



## COVID-Era Success Stories in Planned Giving

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The global pandemic created by the spread of COVID-19 has impacted millions of lives, disrupted the operations of charities and organizations, and upended planned giving fundraising as we know it. Yet from this global crisis, we have witnessed several remarkable planned giving success stories from our clients. Following are four of these successes that we hope will prove educational and inspirational.

### **Success in the midst of a pandemic: Matt Bernstein – Jewish National Fund**

Matthew (Matt) Bernstein is the Director of Planned Giving at Jewish National Fund (JNF). This is his 31<sup>st</sup> year in the position, and Matt says the COVID-19 pandemic does not seem to have affected their planned giving program in a negative way; in fact, the pandemic may have been a motivating influence. They just closed their fiscal year ending September 30, and Matt says it was their best year ever - planned gifts came in at about \$30 million, and the total of all gifts was about \$100 million.

One of the important ways that JNF reacted quickly at the onset of the pandemic was to bring their guided tours of Israel online. This has been a significant activity with their supporters for some time, but COVID-19 brought the tours to an abrupt stop. The organization shifted to virtual tours without missing a beat, making them available in \$50 increments, and they have become a smashing success. Their virtual tours are now booked through March of 2021.

In addition, Matt says they are generally seeing more of everything these days – more CGAs, more CRTs, and more bequests. For fiscal year 2020, they brought in over 200 new CGAs. They have also seen a dramatic increase in the number of Donor Advised

Funds, which are fairly new to the organization. Matt is pleased that they made a decision in recent years to handle their own DAFs.

### **Outpouring of Support for Academic Medical Center During Pandemic**

A major academic medical center reported that healthcare philanthropy experienced an outpouring of support early in the pandemic. Millions of dollars poured in for research and clinical treatment related to COVID-19. The hospital's fiscal year ended September 30, and they raised 112% of their goal.

While the medical center has a national reputation, it has historically engaged those geographically adjacent to its campus. Virtual events and webinars have broadened the geographical reach of their fundraising staff. Nonetheless, the challenge for their major and annual gift fundraising is building the next generation of donors. Personal visits and tours traditionally attract new donors and motivate increased giving from existing donors. The future of that pipeline of new donors is uncertain.

The hospital's planned gift activity has been mixed. The pandemic is a life event for many that motivates them to review plans with their professional advisors. Increased estate planning activity may account for the modest surge they have seen in estate gift notifications. However, the pandemic has negatively affected the estate settlement process in some cases. There are estates experiencing administrative delays due to slowdowns in court supervised probate.

Healthcare fundraising often relies on collaboration with clinical or research staff. The pandemic presents unique challenges for fundraisers to connect donors with those whose work they would like to support. The fundraising team experienced unexpected success with online events. An annual gala was conducted remotely and professionally produced using a combination of pre-recorded and live presentations.

### **University Sees Success from Personal and Tactful Outreach**

The director of planned giving at a major university reported how COVID-19 has affected planned giving on her campus. Her office postponed a direct mail solicitation focused on estate giving that was planned for March 2020. The timing of the estate gift message seemed insensitive, given the impact of the pandemic. Instead, she checked in with all of her active prospects and stewardship donors by telephone to make sure they knew she was thinking of them.

The bequest solicitation mailing was delayed until May. They paid close attention of the piece to ensure they were not being tone deaf to the pandemic. Instead of sending the

entire solicitation at once, they sent three separate batches at staggered intervals. This gave them time to gauge the reaction from donors and adjust their message accordingly.

The university is in the last year of its campaign. While bequests were always credited to the campaign, the university began actively soliciting deferred gifts as part of the campaign. Documented estate notifications had averaged \$300,000 a year. So far this year they have notifications of \$1.5M in new estate expectancies. Some of that is related to marketing estate gifts for the campaign, but the pandemic has encouraged increased estate planning activity. Gift annuity activity is also above average for 2020. Some annuities were closed to beat the ACGA rate reduction. Nonetheless, donors escaping market volatility continue to close annuities after the ACGA rate change.

Since face-to-face meetings are impossible, the director of planned giving sends a “good news” email every Friday to her donors and prospects. She sets a positive and encouraging tone and includes links to videos of campus activity of interest to alumni. Since the Legacy Society can’t meet in person, she is creating a book documenting the history of the impact of past and future estate commitments. While the pandemic created challenges, it has also resulted in finding creative new ways to communicate with donors.

### **HopeHealth Hospice & Palliative Care Sees Success in Shifting Signature Fundraising Events Online**

A marketing services client, HopeHealth Hospice & Palliative Care of Providence, Rhode Island held its first-ever virtual event to raise funds for the HopeHealth Hilitar Hospice Center. With no opportunity to do in-person events in the foreseeable future, the fundraising team merged two annual events—a gala and a golf invitational—and the two committees worked together in an amazing show of unity to put together the combined, online event.

The goal was to match the expected net of the two events, and they hit 96% of the combined goal. They invited supporters, donors, volunteers, staff, families, and friends to participate remotely in this special event. Key to donor engagement was a request to “share your stories of Hope and Gratitude together with us.”

HopeHealth understood that during the pandemic, the key to creating a successful online event is to avoid virtual fatigue. With many of us working from home since March, the last thing anyone wants is another Zoom call. If anything, people are looking for a break from their computer screens.

To motivate their donors, they wanted to give their audience something to be excited about. Instead of power point presentations, they created an online event that encouraged audience interaction and the opportunity to share knowledge with one other. They made it a community event their audience didn’t want to miss that included:

- a local celebrity host,
- a band,
- video and audio donor stories and testimonials,
- an Impact video about the mission of the organization, and
- an award ceremony to honor an exceptional supporter.

It was an overwhelming success for the organizers and attendees alike. Learn more about the event online.

<https://www.hopehealthco.org/ways-to-give/fundraising-events/hope-health-gala-evening-hope-gratitude-ri/>

## **In Conclusion**

The adversity created by the pandemic has also resulted in some surprising innovations in how planned giving officers are building relationships with their constituencies and sharing the missions of their organizations. The global crisis has changed many of our conversations, but it has also created a new focus on what is important to us and how to have lasting impact, which is at the heart of all planned giving.

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