank you; you're important
- Storytelling: Look at your impact
- Vision: Looking ahead; case for long-term support
- You give to us, here's something to help you plan ahead, too



PHASE 2 OF 5

Discovering

Waypoints

- Feels connected and appreciated
- Introduced to idea of planned giving

Watch for

- High engagement with nonprofit
- Reading introductory legacy giving articles



Plan for the Future



7 Donor Mindsets

No Focus



High Focus

1. This work is important. | 2. This organization is capable. | 3. This organization is trustworthy. | 4. I am connected to this work. | 5. An estate gift is a smart choice. | 6. People like me do things like this. | 7. I need to share my intentions.

Goal: Educate donors on why they need an estate plan

Key Messages

- Estate planning offers peace of mind and protects those you love
- Steps to take
- We're experts; we can help



PHASE 3 OF 5

Considering

Waypoints

- Reflects on finances and plans
- Considers values and legacy
- Weighs priorities

Watch for

- Opportunities to strengthen identity formation
- Interest in nonprofit's vision and impact



Values Match



7 Donor Mindsets

No Focus



High Focus

1. This work is important. | 2. This organization is capable. | 3. This organization is trustworthy. | 4. I am connected to this work. | 5. An estate gift is a smart choice. | 6. People like me do things like this. | 7. I need to share my intentions.

Goal: Prompt reflection on individual values and connection with values of the nonprofit

Key Messages

- Grateful; donors like you help us live out specific organizational values
- Consider what's important to you
- Promote longevity of the organization and vision for the future



PHASE 4 OF 5

Deciding

Waypoints

- Integrates nonprofit with identity
- Researches options
- Decides to make a legacy gift

Watch for

- Increased web traffic
- Gift vehicle research
- Contacting gift officer



Perpetuate Your Values



7 Donor Mindsets

No Focus



High Focus

1. This work is important. | 2. This organization is capable. | 3. This organization is trustworthy. | 4. I am connected to this work. | 5. An estate gift is a smart choice. | 6. People like me do things like this. | 7. I need to share my intentions.

Goal: Drive donor's desire to create a planned gift as a way to transcend death

Key Messages

- A planned gift allows you to leave a meaningful mark on the world
- You can create a bigger impact than you thought possible by partnering with our org
- We share the same values and vision for the future



PHASE 5 OF 5

Acting

Waypoints

- Assembles estate planning team
- Arranges gift
- Notifies nonprofit

Watch for

- Requesting bequest language
- Completing gift notification form



Step by Step



7 Donor Mindsets

No Focus



High Focus

1. This work is important. | 2. This organization is capable. | 3. This organization is trustworthy. | 4. I am connected to this work. | 5. An estate gift is a smart choice. | 6. People like me do things like this. | 7. I need to share my intentions.

Goal: Provide step-by-step instructions for donors to make a revocable estate gift

Key Messages

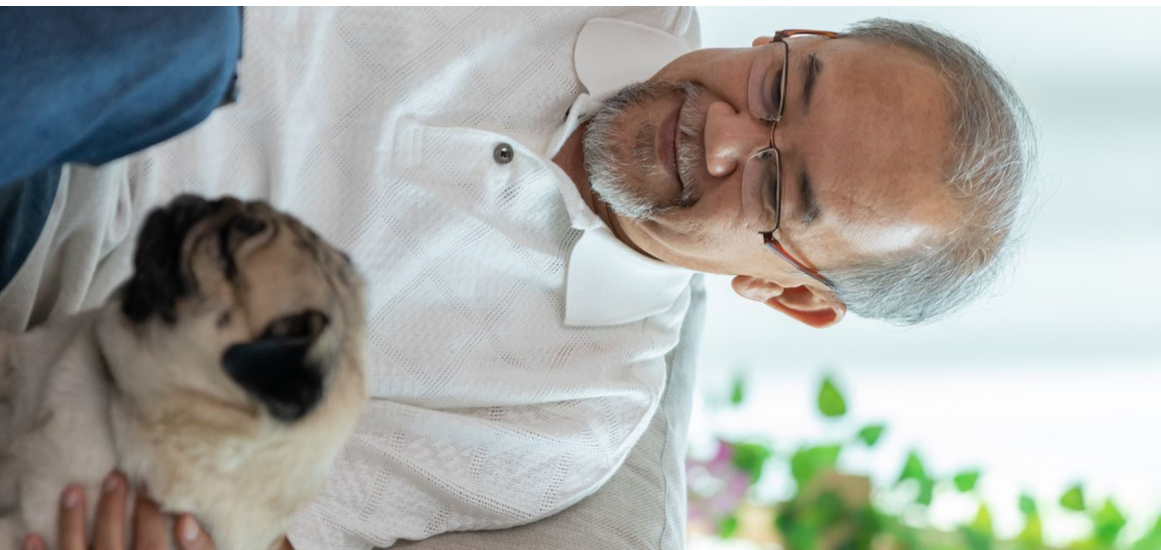
- Now is the time to create the world you want to see
- We're the right partner for your impact
- Here's how to make your gift

CTA: Contact me, I'm here to help



7 Donor Mindsets

-
1. This work is important.
 2. This organization is capable.
 3. This organization is trustworthy.
 4. I am connected to this work.
 5. An estate gift is a smart choice.
 6. People like me do things like this.
 7. I need to share my intentions.
-



This organization is trustworthy.

BELIEF THAT AN ORGANIZATION CAN BE TRUSTED
BELIEF IN AN ORGANIZATION'S LONGEVITY
BELIEF THAT AN ORGANIZATION IS FINANCIALLY SOUND



Join Us as We Celebrate 50 Years of Caring for Children

For 50 years Miller Children's & Women's has been providing quality, child-centric services to kids who need it most.

We hope you'll join us and be a part of the celebration by accepting the 50¢50 Challenge. All you need to do is include a gift to Memorial Medical Center Foundation in your estate plan and let us know. Not only will your gift allow you to play an important role in our future, you'll also become the newest member of the **Seaside Legacy Circle**.



The issue of hunger in America is complex, enduring and widespread. About 37 million people struggle with hunger in the U.S., making the need for Feeding America's research, advocacy and nationwide network of 200 food banks and 60,000 food pantries and meal programs more urgent than ever. Yet Feeding America isn't funded by commercial means. Instead, we rely on donors like you to fuel the fight against hunger long term.

YOUR BENEFITS

A gift to Feeding America in your will or financial plan:

- enables you to make a greater impact than you may have thought possible
- may provide you with financial and/or tax benefits
- is often realized after your lifetime, so your current budget isn't affected

WHY FEEDING AMERICA



1 in 7
Americans receive help each year



4.6 billion
Meals are provided each year



99%
Of donations raised go directly to programs for people in need



4-star rating
Charity Navigator's highest overall rating

To learn how you can support a hunger-free America, contact Jessica Noe at (800) 771-2303, Ext. 5593.



I am connected to this work.

BELIEF THAT ONE'S GIFTS MATTER

BELIEF THAT AN ORGANIZATION IS PART OF ONE'S LIFE STORY



From its beginning, the Forever True, For Iowa State campaign set out to help more students access their dream of an Iowa State education. **Nearly 7,000 students received donor-funded scholarships last year alone.**

In addition, many students who faced financial hardships due to the COVID-19 pandemic received support from donors like Mike and Mary Ann Kozinko through the Cyclone Strong Fund or completion grants that helped them stay at Iowa State.

The momentum of the Forever True campaign remains strong as we approach its final months. Most importantly, donors are already making a difference.



Iowa State senior student

“This scholarship has given me so much. It’s given me freedom of time, which I didn’t realize I would cherish as much as I do now. I’m no longer working so much to avoid eviction notices, and I can enjoy life.”



Iowa State senior student

“This scholarship allowed me to avoid taking out loans, which I was worried about how I would pay for. It’s a relief to know I can focus on my studies without the stress of financial worries, and I could not be more grateful for the support.”



Iowa State senior student

“This scholarship relieved my stress about how I was going to pay for my books and tuition, and even covered some of my housing. I struggle financially every year as to how I will cover these expenses in order to keep attending college. The Heiden Fund mitigated these worries, and I could not be more grateful for the support.”



Iowa State senior student

“The lack of two incomes [in my household] put a strain on my dreams and college goals, but I was able to persevere and work my way through college along with the help of scholarships that the Habas graciously provide. The support has meant the world to me and has helped me be able to keep working toward my college and career goals.”



Iowa State senior student

“This scholarship relieved my stress about how I was going to pay for my books and tuition, and even covered some of my housing. I struggle financially every year as to how I will cover these expenses in order to keep attending college. The Heiden Fund mitigated these worries, and I could not be more grateful for the support.”

—JOEZEL NORIEGA,
Iowa State senior studying hospitality management and a Habas Scholarship recipient



An estate gift is a smart choice.

BELIEF THAT ONE WANTS TO BE REMEMBERED
BELIEF THAT A DONOR DOES NOT NEED TO LEAVE THEIR ESTATE TO HEIRS
BELIEF THAT ESTATE PLANNING IS VALUABLE



Keep the Music Alive for the Next Generation

For generations, Carnegie Hall has set the standard for musical excellence. With a little planning, you can help us continue to bring the transformative power of music to audiences for years to come. Including us in your overall estate or financial plans not only helps advance Carnegie Hall's reputation for excellence, but also provides you with tax benefits in return.

Chart your path here by learning the different gift options available to you. We will work with you to find a charitable plan that lets you provide for your family and support Carnegie Hall at the same time.

Your complimentary *A Personal Record:* *Estate Planning You Can Do at Home* helps you organize:

- + Financial information
- + Assets and their location
- + Executor, advisor names, and contact
- + What your next of kin and executor need to know
- + People and charitable beneficiaries to be remembered

Your planner will save you time when you review or write your will. Many donors love it!

WFP142721



Today, you can take control of your estate plan and protect your loved ones with a complimentary booklet that's easy to use and understand.



Request your
FREE planner
today by
returning
the enclosed
reply card.

I need to share my intentions.

BELIEF THAT SHARING INTENTIONS WILL HELP WISHES BE FULFILLED
BELIEF THAT SHARING INTENTIONS IS GOOD FOR THE NONPROFIT

Reasons donors choose not to disclose planned gifts

Q: Why did you choose not to tell them?

Did not want special attention/recognition	48.3%
Want to retain control over amount of gift	37.9%
Did not want to be asked for other gifts	34.5%
Felt that it was too personal to discuss	29.3%
Have not been asked by the nonprofit	12.1%
Concerned that the nonprofit would not respect my privacy	10.3%





PRESENTATION COLLEGE

Planned Giving
Home

Easy
Gifts

Income
Gifts

More Ways to
Give

Resources &
More

Contact
Us

Giving / Planned Giving / Thank You for Your Generosity

Thank You for Your Generosity

If you have already made a gift to Presentation College, please let us know. We would like to thank you and welcome you into our legacy society. By letting us know, we can ensure that we fulfill your gift exactly as you intended. Please complete the form below or contact us at (605)229-8595 to let us know.

Information you share will be kept confidential and we respect any desire to remain anonymous.

First Name

Last Name

Email Address

☐ I'm not a robot



Submit

10. Many people like to leave one or more gifts to charity in their will. If you were to sign a will in the next six months, how likely would you be to include a gift to the Minnesota Orchestra?

1. I already have

2. Very likely

3. Likely

4. Undecided

5. Unlikely

6. Very unlikely

THE 2019 GW LEGACY CHALLENGE

Make
AN **IMPACT**
TODAY AND TOMORROW

If you've included the George Washington University in your estate plan and haven't told us, we'd love to hear from you! This year, when you notify us of your



1

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2

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“Why”

3

Engagement &
Stewardship

☆ GOOD STEWARDS

Legacy pledgers:

- Are significantly more interested in data on the organization's performance
- Hold higher expectations of the quality of service

Legacy Societies provide four clear benefits:

1. A forum for the charity to express appreciation
2. An incentive for non-members to make similar plans
3. A regular reminder to donors of the importance of their future gifts (so they don't change their minds)
4. The opportunity to ask for current gifts

THE PLAN

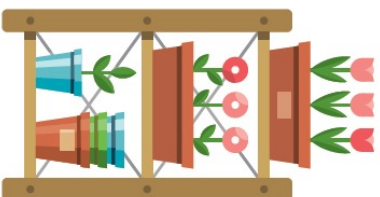
Make the effort to try something new

- » Virtual tours of organization
- » Lunch-and-learns
- » Webinar series
- » Online events
- » Virtual coffee or lunch
- » Digital happy hour
- » Facebook Live concert





**Shriners Hospitals
for Children®**
Pamela and Major Givens Office
2000 South Orange Avenue
Tampa, FL 33607-3460



Happy Spring!

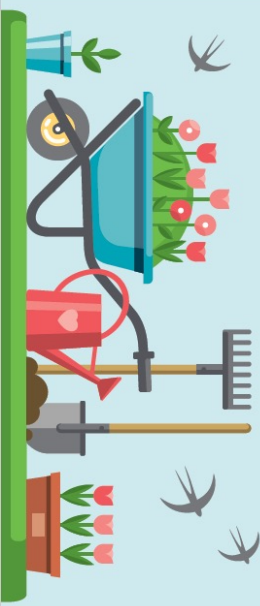
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Sequoia



**Shriners Hospitals
for Children®**

**Plant a Seed and
Watch It Grow**



Mackenzie
Shriners Hospitals for Children Patient

**"To plant a garden is to
believe in tomorrow."**

—AUDREY HEPBURN

*Thank you for remembering
Shriners Hospitals for Children® now, so
that we can help children and families in
the future. We are grateful for your support
through the Dream Makers Legacy Society!*

*Return the enclosed card to share a message of hope and
healing with the children and families at Shriners Hospitals.*





Info

Comments

Up Next

DMSO at Home: Jonathan & Julie Sturm

Thursday at 8:30 AM · 🌐

In this episode of DMSO at Home, Concertmaster Jonathan Sturm and Principal Cellist Julie Sturm share a glimpse into their daily life, including a lively debate on handwashing repertoire and a performance of the Handel/Halvorsen Passacaglia.

#DMSOatHome is a Des Moines Symphony project aimed at connecting with our community online through videos, livestreamed concerts, and more. Watch for all-new content on our social channels and at dmsymphony.org/athome.

👍 269

48 Comments 108 Shares 9K Views

 **Des Moines Symphony**
8.2K Followers

Follow



Share

Write a comment...



Live with Carnegie Hall

Music has the undeniable power to comfort, uplift, connect, and inspire. In response to this unprecedented time, we invite you to join us for an entirely new online series, [Live with Carnegie Hall](#). Tune in for unforgettable episodes that feature some of the world's finest artists as they share behind-the-scenes stories, excerpts from past performances, and live musical moments. Free live streams and archived episodes can be viewed on this page, as well as on the Hall's [Facebook](#) and [Instagram](#) pages, where audiences are also invited to join the conversation.

Watch Now



Dear _____

As fellow Dallas Hall Society members, Gail and I want you to know we are thinking about you and hoping you are well during this unique time in history.

Instead of an invitation to our annual spring event on campus, it is a pleasure to send a glimpse of our campus to you this year. As one of our most valued friends, this puzzle is a token of appreciation for your ongoing investment and dedication to the success of SMU.

You can be very proud of how SMU's faculty, staff, and students have risen to the challenge of this global pandemic. Campus seems too quiet now, and I look forward to welcoming you and our entire Mustang family back to the Hilltop soon.



SMU.

Office of the President

May 20, 2020

Dear _____

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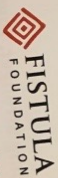
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Regards,

R. Gerald Turner
President

World Changers Shaped Here

Southern Methodist University PO Box 750460 Dallas, TX 75275-0460
214-768-8283 Fax 214-768-3570 smu.edu



Update from the Field: Fighting Covid-19 in Africa and Asia



Community health workers in Zambia with masks, gloves

Dear

I wanted to share an update with you. We have been hit hard by the coronavirus, and we are

I wish that I could tell you how much we are grateful for your support. Because of you, in the face of adversity, we are transforming the lives of as many fistula survivors as possible, while

With deep gratitude,

Kate Grant, CEO

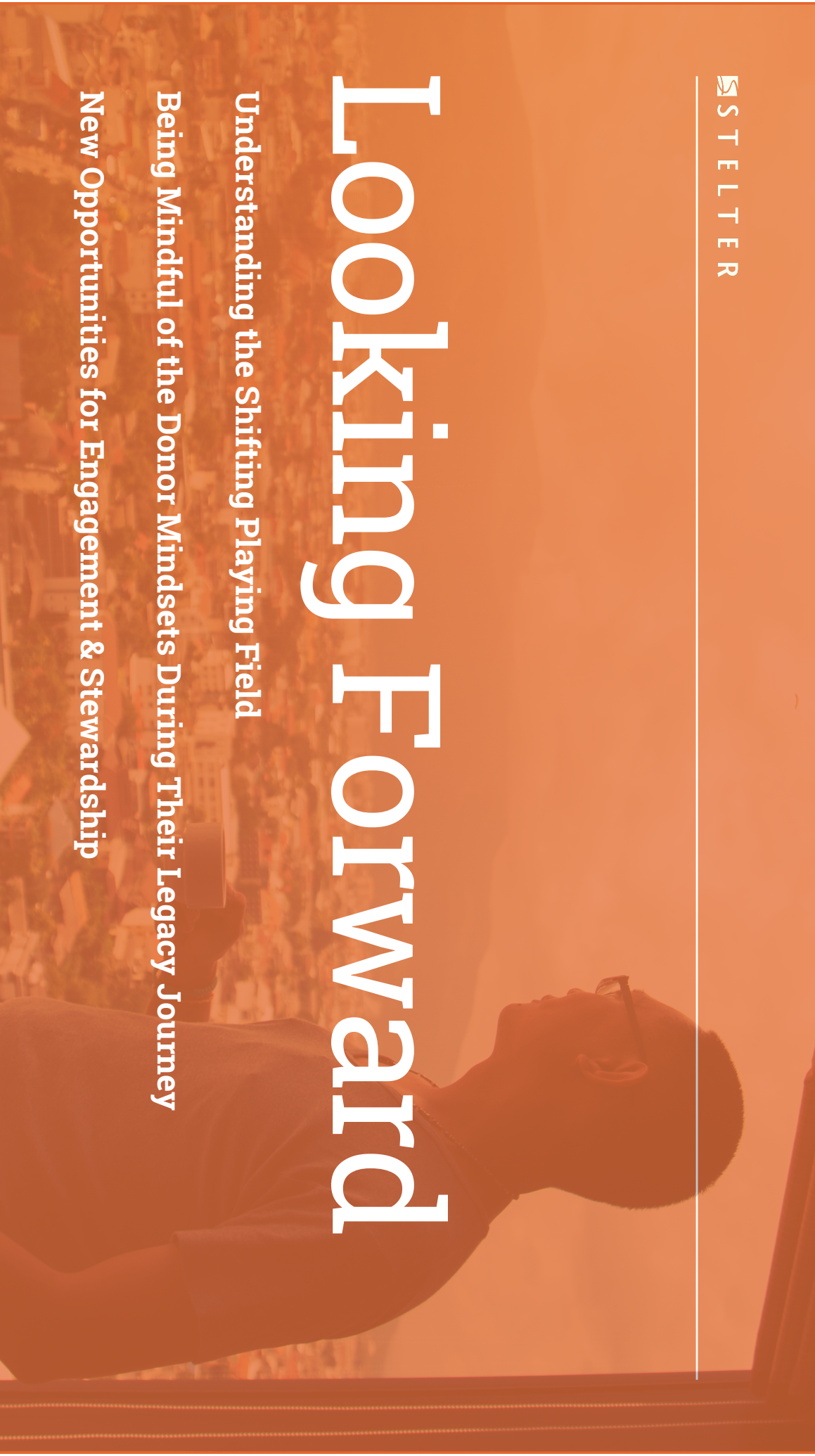
I hope you are staying well during this challenging time.

Looking Forward

Understanding the Shifting Playing Field

Being Mindful of the Donor Mindsets During Their Legacy Journey

New Opportunities for Engagement & Stewardship



Thank you!



Nathan Stelter
President
The Stelter Company
800-331-6881

nathan@stelter.com
[LinkedIn.com/company/nathanstelter](https://www.linkedin.com/company/nathanstelter)
[@nathanstelter](https://twitter.com/nathanstelter)