Planned giving: a multi-generational look

– LINDSAY SIEVEWRIGHT

Any organization with an active planned giving program (and by this I mean any organization who receives gifts in Wills even without pro-active marketing or action on their part) has no doubt built a donor profile of their planned givers. They may be identified as loyal monthly donors, as giving to special appeals, participating in events or fundraising for the cause during their lifetime as a donor. All of this information is useful in helping to build a picture of who your planned givers are. Trickier to fathom are those individuals who have included you in their Will but who have never been donors or supporters – the motivation for their gift could be anything and often remains unknown.

“Donors of all ages are comfortable using different channels of engagement.”

Once the gift has been fulfilled, most organizations will take the opportunity to build a profile of their planned givers. This is useful and interesting, but wouldn’t it be more helpful in terms of donor cultivation and stewardship to know more about these donors earlier in the cycle – before they make their final gift?

The usual suspects

Planned giving programs and marketing are usually focused on certain generational groups – the older donors.

This is logical.

These are individuals who have walked a good way on their life path, have reached goals and milestones and are comfortable thinking about what marks they will leave when they are gone. Wills are being written, family taken care of and their favorite charitable organizations remembered. They are the “usual suspects” and with your limited budget (and just show me someone whose budget isn’t limited) it makes sense to use resources for these groups.

But what about younger donors?

How do you engage generation X and Y and how do you get (and maintain) them on the planned giving wagon?

Or are they already on it?

I am often told that I ask a lot of questions. Some might consider me nosey but I see it differently. Quite simply, I want to know a lot – about everything! I take the same approach when dealing with donors – if there’s something we don’t know – let’s ask them!
Recently in Canada
The Canadian office of an animal welfare INGO were interested in finding out more about planned giving potential within their donor file. An online survey was carefully crafted and sent with the aim of uncovering, among other things, planned giving pledges and potential.

The general response in terms of age looked like this:

### LEGACY BEQUESTERS BY AGE

- **UNDER 30**: 3%
- **30-40**: 8%
- **40-54**: 38%
- **55-59**: 18%
- **60-69**: 24%
- **70-79**: 7%
- **80+**: 2%

Older supporters have included the organization. But younger supporters have also taken that step – and not in an insignificant number.

This is an encouraging sign. It shows their supporters not only value the organization’s mission but they are also perceived as trustworthy and enduring. It also reminds us that Boomers (born 1946-1964 and who represent 32% of all Canadian giving) are a force to be reckoned with.

The Next Generation of Canadian Donor study also confirms interest in planned giving in younger donor groups:

### TRANSACTION CHANNELS

<table>
<thead>
<tr>
<th></th>
<th>GEN Y</th>
<th>GEN X</th>
<th>BOOMERS</th>
<th>CIVICS</th>
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</thead>
<tbody>
<tr>
<td>Make monetary donations</td>
<td>50%</td>
<td>69%</td>
<td>69%</td>
<td>77%</td>
</tr>
<tr>
<td>Support friends who are fundraising</td>
<td>37%</td>
<td>45%</td>
<td>46%</td>
<td>47%</td>
</tr>
<tr>
<td>Make a donation in honour of, in memory of, or as a tribute</td>
<td>13%</td>
<td>22%</td>
<td>35%</td>
<td>51%</td>
</tr>
<tr>
<td>Buy products that support them</td>
<td>27%</td>
<td>30%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Include in Will</td>
<td>0%</td>
<td>4%</td>
<td>5%</td>
<td>8%</td>
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Bolding indicates statistical significance among audiences.

### The planned giving challenge

It is likely that many of these legacy bequests won’t be fulfilled for 40 or more years and this presents a challenge. That is a long time to maintain donor loyalty and engagement. It is likely you will lose some along the way – changes in personal circumstances, family need and life experiences may mean you don’t get part of the final pie. But even without these variables, a pro-active approach to your planned giving program is a must. Not only will being pro-active help maintain planned giving loyalty; it can help build strong donor relations which can result in getting more from the whole donor lifecycle.

### Pointers for pro-active planned giving

1. **Keep your donors engaged**
   - Donors of all ages want to know how they are making a difference – the younger they are the more likely they are to be asking. Make sure your supporters (and the general public if you are investing in general marketing) can see the differences being made by planned giving gifts.
   - Use different channels – use all communication channels for planning giving messaging.
Our recent study of Canadian donor habits affirmed what we suspected – donors are omnivores. They will happily read a direct mail piece, will like, follow and share you on social networks, visit your website and talk to you on the phone. It therefore makes sense to use all channels for your planned giving marketing.

Social media was recently successfully used alongside emails and telephone to promote an income tax reduction and estate tax elimination seminar. One fifth of attendees were respondents to the social media marketing (this was not paid advertising but posts and tweets on the organization’s social media pages).

2. Share other donor experiences
   - Don’t underestimate a good testimonial
While carrying out planned giving focus groups in Argentina a few years ago (where naming an organization in a Will was all but unheard of) only two out of twenty focus group attendees knew planned giving existed. Both remembered reading testimonials from European supporters in the organization’s annual magazine. The testimonials were featured more than five years earlier but had stuck in their minds.

3. Non-financial participation
   - Offer opportunities to participate
Something else that came out of the online survey was the interest supporters had in participating. Look for, and offer, volunteer opportunities and organize events (tax seminars, speakers from the field sharing photos and experiences, meet and greets, project visits). Some of the survey respondents had the opportunity to volunteer in a sports event this autumn, which meant the planned giving officer was able to meet and get to know them and was all in all a very positive experience.

4. Opportunities for contact
   - Get to know your donors better
Using a survey to indentify planned givers and the best planned giving prospects gives you a smaller pool of individuals to concentrate on. Take advantage of this by getting to know them better. Use survey information (and donor history) to personalize communications. Invite prospects to your office for coffee and uncover those compelling testimonials from your richest resource – your donors.

By keeping an open mind as to where your planned giving prospects lie you open up new and exciting terrain – and make long-term cultivation and stewardship strategy a must.

Lindsay began working with nonprofits as coordinator of ethical goods and volunteer for an international aid organization. After working in finance and education for a number of years she began working as hjc’s European Fundraising Innovation consultant. Over the last 7 years she has lead legacy projects on three continents. Her passions are legacy, digital and integrated fundraising. She is a joint founder of Xtraordinary Fundraising, UK based integrated fundraising experts. Contact her, lindsay.sievewright@hjcnewmedia.com.

Dealing with grief
– DOUG FLANDERS

Gift planners know the pleasures of working in this area of fundraising. You interact with generous donors who are usually deeply committed and know your cause intimately. You are also able to help them plan the implementation of their philanthropic dreams. To someone in the fundraising profession it cannot get much better than that!

A downside to the profession, however, is that those dreams can only be fulfilled after a major and permanent life transition — death. When one of your planned giving donors or someone close to them dies, you may have to deal with grief—the grief of a remaining spouse, a family’s grief and sometimes your own. How does the planned giving professional deal effectively with such difficult realities?

Grief is nature’s emotional response to loss. The greater the loss, the more intense is the grief. People handle grief differently and on different timelines. This makes it more challenging to know what to do because one approach does not fit all.

The following suggestions may be helpful.

Show your respect. When a donor or someone close to them dies, you may choose to attend the visitation, memorial service or wake. Distance may preclude this but attending may not be the most effective use of your time. One of my donors had recently lost his wife. When I commented to him on the beauty of her memorial service, he responded, “Oh, were you there?” And this was after having spoken to him at the reception following the service. A personal visit in the donor’s home or writing a
meaningful letter of condolence may be more productive and meaningful.

**Show compassion.** An expression of caring and to just “be there” with the person can go a long way in making a difficult time easier. Your physical presence, even for a short time, can have a healing dimension.

**Listen.** Listen to what happened and to the stories about the person. In so doing you will broaden your compassionate reach. Concurrently, avoid giving advice or trying to explain the loss. You role is that of a planned giving professional and no other.

**Be prepared for a variety of emotions.** In visiting the bereaved, I have encountered anger, sadness, tears, denial and even quiet joy. The joy came from a deeply religious person who believed her loved one was in a much better, happier place. Grief can be a real rollercoaster of emotions; just accept this as part of the process.

**Make no assumptions.** One day, I had back-to-back visits with two women recently widowed. Both had legacy gifts whose terms needed tweaking. The first widow was in deep mourning over the loss of a much-loved partner. The second widow was mourning too, but for different reasons. When I shared that I was sad for her loss, her quick response was “Don’t be!” The contrast between the two was startling but I discovered the latter’s marriage had been unhappy and the woman’s grief was related to her perceived loss of financial security.

**Be practically helpful.** If the death necessitates a change in the nature of a planned gift—the reworking of an agreement, the changing of a beneficiary, etc.—expedite the change quickly, efficiently and exactly according to the donor’s wishes. It will be something a donor no longer has to think about and it can help move them to their new normal.

**Be careful of boundaries.** Although you may be fond of the donor, you are not their friend. Stay connected, do what you can but be careful not to let the needs of the moment cloud the professional lines that must be maintained. Should you notice the grief lingering, you might wish to encourage your donor to seek outside counsel. But being the counsellor is not your role.

As a planned giving professional, you may even have to deal with your own grief if a liked and respected donor dies. The first time I received word of a donor’s death with whom I had experienced much interaction, the sense of loss took me by surprise. Be good to yourself and be confident that your sadness will shift into something different. You can relish a life well-lived. You can also savor the results of your work through the legacy gift that will now come to your organization. The donor’s philanthropic wishes will now be fulfilled.

Grief is a part of life and, for the gift planner, part of work. Knowing how to deal with grief appropriately will make us all the more effective in what we do.

Doug Flanders M.A., B.Ed. has worked closely with donors and volunteers for over 25 years, currently serving as the Director of Major and Planned Gifts for The United Church of Canada.

Doug is a member of the Canadian Association of Gift Planners (CAGP), a past member of the Board of the Greater Toronto Chapter of the Association of Fundraising Professionals (AFP). He is also a past chairperson of the national Board of Directors of The United Church of Canada Foundation.

**Watch your language**

– RICHARD RADCLIFFE

The view from the window of the plane looked as if God had crunched up some glass and sprinkled it all over the ground. The shards, 20,000 ft below, twinkled in the sunlight with a real beauty and I thought “Wow, what the heck is that – it’s awesome.” It was light bouncing off thousands upon thousands of corrugated roofs in the townships of Johannesburg. Townships – a vague word hiding the clear horror of slums and, more importantly the masses of people living day-to-day lives with everyday killer diseases.

The “lovely view” was a “lovely view” but not a view of loveliness. I wonder what else we see, or read, in a way that is wrong or misleading or confusing. I have also wondered how those who work in gift planning jobs are seen by supporters.

**Words matter**

Let’s start with the words “gift planning” (which are included in this eminent publication). In recent focus groups in America I asked what supporters impressions were of “gift planning.”

The first answer was “It is what I do before Christmas.” So that is positive but...

I then said “So if your contact is the Director of Planned Giving – is that Father Christmas?” I thought I was being very funny. Sadly, the donor looked at me as if I was on another planet! Thankfully others laughed.

I followed this up with “If we put the phrase into a nonprofit setting what does it indicate?” Response: “A regular donation.” In fact, only one supporter understood the term and that was a high net worth individual with a Charitable Gift Annuity (which again nobody understood).

But let’s go back to basics and the views of supporters in Canada to the word “legacy.” After all, there is the “Leave a Legacy” campaign and it features in many communications. But, what do people feel about legacy? First impressions in Canada are “the Trudeau legacy” and other impressions are “large” “deathly” “unaffordable” “complicated” and “expensive to do.” The word “bequest” is even worse – understood as a piece of land or property with a value even bigger than a legacy.
Everyone prefers a “gift in a Will” or “remember us in your Will.” This is well known by many of you, but how many websites and newsletters still use the words which are user unfriendly? Sadly, most of them.

What happens if that older person in their 70s, or even 80s +, decides to telephone you? They are about to make the most private, scary call of their lifetime – but they are passionate and motivated enough to want to make the call. They can call and talk to a legacy officer, bequest manager or gift planner. This is now the call from hell, or perhaps the call to hell.

Certainly not those “going through it” – they just want to find a cure or be helped.

Please do not get me wrong – I do not want to insult anyone or denigrate them or patronize them.

I just want the best damned words you can find to get people to leave a legacy – sorry, I mean to leave a gift in their Will.

If we tie ourselves in knots with “politically acceptable words” or misleading words are we weakening our legacy case for support?

Simply the answer has to be: Yes. PLEASE watch your language.

Richard Radcliffe is Founder of Radcliffe Consulting which specializes in advising charities on legacy fundraising around the world. Contact him, richard@radcliffeconsulting.org

First we take the CAGP Bootcamp, then…the WORLD!

– DOROTHY VAN DYCK

Three years ago I decided to transfer twenty years of corporate sales and marketing experience to the world of fundraising and philanthropy; a giant step in my life which led me to the challenge of soliciting major gifts for the Royal Victoria Hospital Foundation in Montreal. I feel as if I’ve learnt a lot working as a Major Gifts officer. It’s exhilarating being part of a team of volunteers and fundraisers who are not afraid to ask. I’ve benefited from some good professional development along the way, as well as great on-the-job coaching. But this year, I wanted to “up my game” and truly learn something new.

So, I registered for the CAGP Strategic Gift Planning Bootcamp in Barrie, Ontario. It seemed to me that many of our donors could benefit if I had an extended knowledge of gift planning strategies. And our team believes in integrating all aspects of fundraising so that we can expand the options for all of our donors.

High expectations lead to jitters

As I made my way to the airport on the way to the course, I found myself feeling somewhat apprehensive. Not only because I do major gifts and wasn’t feeling very confident about my planned giving vocabulary, but I had only just joined CAGP and didn’t know anyone in the organization. Finally, I had very high expectations for what this course would offer me, and that’s often a bad thing! It is my experience that high expectations can mean big disappointments.

When the flight landed, I was very fortunate to find myself sharing a shuttle to the Horseshoe Resort outside Barrie with our course faculty – Janis Loomer Margolis and Norma Cameron. Their energy, as well as the diversity of topics discussed during the ride (including the most absolutely gorgeous man of all time, Gregory Peck) started to make me feel like this might turn out okay after all!

The schedule was tight and jam-packed with crucial information. If you didn’t want to fall behind, there was little time to check email or call family. We had been warned to leave space in our luggage – that the text book would be large and very heavy. It was! It was also filled with amazing information that will continue to be an excellent resource for me and my colleagues in the months and years to come.

But, truth be told, the wealth of experience of the group attending was a commodity that was more precious than any text book.
A community of world-changers

There was no one person dominating – no one who thought that what they had to say was more important than what they needed to learn. There was a lot of sharing and through those exchanges all of us discovered new ways of approaching common issues and facing challenges.

I spent three full days with wonderful people. I laughed and learned. I left feeling that I had an amazing foundation upon which I could build. I left feeling that there were resources out there that could help me do my job better as well as show me how to more effectively serve our volunteers and our wonderful, supportive donors.

Most importantly, I left feeling that I had just joined a community that was interested in changing the world.

That is why I chose to work in philanthropy in the first place, and now my world is much bigger than my workplace.

I want to be a world changer. I’m still not quite sure what that will look like, but I want to make certain that I keep that as my goal. After my experience at the Strategic Gift Planning Bootcamp, I believe that CAGP is going to help me reach that goal.

Dorothy Van Dyck is Senior Development Office, Major Gifts at the Royal Victoria Hospital Foundation in Montreal. Three years ago, Dorothy decided to transfer her twenty years of corporate sales and marketing experience to the world of fundraising. After a brief initiation at the Old Brewery Mission, a homeless shelter in Montreal, she accepted her current position at the Royal Victoria Hospital Foundation and is now enjoying the challenge of soliciting Major Gifts for the new MUHC super hospital. Dorothy is a member of AFP (Association for Fundraising Professionals), AHP (Association for Healthcare Philanthropy) and a brand new member of CAGP.

CAGP-ACPDP™ Professional Growth Opportunities

The next CAGP Original Canadian Gift Planning Course takes place from February 24th to 28th, 2014, in Wakefield, Quebec, a half hour drive from Ottawa.

Your organization or company's professional development budget, time constraints and work priorities may not allow you the benefits of a five-day intensely focused course. Don't despair. The best way for you to keep on top of your game may be the Annual CAGP National Conference. The next one is in Vancouver from April 9th to 11th, 2014. This year's conference offers another opportunity rich in professional development and one not to be missed, especially for the added value of great networking opportunities. Conference organizers strive to make the experience as diverse as possible and aimed at varied needs.

CAGP Gift Planning All in a Day takes place the day before the conference.

If leaving town for a couple of days is simply not an option for you at all, there are the very affordable Webinar Wednesdays, offered monthly by CAGP and recorded so that you can participate at a time that suits your schedule best.

Don't forget your local CAGP Round Table! – and ask about seminars that suit your needs. Round tables are always welcome to host a Gift Planning All in a Day.

For more information on any of the professional development opportunities offered by CAGP, contact Erin Kuhns, Professional Development Coordinator, at 1-888-430-9494 ext. 222 or 613-232-7991 ext. 222.

What’s new for the Government Relations Committee?

– MARGARET MASON

The Government Relations Committee (GRC) has been very active for the past year on behalf of CAGP – ACPDP. The GRC currently consists of 19 members from varying disciplines. CAGP – ACPDP members who wish to participate are invited to do so and we note that it helps to have a technical background because many of the issues considered by the GRC relate to provisions of the Income Tax Act (the “Act”) and other legislation applicable to charities.

The issues of most significance to members of CAGP – ACPDP considered by the GRC this past year were:

1. A pre-budget submission to the Standing Committee on Finance; and,
2. The preparation of a paper for members describing detailed guidelines for the tax receipting of charitable bequests.

In the forthcoming year we are anticipating monitoring the work being done by the Chartered Professional Accountants of Canada with respect to changes being proposed to the financial reporting standards for not-for-profit organizations (including charities). The Statement of Principles currently out for review raises
Starting a basic planned giving program for a Canadian charity: A lawyer’s perspective, Part 2
– MARK BLUMBERG

This article concludes Mark Blumberg’s summary of the basic elements needed to create a planned giving strategy or program in a small to mid-size charity. Part 1, reviewing the first five steps appeared in the October issue of Gift Planning in Canada.

Many small to mid-sized charities are interested in setting up a planned giving program but are not sure where to start. In this two-part article, I will try to cover some of the important steps in creating a small-scale planned giving strategy and program.

6. Marketable Securities. Accepting marketable securities has become easier and easier. Some charities will have a brokerage account with a broker. In that case in addition to the basic fact sheet you should also develop a simple questionnaire for the donor or their investment advisor to complete and to provide to the charity so that the charity is aware of the donation and can provide instructions to the broker to accept the shares and to cash them. Without such instructions you may find that your charity’s shares are returned to the donor. For many charities, using CanadaHelps and their share donation system is a simple and convenient route to go, especially if marketable security donations are infrequent.

7. Planned Giving Society. Establish a planned giving society for individuals who have made bequests or those who have committed to do so. The main reason for doing so is to thank people who have made a planned gift or committed to doing so and to provide a positive example for other potential donors. For example, the Princess Margaret Hospital Foundation has The JCB Grant Society. The SickKids Foundation has the J.P. Bickell Society. The society may only have one event a year but it sends a message that the charity values planned gifts.

8. Responsibility. Decide who will be responsible for the planned giving program. Will it be the Executive Director, a combined position for the major gifts person, or will it be carried out by one or more volunteers or a dedicated part-time or full-time planned giving officer?

9. Budget. A larger planned giving program includes many of the same items as you would see in a charity’s budget – salaries,
events, advertising, professional services including accounting, legal, broker, consultants etc., travel and training/education costs and printing costs. For smaller programs they may include no dedicated staff people or travel or dedicated communication materials – only a small reminder in the charity's newsletter. Planned giving programs need to have a long timeline. In some cases the first bequest received may only be 10-15 years after the program is created. In many cases time spent now only pays off in 20-30 years. Consequently, many charities will provide some support for such a program but will not be prepared to have one or more full-time staff just encouraging planned gifts. Planned giving programs can be initiated with a very small budget and in some cases either a volunteer or part of a staff person's duties.

10. Administration of Bequests. Learn about the process, and if necessary retain a lawyer who is knowledgeable about bequests to assist when and if a gift is received. You may wish to read Jasmine Sweatman's very helpful book “Bequest Management for Charitable Organizations.”

11. Continuing Education. A number of different organizations, for example the Association of Fundraising Professionals (AFP) or the Canadian Association of Gift Planners (CAGP) offer learning programs on planned giving. Have at least one staff member attend educational sessions and network with others responsible for planned giving. Planned giving officers are often generous of their time in assisting others and in promoting planned giving so if you have a question just give them a call.

12. Professional Advisors. Consider having an informal or formal relationship with various types of professional advisors to ensure that appropriate legal, accounting, insurance, and financial advice can be obtained by the charity when necessary. You may wish to review my article “Planned Giving and Professional Advisors: The Why and How to Involve Professional Advisors in Canadian charities” on the important relationship between professional advisors and charities in the planned giving area. In short, the article notes that a more formal planned giving committee can be very useful and can provide recognition to professional advisors involved in the charity. However, such committee structure can be cumbersome and time consuming to maintain and unless the charity is prepared to make such a commitment it may be preferable to start off with more informal relationships with professional advisors or to hire professional advisors to help with certain aspects of planned giving as they are required.

13. Track Expectancies. Although most people who leave a bequest in their Will do not advise the charity, it is a good idea to keep track of the expected gifts and the amounts of those gifts that you are made aware of.

“Almost all the dollar value of planned gifts in Canada came from bequests and gifts of marketable securities.”

14. Marketing. Although some people who leave a bequest to a charity are unknown to the charity, in many cases the best prospects for bequests are people who have regular interactions with a charity. Here are a few simple ideas to market your planned giving program:

- prepare a small advertisement in the charity’s newsletter which encourages donors to consider planned giving options;
- ensure that your website has at least a small section on planned giving;
- place a small insert in the charity’s mailings explaining about planned giving and the charity;
- insert a “signature file” at the end of e-mails from your charity encouraging planned giving;
- remember to mention planned giving opportunities at fundraisers and meetings;
- use social media to remind supporters of planned giving opportunities;
- educate staff and volunteers so they can be ambassadors of bequest giving and other planned giving;
- analyze your donor database and make a targeted approach to certain supporters such as annual or monthly givers in their 50s or later who would be good prospects, widowers especially who have no dependents, or active volunteers;
- consider having a program to explain to professional advisors about the planned giving program and about your charity.

15. Respond. Sometimes planned giving opportunities will just walk through the front door. It cannot be emphasized enough the importance of responding to inquiries and meeting with people who are interested in making a planned gift. Sometimes a lot of work goes into setting up the program and interest either wanes or there are other more pressing matters that are given priority. When a lawyer is requesting information for a Will there is often not a lot of time to respond. Many clients contact lawyers to prepare Wills in the days before they are heading off on a family vacation!
16. **Ramping up a planned giving program.** If you have launched your planned giving program and wish to give it a boost, consider hiring a part-time planned giving officer or a third-party fundraising firm who specialize in assisting charities with planned giving programs by analyzing the charity’s database and preparing a targeted mailing and phone campaign.

In summary, there are eight or ten different planned giving vehicles and some may seem quite complicated. However, planned giving can be quite simple. Almost all the dollar value of planned gifts in Canada came from bequests and gifts of marketable securities. If planned giving seems to be complicated, consider just promoting bequests and gifts of marketable securities.

**Mark Blumberg** is a lawyer at Blumberg Segal LLP in Toronto, Ontario. He can be contacted at mark@blumbergs.ca or at 416-361-1982. To find out more about legal services that Blumberg provides to Canadian charities and non-profits please visit www.canadiancharitylaw.ca or www.globalphilanthropy.ca

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**Dance with the ones whose toes are tapping**

– **JANET GADESKI**

Do you need a quick win to boost or even establish your legacy program? Why not plan your first outreach campaign for an audience that is already engaged, knowledgeable and most likely to be physically present: your volunteers?

Let’s look at why your active volunteers – every one of them – make terrific bequest prospects:

- **They are loyal.** Volunteers show up every year, every month, sometimes even every week, to give time to your mission. How many of your donors are giving monthly – let alone weekly? If a consistent giving history is one marker of a good bequest prospect – and we know it is – then volunteers are among your most qualified prospects.

- **They are often older, in the prime ages for making or revising their wills.** Your volunteers will likely have some experience with death (losing grandparents, parents, perhaps older friends) and understand the urgency of putting their affairs in order.

- **They want to make a difference in their community.** That’s why they volunteer with you. That’s why they volunteer with you. Over months and years of volunteering, they have likely noticed how your mission could be sustained, even expanded, with reliable funding.

- **They have developed trusting relationships with staff members or leadership volunteers.** A discussion of bequests is very comfortable when the person is already talking to you about how they can help your mission.

- **They are present.** If they come to your site or your event to do their volunteer tasks, they are literally coming to you.

Volunteers truly are ready for the legacy message. Everything that you’ve learned about promoting bequest opportunities applies to this audience, and in many ways, they have already accepted a key portion of the message simply by virtue of being volunteers. They’re already in love with your organization. Why wouldn’t you ask them for a commitment that lasts more than a lifetime?

- **They want to make a difference in their community.** That’s why they volunteer with you. And they have already identified your charity as a channel through which they can create that impact.

- **They know your mission and are committed to it.** Again, that’s why they volunteer with you. Over months and years of volunteering, they have likely noticed how your mission could be sustained, even expanded, with reliable funding.

- **They have developed trusting relationships with staff members or leadership volunteers.** A discussion of bequests is very comfortable when the person is already talking to you about how they can help your mission.

- **They are present.** If they come to your site or your event to do their volunteer tasks, they are literally coming to you.

- **They want to make a difference in their community.** That’s why they volunteer with you. And they have already identified your charity as a channel through which they can create that impact.

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“Don’t ever question the value of volunteers. Noah’s Ark was built by volunteers; the Titanic was built by professionals.”

– Dave Gynn

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**Janet Gadeski**, President of Hilborn and Editor of Hilborn Charity eNEWS, brings two decades of experience in fundraising and nonprofit management to her work of providing information and ideas to the leaders of Canada’s nonprofit sector. Contact her, janet@hilborn.com
In the August issue of Gift Planning in Canada I wrote about videos, and how (with the advent of the internet and social media) this medium will increasingly become the way charities communicate with supporters. In the next 10 years, as direct mail further declines, the use of video to engage donors will become of paramount importance to the charitable sector.

The first group of fundraisers to use videos in a significant way may well be planned giving professionals. This may come as a shock to those who have been trained to sit down with donors and discuss technical planned giving options. But times are changing, and what we now know about the neurological processes behind bequest decision-making (thanks to the ground-breaking research of Dr. Russell James) challenges the conventional gift-planning approach many use today. Dr. James has shown that donors use different parts of their brain when thinking about legacy giving versus annual giving. The decision to leave a charitable bequest is made in the emotional part of the brain, particularly the area where individuals think of their own life-stories.

Therefore, the decision to make a charitable bequest is an emotional one, not a rational decision. Legacy gifts come to charities, not because we provide donors with technical expertise about how they can plan their giving, but because we show them how our organization's mission has meaning in their lives. Charities that are most adept at showing how meaningful their mission is to the lives of their donors, and do this as part of a comprehensive legacy engagement strategy, are the ones that will develop the most successful legacy programs.

Legacy videos appeal to emotions

So what does all of this have to do with videos? A huge amount. Good videos can inspire donors; they can make connections for donors between their life stories and an organization's mission. They can move donors and motivate them to act. In combination with an effective legacy survey system, legacy videos can dramatically increase the number of legacy leads and commitments organizations receive. They can also make legacy donors feel more comfortable with the decisions they have made (so they are less likely to change their wills).

I've now worked with a number of charities in both Canada and the USA, creating legacy videos and accompanying surveys that solicit legacy gifts. You can see some of the legacy videos that have been created by going to http://www.stlegacygroup.com/our-work/legacy-videos/.

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**“Good videos ... make connections for donors between their life stories and an organization's mission.”**

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So, how do you get people to watch your legacy video and take action?

1. Firstly you need a good video. If your video does not engage in the first six seconds, you will lose most viewers. But, what makes a good legacy video?
   - Connecting with your donors at an emotional level. Telling stories. Not your organizational story, but stories about the people your organization has helped or those most connected to your cause.
   - Having an effective hook, one that connects the stories you tell to leaving a legacy.
   - Having a clear call to action (i.e. complete our survey or contact us today).
   - Keeping your video under three minutes. Thanks to the proliferation of videos on the internet, the attention span of most people is very limited.

2. Create a legacy survey to accompany the video. The survey opens a conversation with the donors about their values, their life stories and their interest in leaving a legacy to your organization. After your video has “pulled on the heart strings,” your survey solicits the gift.

3. Send out an email to key donors with a link to the video and survey. Ask them to watch the video and then complete the survey.

4. Put the legacy video and link to your legacy survey on your legacy webpage.

5. Send the video and survey link out through your social media channels.

6. Make sure all staff in the organization watch the video. Let them know that they can be part of the legacy team by referring people to it as appropriate.
7. Show the video at events. We recently completed a legacy video for an organization and showed it at their AGM. Nearly 40% of attendees said they would consider leaving a legacy gift after watching the video.

8. Have a link to the video in your email signature in all the emails you send out.

9. Utilize your personal networks and invite others to do the same. Send it to friends, colleagues and relatives, inviting them to share it with others they think would be connected to your message – you never know who will find your video compelling!

Simon Trevelyan is President of S.T. Legacy Group, an innovator in legacy development and marketing, helping charities to maximize their planned giving potential. Contact him at simon@stlegacygroup.com or visit www.stlegacygroup.com.

“Many people see technology as the problem behind the so-called digital divide. Others see it as the solution. Technology is neither. It must operate in conjunction with business, economic, political and social system.”

–Carly Fiorina

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