

Planned Giving in 1-3 Hours A Week

MAY 22, 2023




FUNDRAISING

A CONVERSATION WITH...



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ABOUT CCS

Celebrating 75 years of transformational partnerships with nonprofits.



Leading experts in campaign and development strategy for 75 years



Experienced across nonprofit sectors and locations



Full-time professional staff plans, implements, and manages fundraising projects.

TODAY'S GOALS

01

DEFINE GIFT
PLANNING

02

UNDERSTAND
PHILANTHROPIC
LANDSCAPE +
POTENTIAL

03

LEARN WHAT
YOU CAN DO
IN 1-3 HOURS
A WEEK

04

KNOW HOW
PLANNED GIVING
CAN DRIVE
RESULTS



Define Gift Planning

ESTABLISHING A SHARED UNDERSTANDING



GIFT PLANNING
CULTURE



PLANNED GIVING
PROGRAM / STRATEGY



DEFERRED GIFT
TOOL



Understand Philanthropic Landscape & Potential

A UNIQUE MOMENT FOR PHILANTHROPY



WEALTH TRANSFER



PANDEMIC + ECONOMIC SHIFTS



DONOR SOPHISTICATION



NONPROFIT SOPHISTICATION

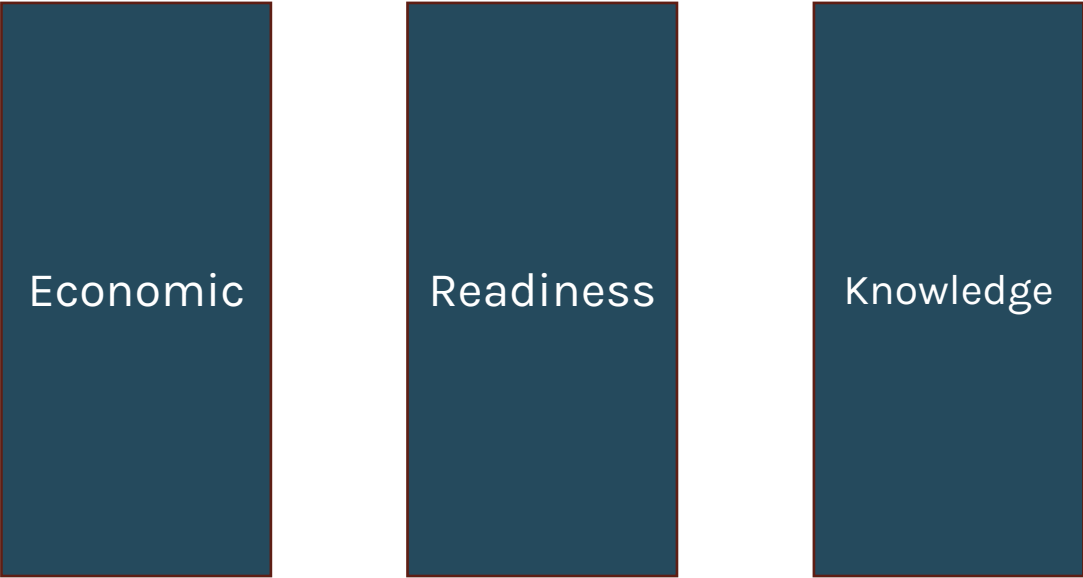
CCS PHILANTHROPY PULSE

GIFT PLANNING TAKEAWAYS

- 1 Area in Which Fundraising Staff Have the Lowest Levels of Expertise
- 2 Nonprofits Receive More Gifts From Donor-Advised Funds Despite Potential in Other Assets
- 3 More Than Half of Nonprofits Expect an Increase in Deferred Gifts in 2023

CCS PHILANTHROPY PULSE

WHAT BARRIERS DO ORGANIZATIONS FACE IN ACCEPTING MORE NONCASH CONTRIBUTIONS?



Greatest obstacles to receiving noncash contributions?

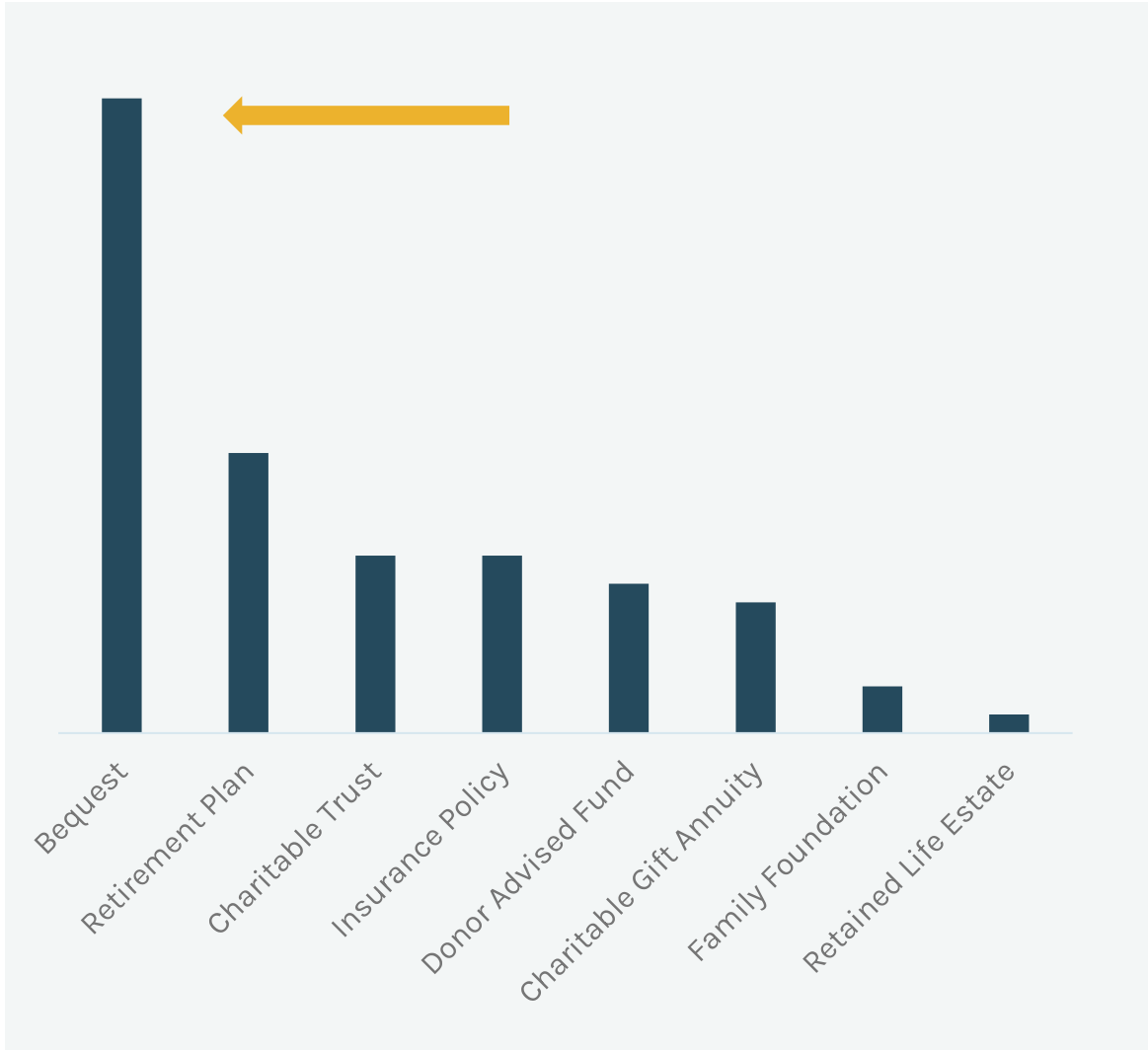
PERCENTAGE OF NONCASH ASSETS RECEIVED BY ORGANIZATION



None to 20% = 71%!

Cash is defined as cash, check, or wire transfer from a bank account. Noncash is defined as gifts of stocks/bonds, real estate, etc. but also includes foundations, DAFs, retirement assets, etc.

BEQUESTS IN THE U.S.



- \$484.8 Amount (in Billions) given to charity by Americans in 2021
- \$46.01 Amount (in Billions) given through Bequests by Americans in 2021
- \$13.71 Amount (in Billions) given through Bequests from estates of less than \$1 Million
- 44 Average age donors make their Will
- 53 Average age donors added a charitable beneficiary to their Will

WHAT ASSETS MAKE UP WEALTH?

A LOOK AT ASSET DISTRIBUTIONS BASED ON NET WORTH TIERS

AGE	ASSETS
40s	Liquid, House, Vehicle
50s & 60s	Same as 40s + Stocks, Retirement
70s & 80s	Same as 40s-60s + Fixed Income, Mutual Funds, Real Estate, Business Interests



TRANSFORM Your Fundraising
in 1 to 3 Hours a Week

PLANNED GIVING IS A COMMITMENT

COMMITTED CULTURE BREEDS SUCCESS

Clarity of Purpose

Confidence

Accountability

Momentum

Education

Identification

Strategy

Action

MANAGE YOUR ATTENTION

WHAT YOU PAY ATTENTION TO BECOMES YOUR EXPERIENCE. - MARUA NEVEL THOMAS, PRODUCTIVITY EXPERT

Decide where you will focus your attention: Education | Identification | Strategy | Actions

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Tasks	EDUCATION	IDENTIFICATION	STRATEGY	ACTION	ACTION
Time	30 minutes	30 minutes	1 hour	30 minutes	30 minutes

EDUCATION | PROFESSIONAL DEVELOPMENT & TRAINING

Building your expertise in gift planning is building your expertise in philanthropy.

KEY CONTENT

- Prospect identification tactics
- Internal process, policy, and resources
- Basics about non-cash giving vehicles
- Impact of planned giving on long term institutional growth and financial stability
- Legislative updates that affect giving opportunities

RESOURCES

- National Association of Charitable Gift Planners
- Regional Charitable Gift Planning Councils and Conferences
- Gift Planning Associations
- Academic Experts
- Gift Planning Websites
- Estate Planning Companies
- Gift Planning Marketing Companies
- E-Learning Resources: Webinars and YouTube

IDENTIFICATION | DATA ANALYSIS

Know Your Donors

Recency: How recently have they given?

Frequency: How long has this person been associated with your organization?

Monetary: How much have they given over time, what was their largest gift?

Volunteer / Organizational Involvement

Age

Marital Status



STRATEGY | RESOURCING

INTERNAL CONSIDERATIONS

STAFF

- Do you /does staff have support to be successful?
- What professional learning would be valuable?
- Are there systems that could make you more effective?

LEADERSHIP

- Are they advocates in this work?
- Do they understand the implications on long-term fundraising?
- Does this team need training?

VOLUNTEERS

- How are they engaged?
- Do they need training?
- Have they made personal deferred gift commitments?
- Do you have an advisory network who can support your efforts?

ACTION | MARKETING & COMMUNICATIONS



Get the
Message Out



Update
Communications
Channels



Invest Time
in a Brochure



Send a Survey
or Postcard



Planned Giving in Action

ABOUT CHURCH OF THE HOLY COMMUNION

MEMPHIS, TENNESSEE



ESTABLISHED IN 1938



600 FAMILIES



ANNUAL OPERATING BUDGET: \$1.98M



CHURCH OF THE
HOLY COMMUNION
EPISCOPAL



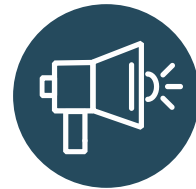
CHURCH OF THE HOLY COMMUNION



Survey to Parishioners



Engaging Educational Events



Specialized Communications



Tailored Outreach

ABOUT ST. PAUL'S EPISCOPAL CHURCH

CLEVELAND HEIGHTS, OHIO



ESTABLISHED IN 1846



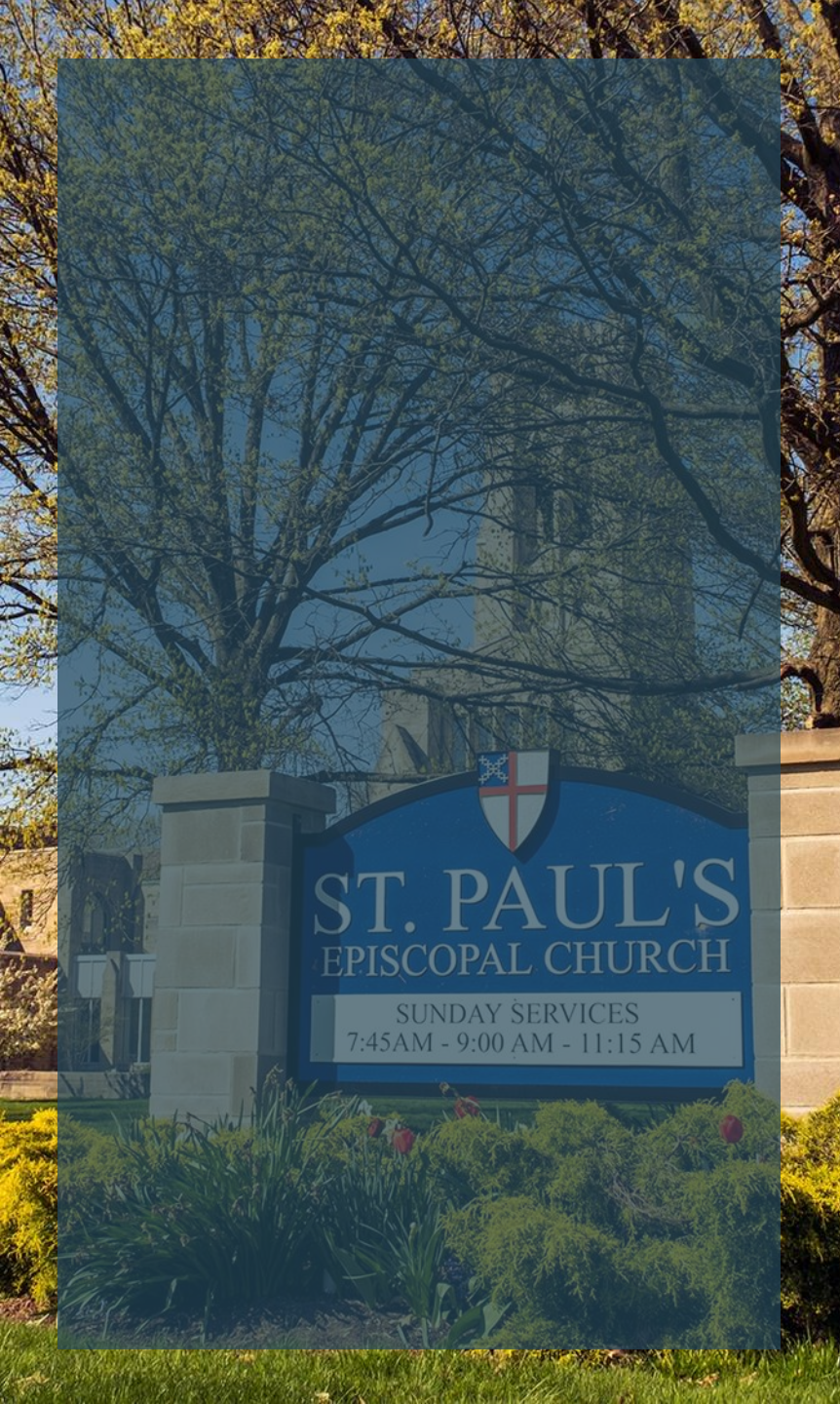
700 FAMILIES



ANNUAL OPERATING BUDGET: \$2.4M



ST. PAUL'S
EPISCOPAL CHURCH



ST. PAUL'S EPISCOPAL CHURCH



Planned Giving
Data Review



Legacy Society
Materials



Education
Events



Blended Gift
Request Strategy



What Resonates for You?

PLANNED GIVING CAN DRIVE RESULTS

01 GROWTH: Organizations pursuing gifts of assets beyond cash are growing.

02 SUSTAINABILITY: Noncash assets create a sustainable revenue pipeline.

03 LARGER GIFTS: Up to 90+% of wealth in the U.S. is in noncash assets.

04 EASIER GIFTS: In a difficult or unstable economy, cash is kept close. Ask for noncash assets.

05 NEW MONEY: Trillions in anticipated generational wealth transfer with the peak estimated for 2030.

06 FOR EVERYONE: Gift planning culture democratizes philanthropy.

07 TRUE PARTNERSHIP: Opportunity to partner with donors by helping to build their financial health and literacy for the benefit of your organization.



CLOSING NOTES

Decide to
Commit

Understand Your
Potential

Plan Your Work

Work Your Plan



Additional Information

APPENDIX

EDUCATION & ACTION | GIFT ACCEPTANCE POLICIES



Lean on
Existing Resources



Audit +
Update Policies



Ensure
Gift Documentation
+ Accuracy

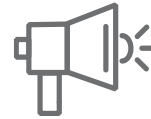
STRATEGY & ACTION | BOARD INVOLVEMENT



Oversight +
Resourcing



Personal
Investment



Advocate



Make
Connections

ACTION | DONOR ENGAGEMENT



Start
Conversation



Listen for Cues



Propose
Blended Gifts
(Cash + Planned Gift)



Draft a Bequest
Appeal

STRATEGY | LEGACY SOCIETY

EXISTING LEGACY SOCIETY

Audit + Invite

Learn + Engage

Market

NEW LEGACY SOCIETY

Branding

Establish Qualifications

Member Benefits

Invite Donors

Inside-Out Solicits

Engagement Opportunities

ACTION | MEASURE YOUR PROGRESS

- Identify key goals and implement measurable metrics for all forms of gift planning activity (communication outputs, cultivation practices, and stewardship vehicles, etc.)
- Evaluate the efficacy of metrics on an annual basis and adjust where necessary.

COMMON MEASUREMENTS OF SUCCESS (PER QUARTER / PER YEAR)

- Number of planned giving mailings
- Number of broader communications that feature planned giving information
- Number of leads received from each mailing and communication channel
- Number of legacy society stewardship events held
- Number of donor education events held
- Number of planned giving visits or phone calls conducted by gift officers
- Number of proposals or blended proposals delivered
- Number of gifts by asset type (cash; noncash asset; combination)
- Number of gifts by giving vehicle (cash, stock, DAF, bequest, remainder trust, gift annuity, etc.)

STRATEGY | LEGACY SOCIETY

FUNDAMENTALS OF LEGACY SOCIETY BENEFITS

ACCESS

Provide access to leadership and other entities to help foster the feeling of being an “insider” at the organization

INFORMATION

Share information about how donors’ future gifts will make a difference in the organization’s work

EXPERIENCE

Offer donors the opportunity to see and understand their generosity and the organization’s impact in action

EDUCATION | DONOR ENGAGEMENT

BUILDING YOUR CONSTITUENTS FINANCIAL HEALTH

Charities are uniquely positioned to help their constituents and donors build and protect intergenerational wealth.

This incredible and life-altering service can be achieved by encouraging individuals to:

1. Write a Will
2. Create an estate plan
3. Create a succession plan for a business
4. Name beneficiaries
5. Teach children about personal finance
6. Invest in children's education
7. Invest in the stock market and real estate
8. Take advantage of life insurance

SURVEY QUESTIONS*

Subject Title: Would you mind answering these four quick questions?

Include your own introduction email.

1. Churches and other organizations that offer donors the option to make planned gifts (versus gifts of cash only) are fiscally stronger than organizations that focus only on cash gifts. Have you donated to an organization using any of the following giving vehicles?
2. Have you included Church X in your estate plans?
 1. If Yes, have you told the Church?
3. If Holy Communion held information sessions on Planned Giving, would you attend (either in person or on zoom) to learn additional information?
4. Please confirm your information.

*CCS conducted this survey through our survey platform.



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Thank You