



STELTER

A short-term guide for marketing planned giving

A plan for the next 90 days



Let's take a closer look at...

The Situation

» What's going on now

The Data

» Some surprising discoveries

The Opportunity

» Marketing planned giving to people at home

The plan

» How to successfully reach out to donors over the next 90 days

» Some pandemic dos and don'ts




THE SITUATION

PHASE 1: Nonprofits reacted


How they did it:

- » Assured donors of the nonprofit's stability
- » Described the organization's response to the pandemic
- » Sought support for immediate needs

CLICK TO ZOOM



URGENT
HELP MOBILIZE FRONTLINE HEALTH WORKERS
>>>



Kristen, we hope this finds you and your loved ones safe and well in these difficult times.

Our program partners urgently need more bicycles to mobilize rural frontline health workers.

These health workers are often the only reliable medical providers for families in rural communities. For every hero we mobilize with a bicycle, more than 100 families will get access to the care they desperately need.

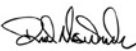
The faster we scale up, the more people they can help.

This pandemic is affecting every single one of us. As we all work to care for our loved ones, we're relying on the generosity of people like you to support our global community.

Make an emergency donation today

GIVE NOW


Thank you for providing access to critical healthcare for those who need it most.



Dave Neiswander
CEO, World Bicycle Relief


A MISSION FOR CHANGE

World Bicycle Relief is mobilizing people through The Power of Bicycles.



World Bicycle Relief, 1000 W. Fulton Market, 4th Floor, Chicago, IL 60607
info@worldbicyclerelief.org

CLICK TO ZOOM



GIVING

Dear shayna,

Thank you for being an important member of our exceptional, committed, and resilient donor community. On behalf of all of us at Memorial Sloan Kettering, please know we are thinking of you and your loved ones during this challenging time.


Our focus has always been on providing our patients with the best cancer care and ensuring our innovative research continues to advance cancer treatment. We are no stranger to tackling uncertainty head-on. Our work in cancer challenges us to face the unprecedented each day, and we are applying this same approach to COVID-19.

As the number of COVID-19 cases in the tri-state area continues to rise, we understand you may have questions. We are taking proactive measures to ensure our patients' needs are met and to protect the health and safety of our patients and staff. More information on MSK's response to COVID-19 is [available here](#).

Now more than ever, we need to stand together so we can emerge even stronger. With your support and commitment, our doctors and scientists will continue to achieve the extraordinary – elevating global standards of cancer care, research, and education. We look forward to staying connected and providing you with updates.

We are deeply grateful for all you make possible through your generosity, and for being an important and valued member of the MSK community.

Sincerely,
Ken Manotti




[@giving_mskccc.org](#)
givingdevelopment@mskccc.org
1.866.815.2501


© Memorial Sloan Kettering Cancer Center, 2020
1275 York Avenue, New York, NY 10065

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CLICK TO ZOOM



COVID-19 EFFORTS



People experiencing homelessness are especially vulnerable to viruses...

Those without homes need us more than ever, so all our Homeless Services will continue without interruption including weekly Outreach and Aftercare.

Joppa volunteers have been visiting people living under bridges, in tents, and in vehicles every single week for the past 599 weeks (that's almost 12 years).

They know they can count on Joppa and we won't let them down now! In fact, we're gearing up to do even more from our new location at 2326 Euclid Ave.


What Joppa is doing to help fight Coronavirus:

We're making every effort to help those we serve and our volunteers stay safe by reforming and preparing through:

- Specific volunteer instructions and client handouts
- Distributing soap, water, and hand sanitizer
- Recommending testing and seeking help upon symptoms

Do you have any hand sanitizer, water or TP you can donate? Want to help?

Find Out More & Get Involved



Copyright © 2020 Joppa. All rights reserved.
You are receiving this because you've expressed interest in Joppa and helping homeless people survive, find housing and rebuild their lives.

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THE SITUATION

PHASE 2: Nonprofits showed support

How they did it:

- » Expressed empathy; offered encouragement
- » Demonstrated hope and positivity
- » Reinforced the connection: "We're all in this together"

CLICK TO ZOOM

How are you, Kit?

Really, how are you?

Afraid for the future? Worried about money? Your health? Maybe grateful for what you have?

Or a combination of all of these?

In the past 2 weeks I have received a ton of emails from giant corporations saying "We're in this together..."

I'm not sure what that means for big companies. But in our community, it means listening to each other.

So—*how are you doing?*

(Click one of the links below to write and tell us. 🙌)

In the weeks ahead we all are facing a lot of uncertainty. We are all at home, watching news feeds, social media, and headline after headline.

How can we serve you best in this time? What do you want to hear from us?

If you are hurting, we want to send you encouragement.

If you are looking for ways to help those who are hurting, we want to share opportunities to do so.





Click below to let us know how you are doing. We want to know what is going in your world.

We look forward to hearing from you and writing (or texting) you back.

[I need some encouragement!](#)

[Send me ways to help others!](#)

With you,
Your friends at Preemptive Love


Preemptive Love Coalition
1300 Darbyton Drive
Hewlett, TX 76643
+1 (254) 400-2033

You are receiving this email because you opted in for emails at loveanyway.com

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CLICK TO ZOOM

A message from John Munger: We're in this together. Real not dropping comedy? View R.E.V.O.C. 2020



Thank you so much for being part of the Loppet community.

Thank you for being part of my community.

These are unsettled times, and, for many of us, painful times. It is my greatest wish that you and yours are healthy and safe.

Things seem to change on a daily basis for just about everyone, including the Loppet, but the Loppet's mission of getting people outside and active has not changed.

My daughter Lauren and I went to the neighborhood park to play tennis last week. I saw more people walking by on the path (6 feet apart, of course) than I can ever recall seeing before.

That's where I'm finding hope. It's clear that outdoor activity is more important than ever to our societal wellbeing, and people well beyond the "Loppet faithful" are realizing this and getting outside.

As long as gatherings of people are not happening, I'm not quite sure what the Loppet's day-to-day is going to look like. We've got a ton of ideas, both for "events" and our other programs, [some of which we're putting into action already](#), but we know that there's more change ahead of us.

But this is where I get even more optimistic. If there's one thing I know about the Loppet community, it's that our superpower is adapting. We find a way to live out our mission, no matter what the world throws at us.

I think back to February 2012, when warm weather made it unsafe to have thousands of people on Lake of the Isles for the Luminary Loppet. Instead of just saying, "well, that's cancelled," the Luminary team figured out a way to move literally TONS of ice art over to Wirth Park, where the Luminary was held as an on-land adventure in the trees.

Today, we're figuring out how to adapt as we plan for this week, next week, next month, and next year.

It is our goal that when we come out on the other side of this crisis—whatever that is, and whatever the world looks like—the Loppet will have been alongside you the whole way, making good on our promise to build community around shared passion for outdoor adventure, and ready for the next challenge.


I'd like to share a link to our most recent annual report, which we completed in early March.

[Loppet Foundation 2019 Annual Report](#)

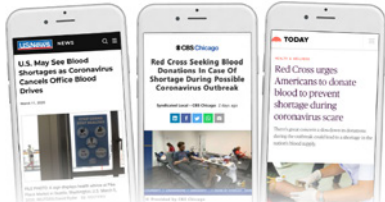

Reading through the report makes me feel like 2019 was 100 years ago.

But, we were planning to send it out to you this week, and we decided to still send it because we hope you find the same inspiration in it that I do: the Loppet community is a powerful force for good, and we will find a way to keep doing good, no matter what.

In good health and hopefulness,



CLICK TO ZOOM



BREAKING: Healthy Donors Are Needed Now

By now, you've seen the headlines and heard the news. Communities across the country are closely monitoring the outbreak of the coronavirus disease 2019 (COVID-19) and following public health preparedness guidance. Part of that preparation includes maintaining a readily available blood supply for hospital patients. **The last thing patients should have to worry about during this time is a shortage.**

As the number of COVID-19 cases grow, so does the need for healthy blood donors. **Right now, the American Red Cross strongly urges eligible donors to schedule their next appointment to donate blood.**

Here's the good news: Donating blood is a safe process and people should not hesitate to give or receive blood. If you are healthy and able, please come in to give. You can help change the headlines with a blood donation.





[Schedule Now](#)

Thank you for all you do, day in and day out, to make patient lives better!

Your American Red Cross

Learn more about steps the Red Cross is taking to protect the health and safety of donors, volunteers, staff and recipients.

If you'd like to give in another way, please visit [RedCrossBlood.org/HostADrive](https://www.redcrossblood.org/HostADrive) to learn about hosting a blood drive, [RedCross.org/Donate](https://www.redcross.org/Donate) to make a financial donation or [RedCross.org/Volunteer](https://www.redcross.org/Volunteer) to explore volunteer opportunities. Thank you!

If you recently donated blood or have an appointment scheduled, thank you on behalf of the patients whose lives you may have touched.

At age 16-17 (depending on state, individuals in generally good health who meet weight and height requirements may become eligible to donate blood. Please review our [eligibility requirements](#), as some states require parental consent. When donating, bring your Red Cross blood donor card or other form of ID.

Blood drive locations and hours are subject to change. Visit [RedCrossBlood.org](https://www.redcrossblood.org) or call 1-800-RED CROSS (1-800-733-2767).

A woman with dark, curly hair is sitting at a desk in an office. She is wearing a light green button-down shirt and has her hand resting on her chin, looking off to the side with a thoughtful expression. A laptop is open in front of her. The background is a blurred office space with warm lighting.

PHASE 3:

So, what's next?

THE SITUATION

Donors are ready to hear from you

You have a captive audience.
How will you respond?

People are thinking about:

- » The fragility of life
- » How to protect loved ones
- » Financial stability
- » Ways to help others





What donors need from you now

**Hope +
Connection**

The Data



THE DATA

79%

**Nonprofits moving
forward with planned
giving marketing**

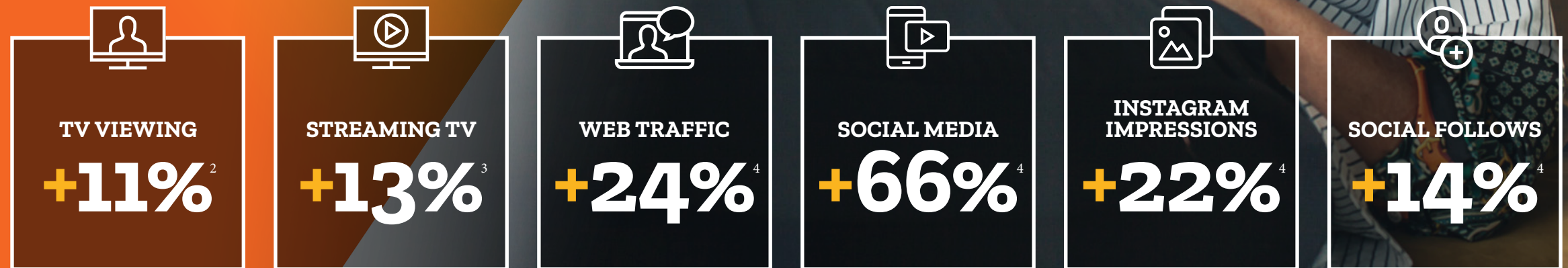
Stelter Planned Giving Pulse Survey | April 29 - May 3, 2020

THE DATA

Screen time is surging

Overall content consumption:

+60%¹



¹ <https://www.nielsen.com/us/en/insights/article/2020/staying-put-consumers-forced-indoors-during-crisis-spend-more-time-on-media>

² <https://www.comscore.com/Insights/Blog/Media-Consumption-during-the-Coronavirus-Pandemic>

³ <https://time.com/5806060/coronavirus-movie-theaters-streaming/>

⁴ WorldData®, Key metrics from March 5 to 16

THE DATA

Email offers a big opportunity

Email activity is up. Inbox volume is down.



EMAIL ACTIVITY

+27%

THE TOTAL MARKET IS
SENDING 19% LESS.



EMAIL
OPEN RATES

+11%



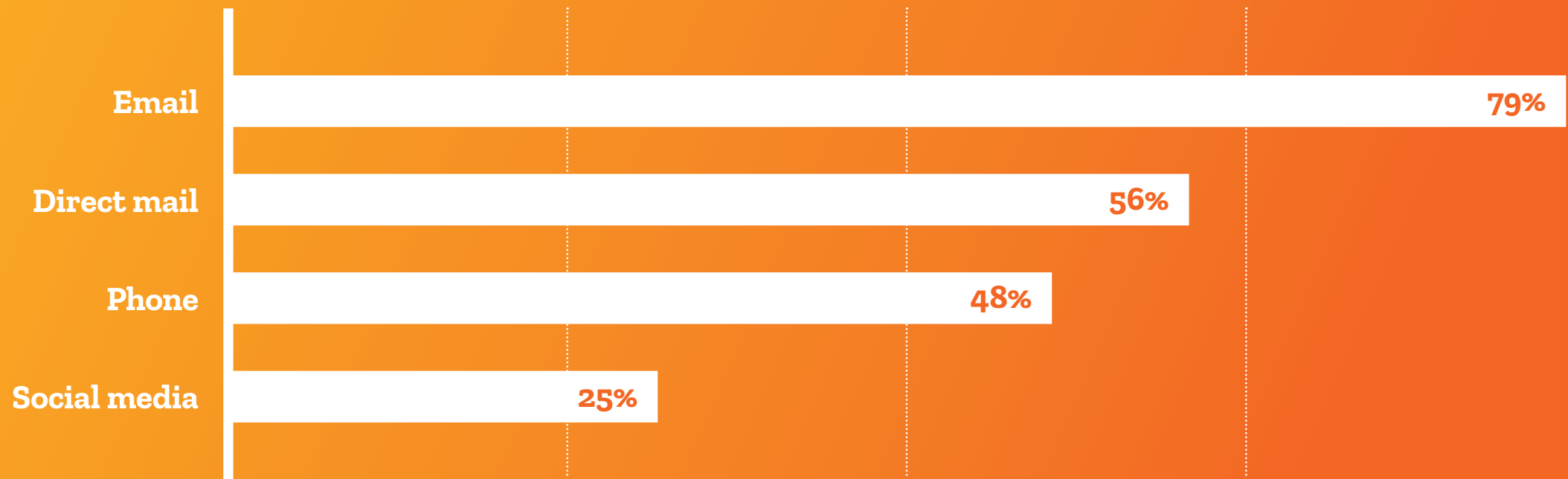
CLICK-THROUGH
RATES

+35%

Even if your email is never opened, seeing a brand's name in an inbox helps to keep you top of mind with donors.

THE DATA

Communication channels nonprofits plan to use



THE DATA



What strategies are you employing to communicate with donors at this time?

The Opportunity



THE OPPORTUNITY

Now is the time!

We know exactly where our donors and prospects are: **AT HOME.**

We work from home.

We socialize from home.

We plan from home.

We consume content from home.

We must reset our marketing plans to fit a "stay home" frame of mind and deliver content that sparks a feeling of connection.





THE OPPORTUNITY

Prepare to reframe your approach

Many of the concepts that planned giving marketers introduce remain valid in today's climate—if you express them differently.

- » Instead of asking for a bequest, ask prospects to take a personal inventory of what matters most to them.
- » Use the COVID-19 crisis as a touchpoint to talk about planning and preparedness.
- » Rather than focusing on what your nonprofit has accomplished, thank your donors for their loyalty and generosity. Then describe how such generous gifts have helped you to continue your mission.

The Plan



A woman with dark hair tied back, wearing a dark sleeveless top, is sitting on a bed or sofa, smiling as she works on a laptop. The scene is warmly lit with a yellowish-orange glow. In the background, there is a wooden shelf with a mug and a framed sign that says "WORK SMART".

THE PLAN

Start with stewardship

Pay attention to language

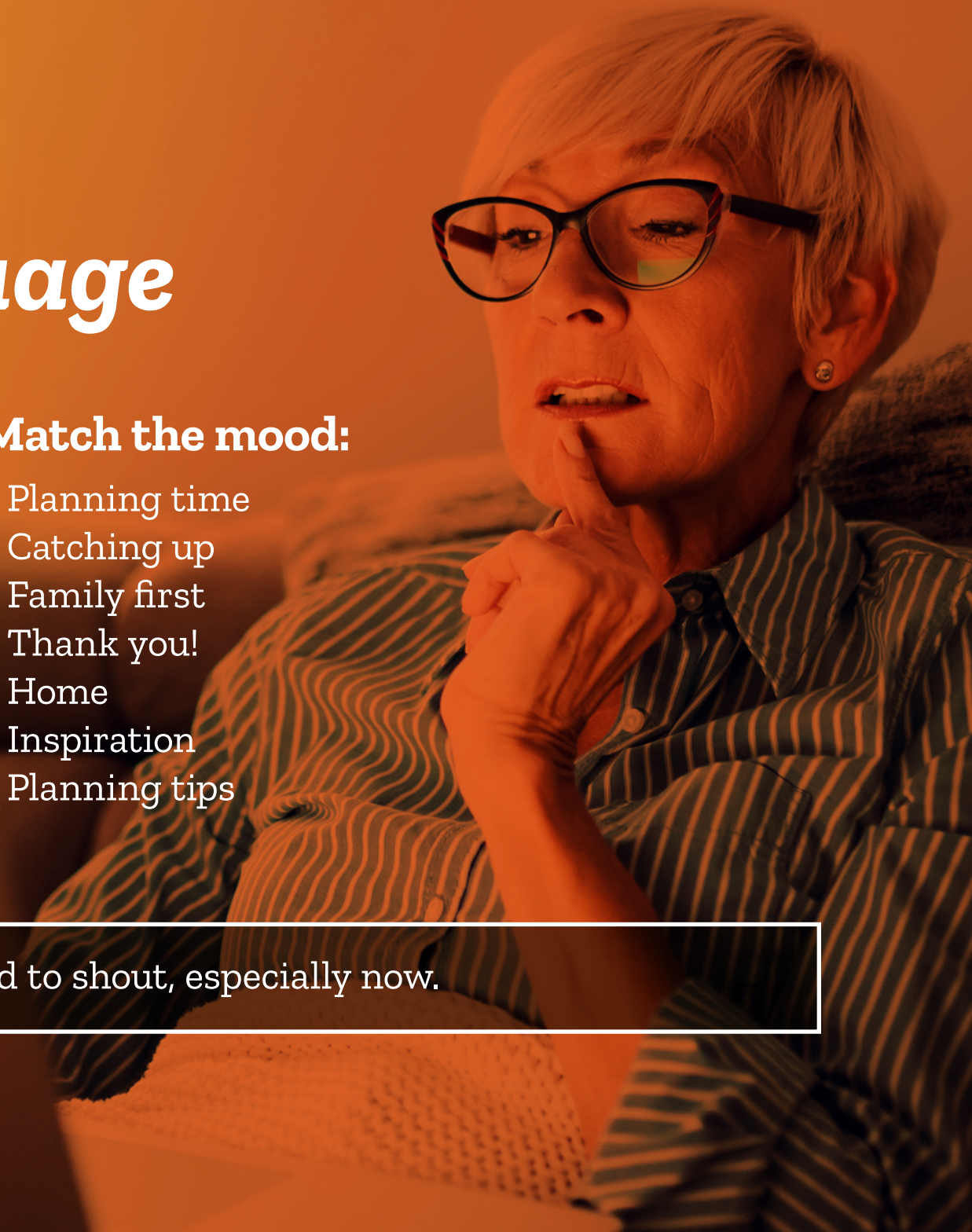
Avoid pushy, scary words and phrases:

- » Hurry
- » Final wishes
- » Don't miss out
- » COVID-19/coronavirus
- » "How do you want to be remembered?"
- » "Have your best year yet!"
- » "Giving is contagious"

Match the mood:

- » Planning time
- » Catching up
- » Family first
- » Thank you!
- » Home
- » Inspiration
- » Planning tips

PRO TIP: Avoid ALL CAPS. No need to shout, especially now.



A man with grey hair, wearing glasses and a grey blazer, is sitting at a desk and working on a laptop. He has a thoughtful expression, with his hand near his chin. The background is a blurred office environment. The image is overlaid with a large orange diagonal shape on the left side, which contains the text.

THE PLAN

Email: Users scan rather than read

People are much more likely to **scan** digital content than read it. In addition, they are not likely to read your content completely or in sequential order.

Three email must-dos:

- » Write in plain language.
- » Use headings, subheadings, bulleted lists and bold text to highlight important information.
- » Place the most important information up front.

THE PLAN

Survey: Extending your donor discovery



**SURVEY-RELATED
EMAILS**

+38%¹

IN SUBMISSIONS

Increased nonprofit survey click-to-open rates

There has never been a more important time to take the pulse of your donors. A survey does just that. A recent increase in click-to-open rates suggests that people have time or are more interested in providing feedback to their favorite organization.²

¹ WorldData®, Key metrics from March 5 to 16

² "Assessing the Impact of COVID-19 on Client Email Marketing Activity," The Stelter Company, Jan. 5 - April 18, 2020



THE PLAN

Have more meaningful conversations

Surveys work because...

- » Many people are taking this “forced slowdown” as a chance to reflect and take a “personal inventory” of what’s nearest and dearest to them.
- » With a majority of the country spending most of their time at home, what a great time to engage donors and prospects to get direct feedback on what they care about and whether you may be part of their plans.

THE PLAN

Make the effort to try something new

- » Virtual tours of organization
- » Lunch-and-learns
- » Webinar series
- » Online events
- » Virtual coffee or lunch
- » Digital happy hour
- » Facebook Live concert



A person wearing a green and white checkered shirt is sitting at a desk, writing on a document with a green pencil. The desk is cluttered with various office supplies, including a laptop, a pen holder with pens and markers, a red stapler, and several stacks of papers. The scene is lit with a warm, orange glow, creating a focused and creative atmosphere.

THE PLAN

5 *creative ideas*

1. MAKE A PERSONAL CONNECTION

Top-tier or assigned donors

- » Send a personal card or letter.
- » Write a personalized email from your personal account (*attach photos, articles or updates of interest*).
- » Make a phone call purely to check in.
- » Distribute a short video made on your phone or laptop with an update on what's going on at your organization.

Theme: Stewardship

Tone: Informal. Share a little humor if appropriate; show your humanity.

Message examples:

- » "At times like this, I am never more appreciative of your many years of support ..."
- » "Shortly before the campus closed, I had a conversation with a student who reminded me of how much a [school name] education can shape a young life ..."
- » "I think I've walked my dog more this month than all of last year!"
- » "PS: I thought you might enjoy this photo of the gardens in full bloom."

2. MAKE A PERSONAL CONNECTION

Reaching a wider audience

- » Send a thank-you postcard.
- » Send a thank-you email.
 - Include a video message from a key staff person
- » Devote the next issue of your planned giving newsletter to stewardship. Topics:
 - Mission spotlight
 - Donations in action
 - How to pass on your values
 - Why your connection matters
- » Offer helpful resources:
 - Legacy letter templates
 - Estate planning resources

Theme: The Gratitude Report

Tone: Warm, supportive and instructional

Message examples:

- » "Thank you! It's because of supporters like you we're able to support our ..."
- » "You haven't met him, but thanks to you ..."
- » "I believe that every child deserves a warm meal. I'm happy to do what I can to ensure that happens," says supporter Jane Doe.
- » "[Our org] can adapt and thrive today, because generous supporters in years past had the foresight to make gifts for the future ..."

3. PROVIDE HOPE; PROMOTE PLANNING

- » Times like these remind us all of the value of careful planning. Rather than overtly promoting wills and bequests, **share resources to help donors plan.**
- » Pair these resources with reminders of the value of your organization and the **hope** your mission provides for the future.

Theme: Everybody Needs a Plan

Tone: Warm, supportive and instructional

Delivery methods:

- » Email
- » Direct mail
- » Social media

Message examples:

- » "We want to provide you with a resource that others like you have found helpful ..."
- » "As a gift to you, please accept this complimentary estate planning kit ... "
- » "When you have a plan, it's easier to make timely decisions and stay on track. As a thank you for your support, we'd like to ensure you have the tools to put your own plans in place ..."
- » "Protect what matters most with this free resource ..."

4. CAPTURE FEEDBACK

Build connection

Surveys can be used at any stage of a marketing campaign. Be sure to ask questions that bring to mind life, family and connections to your mission.

- » Just as a face-to-face conversation would, send a survey that allows you to learn what donors consider important regarding your organization, its mission and operation.
- » Employ a survey now to gain broad insight on your donors' state of mind and interests.
- » Send a short pulse survey to gather immediate feedback on a timely topic.
- » Regardless of the subject matter, remember that surveys are primarily lead-generation tools. Your most engaged donors are your best prospects.

5. EDUCATE DONORS ABOUT GIFT OPPORTUNITIES

Tread carefully here. A one-size-fits-all approach will not work.

Two things to consider before marketing a specific gift type:

- » **Your audience.** What is your audience's typical appetite for targeted gift appeals? What is their frame of mind *today*?
- » **Your organization's relationship to the COVID-19 crisis.** Is your mission directly tied to the pandemic effort? If so, your message could be more direct.

Gifts to Market Now

- » Donor advised funds
 - "Help us today without impacting your current income."
- » Bequests
 - "A simple way to show you care without affecting current finances."
- » CGAs
 - "Increase your income now while supporting our work."
- » Blended giving
 - Use when you hear "I wish I could ..."
- » Percentage giving
 - "Balance your family needs with a desire to make an impact."



In business since 1962, The Stelter Company is the strategic partner nearly 1,500 leading nonprofits nationwide depend on most to provide expertise on cultivating valuable, long-term donor relationships through a unique combination of industry insight, customer focus and creative services.

Industry Insight / Customer Focus / Creative Service

www.stelter.com



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URGENT

**HELP MOBILIZE
FRONTLINE
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A handwritten signature in black ink.

Dave Neiswander
CEO, World Bicycle Relief



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We are deeply grateful for all you make possible through your generosity, and for being an important and valued member of the MSK community.

Sincerely,
Ken Manotti



giving.mskcc.org
development@mskcc.org
[1\(866\)815-9501](tel:18668159501)

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1275 York Avenue, New York, NY 10065

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COVID-19 EFFORTS



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Do you have any hand sanitizer, water or TP you can donate? Want to help?

[Find Out More & Get Involved](#)



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You are receiving this because you've expressed interest in Joppa and helping homeless people survive, find housing and rebuild their lives.

Our mailing address is:
Joppa
2326 Euclid Ave
Des Moines, IA 50310-5702

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How are you, Kit?

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Click below to let us know how you are doing. We want to know what is going in your world.

We look forward to hearing from you and writing (or texting) you back.

[I need some encouragement!](#)

[Send me ways to help others!](#)

With you,
Your friends at Preemptive Love



Preemptive Love Coalition
1300 Darbyton Drive
Hewitt, TX 76643
+1 (254) 400-2033

You are receiving this email because you opted in for emails at
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A message from John Munger: We're in this together.

Email not displaying correctly?
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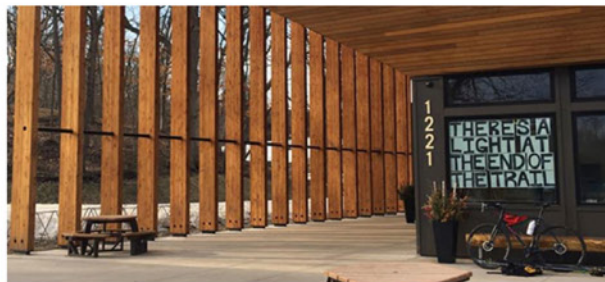


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In good health and hopefulness,

John Munger
Executive Director



Support the Loppet

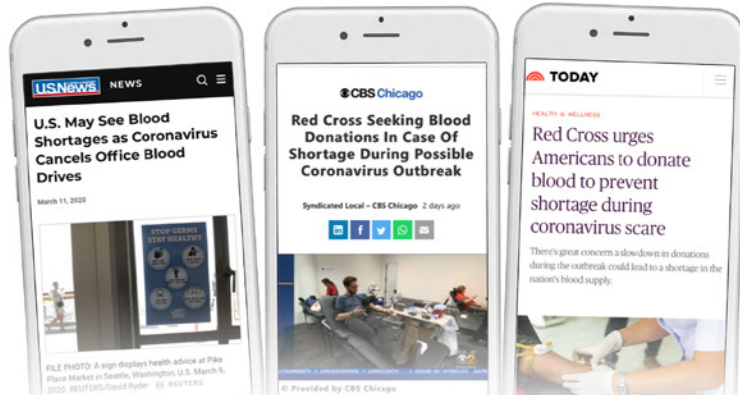
If you are able, consider making a donation at www.loppet.org/donate to support the Loppet's mission of getting people outside and active.

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BREAKING: Healthy Donors Are Needed Now

By now, you've seen the headlines and heard the news. Communities across the country are closely monitoring the outbreak of the coronavirus disease 2019 (COVID-19) and following public health preparedness guidance. Part of that preparation includes maintaining a readily available blood supply for hospital patients. **The last thing patients should have to worry about during this time is a shortage.**

As the number of COVID-19 cases grow, so does the need for healthy blood donors. **Right now, the American Red Cross strongly urges eligible donors to schedule their next appointment to donate blood.**

Here's the good news: Donating blood is a safe process and people should not hesitate to give or receive blood. If you are healthy and able, please come in to give. You can help change the headlines with a blood donation.

[Schedule Now](#)

Thank you for all you do, day in and day out, to make patient lives better!

Your American Red Cross

Learn more about steps the Red Cross is taking to protect the health and safety of donors, volunteers, staff and recipients.

If you'd like to give in another way, please visit [RedCrossBlood.org/HostADrive](https://www.redcrossblood.org/HostADrive) to learn about hosting a blood drive, [RedCross.org/Donate](https://www.RedCross.org/Donate) to make a financial donation or [RedCross.org/Volunteer](https://www.RedCross.org/Volunteer) to explore volunteer opportunities. Thank you!



If you recently donated blood or have an appointment scheduled, thank you on behalf of the patients whose lives you may have touched.

At age 16-17 depending on state, individuals in generally good health who meet weight and height requirements may become eligible to donate blood. Please review our [eligibility requirements](#) as some states require parental consent. When donating, bring your Red Cross blood donor card or other form of ID.

Blood drive locations and hours are subject to change. Visit [RedCrossBlood.org](https://www.RedCrossBlood.org) or call **1-800-RED CROSS** (1-800-733-2767).

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