

**Jumpstarting Success:
Ideas for Building and
Elevating Your Planned
Giving Program**

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Minnesota Public Radio | American Public Media

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Tell Us About You!

- How many know what percentage of your annual revenue comes from planned gifts?
- How many have no planned giving program?
- How many have basic planned giving programs?
- How many have comprehensive, mature planned giving programs?

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First Things First

“The secret of getting ahead is getting started.” –Mark Twain

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What We'll Cover Today

- Building Blocks for a Planned Giving Program
- Your Ideas
- Questions (Maybe) Answered

Building Blocks for a Planned Giving Program

- Bequest marketing and prospect identification
- Qualification, cultivation, and solicitation of prospects
- Donor stewardship and recognition
- Tracking and policies
- Internal support

Marketing and Prospect Identification

Print Marketing: Reply Mailer



E-mail Marketing

• Ideas for mailing and e-mailing lists

- Enlist help of Prospect Research team / database manager
- Predictive models (in-house or third-party vendor)
- Simpler method: age and/or years of giving (note: do NOT limit based on amount of giving)
- Targeted parameters for more specialized messages (e.g., gift annuities, IRA QCDs)

E-mail Marketing

• Messaging Tips and Ideas

- Keep tone conversational when possible
- Ask for response (call to action)
- Give reason to contact now
- Photos help
- Provide personal contact information
- Show benefit to individuals and community
- Feature real donors when possible

Will Bequest for Named Endowment

"We've been supporters of MPR for so long, so we thought it only made sense to help make MPR stronger in the future, when we're not around."

Because we have been MPR supporters since the News station opened in Rochester 30 years ago, we always assumed we would make MPR part of our legacy. When it came time to execute an estate plan, it was easy to make MPR a part of that plan."

Fred and Roxanne Ziecina
Rochester, Minnesota



Charitable Gift Annuity

"When I learned about the charitable gift annuity option I said, 'I gotta do this!' It's a win-win situation."

I can donate money now but save it for after I'm gone. In the meantime, I have a bit more income that I can use to pay my taxes. I wish I could give more to MPR.

[With MPR,] I never feel alone. It keeps me interested in so many things and introduces me to topics and music I didn't know about. I want it to last. I value MPR and I want to make sure it will be here for the next generation."

Marjorie Carr
Arden Hills, MN



Retirement Plan Beneficiary Designation

"I wanted to support the causes and organizations I care most about, and MPR was one. It's one of the things that makes the quality of life here so awesome, so I want to make sure it's here after I'm gone. I think it's important that if you're passionate about something, you commit to it."

Bonnie Creason
Minneapolis, MN



E-mail Marketing

- Determine frequency (quarterly? monthly? weekly?)
- Help is available!
 - In-house marketing staff
 - Third-party vendors, e.g.:
 - Crescendo
 - Stelter
 - MarketSmart
 - PlannedGiving.com

Web Marketing

- Planned Giving Webpage
 - Easily navigable from organization home page
 - Information for donors
 - Legal name, address, and bequest language
 - Federal tax ID number
 - Giving options
 - Gift calculator
 - Information for professional advisors
 - Personal gift officer contact info with photo(s)
 - Donor testimonials

Web Marketing

- Consider vanity/shortcut URL (e.g., mpr.org/legacy)
- Include link / URL for Planned Giving page with all communications (print pieces, e-mail, audio, and video)
- Pro-tip: Create online Legacy Society form!

Print Marketing: CGA Postcard

BENEFITS OF A CHARITABLE GIFT ANNUITY

- Ensure MPR programming you love is around for future generations.
- Acquire an annual source of income. Rates range from 5% to 9 percent, based on your age.
- Receive a tax deduction.
- Become a member of the Legacy Society, which includes invitations to exclusive MPR events.

“When I learned about the charitable gift annuity option I said ‘I gotta do this!’ It’s a win-win situation.”
— MARJORIE, LEGACY SOCIETY MEMBER

GIVE YOURSELF A SECURE INCOME STREAM FOR LIFE WHILE SUPPORTING MPR.

To learn more, and request a free, personalized illustration, visit mpr.org/giftannuity or contact Joe Thiegs at 657-290-1583 or jthiegs@mpr.org



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Print Marketing: IRA QCD



Rolling over isn't just for Beethoven!

Make an IRA rollover gift to MPR before the year rolls over.



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Print Marketing: IRA QCD

**ARE YOU AGE 70-1/2 OR OLDER?
MAKE A TAX-SMART IRA GIFT TO MPR BEFORE YEAR-END!**

You can exclude Individual Retirement Account distributions from your income when you make a gift to MPR through a Qualified Charitable Distribution—sometimes called an “IRA rollover gift”—from your IRA.

- The distribution must be made from a traditional or Roth IRA (not SEP or SIMPLE IRAs).
- You must be at least 70-1/2 years of age when the distribution is made.
- You can eliminate up to \$100,000 per year without including the distribution in your gross income. Married couples may be able to give up to \$200,000.
- The check must be payable to a qualified public charity—like Minnesota Public Radio—and must be postmarked by December 31, 2015.
- The distribution counts toward your annual required minimum distribution (RMD).

This great opportunity benefits you and MPR at the same time, but it is only available through the end of 2015. Don't miss out—get in touch with your IRA administrator today!

LEARN MORE BY VISITING MPR.ORG/IRA OR BY CONTACTING JOE THIEGS AT 657-290-1583 OR [JTHIEGS@MPR.ORG](mailto:jthiegs@mpr.org).

Thank you again for your support of MPR and the essential services it provides!



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Other Marketing Ideas

- **Ads or articles in magazines and newsletters**
 - Alumni / member / organization-based
 - Topical or regional for-profit (e.g., Minnesota Monthly or Mpls.St.Paul)
- **Broadcast media**
 - Radio
 - TV
- **Billboards / public transit signage**

Sample Audio



"We have a cultural tradition that we have to pass from generation to generation. The legacy we leave behind will not only ensure that MPR will be there in the future, but hopefully it will inspire some young listener to join a choir or learn to play an instrument, which will change their life forever.



Not everyone will write a great novel, paint a remarkable picture, or leave a cherished recording behind. But we can do this."

Bill and Paula Glade
Alexandria, MN

PG Prospect Identification (or, Who might make a planned gift?)

- Donor self-identification
- Prospect research leads
- Development officer referrals
- Professional advisor referrals
- Personal and professional networks

Donor Self-Identification

- Make it as easy as possible
 - ✓ Your contact info on web page
 - ✓ Check-boxes on return pieces in mailers
 - ✓ Forms in hard copy AND online
- Marketing is key

Qualification, Cultivation, and Solicitation

Qualification
(or, You've Identified a Prospect – Now What?)

- **Have direct personal interaction**
- **Evaluate:**
 - Affinity
 - Capacity
 - Potential willingness to make a planned (or outright major) gift
- **Ask about greatest interests**
- **Determine family circumstances**

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Qualification

- **Don't be afraid to ask about planned gifts in the first visit. (Use your judgment!)**
- **Key question:**
You've been a generous donor for so many years. Many of our longest-supporting members have included MPR in their will or estate plan. Is that something you've ever considered?

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Cultivation
(or, How do we build the relationship?)

- **Many ways to build the relationship:**
 - Personal visits
 - Phone calls
 - Individual personal e-mail correspondence
 - Mailed letters, cards, and notes

(Hey, this sounds a lot like qualification!)

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Cultivation

• More ideas for building the relationship:

- Special event invitations
- Private studio/HQ/campus/site tours
- Opportunities to meet program staff, behind-the-scenes people
- Involve organization leadership
- Share funding opportunities

Solicitation

(or, How do we ask for a gift?)

- What do you want to ask them to do (bequest, life-income gift, etc.)?
- Unrestricted or for a specific use?
- What's the right dollar amount (if applicable)?
- Who should ask?
- When (is the donor ready)?

The donor said "Yes"! What now?!

Stewardship

Reasons:

- Showing appropriate gratitude
- Legal obligations
- It's the right thing to do
- Maintaining and continuing to develop the relationship with the donor
- MORE AND BIGGER GIFTS

Stewardship

Aspects:

- Gift processing
- Thanking
- Use of the gift / gift administration
- Reporting on the use of gifts
- Gift recognition
- Periodic communication with donor

Stewardship

Ideas for stewarding planned gift donors:

- Thank-you and receipt letters
- Calls and e-mail messages
- Other letters, notes, and cards
- Special event invitations
- Personal visits
- Station/building/site tours

(Hey, this sounds a lot like cultivation!)

Stewardship

Ideas for stewarding planned gift donors (cont'd):

- Thank-you or sponsor messages (print, on-air)
- Donor roster listings
 - Annual report
 - Web page
 - Donor wall or kiosk in building
- **Legacy Society membership**

Legacy Society

- Recognizes future gift donors
- Decide on name
- Regular communications and invitations to the group
- Annual recognition event
- Special section in annual report

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Tracking and Policies

Basic Things to Track

- Requests for planned giving information
- Bequest intentions (Legacy Society members)
 - Donor names
 - Amounts
- Estates in administration
 - Notifications
 - Distributions received
- Life-income gifts (more advanced programs)

Ways to Track

- Donor management database (if possible)
- Excel spreadsheets
- Physical files
- Standalone software

Gift Acceptance Policies

- What is a Gift Acceptance Policy?
- Why is it important?
- You can use Gift Acceptance Policies and Procedures to advance development initiatives.

Gift Acceptance Policies

• Resources:

- David Wheeler Newman, "Effective Gift Acceptance Policies and Procedures," *The Journal of Gift Planning* (August 2009)
<http://www.msk.com/news/pub.cfm?id=1048&type=Publication>
- Kathryn W. Miree, "Understanding and Drafting Nonprofit Gift Acceptance Policies" *Kathryn W. Miree & Associates, Inc.* (2003)
<http://www.giftplanners.com/resources.html>

Internal Support for Planned Giving

Working with Organizational and Internal Partners

- Senior Leadership
- Annual Fund (if separate)
- Major Gifts (if separate)
- Finance Department
- Legal Department (if applicable)
- Service / Programs / Content Staff
- Board of Trustees/Directors
- Volunteers

Making the Case

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**A planned gift can complement
and amplify your donors'
outright giving.**

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**In 2011, the average American's
bank savings account held
\$5,923. The average checking
account held \$3,100.**

(per Pitney Bowes, <http://news.pb.com/press-releases/savings-account-balance-decline-for-residents-in-four-electoral-swing-states.htm>)

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“There’s a way to do it better . . . find it!”
 –Thomas A. Edison (attributed)

Think about alternatives to cash gifts.

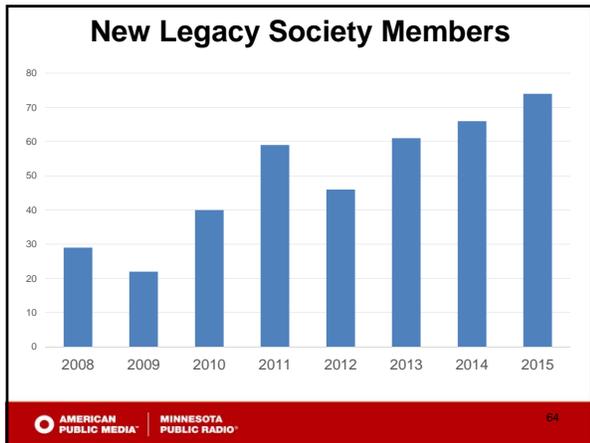
Ideas for Gifts Other Than Cash

- Appreciated Stock
- Mutual Fund Shares
- Real Estate
 - Residences
 - Cabin or vacation property
 - Undeveloped land
 - Farmland
 - Commercial real estate
 - Oil and mineral rights
- Artwork
- Collector Cars and Other Valuable Vehicles
- Intellectual Property Rights
- Privately Held Business Interests
- Required Minimum Distributions or Qualified Charitable Distributions from IRAs

Example: Capital Gains Tax Savings with Charitable Gift of Appreciated Stock

Assumptions: Donor has \$1 million in cash and \$1 million in appreciated stock with a basis of \$200k (\$800k unrealized long-term capital gain). She is trying to decide whether to use cash or stock to make the gift. Which should she choose?

	Cash	Appreciated Stock
Charitable gift amount	\$1,000,000	\$1,000,000
Ordinary income tax saved at 39.6% rate	\$396,000	\$396,000
Capital gains tax saved at 23.8% rate (20% + 3.8% surtax)	\$0	\$190,400
After-tax cost of gift	\$604,000	\$413,600



Your Best Ideas

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Questions and Answers

- What haven't we said that's on your mind or that would be helpful to discuss?
- What other questions do you have for us?

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Final Thoughts and Words of Wisdom

“Don’t judge each day by the harvest you reap but by the seeds that you plant.”

–Robert Louis Stevenson

“Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence.”

–Helen Keller

“If you want to succeed you should strike out on new paths, rather than travel the worn paths of accepted success.”

–John D. Rockefeller



Thank You!

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