HELPFUL HINTS FOR SUCCESSFUL PLANNED GIVING DONOR SEMINARS

Offering donor seminars on planned giving topics is generally recommended as a part of a comprehensive planned giving program. Done well, they can help bring your donors and prospects closer to your organization and prepare them for a one-on-one visit from a volunteer or staff member. Doing them successfully requires sensitivity to your target audience, a creative approach to attracting your guests, and a solid follow-up plan.

Target Audience

The best individuals to target for these seminars are your longer-term donors age 40+ and your donors who are active retirees. They tend to be concerned about planning issues, and loyal to your organization. An ideal number for the seminar is 25. To get that many, you will have to mail to about 500 people. You can expect a response rate of 2-8%. Mail the invitation 4-5 weeks out. Boost response rates with a second mailing 3 weeks out, and a phone call one week out. Call all registrants the day before to confirm their attendance.

The Invitation

There is no need to send a fancy invitation – a flyer or letter is sufficient. For your older donors, use a larger typeface, good contrast, not too busy. Describe the dual program (see below), promote the benefits of attending, mention a door prize (perhaps a book) and refreshments, and ask for a phone RSVP. When callers RSVP, ask them if they would like to bring a guest. Be sure to capture all contact information. Of course, there is never a charge for these seminars.

Day, Time, Location

For your older prospects, choose a "hassle free" location, easy to get to, free parking, handicapped accessible, comfortable room, easy access to restrooms. An educational setting is good, not too commercial (e.g., a library or museum). Any day of the week can work, even Saturdays. Optimal times are 10 a.m.-noon, or 2-4 p.m. Avoid night-time and rush hour, and don't go over two hours. Avoid serving meals – that will attract the wrong audience. Instead, serve snacks (cookies, fruit), cold drinks and decaf coffee. Avoid theater style seating. Be ready for early arrivals; prepare for sign-in at least 30 minutes before announced start time.

For younger donors, you may wish to offer a lunch meeting since most of this age group is working. Of course you will want to arrange for a location most convenient to your invitees.

The Dual Program

Prepare and promote a two-topic program. The first talk should be about something interesting related to your organization. For example, an art museum might have the curator give a behind-the-scenes look at how painting restoration is done. Or a hospital might have a physician talk about the latest findings regarding treatment for Alzheimer's disease. The second talk is about a planned giving topic, strictly informational, NOT a sales pitch. Suggested topics include:

888-458-4351 954-989-3442 (fax)
www.CoreStrategies4Nonprofits.com

- ✓ Why you need a will
- ✓ Advance directives, living wills
- ✓ Understanding long-term care
- ✓ Avoiding guardianship
- ✓ Joint ownership with children

Avoid topics such as "Understanding Planned Giving;" "Minimizing Estate Taxes;" "Managing your Social Capital." These usually are real turn-offs! You may include information on specific planned giving tools as part of the presentation, as opposed to advertising such things as trusts or charitable gift annuities.

Each presentation should be no more than 20-30 minutes with Q&A. Allow time for the welcome, speaker introductions, wrap up/door prize giveaway and schmoozing with informal Q&A following the presentations.

Sponsor

Decide what speaker you want on the planned giving topic, taking care that the speaker is reputable, entertaining, knowledgeable about the topic, has a professional style and is supportive of your organization and its mission. Ask the speaker's business to be the sponsor, underwriting the cost of the mailing, refreshments and room charge if there is one. Typical sponsor benefits include:

- ✓ Name on invitation and on any advertising or promotion (newsletters, website, etc.)
- ✓ May provide promotional literature at the event
- ✓ May provide free initial consultation to attendees
- ✓ Your organization will refer attendees and/or others to them for advisory services when appropriate
- ✓ May invite their own prospects or clients if desired

Have a clear understanding with sponsors that they are **not** to phone your attendees after the event; that the event is totally **controlled by your organization**; that their presentation is **not to be a sales pitch** but educational; that all subsequent transactions will be based on **full disclosure and highest ethical standards.**

Following Up

Follow-up calls are to be made by your organization, not by the sponsor. Call your attendees within three days. Ask them why they came to the seminar; if they felt it was worthwhile and if their questions were answered; what other topics for future seminars might be of interest to them; how you can help, and always seek a visit. Keeping the whole process simple and PLANNING AROUND THE NEEDS OF YOUR TARGET AUDIENCE will assure success.

With appreciation to John Elbare, MBA, CFP of Florida Philanthropic Advisors, LLC for many of these ideas.