



TRANSITIONING *to* TOMORROW

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Transactional to Transformational: Moving Donors from Direct Mail to Major Gifts

From a “one night stand” to
marriage

How to move your best
prospects through the
process



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Just one story...

From facility rental to
board membership to
special project gift
to endowment gift



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What's a One Night Stand?

Facebook, Twitter, or any social media follower

First time event participant or attendee

First time event donor

New direct mail donor – benefit offer/sweepstakes



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What's an Affair?

Subscriber

Volunteer

Board member

Bequest intention –
remember these are revocable

Current low level donor

Current major donor



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What is a Marriage?

Endowment donor

Irrevocable
planned gift



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Methods that work ...

aka “The tools you
need”



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Understanding who you've met...

Get to know them -

survey, focus groups, events, one on one meetings

Wealth engine and other tools that you can purchase

Research tools

General demographics

Prospect review



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Communicate!

Can you hear me now?



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Non profit communication is not different from corporate communication – be smart about how you communicate with your “customers” and know what they want to hear, when they want to hear it, and how they want to hear it.



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A strategic fundraising plan needs a corresponding strategic communications plan!

- * developed in concert and implemented in an integrated fashion

- * external input - be inclusive and externally focused



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You can identify what makes your organization unique in your prospect's minds – ask the right questions!

- * what they want to hear about
- * when they want to hear it
- * how often and in what manner

You can also uncover the "big idea" that transcends what your organization does and inspires people to give to you .



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At last count, 65 million Americans have registered for the "Do Not Call" list, explicitly telling direct marketers that they do not want to be communicated with by telephone.

How many of your donors are on that list? What does that tell you about how they want your organization to communicate with them?



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Adjust and Alter your plan based on what you learn!

In this way, you stand a better chance of having an affair... and to reaching the right people with the right message at the right time



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Communicate!

Educate!

Involve!

Get Engaged!

Get Married!



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Discussion

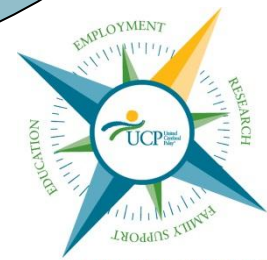
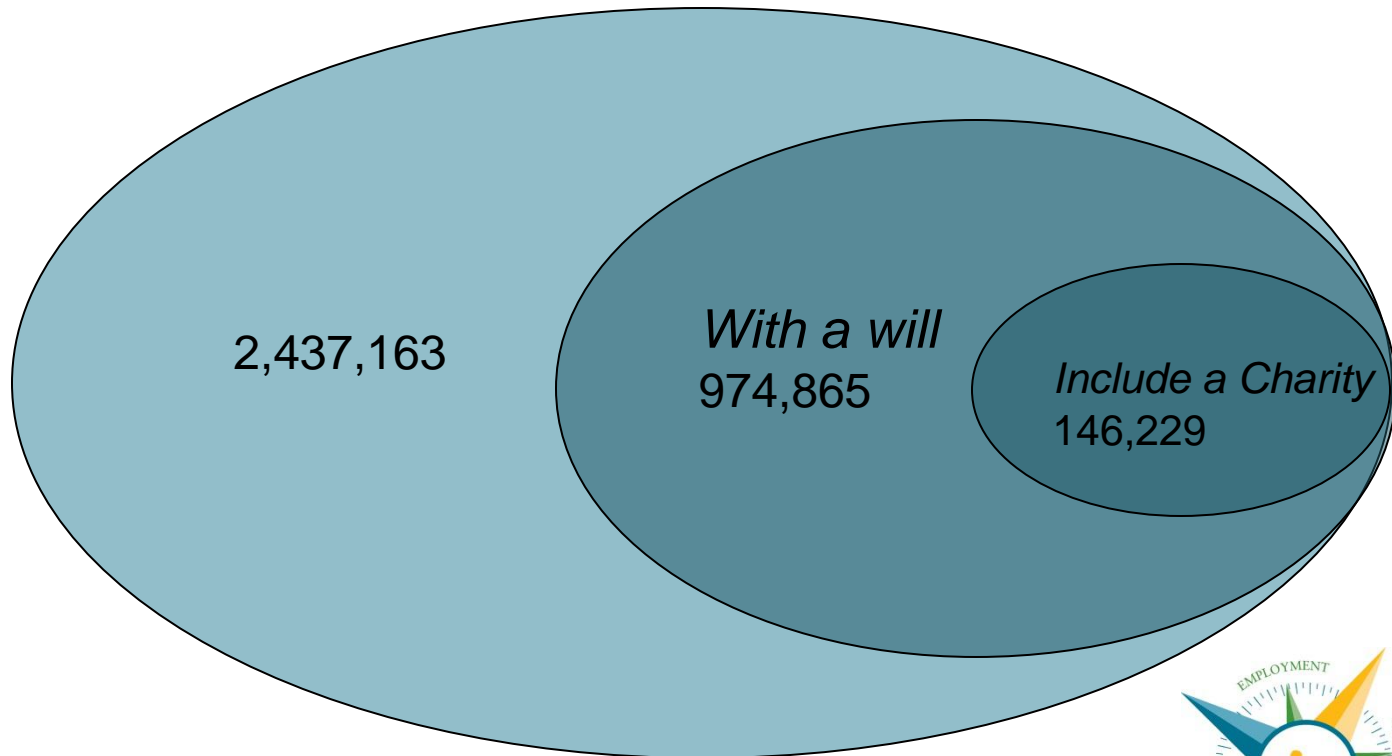
- How many people died in the US last year?
- How many of those had included a charity in their will?
- How much was this worth to the charity sector?
- How much did you make?
- How many confirmed bequestors do you have?

Is this good or bad news?



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Deaths in the USA annually



Discussion

Will charity income from bequests get bigger or smaller in the future?



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Yes!

2,437,163



3million



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Over 65's

40million



**72
million**



The answer to how is **why**.



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Solo Moment

Take 2 minutes to write your will



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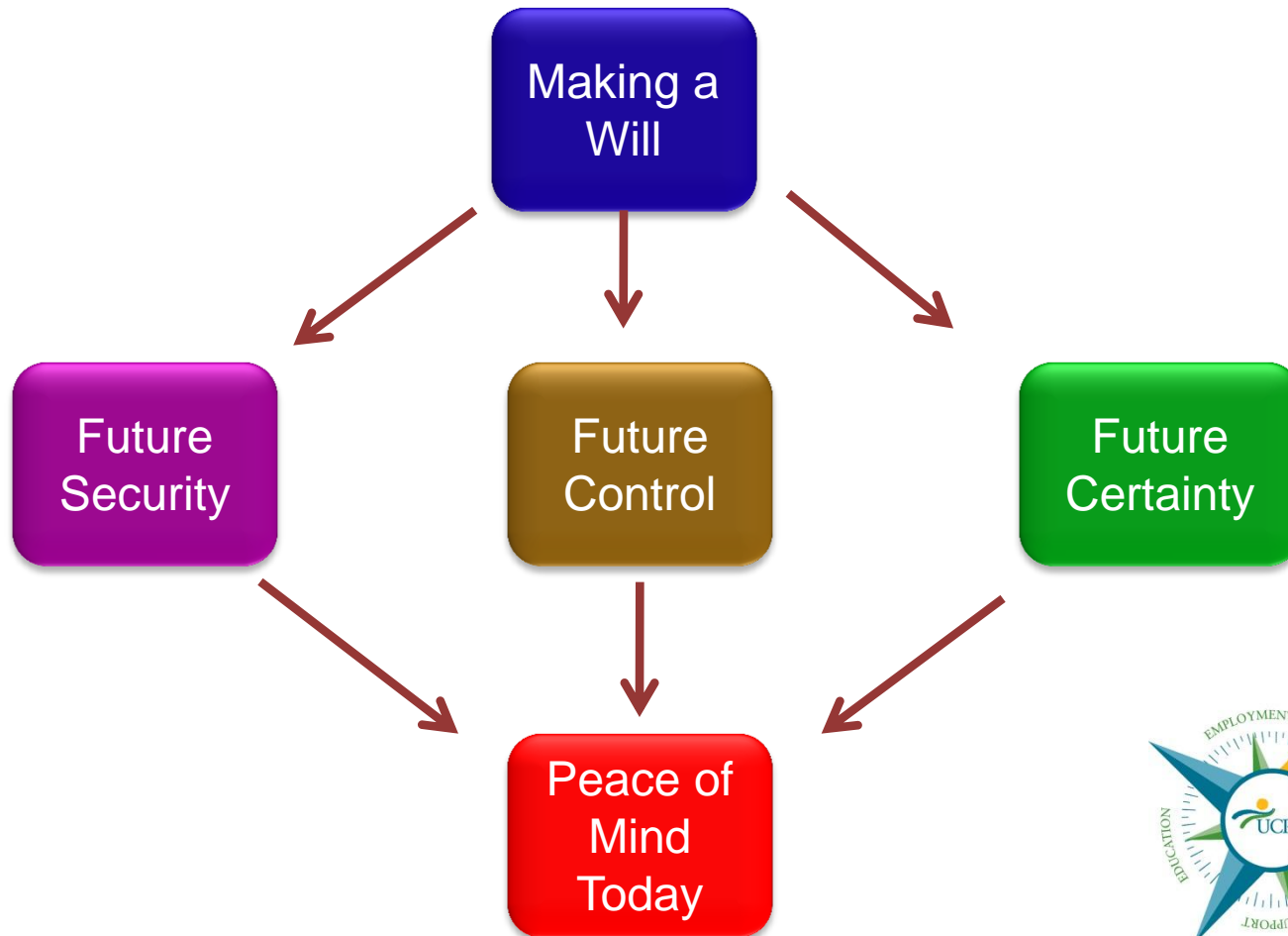
Discussion

How did it feel?
What process did you work through?
Did you leave a gift to charity?
If no – why not?
If yes – why?



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Motivators to make a will



Triggers

1

- Health Scare, Travelling overseas
- Death/illness of someone close

2

- Change in relationship status
- Birth of grandchildren. Change of Executor

3

- House purchase.
- Inheritance

4

- Supporting a Charity
- Retirement. Sorting out financial plans



Motives for a bequest

Reasons donors cited for leaving a bequest	%
Desire to support charity	97
Ultimate use of the gift by the charity	82
Desire to reduce taxes	35
Long range estate and financial planning issues	35
Create a lasting memorial for a loved one or self	33
Relationship with a representative with a charity	21
Encouragement of family and friends	13
Encouragement of solicitor or financial planner	12

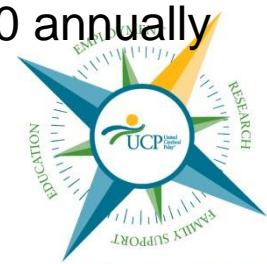
US data



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Attitudes

- Financial Security and Happiness: Those that recognise their financial resources exceed their material need by them and family. This brings deep satisfaction.
- Modest to self
- Generous and affectionate to those around them
- Views self as selfless person
- Polarised on religion (no different to BQ and non BQ)
- Donate twice as much as non-bequestors \$1,000 vs. \$500 annually
- Want to help those less fortunate than themselves



Attitudes to bequesting

1. Family already provided for (or children secure)
2. No family
3. Belief in the charity
4. Want to help in an ongoing way
5. What they say they want from a charity....
 - Reputation
 - High proportion of funds to cause
 - Good management



Target market

Over 65

Women

No children

Positive attitude to charity

Stable

Perceived asset rich

No pets.....



Choosing a charity

Inspiring

- Vision
- Progress
- Need
- Importance
- Relevance

Reassurance

- Reputable
- Established
- Worthy
- Small enough to notice



Learnt about bequests

Source	%
Charity through it's publications	24
Legal or financial advisor	21
Family or Friends	20
Charity through an individual visit	11
Speaker at a financial planning event	8
General knowledge	7
Another donor	6
Other	6
Unknown	9

US NCPG 2001



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Barriers

53% support idea of leaving a gift in their will!

- Family first
- Don't know you can leave a gift in will
- Perception they don't have enough money
- Already support charities in other ways



Strategies



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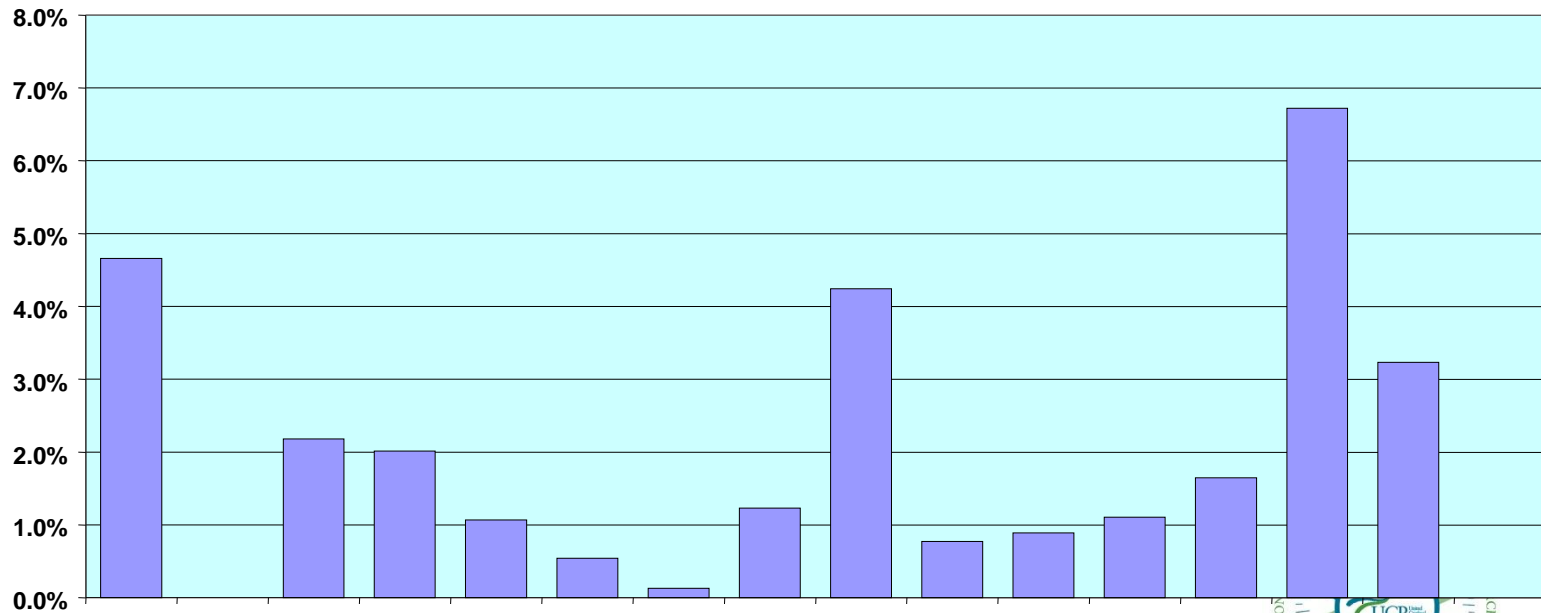
Bequest Best Practice

1. Analysis and targetting
2. Lead generation (warm, survey, cold)
3. Conversion (Why > How)
4. Donor care (Clubs, Tours)
5. Influencers
6. Ongoing communications
7. Internal culture
8. Measurement

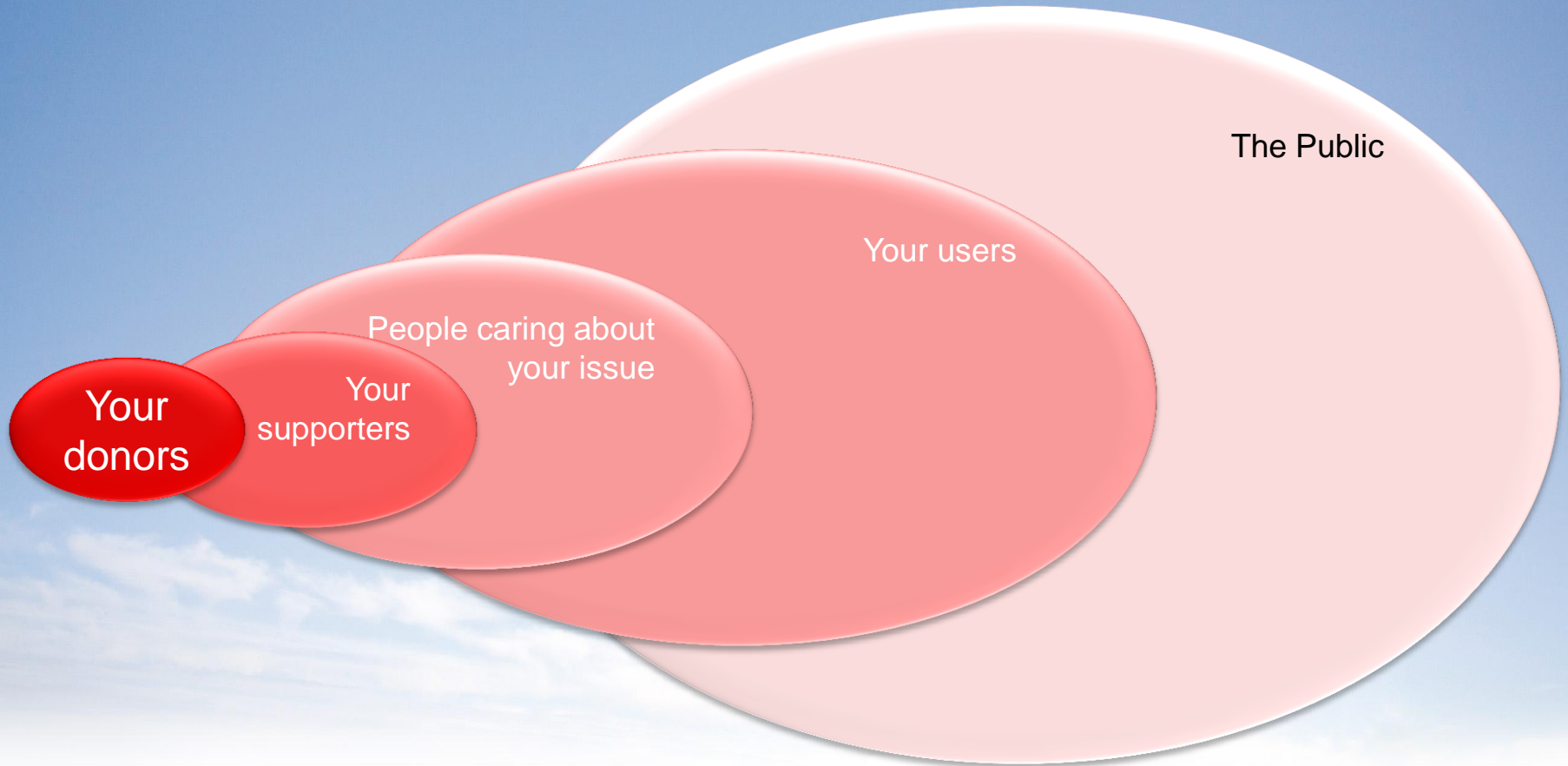


Analysis & Targeting

Bequest penetration by charity
(% of active mail cash donors)



Who to target

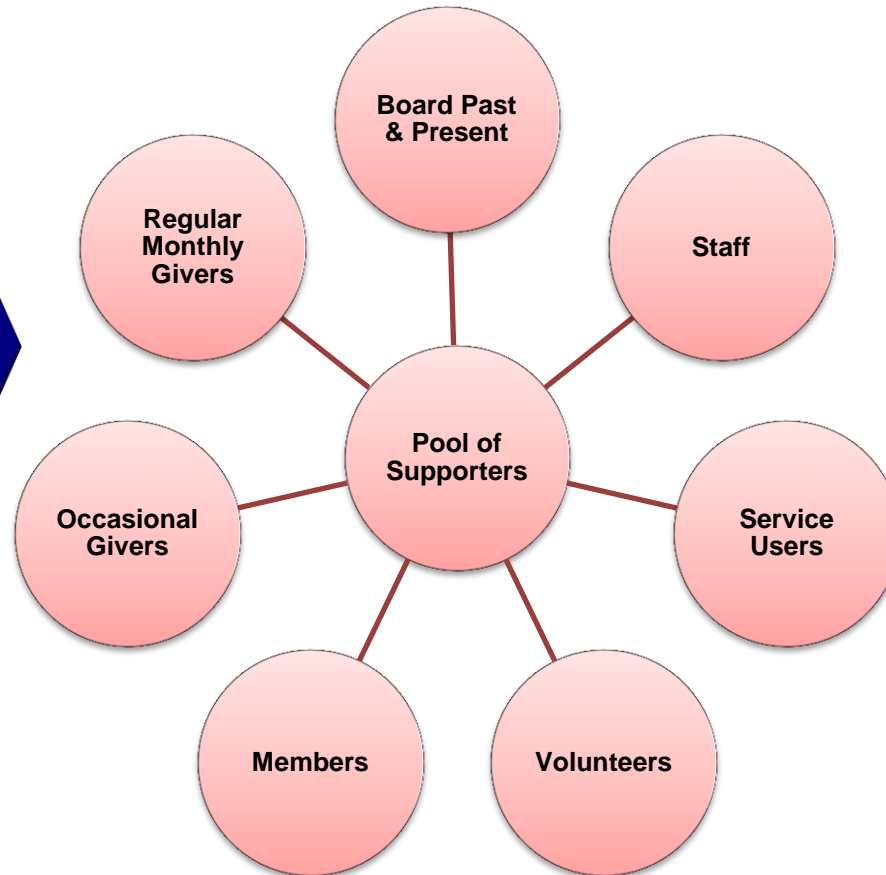


include a charity
It's good will.

Who are we looking for

Demographic

Date of birth
Postcode analysis
Survey responses
Contact details provided
Gender
Title
Address type
Length of residence
Ms/Miss



Behavioural

Length of involvement
Supporter type
Recruitment source
Regular giver
Membership
Type of service used

Hierarchy of prospects

1. Committed donors – female (10 years plus)
2. Committed volunteers
3. Committed donors – male
4. Direct experience of the charity
5. Major donors
6. Lapsed donors
7. Occasional donors

Source: Richard Radcliffe (UK experience)

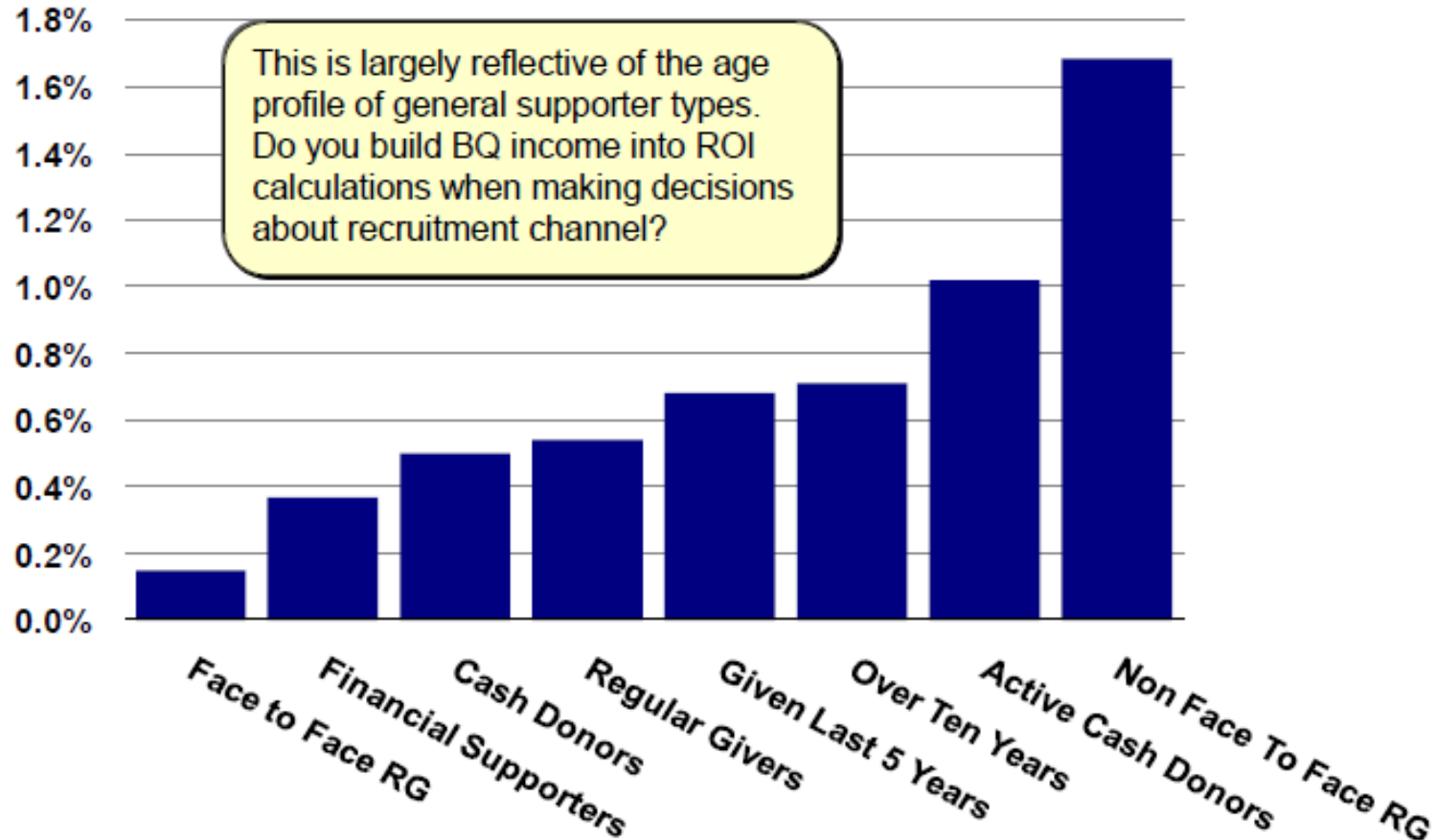


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pareto fundraising

Confirmed bequestors by type of support

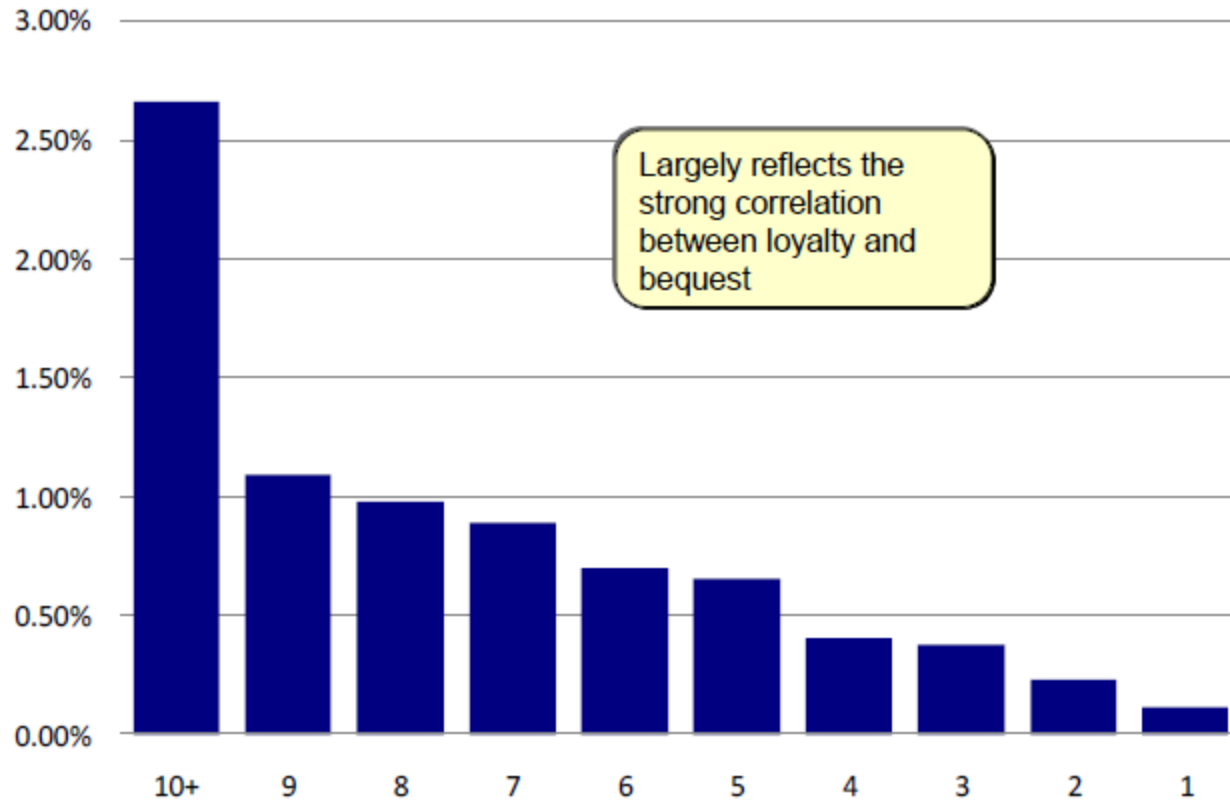


Confirmed Bequestors by Type of Support



pareto fundraising

Confirmed bequestors – cash gifts



Largely reflects the strong correlation between loyalty and bequest

Confirmed Bequestors vs Whole Population - Gifts (All)



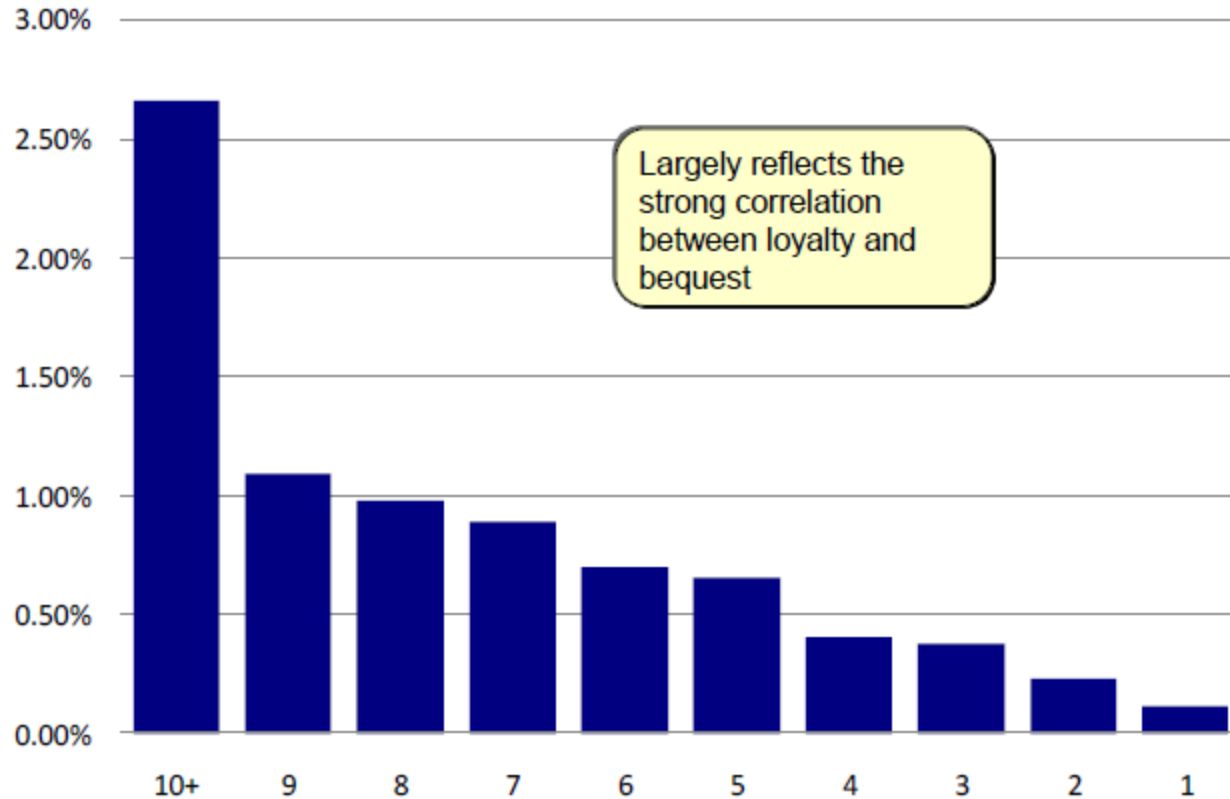
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pareto fundraising

Confirmed bequestors – cash gifts



Confirmed Bequestors vs Whole Population - Gifts (All)



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CPA Case Study

1. Have a donation 5+ years ago
2. Have a donation 10+ years ago
3. Have 5+ single gifts
4. Have 10+ single gifts
5. Have been a regular giver
6. Have given a single gift of \$250 or more
7. Have given a single gift of \$1000 or more
8. Have a recent donation 0-12

And then we'll rank them by the scores out of 8

Then match to bequest survey data -, age, link to cause, date of first donation etc.



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Advertising

TV – everyone
benefits

Press – newspaper

Press - mags

Professional
publications

Beer mats!

WHEN YOU COME BACK
AS A WHALE YOU'LL
BE BLOODY GLAD
YOU PUT GREENPEACE
IN YOUR WILL.

☎ 1800 81 51 51



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Direct Mail

- Targeted Bequest Appeal
- Tick boxes on appeals
- Good for older cash donors or non face to face RGP's
- Similar approach to cash mail appeal



Supporter Survey

- Annually or phased mailing
- Identifies prior values for targeting
- 1-2% confirmed
- 1-2% intend
- 2-4% inquiry

THE AUSTRALIAN CONSERVATION FOUNDATION'S ANNUAL SUPPORTER SURVEY 2007

PRIVATE AND CONFIDENTIAL
INDIVIDUAL RESPONSES WILL NOT BE DISCLOSED.
PLEASE RETURN BY 9TH MARCH 2007.

As a valued supporter of the Australian Conservation Foundation (ACF), you have been selected to take part in an important new supporter survey. We intend to repeat the survey annually, and may release key statistics and findings on our website, newsletter and to the media.

ACF is committed to inspiring people to achieve a healthy environment for all Australians.

For over 40 years we have been a strong voice for the environment, promoting solutions through research, consultation, education and partnerships. We work with the community, business and government to protect, restore and sustain our environment.

Your answers to the following questions are crucial. By letting us know what is important to you, you will help us to better respect your needs as one of our most valued supporters. This will help us to identify and reach out to potential new supporters and raise much needed funds more effectively. This will allow us to continue to spread our message and become an even louder voice for our environment.

HOW TO COMPLETE YOUR CONFIDENTIAL QUESTIONNAIRE

Please use blue or black ink to cross or tick the appropriate boxes and write in CAPITAL LETTERS where text is required.

Thank you so much for your help.

SECTION ONE: CAMPAIGNING TO PROTECT OUR ENVIRONMENT

1. Which of the following statements best describes your concern about the environmental issues in Australia today? (Please tick one box only)

I am concerned about the environment but believe enough is being done

I am concerned about the environment and believe major changes need to be made within society

I am concerned about the environment but don't believe society can make the changes necessary

I am not concerned about the environment

I am not sure/Other (please specify)

2. In your opinion, how important are the following environmental issues facing Australia at the moment? (Please rank each issue on a scale of 1-5, where 1= not important at all and 5= extremely important)

Preventing dangerous climate change

Encouraging businesses to be socially and environmentally responsible

Extinction of plants and animals

Logging of old growth forests

Protecting Australia's oceans and marine life

Establishing a nuclear free Australia

Establishing sustainable population levels

Saving the Murray and Australia's threatened river systems

Sustainable land and water use in rural Australia

Protecting the natural and indigenous heritage of Northern Australia

Saving energy, water and waste in the home

Waste policy and planning in our cities

Ending uranium mining in Australia

In addition to the environmental issues listed above, are there any others which are important to you?



Supporter Survey

THE question:

9. Gifts left to ACF by people in their wills can have an enormous impact on our work. We depend upon the income we receive from these gifts to continue our work. It is important for us to know how many people support us through their wills. (Please tick one box only)

- Yes, I have already mentioned ACF in my will
- I intend to include ACF when I make or next revise my will
- I would consider including ACF in my will, and would like more information
- I do not have a will
- I have written a will, and have mentioned charities, but have not included ACF
- I have written a will but have chosen not to mention charities



Wills and Info days

Come and see/hear

Attractive reason

Prospect
identification

Follow up

Invite guests

Talkability

Free will – creates

inertia



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Internal Prospects

Beneficiaries

Members – key
opportunity

Other supporters

Service users

Volunteers



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Phone Conversion

Phased
Timely follow up to
mail

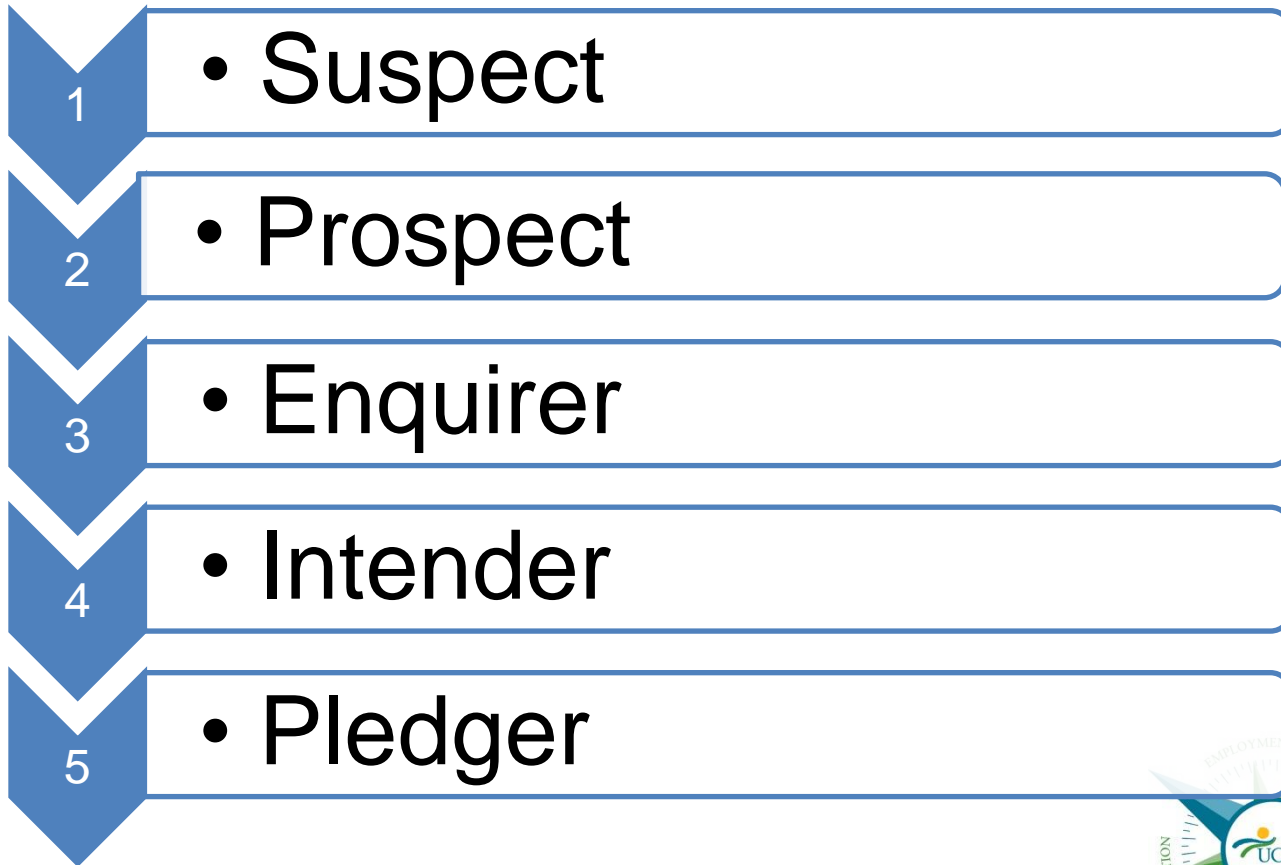
“Have you
considered”

To set up
appointment



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Stewardship stages



Developing personal relationships

Possible strategy:

1. Visit to deliver a recognition certificate for ongoing support
2. Article in newsletter sent personally on bequests
3. Specific bequest or bequest survey mailing – if immediate yes move to recognition communications pathway
4. Invite supporter to annual function/tour of facilities
5. Phone or visit the donor to specifically ask to consider leaving a bequest
6. Thank/recognise if yes. If no continue in usual communications pathway



Making the ask

When:

- Annual or biannual bequest survey
- Specific bequest mailing
- Telephone follow up
- Mail follow up
- Visit



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Bequest materials

Why > how

Vision

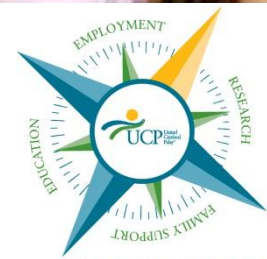
Case study

Evidence

(progress/need)

Testimonial

Reassurance



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Web presence

Reminder
Why and how
Talk to us
Bring it to life –
video, testimonials
Wording for will

<http://cancer council.com.au/editorial.asp?pageid=176>



The screenshot shows the Cancer Council NSW website. At the top left is the Cancer Council NSW logo. To its right is a banner image of a group of people. Below the banner is a dark blue navigation bar with links: Patients, families and friends; Preventing cancer; How you can help; Cancer action; Shop; Schools, childcare, community; Cancer research; Health professionals; Statistics; About us. Below the navigation bar is a search bar with the text "Every closer to a cure" and a search button. To the left of the search bar is a sidebar with a "Cancer Helpline 13 11 20" and a list of services: Consumer Training, Girls Night In, Relay For Life, Donations, Donate Now!, Become a breakthrough supporter, Workplace Giving program, Gifts in memory, Wills and Bequests, Book of Hope, and Eden Gardens. The main content area features an article titled "Why leave a Bequest for The Cancer Council?" with a sub-header "Every closer to a cure". The article text states: "Our mission is to defeat cancer. Leaving a gift to the Cancer Council NSW in your Will is a way of ensuring that research, education and support for cancer patients continue well into the future." Below the text is a list of links: "Why leave a bequest for The Cancer Council?", "Leaving a bequest is easy", "More information about our work and leaving a bequest", "Wording for your Will", and "Join the Daffodil Circle". To the right of the text is a photograph of an elderly person's hand being held by a younger person's hand.



Influencers

- Agnostic
- Top of mind
- Easy to find
- Financial advisors
- Family members
- Very big opportunity for Include a Charity



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Ongoing Relationship

- ‘Club’ membership – who does/share with group
- Tailored v protected
- Appeals + notes
- Surveys with different questions
- Functions & Events – morning with guest
- Offer to pick them up
- Progress reports



What gets measured

Prospects/Enquirer/
Intendor/Confirmed
Conversion rates
Value on books
No# and Value
known bequestors
Contact/visit rates
Asks



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Thank you!



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