



GREATER  
PUBLIC



# Marketing Ideas for Your Planned Giving Program

August 26, 2020

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Kathy Reed, Assistant VP of Major and Planned Giving, WXXI

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# Today's Presenters



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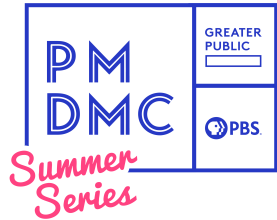
**Joe Thiels**

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612.999.3940

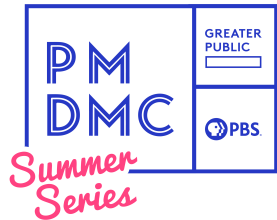
[jthiels@greaterpublic.org](mailto:jthiels@greaterpublic.org)

# Why Planned Giving?



# Why Planned Giving?

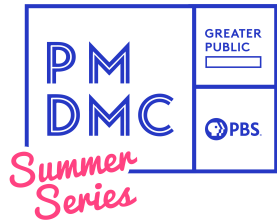
- Revenue opportunity
  - \$43.2 billion from bequests in 2019
  - 9.6% of giving from all sources
  - 12.2% of total giving from individuals
- Helping donors leave a legacy



Statistics per *Giving USA 2020: The Annual Report on Philanthropy for the Year 2019* (2020), Giving USA Foundation and Indiana University Lilly Family School of Philanthropy.



# Planned Giving Marketing Plans



# Why Am I Doing This?

## Goals & Objectives

EDUCATE	GENERATE	UNCOVER	STEWARD
<p>Let your donors know you have a PG program</p> <p>Ways to Give</p>	<p>Cultivate Leads</p> <p>Who raised their hand?</p>	<p>Build Trust</p> <p>Follow Through</p> <p>1:3 rule</p>	<p>Steward</p> <p>Not one &amp; done</p> <p>Stay in the Will</p> <p>Treat like winners</p>

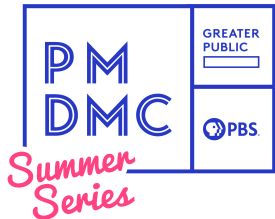
# Everything in PG has a purpose

	Educate	Generate	Uncover	Steward
On Air Spots	X	X	X	X
Discovery*		X	X	
Survey	X	X	X	X
Donor Stories	X			X
Annual Report	X			X
Newsletter	X	X	X	X
Website	X	X	X	X

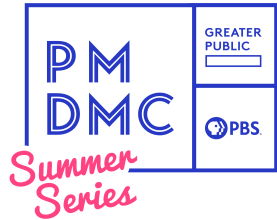
# Grow Planned Giving with Strategic Marketing

PG Promotion On Air is our competitive advantage!

- Wills / Beneficiary Campaign:
  - Jan, March, June, Aug
  - Oct (National Estate Planning Awareness Week 10/19 – 10/25) [www.naepc.org/events/awareness\\_campaigns](http://www.naepc.org/events/awareness_campaigns)
- Gifts of Stock: April, Dec and targeted around financial programming (e.g. *MARKETPLACE*)
- CGAs: April, Sept

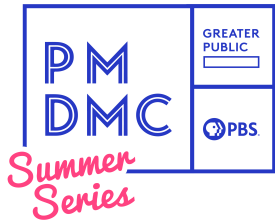


# Planned Giving Websites



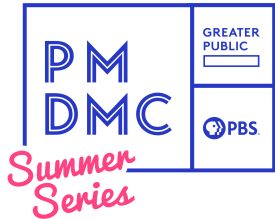
## What do you want to get out of your Website...

- Introduction of Planned Giving and the team
- Is it a tool for prospects, donor and/or professional advisors?
- Is it an educational resource? And if so, how technical do you want the information to be and how often to do you intend to up-date.



# Make sure you have the basics

- At a minimum, make sure to include:
  - Legal Name
  - Federal Tax Identification Number
  - Address
- Also helpful, include the name and contact information to a specific person to your organization who can assist with planned giving questions, i.e. Planned Giving director/officer.



# Make Your Website Work For You!

## Prospect and Donor Interaction

## Educational Tool

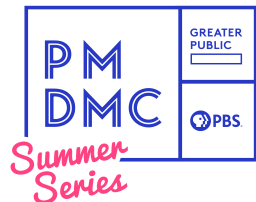
Opportunity  
for  
Self-  
Identified

Events for  
Recognition  
Society

Gift  
Vehicles

Testimonial  
s

Connect to  
other  
giving  
pages





# Legacy Society

Join the MPR Legacy Society, and you'll be among the more than 800 individuals committed to supporting the future of public media. Your legacy gift will benefit MPR by strengthening our endowments, which allows us to create and maintain programming that is indispensable for you and all our audiences.

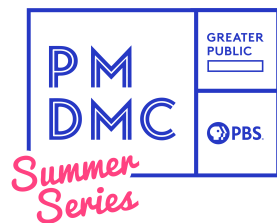
If you've included MPR in your estate plans, [please let us know.](#)

[Explore the many ways you can join the Legacy Society](#)

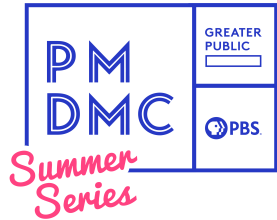
[See our list of generous Legacy Society members.](#)

## Legacy Society Benefits:

- Invitations to special events, receptions and live shows
- VIP Tours of our headquarters, The Kling Public Media Center, and our studios
- Recognition of your commitment in the [MPR Annual Report](#)
- Special experiences tailored to your interests
- Inspiring others with your commitment



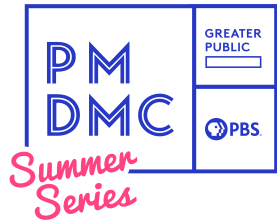
# Planned Giving Email





# E-Newsletters

- Monthly e-newsletter
- Personalized intro with local information
- Financial, tax, estate information from vendor
- Goes out the last Sunday of the month
- Ability to reply to request information



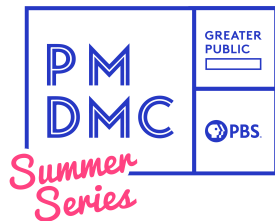
# E-Newsletters



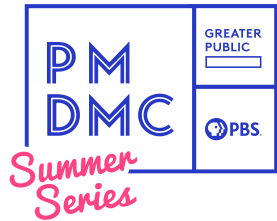
## Planned Giving

Can you believe we're coming up on August? I hope you've been able to take advantage of the summer weather by enjoying the great outdoors – at a socially acceptable distance, of course. I've grown accustomed to my new fashion accessory (the mask) and have ventured out for a few outdoor dining experiences. I will be the first to admit that I'm proud to be a New Yorker – and a Rochesterian – as I witness most individuals and businesses following the COVID-19 protocols that have been recommended by the CDC. Thanks to all of you for caring so much about our community!

I continue to hear from many members and donors about how much WXXI means to them, especially during the pandemic. **We're so grateful for your kind words and your generous financial support.** Your commitment ensures that we can

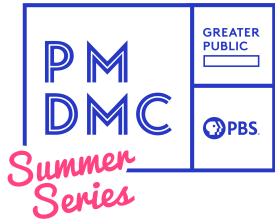


# Planned Giving Print Pieces

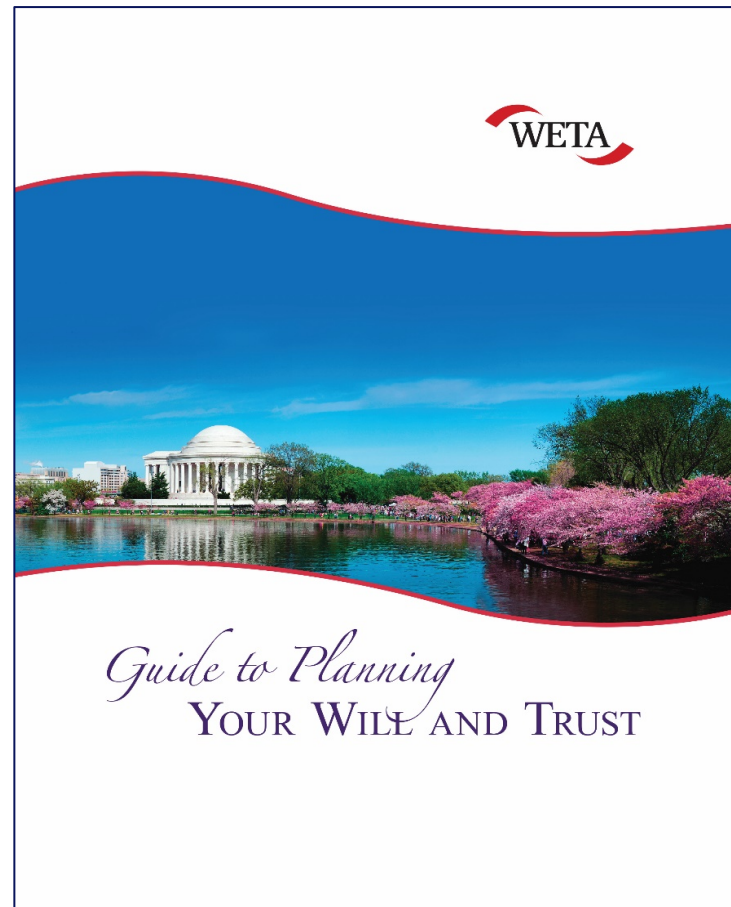
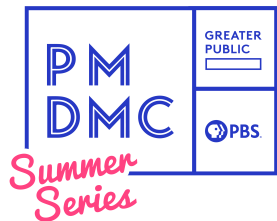
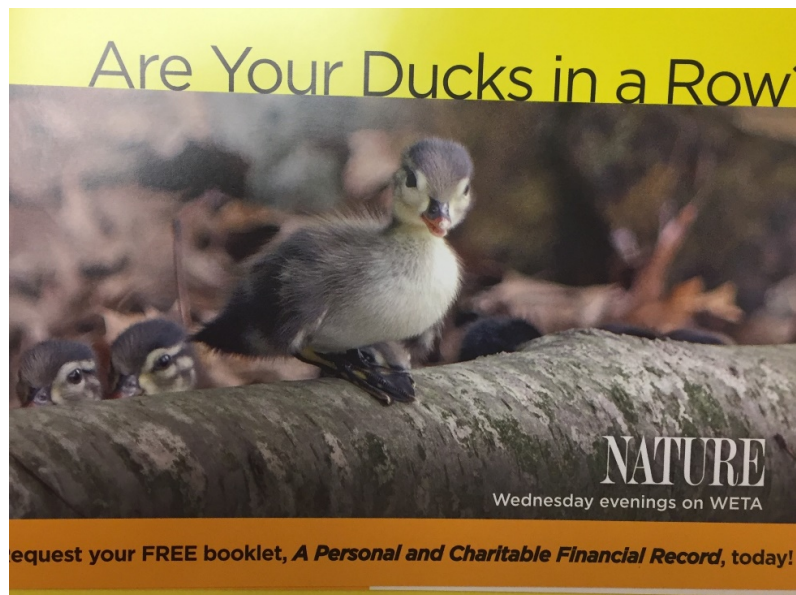


# What are you printing?

- Newsletters to PG prospects
- Surveys
  - Leadership Circle annually
  - Digital campaigns
- Inserts
- Postcards



# Print Samples



# Print Samples

wetagift.org

PAULINE IS A PASSIONATE and life-long supporter of public television. She believes WETA programs keep her connected to what's happening in her community and in the world—and wants to ensure these programs remain available for current and future generations. That's why Pauline has included her PBS station in her Will.

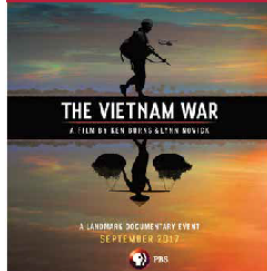


Please consider joining Pauline by making a gift to WETA through your Will or IRA. For information on how you can plan a legacy with WETA or to request a FREE printed or electronic copy of the WETA Guide to Planning Your Will and Trust, return the enclosed reply card or go online to [wetagift.org](http://wetagift.org), or call Debbie Elason at (703) 998-1834.



To make a gift to WETA through your Will, Trust, IRA or other plan, please use our legal name, **Greater Washington Educational Telecommunications Association, Inc. (WETA)**. Our address is 3939 Campbell Avenue, Arlington, VA 22206. WETA is a 501(c)(3) tax-exempt organization and was established on October 2, 1961. WETA's Federal Tax Identification number is 53-0242992.

Coming in September ...



Many loyal WETA members have honored a loved one by making a tribute gift to WETA in their Will. If you have included WETA in your Will, IRA or other financial plan, please tell us so that we may thank you today and recognize you as a member of the **Elizabeth P. Campbell Legacy Society**.



OFFICE OF PLANNED GIFTS  
3939 Campbell Avenue • Arlington, Virginia 22206  
703-998-1834 • [wetagift.org](http://wetagift.org)

Printed on Recycled Paper



## Legacy

Spring 2017

Estate Planning Ideas for WETA Members and Friends



### RARE – Creatures of the Photo Ark

Summer 2017, WETA TV 26 and WETA HD

RENOWNED CONSERVATIONIST and *National Geographic* photographer Joel Sartore is a natural-born storyteller. His Photo Ark project is a digital "collection" of the world's rare and at-risk mammals, fish, amphibians, birds, reptiles and insects, and the focus of *RARE—Creatures of the Photo Ark*. This captivating new three-part series, produced by WGBH Boston and premiering on WETA TV 26 in Summer 2017, follows Sartore as he documents threatened species at zoos, in nature preserves and in the wild. Throughout *RARE*, scientists and naturalists reveal surprising and important information about why ensuring the future of these animals is so critical. When complete, the Photo Ark will be one of the most comprehensive records of the world's biodiversity.



CLASSICAL WETA 90.9  
CELEBRATING 10 YEARS

Are you listening?

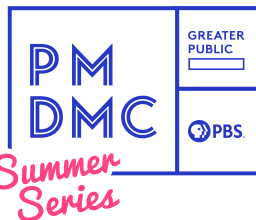
This year marks the 10th anniversary of Classical WETA 90.9 FM, the most listened-to classical music station in the country. Whether it's Mozart in the morning or Bach at bedtime, more listeners of all ages are tuning in to the sounds of the world's greatest music by the world's greatest orchestras on Classical WETA FM. In the Washington region, tune to Classical WETA at 90.9 FM and 88.9 FM Frederick, and on WGMS 89.1 FM in Hagerstown. You can also stream Classical WETA online at [classicalweta.org](http://classicalweta.org) or connect to the station via tablet and smartphone on the Classical WETA App, available at [classicalweta.org](http://classicalweta.org), iTunes and Google Play.



Judith H. with *Poldark* star Aidan Turner  
(Photo by Lisa Corbett)

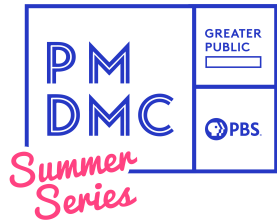
"Thirty years ago, I became a supporter of WETA when I moved to the D.C. area. WETA helps me to be an informed and engaged citizen with such outstanding programs as *PBS NewsHour* and *Charlie Rose*. I'm especially interested in international affairs, the arts and animal protection. These causes are part of what I want my legacy to be. I made a future intention for the station so that WETA can uphold our Constitutional rights protecting freedoms of the press and speech. And I want to help WETA produce high quality programs for public discussion of major issues and provide arts entertainment for future generations. And I just love *MASTERPIECE*."

— Judith H., Legacy Society Member, WETA

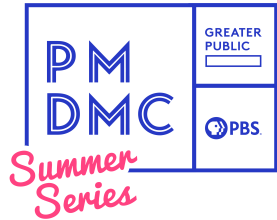




# Q & A

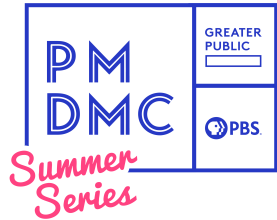


# Planned Giving On-Air



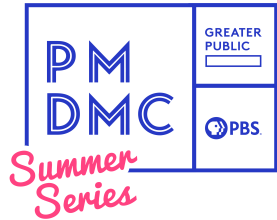
# Use radio and TV to your advantage!

## WETA Sample



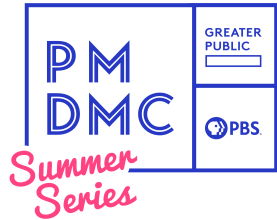
# Use radio and TV to your advantage!

## WXXI Sample 1



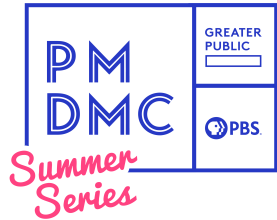
# Use radio and TV to your advantage!

## WXXI Sample 2

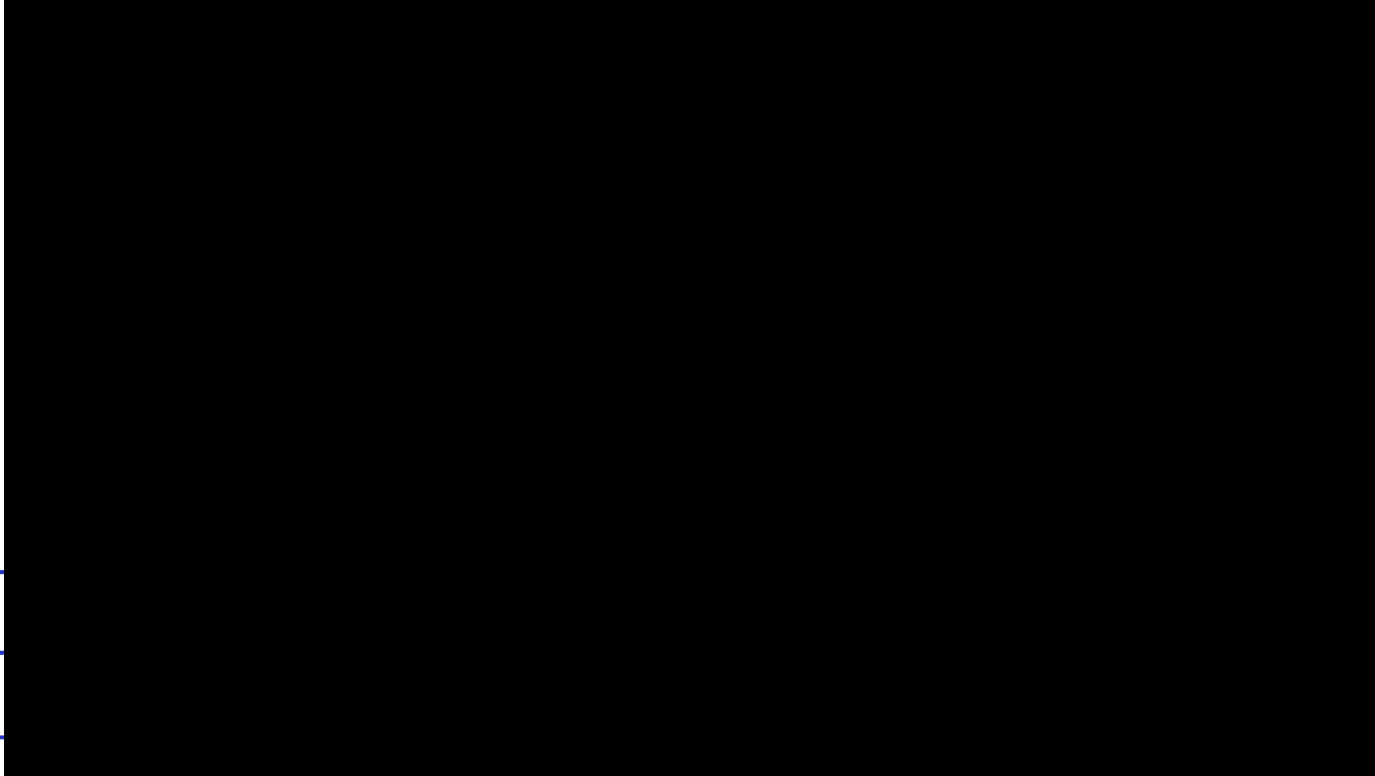


# Use radio and TV to your advantage!

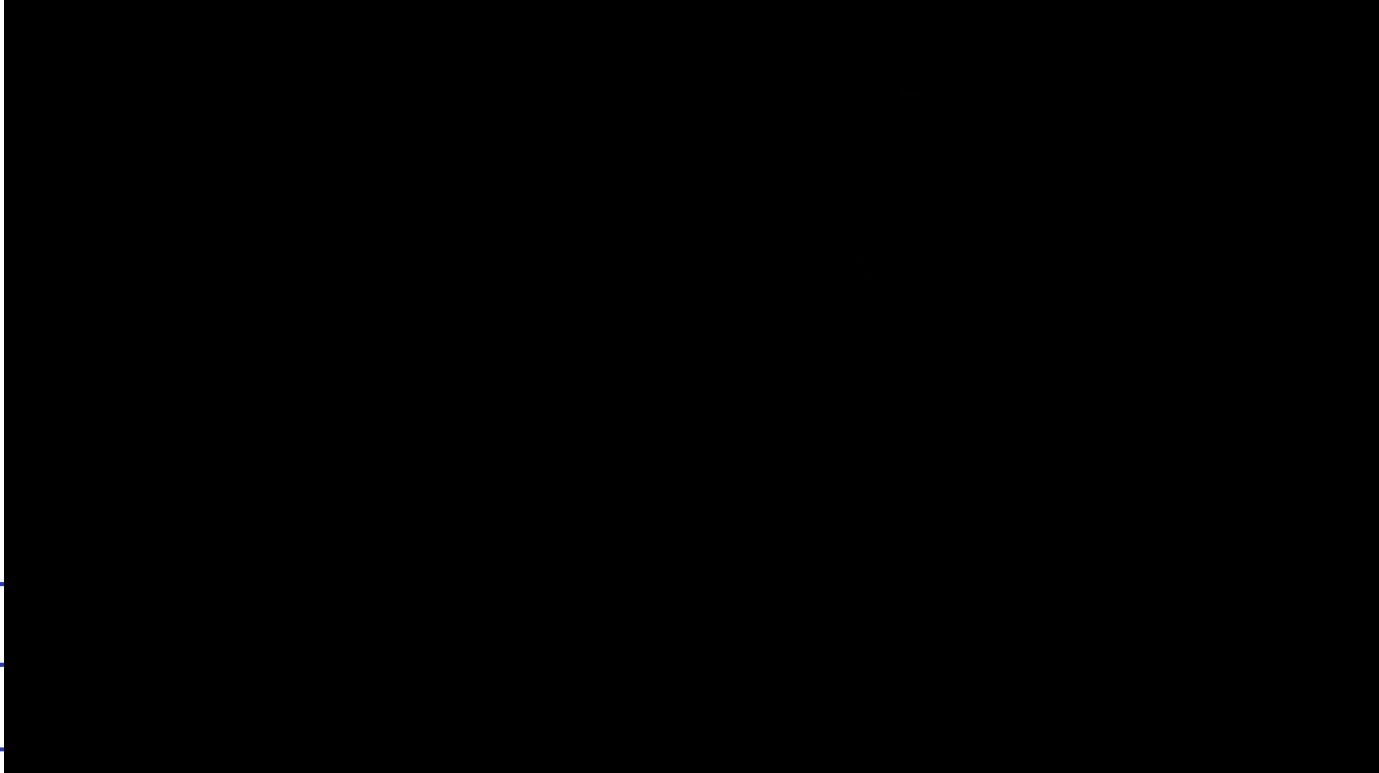
## The Current (MPR) Sample 1



# Use radio and TV to your advantage!

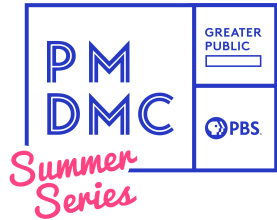


# Use radio and TV to your advantage!





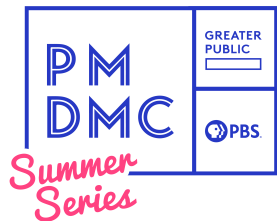
# Planned Giving Testimonials



# Testimonials

“Like many listeners, I grew up listening to NPR in the backseat of my parents’ cars. As I became an adult, it became a part of my own life and what I grew to depend on to start my day. I’ve included WXXI in my estate planning because I want to ensure that it’s always there for future generations so that other kids can grow up curious, interested in the world and wanting to ask questions of those who are entrusted to make decisions in every aspect of our lives.”

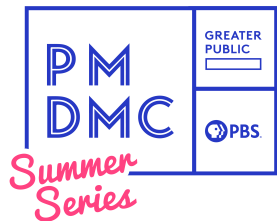
--Carrie



# Testimonials

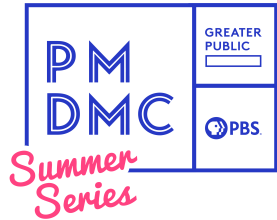
“Why do I include WXXI in my will? Because they are food for my brain, heart and soul. The quality programming, news, and contributions to the community are a unique crown of jewels worth preserving and supporting. Thank you to all at WXXI who make it happen. Keep up the good work providing the many invaluable gifts to our community.”

--Karen

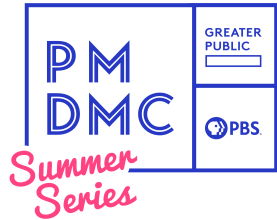


# Use radio and TV to your advantage!

## The Current (MPR) Sample 2

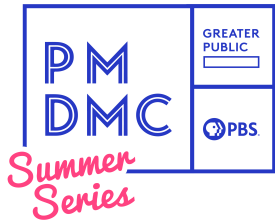


# Planned Giving Surveys



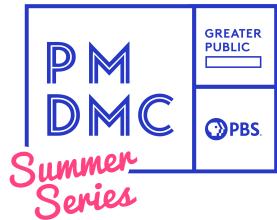
# Survey Budget and Scope

- Identify who should receive the survey
- How many will we send?
- Identify costs
- Gain leadership support and approval for project



# Survey Questions

- Purpose different from other surveys
- Drafting copy and questions
- Review and revisions
- Approval of questions



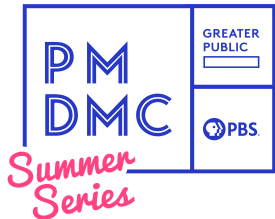
# Digital and Print Production

## Digital

- Third-party vendors
- Design
- Testing
- E-mailing

## Print

- Third-party vendors
- Design
  - ✓ Survey
  - ✓ Letter templates
  - ✓ Envelopes
- Printing and mailing







#### Contact Information

Call us: 651.290.1500

Email us

[How is this information used?](#)

Step 5 of 8

62%

## PART II: Your Relationship with MPR

### 1. Please tell us about your involvement with MPR.

	I already enjoy	I would consider	I would not consider
Attending MPR events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Listening to MPR programs on my computer, phone, or other device	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Listening to MPR podcasts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteering with MPR	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting MPR as a Member	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting MPR through my donor advised fund	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talking with friends/family about my support of MPR and the importance of its programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sharing MPR content through my social media accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Calling in to programs or contacting them online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PREVIOUS

NEXT



#### Contact Information

Call us: [651.290.1500](tel:651.290.1500)

[Email us](#)

[How is this information used?](#)

Step 6 of 8

75%

**2. Many people like to leave a gift to charity in their will or trust or by beneficiary designation. Have you left/would you consider leaving your own gift to MPR?**

- ☐ I have already left a gift to MPR in my will or trust, or by beneficiary designation.
- ☐ Leaving a gift to MPR is something I intend to do.
- ☐ Leaving a gift to MPR is something I would consider doing.
- ☐ Leaving a gift to MPR is not something I plan to do.

**To help supporters like you consider a gift, we have created complimentary planning materials. Please check the box below if you would like to receive additional resources.**

- ☐ Yes, please provide me with information about leaving a gift.

PREVIOUS

NEXT

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Image courtesy of MarketSmart (imarketsmart.com)



## Leadership Circle

## Report to the Community

Please return by August 21, 2020

XXXXH Address\_LineXXXX  
XXXXStreetXXXX  
XXXXStreet AddressXXXX  
XXXXCity, State\_Code ZipcodeXXXX

XXXXD\_INDX XXXSOURCE\_CODEXX

Email: XX<EMAIL>XX or XXXNone on FileXX

Please update/provide your email address here:

(WETA will keep your contact information strictly confidential.)

DO NOT DETACH - SEND ENTIRE FORM BACK WITH YOUR SURVEY RESPONSES

### Please tell us how you would like to be listed in the 2019/2020 WETA Report to the Community.

Our records currently show that you prefer to be listed as:

<<LC Publist>>

- ☐ I/We prefer to remain anonymous.
- ☐ I/We do not have changes to my/our listing.
- ☐ I/We would like to update my/our listing as follows:
- ☐ I/We would like to be listed as a *Friend of Classical Music*, noting my/our special commitment to Classical WETA 90.9 FM.

## WETA Questionnaire

We value all of your contributions to WETA, including your opinions! All responses will be kept strictly confidential and are for internal use only.

- What do you think are the most important elements of WETA's work?
 

Ensuring that our community has access to PBS television programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operating the DC area's only classical music radio station.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Producing award-winning content for national distribution, including PBS NewsHour, Washington Week and special documentaries with Ken Burns and Henry Louis Gates, Jr.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting children, parents, caregivers and teachers through our WETA PBS Kids channel and other education initiatives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Which of the following types of television programs are important to you? (Check all that apply)
 

<input type="checkbox"/> News/Public Affairs	<input type="checkbox"/> Nature/Science	<input type="checkbox"/> WETA UK
<input type="checkbox"/> Drama	<input type="checkbox"/> History Documentary	<input type="checkbox"/> WETA World (new as of June 2020)
<input type="checkbox"/> Performing Arts	<input type="checkbox"/> Children's	<input type="checkbox"/> Other

If other, please provide more detail: \_\_\_\_\_

Just a few more questions on the other side! ➔

**LEADERSHIP CIRCLE**  
Report 100: Lora Bold 29 pt / Deadline: Lora Bold 16 pt  
Lassend text in Times NR 13/14 pt (w Bold & Italic)  
Section headers: Lora Bold 11/16 pt / Questionnaires: Newsline One 30 pt  
Survey text: Lora Bold, Regular and Italic 12/14 pt  
Just a few more: Lora Bold Italic 14 pt

**LEADERSHIP CIRCLE**  
LBB60 - 2020 July Publist & Survey Cultivation, Draft 4  
Survey (8 1/2 x 14 inches) - FRONT  
Folds in quarters, head out  
Photo in color process ink  
25# Strathmore Writing Wave Bright White stock

**WETA Job No. L200796**  
LBB60 - 2020 July Publist & Survey Cultivation, Draft 4  
Survey (8 1/2 x 14 inches) - BACK  
Folds in quarters, head out  
Photo in color process ink  
25# Strathmore Writing Wave Bright White stock

## WETA Questionnaire, continued

- What are your most important sources for national news? (Check all that apply)
 

<input type="checkbox"/> PBS NewsHour/other WETA programs	<input type="checkbox"/> Newspapers and magazines
<input type="checkbox"/> Commercial networks like ABC, CBS or NBC	<input type="checkbox"/> Social media/other online-only sources
<input type="checkbox"/> Cable news networks like CNN, Fox News or MSNBC	<input type="checkbox"/> NPR/other radio programs or stations
- How often do you listen to Classical WETA 90.9 FM?
 

<input type="checkbox"/> Almost every day	<input type="checkbox"/> Occasionally	<input type="checkbox"/> Rarely or never
---	---------------------------------------	--
- What kind of music do you like to listen to? \_\_\_\_\_
- Which types of organizations are most important to you when determining your charitable giving?
 

<input type="checkbox"/> Animal Welfare	<input type="checkbox"/> Education	<input type="checkbox"/> Relief/Human Services
<input type="checkbox"/> Arts/Culture	<input type="checkbox"/> Nature/Environment	<input type="checkbox"/> Religion
<input type="checkbox"/> Other (Please provide more detail here: _____)		
- What social and online media do you use?
 

<input type="checkbox"/> Facebook	<input type="checkbox"/> Instagram	<input type="checkbox"/> Blogs
<input type="checkbox"/> Twitter	<input type="checkbox"/> Podcasts	<input type="checkbox"/> YouTube
- Do you contribute to charitable organizations through a private or community foundation or from a donor-advised fund?
 

<input type="checkbox"/> Yes	<input type="checkbox"/> No	If yes, what is its name? _____
------------------------------	-----------------------------	---------------------------------
- Do you currently give to WETA through your employer (payroll deduction, CFC, etc.)?
 

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------
- What do you value most about WETA? \_\_\_\_\_
- Would you consider giving to WETA through your Will, Trust, IRA or other asset?
 

<input type="checkbox"/> Yes, please send me a free copy of the WETA Guide to Planning Your Will & Trust
<input type="checkbox"/> Printed copy via US mail
<input type="checkbox"/> Digital copy/PDF to this email address: _____
<input type="checkbox"/> I have already named WETA as a beneficiary in my Will, Trust, IRA or other asset
- Would you like to receive a confidential illustration on how you can receive fixed payments for life by establishing a charitable gift annuity with WETA?  
(Minimum gift of \$10,000; minimum age of 65)
 

<input type="checkbox"/> Yes, my birthdate is: ____/____/____ (Annuity calculations vary depending upon your age.)
<input type="checkbox"/> No, not at this time
- Is there anything else you would like to share with us? \_\_\_\_\_

Thank you for your time!

Printed on recycled paper

### LEADERSHIP CIRCLE

Questionnaire header: Newsline One 22 pt & 14 pt  
Questions: Lora Bold 12 pt  
Answers: Lora Regular (w Italic) 12/14 pt  
Thank you: Lora Bold Italic 16 pt

### WETA Job No. L200796

LBB60 - 2020 July Publist & Survey Cultivation, Draft 4  
Survey (8 1/2 x 14 inches) - BACK  
Folds in quarters, head out  
Photo in color process ink  
25# Strathmore Writing Wave Bright White stock

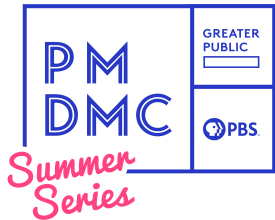
# Automated Reply Fulfillment

## Digital

- Thank-you e-mail (segmented)
- Planned Giving brochure PDF

## Print

- Thank-you letter (segmented)
- Planned Giving brochure
- Legacy Society Information Form
- Postage-Paid Reply Envelope



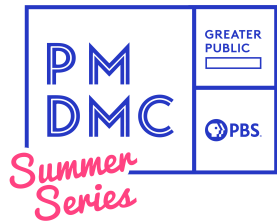
# Survey Results

- **16,138 total recipients**

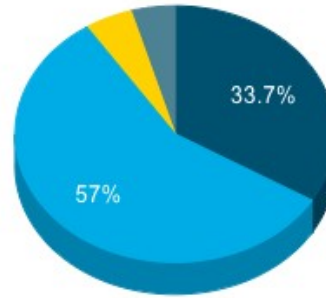
- 16,138 print only
- 10,711 print + digital

- **3,411 total respondents**

- ~2/3 print and 1/3 digital
- 14.4% print response rate
- 10.2% digital response rate
- 21.1% overall response rate



2. Many people like to leave a gift to charity in their will or trust or by beneficiary designation. Have you left/would you consider leaving your own gift to MPR?



● Leaving a gift to MPR is... ● Leaving a gift to MPR is... ● Leaving a gift to MPR is...

◀ 1/2 ▶

Answers	Count
Leaving a gift to MPR is something I would consider doing.	347
Leaving a gift to MPR is not something I plan to do.	588
Leaving a gift to MPR is something I intend to do.	50
I have already left a gift to MPR in my will or trust, or by beneficiary designation.	46

Image courtesy of MarketSmart (imarketsmart.com)

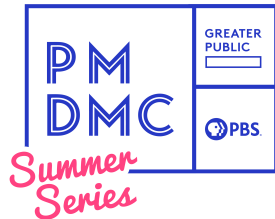
# Results (The Real Results!)

## 149 new Legacy Society members

- 108 via print survey
- 41 via digital survey

## 1,104 new Planned Giving leads

- Intend to leave a gift
- Would consider a gift
- Requested Planned Giving information



# Survey Results (The Real Results!)

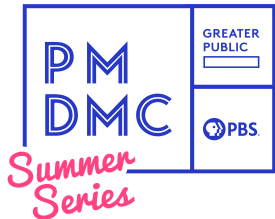
Estimated gift values:

\$ 41,000 (10-year average realized estate gift size)  
x 149 new commitments

---

**\$6,109,000 in estimated new estate gifts**

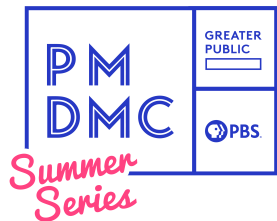
(c.f. \$785,000 from 17 actual disclosed amounts, averaging ~\$46,000 per new commitment from survey)





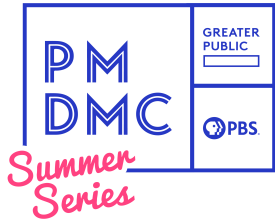
# Survey Follow-up

- New Legacy Society members
  - Personal welcome letter from CEO
  - Calls and e-mails from planned giving and major gift staff
- Follow-up moves management mailing to “hand-raisers”
- Other personalized individual donor follow-up as deemed appropriate



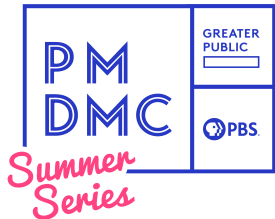
# Processing Returned Surveys

- Sent all print surveys to a scanning company to convert into searchable PDF documents
- Attached survey scans to donor profiles in CRM
- Presented process and findings to the philanthropic development team

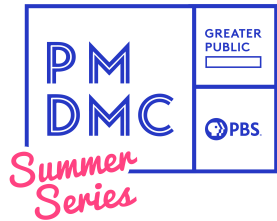


# Key Takeaways

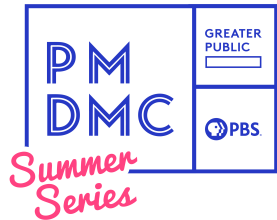
- Bring in CRM team early in the planning process
- Print current contact information on survey and allow recipients to update
- Anticipate survey processing to require lots of staff time
- Always remember the purpose of the survey!



# Q & A



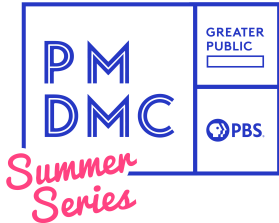
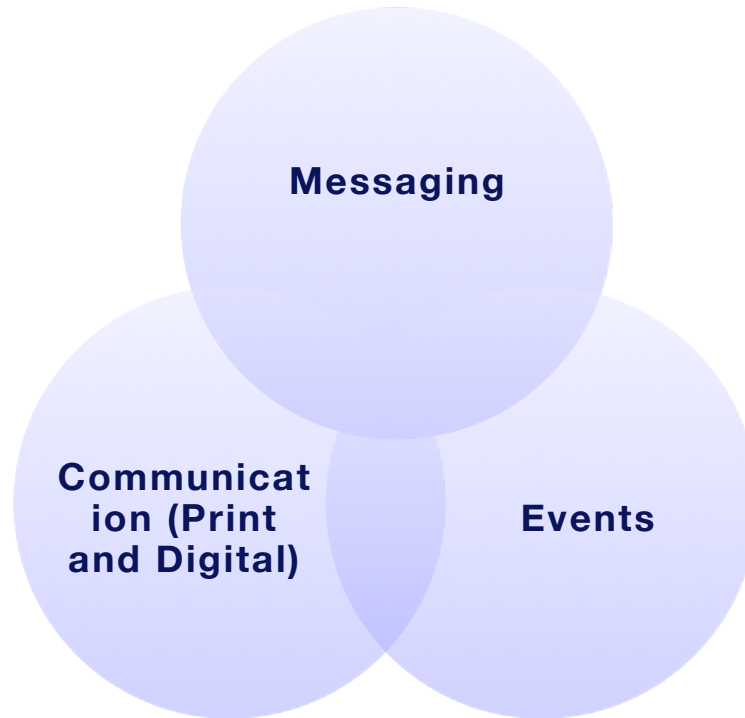
# Collaboration with Membership



## Collaborating with Membership! Why do it?



# Align your marketing calendars



# Integrate Your Messaging

## Member Drives

- Testimonials
- Include Planned Giving options as ways to support

## Print / Digital

- Giving mailers
- Newsletters
- Inserts



Summer  
Series



# Ways to Give Guide

## Ways to Give

Your generosity powers Minnesota Public Radio's mission to enrich minds, nourish spirits, expand perspectives and assist our audiences in strengthening their communities. MPR is public media, and public

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### Donate Stock



[MPR.ORG/STOCK](https://mpr.org/stock)

A gift of stock or mutual fund shares is a smart way to leverage your assets and can yield tremendous benefits for you and MPR. Giving stock held for more than 12 months offers a two-fold tax savings:

- Avoid paying capital-gains tax on the increase in value of your stock.
- Receive a tax deduction for the full fair market value of the stock on the date of the gift.

A gift of stock also brings with it MPR membership, with benefit levels corresponding to the amount of the gift.

### Legacy Giving



[MPR.ORG/PLANNEDGIVING](https://mpr.org/plannedgiving)

Include the preservation of public media as part of your lasting legacy. Your planned gift will sustain MPR's excellence and ensure our future for generations to come. Donors who include a planned gift in their estate will become members of the MPR Legacy Society and receive special member benefits. Common ways to include MPR in your estate plan include:

- Bequest in a Will or Trust
- Life Income Gifts (i.e., Charitable Remainder Trusts, Charitable Gift Annuity)
- Beneficiary Designations
- Named Endowments

### Donor-Advised Funds



[MPR.ORG/DAF](https://mpr.org/DAF)

Directing grants from your donor-advised fund to support MPR assures our essential public service is freely accessible to all Minnesotans. Contact your fund manager to make a distribution to MPR through your donor-advised fund.

### Check, Credit Card, EFT



CHECK

Gifts can be mailed to:

Minnesota Public Radio  
Membership  
480 Cedar Street  
Saint Paul, MN 55101

CREDIT CARD

Credit card gifts are accepted 24/7  
on [MPR.ORG/GIVE](https://mpr.org/give)

SUSTAINER GIFTS WITH  
ELECTRONIC FUND TRANSFER (EFT)

[MPR.ORG/SUSTAINERS](https://mpr.org/sustainers)

One of the easiest ways to make a difference all year long, sustainer gifts processed through a bank account avoid processing fees, ensuring more of your donation goes to MPR programming.

### Volunteer



[MPR.ORG/VOLUNTEER](https://mpr.org/volunteer)

By lending your time and energy to MPR, you help us engage with our community, further our programming mission and extend our message to a wide and diverse audience. We have volunteer opportunities for various interest areas, availability and skill sets. There are plenty of volunteer opportunities year-round—we welcome and appreciate any time and energy you have to donate to our services.

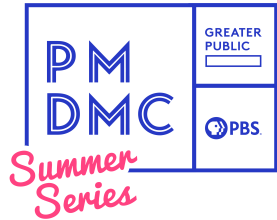
MINNESOTA PUBLIC RADIO®  
**Powered  
by People**

P M D  
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GREATER  
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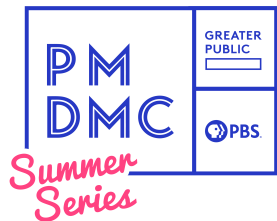


# General PG Messaging



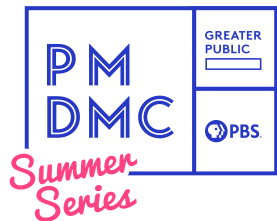
# General Messaging Principles

- Try to minimize jargon
- Normalize planned giving – invitation to join others
- Low-pressure, patient, donor-centered approach
- “Slow-drip,” consistent messaging over time
- Testimonials are great



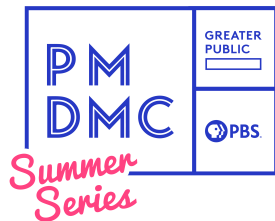
# Other Marketing Opportunities

- In-person visits
- Phone and video calls
- E-mail conversations
- Station events
- Board and staff meetings

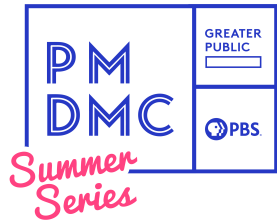


# A Suggested Approach and Question

*“Mary, you’ve been a wonderful donor for so many years. Many of our other members like you who have supported us for a long time have included MPR as a beneficiary in their will or retirement accounts. Is that something you’ve ever considered?”*



# Q & A



# Speaker Information

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## **Kathy Reed**



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# Thank You!

