



Donor Personalization for Planned Giving

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Learning Objectives

- ▶ Design a personalization plan for the unique audience segments receiving fundraising materials.
- ▶ Apply generational cohort research to create planned giving messaging specifically tailored for the three age groups most likely to leave a planned gift.
- ▶ Break down silos in your development office by taking a donor-centered approach to personalization planning that is in the best interest of the donor.

Six Steps To Create a Personalization Plan

- ▶ Step 1: Define your segments
- ▶ Step 2: Identify level of personalization
- ▶ Step 3: Review current treatment plan
- ▶ Step 4: Create desired treatment plan
- ▶ Step 5: Identify barriers and obstacles to implementation
- ▶ Step 6: Set measureable milestones

Step 1: Define Your Segments

- A segment is a unique group of people who have something in common as it relates to your organization.
- You have to be able to specifically define what it is that binds these individuals into a segment.
- You have to know approximately how many people fall into each segment and how to “select” them.



Step 2: Identify Level of Personalization

Individual Level

- ▶ Each **person** is special and has a unique relationship to your organization that should be emphasized.
 - ▶ Board member
 - ▶ Organization leader
 - ▶ Staff donor
 - ▶ Major gift donor
 - ▶ VIP planned giving prospect

Group Level

- ▶ Each **group** is special and has a unique relationship to your organization that should be emphasized.
 - ▶ Loyal donor
 - ▶ Long-term member
 - ▶ Giving club member
 - ▶ Monthly sustainer
 - ▶ Lapsed donor

Step 2: Identify Level of Personalization

Individual Level

- ▶ Highly personalized messaging that would only apply to that individual:
 - ▶ Salutation
 - ▶ Specific program interests
 - ▶ Family details
 - ▶ Recollection of past conversation

Group Level

- ▶ Personalized messaging that would apply to each member of the segment:
 - ▶ Length of donation history
 - ▶ Years of membership
 - ▶ Giving club activities
 - ▶ General thanks for volunteering

Step 3:

Review Current Treatment Plan

- ▶ You should be able to answer the following five questions for every fundraising piece that leaves your organization:
 - ▶ 1. What?
 - ▶ 2. When?
 - ▶ 3. Why?
 - ▶ 4. Who?
 - ▶ 5. How?



Step 3 Example: Current Treatment Plan - VIP Planned Giving Prospect

- ▶ 12 Standard direct mail appeals for annual fund signed by President
- ▶ 12 Standard email appeals for annual fund (if online donor)
- ▶ General acknowledgement letter for each new gift
- ▶ General online receipt for online gift
- ▶ 6-8 Gift Planning direct mail cultivation/stewardship appeals
- ▶ Visit from relationship manager if in the area
- ▶ Birthday and holiday cards
- ▶ Invitations to regional events

Current Treatment....

- Do these people even know me?
- All of this mail is overwhelming!
- Who the heck is Lisa?



Step 4:

Create Desired Treatment Plan

- ▶ You should still be able to answer the five important questions for every fundraising piece that leaves your shop.
- ▶ Every piece should be personalized to that one individual or group.
- ▶ This process is, and should be, more time consuming. BUT you will begin to see a better ROI for your time and effort.



Step 4 Example:

Create Desired Treatment Plan

- ▶ Annual fund solicitation once a year through the donor's preferred channel
- ▶ Special appeals as they arise through the donor's preferred channel
- ▶ Thank you call from relationship manager for every new gift
- ▶ Personalized acknowledgement letter for each gift made signed by the relationship manager or natural partner*
- ▶ Personalized cover letter for Gift Planning cultivation and stewardship appeals
- ▶ Planned visits by relationship manager or natural partner and others as appropriate
- ▶ Handwritten cards
- ▶ Invitations to regional events that would appeal to donor

Step 5: Identify Barriers & Obstacles



- ▶ Fundraising database limitations
 - ▶ Coding for selection
 - ▶ Tickler system
- ▶ Turf wars with other fundraising teams
 - ▶ Getting everyone's buy-in
 - ▶ Deciding who "gets credit"
- ▶ Additional time and money required
 - ▶ Different cover letters
 - ▶ Lots of handwriting

Step 6:

Set Measurable Milestones

- ▶ What is your goal in implementing a personalization plan?
 - ▶ Positive feedback from donors?
 - ▶ Increase in number or size of donations?
 - ▶ Faster commitment rate for bequests?
- ▶ Create SMART goals for the program.
 - ▶ Specific
 - ▶ Measureable
 - ▶ Attainable
 - ▶ Relevant
 - ▶ Timely



Targeted Messaging For Planned Giving Personalization

FOR THE TOP THREE GENERATIONAL COHORTS

Generational Cohorts

Adopted from Pentera's white paper "Generational Marketing for Planned Giving"

Cohort Name	Birth Years	Age in 2018
The Greatest Generation	1903-1927	91+
The Silent Generation	1928-1945	73-90
Baby Boomers**	1946-1964	54-72
Generation X	1965-1980	38-53
Millennial Generation	1981-1997	21-37
iGeneration	1998-??	20 and under

The Greatest Generation

1903-1927

Who Are They?

- ▶ World War II veterans
- ▶ Patriotic and loyal
- ▶ Traditional values, morals, ethics
- ▶ May be lapsed donors or volunteers
- ▶ Security is very important

Targeted Messaging

- ▶ Prefers printed materials
- ▶ Needs large font, but doesn't want it
- ▶ Use simple language
- ▶ Include advice from professionals
- ▶ Enjoys visits & special events

The Silent Generation

1928-1945

Who They Are?

- ▶ Great Depression vs. Lucky Few
- ▶ Listens to authority & respected institutions
- ▶ Experienced changes in cultural diversity, civil rights, family structure
- ▶ Admires hard work, commitment, responsibility
- ▶ Currently holds a large percentage of the nation's wealth

Targeted Messaging

- ▶ Prefers formal communication in writing or face-to-face
- ▶ Reference experts in printed materials
- ▶ Tout that your organization is highly regarded or well respected
- ▶ Use inclusive language
- ▶ Emphasize legacy to appeal to a sense of honor

Baby Boomers

1946-1964

Who Are They?

- ▶ Leading-Edge Boomers
 - ▶ 1946-1955
 - ▶ Vietnam, JFK & MLK
 - ▶ Economic good times
- ▶ Trailing-Edge Boomers
 - ▶ 1956-1964
 - ▶ Watergate & Arab Oil Embargo
 - ▶ Keeping up with the Joneses

Targeted Messaging

- ▶ Longs for experience & information
- ▶ Values youth, individualism & optimism
- ▶ Caring for aging parents & retirement
- ▶ Idealistic vs Pragmatic
- ▶ Focus on authenticity, individuality, core values, self-fulfillment

Generation X is coming...

1965-1980

Who Are They?

- ▶ Latchkey Generation
- ▶ Married with children at home
- ▶ Expect multicultural & global thinking
- ▶ Ambitious, hard working, independent, skeptical, cynical
- ▶ Accumulating wealth...and debt

Targeted Marketing

- ▶ Starts thinking about a planned gift at ages 45-50
- ▶ Address parenting issues like college and guardians
- ▶ Likes informal communications with a focus on the big picture
- ▶ Creative & fun social events

Questions?

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