Planned Gift Marketing During & After COVID-19

A Chance to Pivot or Truly Change?
The only constant is change.

~ Heraclitus
Remote Notarization Allowed In New York Under Cuomo Executive Order

Lisa Chamoff  Contributor  
Real Estate  
I tell stories about real estate with a focus on the New York market.
Agenda

Donor Mindset  Marketing & Messaging  Looking Forward
Donor Mindset

Ever-Changing Emotions and the Impact on Trust
Seek First to Understand

1. Navigating the Unknown
2. Need for Connection
3. Impact of Uncertainty on Trust
Navigating the Unknown

**Uncertainty of health, mental health, employment and the future**

- Geographic progression of COVID-19 is resulting in a mixed range of anxiety given donor’s specific physical location
  - Feelings of Grief are real
- 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.

Donor Mindset

Navigating the Unknown

‘Surge Capacity’ had been depleted

• Impact on trust can influence decision making
  ◦ Excessively seeking reassurance from others
  ◦ Micromanaging people
  ◦ Procrastinating

• Life is currently a game of Risk

• Consistent recommendations
  ◦ Focus on things you can control
  ◦ Take care of yourself
  ◦ Stay connected
What donors need from you now

Hope + Connection
Donor Mindset

Need to be Connected

Prof. Jen Shang, Co-Director of the Institute for Sustainable Philanthropy and the world’s ONLY philanthropic psychologist

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
Donor Mindset

Need to be Connected

Lack of WELLBEING due to DECREASE in sense of connection

• The feeling of being connected is 1 of the 3 most fundamental needs we have as humans
• Expected people would feel less connected to the world, other people, their communities and family/friends. NOT less connected to animals...tells us broader decline in connectedness
• Not just a PHYSICAL need, but more so the need for SECURITY and COMFORT
Donor Mindset

Need to be Connected

Opportunity for Charities

1. Recognize helping people **FEEL** connected with others is very different from actually being connected - the FEELING, not the FORMALITY.
   - NEW MARKETING KPI = HUMANITY?

2. To **GENUINELY** meet people’s need to connect, we have to take steps to connect with them first (note: innovation occurs at a much faster pace during times of crisis than normal times).

3. Continue to create two-way conversations so that your donors can **FEEL** listened to, understood and cared for.
Survey: Extending your donor discovery

Increased nonprofit survey click-to-open rates

There has never been a more important time to take the pulse of your donors. A survey does just that. A recent increase in click-to-open rates suggests that people have time or are more interested in providing feedback to their favorite organization.

1 WorldData*. Key metrics from March 5 to 18
2 “Assessing the Impact of COVID-19 on Client Email Marketing Activity” TheSieber Company, Jan. 5 - April 18, 2020
Have more meaningful conversations

Surveys work because...

» Many people are taking this “forced slowdown” as a chance to reflect and take a “personal inventory” of what’s nearest and dearest to them.
» With a majority of the country spending most of their time at home, what a great time to engage donors and prospects to get direct feedback on what they care about and whether you may be part of their plans.
Donor Mindset

Uncertainty’s Impact on Trust

What does it mean for nonprofits and your donors?

• A lot of unknown swirling around us. What you’ve done before doesn’t necessarily matter, it’s what you do NOW.
  ◦ Distinction between REPUTATION and TRUST
  ◦ Reputation = “Reflective” measure. What you did.
  ◦ Trust = “Predictive” measure. What people think you’ll do in the future.

• KEY = Are your actions aligned with your values?
Uncertainty’s Impact on Trust

Keys to Strengthening Trust and Confidence With Donors

1. **Show up and do your part.** After all of this is behind us, people won’t remember what you SAID but what you DID!

2. **Don’t act alone.** Are there opportunities to collaborate with other NPO’s or businesses to do good in your community?

3. **Solve problems that need solving.** Not the time to push products (i.e. gift vehicles), instead how are you solving problems today (i.e. student relief funds, etc.).

4. **Communicate with emotion.** Not the time to be boilerplate or tone deaf, show your human side.
PROVIDING HOPE

Because of the thoughtful generosity of people like you, BrightFocus Foundation has been able to fund scientists to investigate causes, treatments and possible cures of diseases through our three programs—Alzheimer’s Disease Research, Macular Degeneration Research and National Glaucoma Research. These programs have provided funding for:

- MORE THAN $87 million in Alzheimer’s disease research projects.
- MORE THAN $15 million to scientists studying macular degeneration.
- MORE THAN $24 million to scientists studying glaucoma.
Marketing & Messaging

What Makes Sense? What Doesn’t?
THE SITUATION

Donors are ready to hear from you

You have a captive audience. How will you respond?

People are thinking about:
» The fragility of life
» How to protect loved ones
» Financial stability
» Ways to help others
Now is the time!

We know exactly where our donors and prospects are: **AT HOME.**

- We work from home.
- We socialize from home.
- We plan from home.
- We consume content from home.

We must reset our marketing plans to fit a "stay home" frame of mind and deliver content that sparks a feeling of connection.
Navigating Planned Giving Outreach

1. The Importance of Planned Giving During a Crisis
2. The Role of Marketing
3. Tips for Messaging Success
First Things First....This is About People

- Be empathetic, understanding of donor mindset(s)
- Fear, unknown, fluidity of situation can be paralyzing
  - Don’t let it! Be proactive. Show your human side!
- No “One-Size-Fits-All” for engaging donors right now
- Listen, listen, listen
The Importance of Planned Giving During a Crisis

Lessons Learned From the Past

• **NO SCRIPT** – Nothing in the modern day compares to this pandemic
• But, those who weathered the Great Recession best had planted seeds years before
• Post Great Recession, for profit and non-profit that invested, saw ROI

This IS Different, but...

• People are taking a ‘personal inventory’ of what’s most important
• People are doing their planning
Over the past few weeks, I have been inspired by Penn Staters' strength and commitment. Thousands of alumni and friends have offered a helping hand to our students, University researchers are studying the virus and developing treatments and vaccines, and our Penn State Health heroes are serving our communities on the front lines.

But the past month has also brought a whirlwind of evolving news stories and response strategies. With the passage of the CARES Act on March 27, we have received many questions about how the new law affects our alumni and friends, particularly the impact on personal income, financial management, retirement accounts, and charitable giving. The Office of Gift Planning's website has helpful information about the CARES Act, and our team will hold a webinar, How the CARES Act Impacts You, on May 20 at 2 p.m. EDT. Register for the webinar here.

As you navigate this challenging period—and perhaps have additional time to consider ways to protect the people and causes dear to you—we would also like to provide a complimentary personal resource record guide to help organize your plans and prepare for the future.

Dear Susan,

Over the past few weeks, I have been inspired by Penn Staters' strength and commitment. Thousands of alumni and friends have offered a helping hand to our students, University researchers are studying the virus and developing treatments and vaccines, and our Penn State Health heroes are serving our communities on the front lines.

But the past month has also brought a whirlwind of evolving news stories and response strategies. With the passage of the CARES Act on March 27, we have received many questions about how the new law affects our alumni and friends, particularly the impact on personal income, financial management, retirement accounts, and charitable giving. The Office of Gift Planning's website has helpful information about the CARES Act, and our team will hold a webinar, How the CARES Act Impacts You, on May 20 at 2 p.m. EDT. Register for the webinar here.

As you navigate this challenging period—and perhaps have additional time to consider ways to protect the people and causes dear to you—we would also like to provide a complimentary personal resource record guide to help organize your plans and prepare for the future.
The Importance of Planned Giving During a Crisis

**Key Concerns Facing Gift Planners**

- Misperception from Leadership on ‘what’ planned giving truly entails
- Typical understanding boiled down to — “Leave XYZ Charity in your will”
- Is it “appropriate” to talk about planned giving, even though many people are doing their wills?

**Education/Awareness is Key**

- Don’t need to “ask” to talk about importance and impact of planned gifts - Storytelling
- If you’re not top of mind, another charity is:

> “We still have to operate our business. If we stop asking, they’re going to stop giving. It may be less and it may be fewer, but you can’t take your foot off the gas. It’s especially important now. People are googling estate planning, how to make my will. This is fresh on people’s minds.”
1. **Death Reminders Inundating Us.** Everywhere you turn the media is giving us death tolls, death projections, etc.

2. **Death Just Got Way More Offensive.** Typical reaction is avoidance (desire to suppress reminders of death).

3. **NOW is the time to be “top of mind”**. Will-writing and updating at all-time highs!

4. **Ways to Engage.** Thank you’s, check-in, collect & share stories, show the impact of legacy giving, survey and offer assistance.

---

**Legacy Fundraising: The Best of Times or the Worst of Times?**

Russell N. James III, JD, PhD, CFP®
Professor & CH Foundation Chair in Personal Financial Planning
Director of Graduate Studies in Charitable Planning
Texas Tech University

Michael J. Rosen
President, ML Innovations, Inc.
Author, Donor-Centered Planned Gift Marketing
Publisher, the Michael Rosen Says blog
Don’t Be Stuck on the Sidelines

- **Stelter PULSE Surveys** (March 31 and April 30)
  - Surveyed 292 and 345 nonprofits respectively nationwide
  - Nonprofits actively communicating to donors rose from **66% to 79%**
  - Focus on stewardship and personal touches
  - Budgets under scrutiny as those seeing decreases grew from **14% to 28%**
  
  (However, 2% did see a budget increase of 50%)
What’s Working?

1. **Pick Up The Phone**
   Phone calls, by far, remain the most common way fundraisers report connecting with donors.
   
   “Phone calls—people who have been too busy are now available and interested in talking. We send a bag of our university-branded coffee in advance and ask to have a ‘coffee chat.’ Our entire fundraising team doubled their outreach from last year. Most donors are still committed, but uncertain as to timing and amount of gift.”
   
   —Higher Education nonprofit

2. **Build Relationships For Their Own Sake**
   People are isolated and eager for meaningful conversation. Older Americans are particularly vulnerable right now and many perk up at the chance to talk, if for no other purpose than to receive some much-needed attention and compassion.
   
   “Stewardship, and more stewardship, staying in contact with legacy members and prospects. There is a caution in the air, but this may be an opportunity as well.”
   
   —Arts and Culture nonprofit

3. **Combine Approaches**
   Develop a sequence of interactions, such as phone call + email or direct mail + phone call + email. With more time available to follow up, fundraisers are better able to concentrate their efforts around a targeted campaign.
   
   “We have continued with our newsletter, which dropped the beginning of April. Good timing. Then following up with phone calls from musicians. Staff are writing note cards at this point in time. Looking ahead at virtual meetings with PG prospects. Join us for tea or maybe wine with a musician.”
   
   —Arts and Culture nonprofit
The Importance of Planned Giving During a Crisis

**Planned Giving is Always About the “Long Play”**

- Hard to think long term now given uncertainty of the next 24-hours
- Opportunity to train frontline fundraisers on planned giving

**Opportunities**

- NOT time for ‘vehicle’ asks (unless already in conversation with or prompted by donor/advisor)
- A deferred gift may provide an easier option to support your work
- Percentage designations are/will be more attractive than fixed dollar amount
What’s Working?

“Had been planning a Stelter CGA mailing since January. It happened to drop on April 3. We used this as an opportunity to follow up with a phone call to ask if they received the brochure and if they would accept a personalized illustration. If we were not able to reach them by phone, we sent them an email containing an abbreviated CGA proposal for their review. So far we’ve sent out about 40 proposals and are in the process of completing one six-figure CGA as a result. We felt the mailing was providential as it gave our planned giving staff a focus during the crisis and a reason to reach out to our planned giving prospects.”

—Higher Education nonprofit

“We’ve identified previous DAF donors who might be good candidates for a solicitation with the concept of “It’s your rainy day charitable fund. Guess what? It’s raining!”

—Education nonprofit
The Role of Marketing

**Context and Content Matter!**

- Be mindful of the phases of communication your donors have seen from you in the last 2 months
- Understand planned giving marketing as ‘Reactive’ vs typical ‘Reflective’
- Content is taking center stage
- What mediums make sense to use and how often?
Understand the “Phases” of Communication Your Donors Have Seen From You (and Others) the Past Couple Months

• **PHASE 1** — “Here’s what we’re doing to ensure the work we're doing will continue, your donations are impacting the work you care about, etc.”

• **PHASE 2** — “We're here for you, thinking about you, please let us know how we can help.”

• **PHASE 3** — NOW WHAT?
PHASE 1: Nonprofits reacted

How they did it:
» Assured donors of the nonprofit’s stability
» Described the organization’s response to the pandemic
» Sought support for immediate needs
PHASE 2: Nonprofits showed support

How they did it:
» Expressed empathy; offered encouragement
» Demonstrated hope and positivity
» Reinforced the connection: “We’re all in this together”
PHASE 3:

So, what's next?
“Reflective” and “Reactive”

- **Unplanning Planned Giving** blog post (April 27, 2020)
  - Planned giving is typically reflective...Enter COVID-19
    - Make it easy to take action
    - Engage with allied professionals
    - Keep messaging simple
    - Engage donors to share stories

- **What’s Trending: Content Takes the Spotlight** LinkedIn article (May 18, 2020)
  - The crisis has made content more valuable
    - Relevance is key
Dear Salutation,

"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has."

Margaret Mead inaugurated the very first Earth Day, joining with organizers and activists on April 22, 1970, to share a vision of the world they wished to see. A world with clean air and water, without poisonous pesticides and pollution, where animals and humans could survive and thrive.

Five decades later, we are coming together in different ways. The COVID-19 global pandemic has brought into sharp focus how deeply we depend on one another to act for a greater common good. As we each do our part to take care of our beloved communities and ourselves, we create powerful collective momentum to continue fighting for the places and people we care about most deeply.

Thank you for being part of that fight. With roots dating back more than 125 years, the [organization] amplifies the power of nearly four million members and supporters to defend everyone’s right to a healthy world. We are in this together, now more than ever.

By including [donation] in your estate plan, you can make that vision a reality. Please return the enclosed reply card today to receive a free planning guide or to notify us of a gift.

Ever pleased
As someone who has been intimately connected with [name] you understand the urgency of our work more than most. We are called to build a world free of violence, oppression, and inequality—and the COVID-19 pandemic is the latest crisis to magnify the injustices of our world.

You have likely been hearing much about the present response in the time of coronavirus and our current work promoting the safety and peace of all, particularly those most vulnerable. I’d like to also take a moment to reflect with you on the future.

You have likely been hearing much about the present response in the time of coronavirus and our current work promoting the safety and peace of all, particularly those most vulnerable. I’d like to also take a moment to reflect with you on the future.

We are ever grateful that [name] is able to adapt and respond today, even (and especially) in times of crisis, because generous supporters in years past had the foresight to make gifts for the future. [Reference 1-2 alumni!] Donors/gifts that have been realized and are making an impact! Ask for this at proof.

By making a gift to [name] through your estate plan, you can embark upon the next chapter of your longstanding commitment to building lasting peace with justice. If you would like to learn more about ways you can make a gift for the future—or if you have already included [name] in your estate plan and not yet notified us—please return the enclosed reply card today or visit us at [website].

We’ve heard from many alumni about their transformative experiences and meaningful work with AFSC. Bruce Nordstrom-Loeb, who included us in his will after working with us in the South and in Michigan, recently shared:

“My work with the [name] broadened my sense of how to work from a place of peace and justice. With its distinctive spirit, [name] belief that there is something of God in every person shaped the direction I would continue to take throughout my life.”
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 FOLLOWERS +14%⁴

² https://www.connocer.com/insight/blog/Media-Consumption-during-the-Coronavirus-Pandemic
⁴ WordDUP. Key metrics from March 5 to 18
Email offers a big opportunity

Email activity is up. Inbox volume is down.

**Email Activity**

+27%

The total market is sending 19% less.

**Email Open Rates**

+11%

**Click-Through Rates**

+35%

Even if your email is never opened, seeing a brand’s name in an inbox helps to keep you top of mind with donors.

*WorldData*, Key metrics from March 5 to 15
Email: Users scan rather than read

People are much more likely to scan digital content than read it. In addition, they are not likely to read your content completely or in sequential order.

Three email must-dos:
» Write in plain language.
» Use headings, subheadings, bulleted lists and bold text to highlight important information.
» Place the most important information up front.
Dear Susan,

As we navigate these uncharted waters together, we reflect on the people and places we hold most dear. We have some news we would like to share that can help you focus on your future, and the future of Penn State.

But you must act by June 30 to maximize your benefits.

The concept, called a charitable gift annuity, is simple. You make a donation using cash or marketable securities, and we, in turn, pay you a fixed amount for life. With this type of gift, you can feel secure knowing you will receive stable payments for as long as you live.

And now, if you make your gift by June 30, the gift annuity rates will be as estimated 3.7% to 3.9% higher than they will be beginning July 1.

You are our future. Contact me to discuss how a charitable gift annuity can help.

Sincerely,

Michael J. Englehart
Assistant Vice President, Gift Planning

The passing of the Coronavirus Aid, Relief, and Economic Security (CARES) Act is part of the country’s response to help taxpayers, businesses and nonprofits in these extraordinary times. This new law has a few key provisions that may affect you and your charitable gifts, including:

- A new charitable deduction
- A change to required minimum distributions
- An opportunity for those who itemize

In these challenging times, we are so grateful for your support of Iowa State. The CARES Act provides some additional ways you can receive financial benefits and make a positive impact on students and programs while we learn, teach, work and live from a distance.

One way you can use the CARES Act's benefits is by supporting the Cyclone Strong Fund. This fund was established to help students who need extra support during the COVID-19 pandemic. Please consider a gift today as, together, we remain #CycloneStrong.

Learn more about the Cyclone Strong Fund, or contact us to see how you can continue to make an impact in this time of need.

Questions? We can help.
Office of Gift Planning
Iowa State University Foundation
800.621.8515
giftplanning@foundation.iastate.edu
Prepare to reframe your approach

Many of the concepts that planned giving marketers introduce remain valid in today’s climate—if you express them differently.

» Instead of asking for a bequest, ask prospects to take a personal inventory of what matters most to them.
» Use the COVID-19 crisis as a touchpoint to talk about planning and preparedness.
» Rather than focusing on what your nonprofit has accomplished, thank your donors for their loyalty and generosity. Then describe how such generous gifts have helped you to continue your mission.
Tips for Messaging Success

Critical that “Framing” of Messages is appropriate

• Messages just sent in Q1 may appear tone deaf today
  ◦ i.e. “Plan for the Future”, “Importance of an Updated Will”, etc.
• Acknowledge, show empathy….but DON’T DWELL!
• Context varies by industry/vertical — Independent School vs National NPO vs University, etc...

Best Practices Around Content

• Simplify your message during this time...narrow, succinct, focused
• Provide Value — Serve as a resource, provide tools ‘others have found useful’ (social proof)
  ◦ Being prepared, safeguard portfolios, take care of family
Pay attention to language

Avoid pushy, scary words and phrases:
» Hurry
» Final wishes
» Don’t miss out
» COVID-19/coronavirus
» “How do you want to be remembered?”
» “Have your best year yet!”
» “Giving is contagious”

Match the mood:
» Planning time
» Catching up
» Family first
» Thank you!
» Home
» Inspiration
» Planning tips

PRO TIP: Avoid ALL CAPS. No need to shout, especially now.
Dear John,

Thank you so much for being part of our extended [hospital name] family. During these uncertain times, there is one thing that hasn’t and won’t change: our commitment to improving the lives of children and families.

As you know, our staff remains dedicated to providing hope and healing to our kids. And your love and generosity mean so much to us — now more than ever.

While the ways we stay connected may look and feel different right now, we will always be united in our desire to improve the lives of kids in our care. Thank you, again, for all the ways you come alongside the patients and families at [hospital name].

[Image of children, one with prosthetic leg]

"This year will make five new legs we’ve received from [manufacturer] at no cost," says his mom, Kay. "Unbelievable, right?"

Questions? We’re Here to Help
Planned Giving Office
[Phone number]
[Email]
[Website]

---

[Image of doctor and patient]

Get My Guide

---

[Image of hospital]

Get My Guide
In celebration of the 50th anniversary of Earth Day, we’re offering you a complimentary copy of the Sierra Club’s *Personal Estate Planning Course.*

As part of our ongoing celebration of the 50th anniversary of Earth Day, we’d like to offer you these complimentary guides that can help you care for your loved ones and our natural world.

**Free Resources**
Estate planning made easy.

**Protect What Matters Most**
Your complimentary guides
Tips for Messaging Success

**Stewardship, Stewardship, Stewardship**

- Engage known planned gift donors — Calls, personal notes, even personal videos
- Setup virtual ‘town halls’ with key administrators (healthcare/higher education)
- Virtual coffee breaks/meetings
- Send out content from archives (theatre client)

**Themes to Adhere To**

- Genuine ‘Thank You’ and ‘Checking-In’ outreach
- Gratitude Reports
- Show examples of how planned gifts have impacted your work
Happy Spring!

Plant a Seed and Watch It Grow

“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.
Together, We Are Forever Syracuse

Syracuse University
1870 Society

Why We Are Forever Syracuse

Syracuse University was a training ground for me. It gave me the experience of making relationships that taught me self-discipline. For me, there's a depth of satisfaction and excitement about giving to Syracuse University. I believe it is financially strategic, smart planning, and most of all, extremely satisfying.

"If it was for the University, Syracuse students wouldn't be the people they are today. If we can help future students reach their potential, that's what it's all about."

Tell Us Your Story

These are just a few of the 1870 Society members of the Orange family. What makes you Forever Syracuse? Why do you give to Syracuse University? Let us know. Simply return the enclosed reply form or tell us your story. We look forward to hearing from you.
Dear volunteer,

In these challenging times, I express my heartfelt gratitude.

Your dedication to protecting vulnerable children in the face of these unprecedented circumstances has been unwavering. You have been a beacon of hope and a source of strength for those who need it most. Your selflessness and generosity have made a tangible difference in the lives of millions of children around the world.

The increases in COVID-19 cases have brought a renewed sense of urgency to our work. The situation is particularly critical in conflict-affected areas, where children are most vulnerable. Your support is more important than ever.

Thank you for your ongoing commitment and for making a difference in the lives of children. Your dedication is truly inspiring.

Yours sincerely,

[Signature]
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
DMSO at Home: Jonathan & Julie Sturm

Thursday at 8:30 AM ⏰

In this new 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.

Followers: 8.2K
Views: 9K

Live with Carnegie Hall

Watch Now:
Dear [Name],

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.

Regards,

R. Gerald Turner
President

May 20, 2020
Update from the Field: Fighting Covid-19 in Africa and Asia

Dear [Name],

I wanted to share with you some news about how we have been helping communities affected by Covid-19. As you know, the pandemic has had a profound impact on many people around the world. Thanks to your support, we have been able to provide crucial assistance to many communities. Because of you, we have been able to transform the lives of as many people as possible, while promoting safety and wellness.

With deep gratitude,

[Signature]
Kate Grant, CEO

I hope you are staying safe during this challenging time.
Looking Forward
What Have We Learned? What Are We Still Learning?
Nothing Puts Major Gift Considerations on Hold More than Uncertainty

- Focus was initially on the pandemic
- Societal and civil unrest
- The elections
- Ongoing division
- “Waiting for the next shoe to drop”
Things to Remember Now and in the Future

- Targeted & relevant communication around the ‘why’
- Face-to-face meetings are gone for awhile — Opportunity to extend your discovery through surveys
- Importance of collaboration with internal teams
  - Include info on/link to “Emergency Student Fund”, etc.
- Bequest/Legacy Challenge — Work with donor to pivot ‘where the money’ goes
Looking Forward

Legacy Challenges

Dear Salutation,

Over the last few months, students, faculty and staff have personified our motto of We could not be prouder of the resilience and commitment shown as we transitioned to online learning this semester in response to the COVID-19 pandemic.

We are also grateful to our friends and alumni, many of whom have reached out to us during these uncertain times, wanting to know how they can help. We understand that right now, balancing family and giving can be difficult. That’s why we are excited to announce a new way you can make a difference at today, without parting with assets you may need. How? By being a part of the Legacy Gift Matching Challenge.

To join, simply make a gift to in your will and notify us of your intention. Matching funds equal to 10% of your gift’s value (up to $10,000) will then be directed to an existing fund of your choice today.

You can direct these matching funds to support a program at you are passionate about, or you can direct them to our Student Emergency Aid Fund, which is assisting students who may not have access to the internet at home, who lack stable housing, and more.

When you participate in the Challenge, you help students today, while also putting us on solid footing for the future. We are grateful and honored for the continued support we receive in these unprecedented times.

Please don’t hesitate to contact me with any questions you have. Thank you.
Things to Ponder for Your Future Outreach

• Authenticity rules the day
• Is 'Humanity' the next big Marketing KPI?
  ◦ Formality vs. Informality?
  ◦ Candor vs. Professional?
  ◦ Vulnerable vs. Bullet-Proof?
• Will Americans be more open to talking about their mortality, end of life plans, etc.?
The Jury is Still Out…

“Set It and Forget It” and Content Automation

• “Set It and Forget It” marketing can come back to bite you
  ◦ Multiple Higher Education institutions came under fire for boilerplate emails
• Content Automation — Tread lightly
  ◦ Hubspot, Pardot, etc.
  ◦ Great tools, but, be weary that creating ‘content journeys’ years in advance can fall on deaf ears and even turn people off
Thank you!
Resources

Planned Giving Marketing During COVID-19

Blogs, videos and resources to help you through this time

Access Resources >>

https://www.stelter.com/addressing-todays-marketing-challenges-covid

Your Must-Have Guide for Communicating With Your Donors Now

A plan for the next 90 days

Get the eBook >>

https://www.stelter.com/white-papers/a-short-term-guide-for-marketing-planned-giving
References
(In order of appearance)

References

11. Green, Fraser - Unplanning Planned Giving, [http://www.goodworksc.ca/unplanning-planned-giving/](http://www.goodworksc.ca/unplanning-planned-giving/)
13. AdAge - Adobe Study Suggests Consumers Have Grown Tired of 'We're With You' Ads, [https://adage.com/article/digital/adobe-study-suggests-consumers-have-grown-tired-were-you-ads/2258311](https://adage.com/article/digital/adobe-study-suggests-consumers-have-grown-tired-were-you-ads/2258311)