

Securing Planned Gifts With Direct Mail


BY MICHAEL J. ROSEN, CFRE

As with other types of fundraising, planned-giving asks made during face-to-face visits will usually yield the strongest results. Therefore, development professionals should attempt to visit with as many prime prospects as possible to cultivate them and to eventually ask for a planned gift. Nevertheless, most organizations have vastly more prospects than staff or volunteers are able to see during the course of the year. So, as with the annual fund, other methods of making a planned-giving appeal should be used.

Because most organizations are already comfortable with using direct mail as part of the development effort, it is a reasonably simple process to apply direct mail to a planned-giving program. While planned-giving, direct-mail appeals can take many forms, most of the standard direct-mail rules apply.

One example of a successful planned-giving, direct-mail appeal comes from the Natural Resources Defense Council (NRDC) in New York City (www.nrdc.org), which implemented its first planned-giving, direct-mail campaign in 2009. The NRDC Million-Dollar Challenge matched bequest commitments at a rate of 10 percent up to \$10,000 per commitment. If a commitment was made but the amount remained undisclosed, the commitment was matched with a challenge gift of \$150. The total value of the challenge grant was \$1 million.

The NRDC, which has 1.3 million members and activists, sent the planned-giving appeal to current members over the age of 55 or, if no age data were available even after an age-appending process, to current members who had been members for at least five consecutive



If you want planned gifts, you generally have to ask for them. This is not headline-breaking news. In any facet of a well-rounded, successful development program—annual fund, major gifts, capital campaign, etc.—development professionals must identify prospective donors, educate them, cultivate them and then ask them for a donation. The same is true for planned giving, which, after all, is just another fundraising effort. However, passive marketing is not enough. If you want more planned gifts, you need to ask more people, in the right way. Even the best planned-gift marketing efforts will yield only paltry results unless they eventually lead to an effective ask.

 For more information, visit www.afpnet.org. Search: Planned Giving

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years. With some additional refinements, the prospect pool totaled approximately 50,000 people.

The NRDC sent the first two direct-mail pieces, with each mailing going to 25,000 people, meaning that some non-responding prospects received multiple appeals. The NRDC magazine, *On Earth*, carried an advertisement promoting the challenge program in an effort to educate prospects and reinforce the mailing.

The direct-mail package included a letter from John Adams, the NRDC founding director. The closed-face, outer envelope had a stamp, not a metered strip; a typed address; and the teaser “An inspiring message from a longtime NRDC member in Wyoming.” In his letter, Adams described the founding of the organization and its continuing vision. He also demonstrated his commitment to the organization by adding that he and his wife had included a bequest provision in their estate plan.

Adams then highlighted the challenge program and encouraged readers to participate. He closed the two-page letter by mentioning that they could help safeguard the environment by making sure the NRDC was there for generations to come. The letter also referred to a lift note from a legacy donor (the one mentioned on the outer envelope) and a full-color brochure, *Guide to Bequests*, to help readers understand how they could include the NRDC in their estate plans.

The lift note from Meredith Taylor, an NRDC planned-gift donor, was a passionate testimonial. She explained why she and her husband had included the NRDC in their estate plans. She also encouraged readers to follow her lead by making a commitment as well: “All you have to do is tell NRDC that you’ve included the Natural Resources Defense Council in your estate plans. There’s no need to write a check; it’s just a matter of saying that you’ve named NRDC in your will.”

While the NRDC *Guide to Bequests* brochure did not mention the chal-

lenge, it did review a number of charitable estate-planning options and included several lovely photographs of natural scenery and wildlife. The package also included a buckslip that read, “Announcing the NRDC Legacy Leader Million-Dollar Challenge!” The buckslip briefly explained the terms of the challenge and, as did the letter, included the name and contact information of Michelle Quinones, senior gift-planning specialist.

The buckslip also outlined the benefits of being part of the NRDC’s recognition society: lifetime NRDC subscriptions, invitations to special events, one gift membership and, unless the donor wished to remain anonymous, recognition in the NRDC annual report. The final elements of the NRDC direct-mail package were a confidential reply form and a business reply envelope. The reply form gave recipients the option of disclosing that the NRDC was already part of their estate plans or indicating that they would like additional information. The form did not ask for the amount of the gift commitment. While that information would be needed for the challenge grant, NRDC did not want to create an immediate obstacle to the response. Instead, staff knew there would be plenty of time to get that information once the form was received.

For those who indicated they had made a commitment, the NRDC sent a thank-you letter. The thank-you letter package contained a gift form confirming the commitment, confirming how the donor’s recognition listing would appear in the annual report and asking for the dollar amount of the commitment so that it could be matched. The package also contained informa-

tion about how the donors could assign their one free gift membership. When the confirmation form was received, the donors were sent a certificate recognizing their membership in the NRDC’s recognition group. The certificate mailing was followed by a friendly telephone call to thank the donors again and to make sure they received the certificate.

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The first two mailings generated 87 confirmed bequest commitments. Of those, 62 were willing to confirm the gift value. The value of the commitments from the first two mailings was \$8.5 million, with an average bequest value of approximately \$137,000. There was also \$330,000 in matching-gift support, according to Michelle Mulia-Howell, director of gift planning at the NRDC. In a typical year, the NRDC would receive approximately 60 bequest commitments. The organization now has more than 1,300 members of its planned-giving recognition group.

While the NRDC uses direct mail to generate inquiries and gifts, the organization also relies on the telephone and face-to-face visits to follow up. These contacts provide additional cultivation and stewardship while giving staff the opportunity to learn more about prospects and donors. With a gift-planning staff of one director, two officers and an assistant, the NRDC could not reach out personally to 50,000 individuals. The direct-mail campaign, however, allowed it to do that. As a result, millions of dollars were raised that otherwise would not have been committed. ●

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