

Major Gifts + Bequests = Integrated Planned Giving Program

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Friday, February 25, 2011

2:05 pm

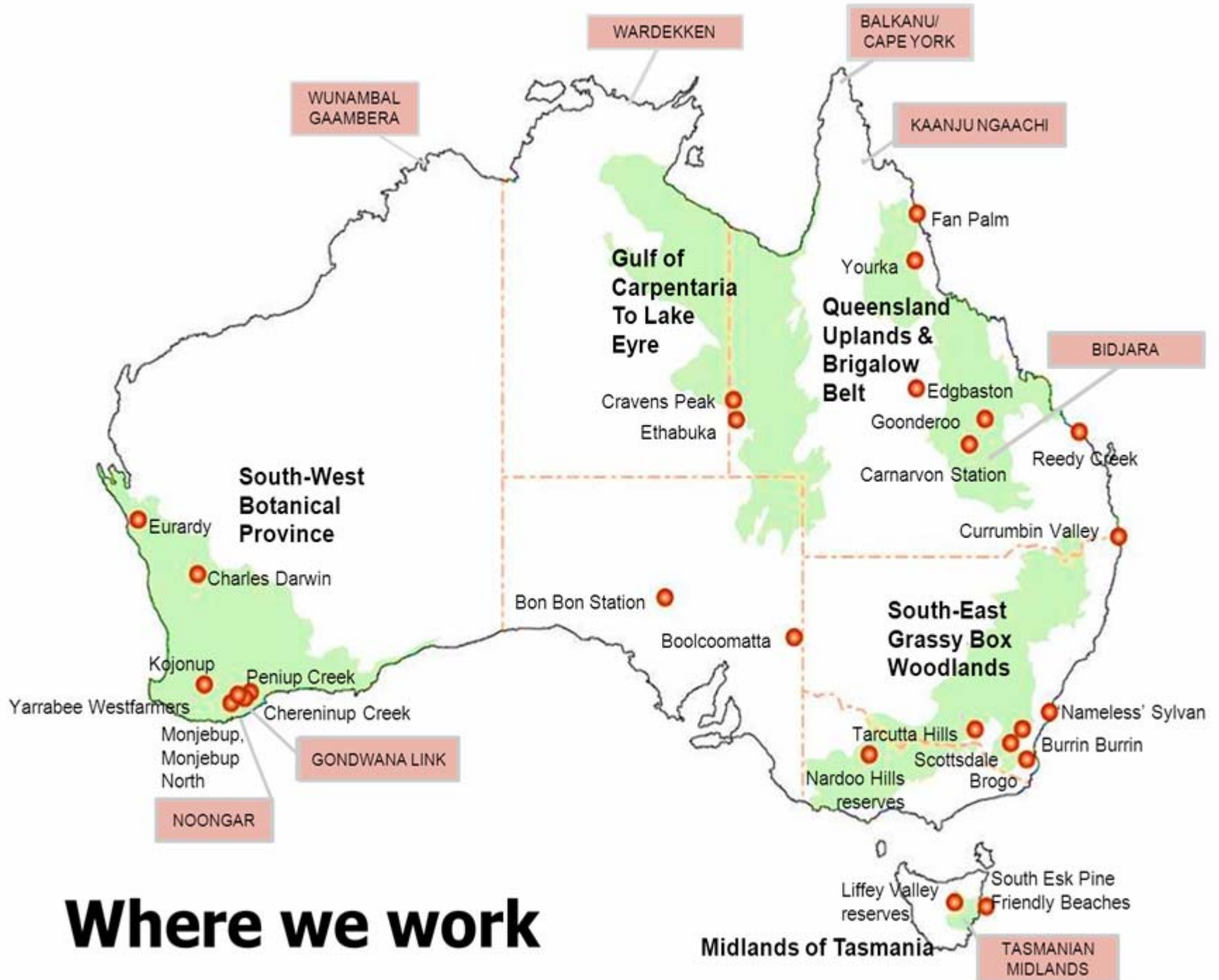
Bush Heritage Australia - Background

- In 1991 Bob Brown (the Leader of the Greens party) learned of 2 properties up for auction & likely to be sold to loggers in Tasmania.
- Bob used the prize money from the Goldman Environment Award as a down payment on a loan...then went door knocking, to ask his friends to chip in.
- Bob and his friends were successful – and that was the beginning of Bush Heritage. Now celebrating its 20th year!



Vision

Our vision is to own and protect, or assist others to protect, more than seven million hectares or 1 per cent of Australia's land, water and wildlife by 2025.



Where we work

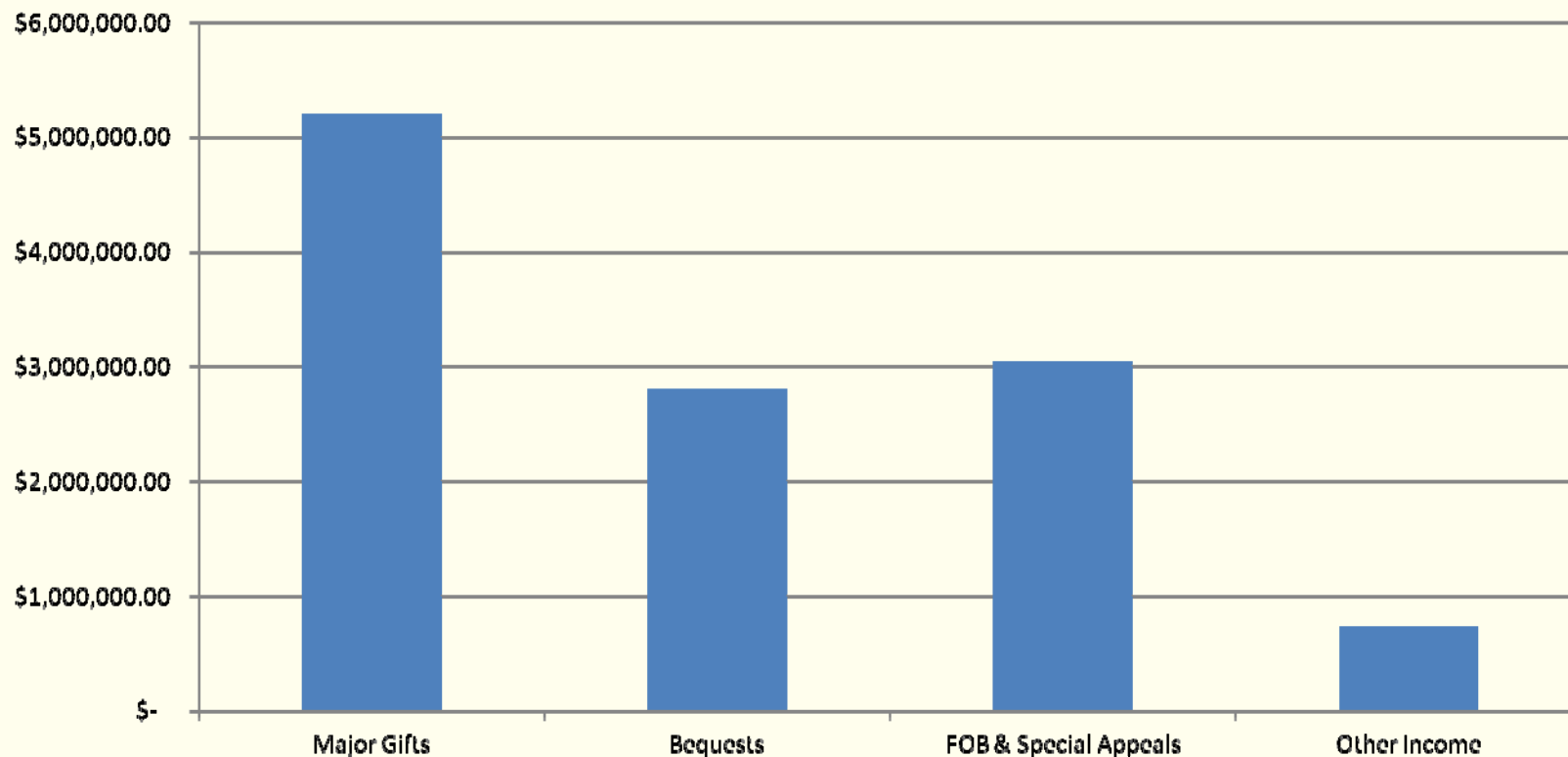
Bush Heritage - Context

- Bush Heritage has 77 staff members:
 - 49 based in our Melbourne Conservation Support Centre
 - 28 spread throughout Australian either on
 - Bush Heritage Reserves, or
 - Regional hubs in roles such as Reserve Managers, Ecologists, and Philanthropy Executives.
- Our 2010/11 operating budget is approximately \$12 million.



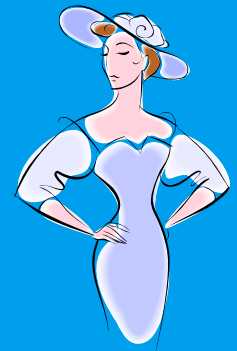
BUSH HERITAGE
AUSTRALIA

Revenue Sources – 2009/10



Definition of a Major Gift?

Any gift over \$10,000 from individuals,
trusts/foundations and corporations



How It Was....

Major Gifts

- Two Philanthropy Executives focused on gifts over \$100,000 from major individuals and trusts/ foundations.
- One Philanthropy Executive focused on gifts from \$10,000 - \$100,000 and all corporate giving.
- Campaign Assistant organized MG donor/prospect events, reserve visits, and mailings.

Bequest

- Business Manager handled Estate management.
- Bequest Team Leader managed bequest enquiries and confirmations.
- Bequest Officer supported confirmation process and organized bequest events reserve visits, and bequest mailings.

What was the problem?



How It Is Now....

- Five Philanthropy Executives:
 - Four focusing on gifts over \$10,000 from major individuals, trusts/foundations, and corporations.
 - Geographically aligned with our donors in Melbourne, Sydney & Perth.
 - One focusing on Planned Giving and Deceased Estate Management.
- Bequest Officer:
 - Key point of contact for bequest related enquiries from donors and the public.
- Campaign Assistant:
 - Oversees all donor/bequest events and reserve visits (supported tours), and MG/Bequest mailings.

How We Work.....

Major Gift Approach

- Each Major Gift Philanthropy Executive has a portfolio of approximately 130 current donors and prospects qualified at \$10,000+:
 - 45 individual prospects (lifetime & bequest potential)
 - 20 trust/foundation or corporate prospects
 - 50 existing major donors (individual, t/f & corporate)
 - 15 confirmed bequestors



We get prospects from a number of sources including:

- Board & Committee contacts
- CEO contacts
- Donor referrals
- Data base
- Donor Acquisition Programs



We use the 3 C's....for prospect rating

▶ C = Connection

- 0 - unknown
- 1 - a person "known to" a BHA Board, campaign volunteer or staff member, but not personally
- 2 - a person or any representative of a company/philanthropic entity with whom a BHA Board, campaign volunteer or a staff member has made direct face to face contact or substantial contact (phone, written) involving dialogue
- 3 - a person or a high-level decision-maker in a company/philanthropic entity whom a BHA Board, campaign volunteer or staff member "knows well enough" to obtain a meeting

▶ C = Concern

- 0 - unknown
- 1 - generalised interest in nature conservation - known or inferred from personal knowledge or published sources
- 2 - made donation(s) to environmental causes, or considered by a BHA Board, campaign volunteer or staff with direct personal knowledge to be likely to donate
- 3 - specific interest in donating to Bush Heritage in particular - directly confirmed by the person, or the person has donated to Bush Heritage

▶ C = Capacity

- 0 - Unknown
- 1 - \$10,000 - \$49,999
- 2 - \$50,000 - \$249,999
- 3 - = or > \$250,000

Cultivation/Solicitation Strategy:

Each strategy is personalized using a number of tools including:

- Campaign Supporter Trips
- Donor events (hosted & info)
- One on one meetings
 - Philanthropy Executives
 - CEO
 - Board & Committees
- Campaign Cabinet



How We Work....

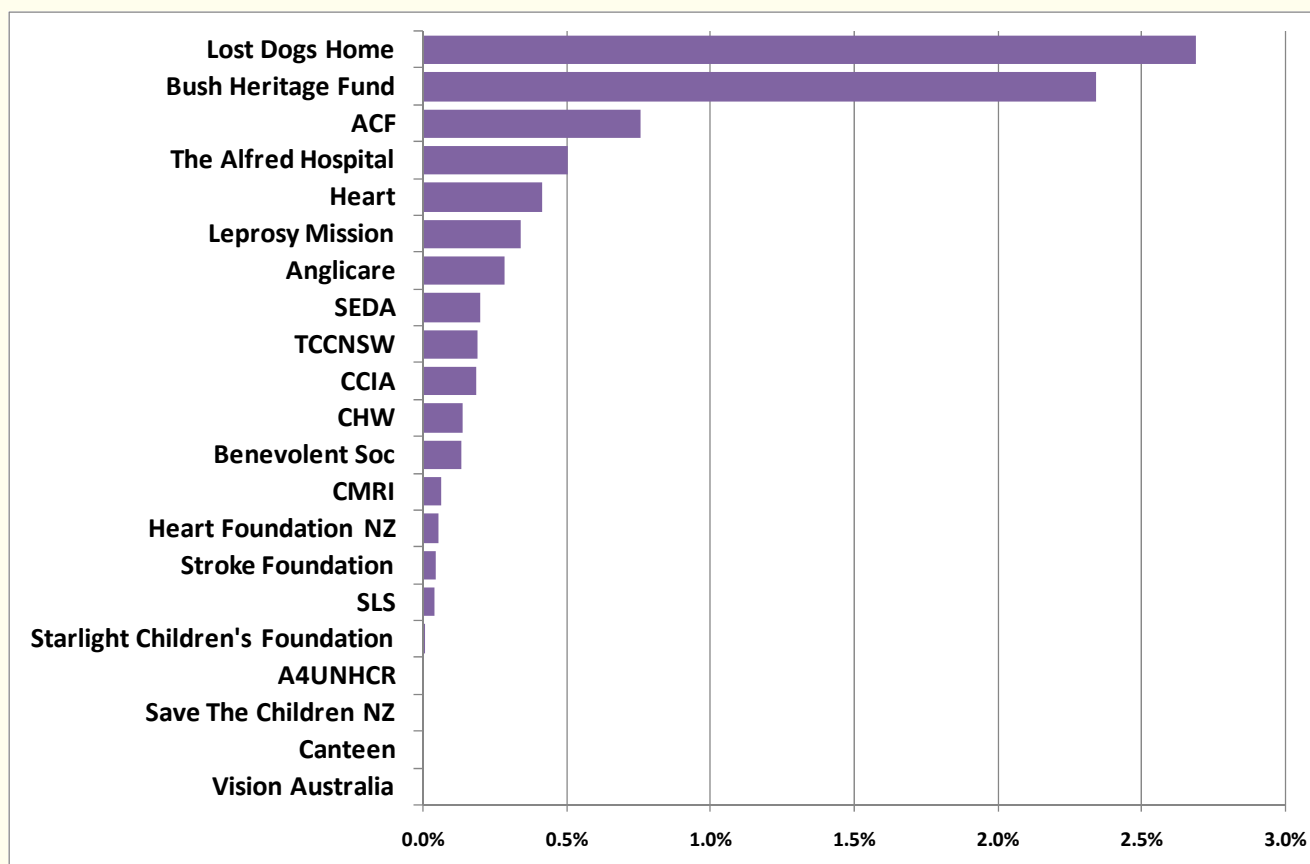
Planned Giving Approach

Who are our bequestors?

- 742 confirmed & 630 enquiries (January 2011)
- Most are long term supporters – 43% added to database before 2000 and 79 % before 2005.
- Almost half are aged > 60 years, and over one in five is aged > 70 years.
- Many more women than men, especially in older age category.



Confirmed bequestors by charity (% of all financial supporters)



Value of bequests to BHA

- To date, BHA has received approximately \$6.8 million in bequests from a total of 70 estates.
- Value of future pledged bequests is estimated between \$47 million and \$69 million.
- Of the 70 estates received so far, almost all were BHA supporters but only 27 had confirmed bequest. Seven came 'out of the blue'.
- From 2001/02 to 2009/10, the average size of bequest received by was \$77,600.

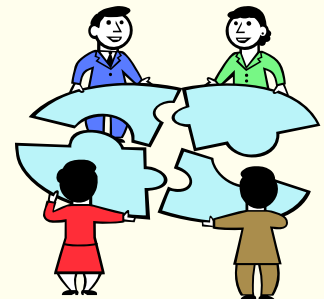


The Challenge

Large numbers of donors with bequest status in our database (1,400 in total).

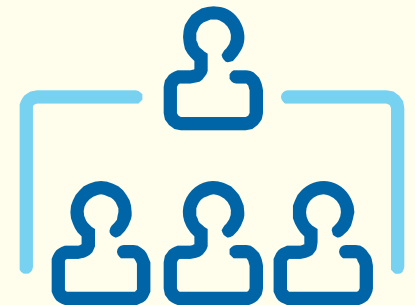
All require some degree of personalized attention if we are to:

- maximize the potential of their planned giving (including bequest)
- uncover lifetime giving opportunities.



The Solution

- Segment overall bequest list into three main groups (A, B and C)
- Prioritize list from both a bequest & major gift perspective to:
 - Convert (enquiry to confirmed) and steward Bequest
 - Determine potential for lifetime gift



List A (aged > 70 years)

- Of the 1400 confirmed or enquiries, nearly 25 % are in the senior age range (aged 70+ years).
- Of these at least 80 individuals are over 80 years old.
- “A” list bequestors are a high priority for individualized stewardship if we are to ensure that their intention to support Bush Heritage through their Will comes to fruition.
- Research indicates that a high proportion of people make their final Will during the last three years of their life, and loyalties to preferred charities often change at this point, depending on an individual’s family circumstances, health, etc.

B list (aged 55 - 70 yrs; > 60 yrs but no DOB)

- 32% of our bequestors are in the age bracket 55-70 years.
- Key period during which people are most likely to include a charitable bequest in their Will for the first time (children leaving home, inheriting money from their own parents, etc).
- This segment is a priority for bequest solicitation/conversion (from initial enquiry to confirmation), and for inclusion in more active stewardship activities such as independent reserve visits (i.e. Guided Tours) as well as information/bequest events.

C list (aged < 55 years)

- The balance of the list (aged < 55 years) are younger people in the family formation/career establishment part of the life cycle whose charitable bequest (if they include at all) is likely to be smaller, and whose intention may well change over time.
- While this group will continue to be invited to general donor/bequest events, invitations to more targeted events (e.g. CSTs, Guided Tours, hosted events) will be selective, and their relationship management will be essentially handled through the direct mail program directed by Supporter Services.

B & C List Strategy – primarily managed by Bequest Team

	Definition	#	Relationship management	Routine mailings	ACR	Additional mailings	Supported CST/CST	GT	Home visit	VSG/BQ events
B plus	Confirmed 55-70 yrs	212	Priority to nurture	Yes	Yes	Xmas	CST	Yes	No	Yes
B plus	Confirmed - Over 60, no DOB	43	Priority to nurture	Yes	Yes	Xmas	CST /Supported (selective)	Yes	No	Yes
B minus	Enquiry 55-70 yrs	138	Priority for conversion	Yes	No	Selective	CST	Yes	No	Yes
	Enquiry - Over 60, no DOB	41	Priority for conversion	Yes	No	Selective	CST /Supported (selective)	Yes	No	Yes
B minus	All other prospects	19	Priority for conversion	Yes	No	Selective	Supported CST/CST (selective_	Selective	Selective	Selective
	TOTAL REGULAR STEWARDSHIP	453								
C plus	Confirmed- balance of list	276	Support Services	Yes	Selective		No	Selective	No	Yes
C minus	Enquiry - balance of list	362	Support Services	Yes				Selective	No	Yes

The Conversation Needs to Go Both Ways!

Major Gift/Planning Giving Team

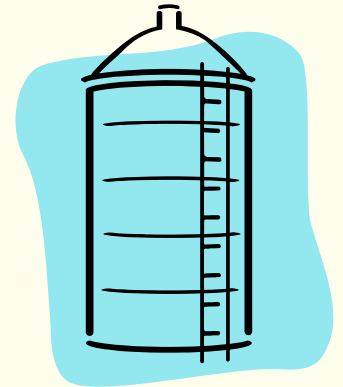


Life Time Gift

Bequest or other PG vehicle

Conclusion

- Avoid silo mentality!
- Understand your donors/prospects.
- Don't get in your own way....be both analytical and emotional.
- Use all available resources to convert and steward bequests AND identify lifetime gift (and/or other planned giving opportunities).



Questions?



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