



CHARITABLE GIVING KC

Connecting Hearts & Minds

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In our Connecting Hearts and Minds emails we share articles and resources with you that we think will enhance your nonprofit knowledge database and give you ideas for your own nonprofit work based on our experience.

Using Surveys in Legacy and Planned Gift Marketing

There are quite a few novel ideas on this subject that have been explored more thoroughly by Dr. Russell James in one of his latest presentations that you can find linked below. We are offering a brief synopsis here, however, because he has some great tips on how to structure surveys and use them for the most impact in your marketing for legacy and planned giving.

Why is it SO Hard to Talk about Legacy or Planned Giving?

This should come as no surprise, but who wants to talk about DEATH!? It's an uncomfortable subject on a wide variety of levels for many people. They know it is something they need to think about but it's often something they will "think about tomorrow" and then one day tomorrow is already here and it's too late. As a great Chinese Proverb said, the best time to plant a tree was yesterday, the next best time is today. As Giving professionals you understand how true that statement is for so many.

How Can Surveys Help Nonprofit Professionals Get Past That Barrier?

As a long time philanthropic professional, Dr. James already knew from his research in planned giving that donors are hesitant to talk about their passing. In his current research, however, he wanted to do see how survey research might help bridge that gap and help open a planned and legacy giving conversation with donors. He found that "oblique" communication about giving, for example vague workshops that mention it, or conversations that don't really get around to it, or stories of planned giving being promoted weren't getting the job done and people had much more specific questions about the "types" of giving they could do. However, if they didn't ask about it specifically, which they may not even have known to ask, then they were not given that information. So essentially this oblique communication was not providing donors with the real life practical information they needed or wanted so they became hesitant to attend or pay attention to this traditional type of planned and legacy giving communication.

That's not to say there isn't a place for more "oblique" communication if it is used appropriately in survey research. Dr. Russell shows that in sending out surveys to donors you are able to learn much more about your donors and "couch" those planned and legacy giving questions towards the end of the survey, once you already have them thinking about things that are meaningful to them, asking about family and life connections, and things that are more or less

important to them in their life. This will naturally lead them to thinking about their legacy and then those planned giving questions don't inspire a more negative reaction. In fact, it really allows the nonprofit to get better information in order to start that conversation more naturally.

In the presentation linked below Dr. James goes extensively into how to structure survey questions and what to ask in regards to things like legacy questions (that don't make you think about death), questions that emphasize lasting impact, life stories, family connections, and how to use the best phrasing to increase interest in completing the survey. His extensive research is really quite fascinating and, at the very least, worth checking out for the research and context he provides and how it may be relevant to your organization.

Up Next? Stay tuned for our next *Connecting Hearts and Minds* article on "Sponsorship Levels for Fundraising Events and Why You May Need to Rethink Them."

Source and additional information is linked below:

[Dr. Russell James, "How to Use Donor Surveys To Raise More Money," MarketSmart, 2021](#)

Quote of the Week

"Survey and test a prospective action before undertaking it. Before you proceed, step back and look at the big picture, lest you act rashly on raw impulse."

Epictetus

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