

2015

PLANNED GIFTS

Email

MARKETING STUDY

CASE STUDIES ON EFFECTIVE USE
OF EMAIL FOR PLANNED GIFTS

Authored By:



INTEGRATED MARKETING FOR PLANNED GIFTS

Dear Reader,

Crescendo Interactive, Inc., is the leading planned gifts service provider to nonprofits. It is our pleasure to release our 2015 Planned Gifts Email Marketing Study.

In our prior study we focused on results for multichannel marketing for planned gifts. Our data showed increased use of mobile devices to access planned giving information and also growth in the use of social media for planned gifts.

In this study, we are moving from a macro analysis to a microanalysis of one specific area of multichannel marketing—email marketing. Our 2015 study will focus on case studies as a means of illustrating principles for effective email communication for planned gifts.

We hope our research will help you consider new ways to use email to reach your planned giving prospects and close more gifts.

Very best,

Kristen Schultz Jaarda, JD, LLM

Executive Vice President

Christopher Jaarda, JD

Senior Vice President

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Introduction

Email marketing is still the most important electronic method for reaching planned giving donors and achieving responses.

EMAIL MARKETING BY THE NUMBERS

A review of blind data for GiftLegacy client activities over the last year demonstrated continued growth in the area of email marketing. Here is an overview of our results based on analytics covering the period from July 1, 2014 through June 30, 2015.

- 1.** Charities sent 46.2 million planned giving emails from Crescendo servers last year. Almost 90% of those emails were donor enewsletters.
- 2.** Education organizations sent the most planned giving emails followed by faith-based, human services and healthcare organizations.
- 3.** More charities (29.68%, up from 21.80% in the prior year) continued toward monthly regular distribution emails.
- 4.** Open rates for planned giving emails increased to 16.7%, as compared with 16.4% in the prior year.
- 5.** Special onetime eblasts featured the highest open rates of 21.2%.
- 6.** Overall opt-out rates remained at less than 1% again this year, falling to .15%.

Introduction

Email is still the most efficient and cost-effective way to reach your planned giving donors. For this reason, this study focuses specifically on the principles of effective planned giving emails. The data gleaned from our analysis of client emails illustrates principles of messaging, segmentation, branding, engagement and personalization as essential strategies to reach your donors through email and motivate responses.

The data from this study is based on a review of the 46.2 million Crescendo GiftLegacy client emails sent from our servers over this last year. The study also references some effective emails sent in the prior two years, during the time period covered in our 2013 and 2014 marketing studies.

Crescendo received permission by the named charities to include their information in the study. Where permitted, we were able to provide and rank the top-performing emails by message and subject lines based on factors that include number of emails sent, open rates, visits, bounces and opt-outs. Some organizations permitted us to provide their data and be named. Others requested that the name of the organization remain anonymous, in which case we have honored that request.

We hope the ideas in this study will help inform your planned gifts email marketing. Please contact Crescendo if you need assistance with creating an email marketing strategy for your organization.

Messaging

WHAT YOU SAY MAKES A DIFFERENCE

How are you communicating with your supporters?

What type of email messages produces the best results?

It should come as no surprise that the messages you send to your donors directly shape their views about your organization. Our research shows that messages that focus on the donor, as opposed to the organization's mission, achieve an overall higher response. The messages that resonate most with donors often include the words **you** or **your** and focus on how their support makes a difference. Some of the best examples of donor-centered messaging come from nonprofit holiday emails.

YOU MATTER!



This email was sent from the University of California Irvine, Office of Planned Giving, during the holiday season. The subject line was a simple **Happy Holidays** and featured a message directed to legacy society members. The email received a 46.92% open rate.

Why was this email so effective?

First, the subject line was simple and friendly. It did not use a subject line typical for year-end or holiday fundraising appeals.

Second, notice how the content emphasizes how **you** (the donor) are an inspiration. This email says nothing about the organization. The focus is on the value of the donor to **others**. To whom is **others** referring? Possibly students, UC faculty, other donors or members of the UC

Irvine community. **Others** could also describe the people who directly benefit when a supporter makes a planned gift to UC Irvine.

This message includes another element evident in emails that receive high responses—a thank-you message. One of the best messages you can send to your donors is a message of gratitude, expecting nothing in return. The thank-you is particularly effective here. The supporter can click on a link to an embedded video and hear students say **thank you** for giving.

UC Irvine has also received positive responses to emails featuring donor stories. An email sent in April of 2015, highlighting a bequest from the estate of Jean Leslie, a long-term UCI supporter, resulted in three notifications from donors who had also included UCI in their plans.

THE POWER OF THANK YOU



The power of **thank you** can also be seen in this Thanksgiving message from the National Kidney Foundation of Hawaii. Notice how it specifically names **volunteers, supporters and friends**. These are the people that matter, and this message resonates with all of these audiences because National Kidney is expressing gratitude for their **support, dedication and caring**.

At Crescendo, we often talk with our clients about providing **service over solicitation**. The most effective emails don't ask for money. They focus on the donor, express gratitude and provide resources that can assist a supporter in making some of life's most important decisions.

SERVICE OVER SOLICITATION

The email features a stone wall and steps in the background. The subject line is "How To Benefit Your Family Through Charitable Giving". The body text discusses charitable remainder unitrusts (CRUT) and testamentary charitable remainder unitrusts (TCRUT). It highlights how these trusts can provide income and lasting impact. The message continues to explain the benefits of charitable trusts, including steady income, legacy support, tax deductions, and capital gains reduction. It concludes with a contact offer for a free illustration.

How To Benefit Your Family Through Charitable Giving

Using a charitable remainder unitrust (CRUT) or testamentary charitable remainder unitrust (TCRUT) can create a regular stream of income for you or your loved ones and make a lasting impact at Carolina.

Charitable trusts may be funded with a variety of assets. You select a trustee to manage the trust assets and make payments to you or your loved ones. After all payments have been made, the remainder passes to help Carolina. Benefits include:

- Providing a steady stream of income (as opposed to a lump-sum inheritance)
- Building a legacy of support for our mission and work
- Creating a charitable income tax deduction for a CRUT or possible estate tax savings from a TCRUT
- Reducing a portion of the capital gains on appreciated assets.

Contact us for a free illustration to see the benefits of a CRUT or TCRUT for you.

1-800-994-8803 | createalegacy@unc.edu
UNCLEGACY.ORG

 THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

MESSAGES THAT FOCUS ON HOW TO HELP YOUR FAMILY IN HEADINGS AND SUBJECT LINES PRODUCE HIGH OPEN RATES.

In this message from the University of North Carolina Chapel Hill, the subject line was "How to Benefit Your Family Through Charitable Giving." The message was sent to 12,294 recipients. There was an amazing response with 6,690 Chapel Hill supporters opening the email, a 54.42% open rate.

Why was this email so compelling?

What caused more than half of the recipients to open the email and read the content?

First, the focus was not on solicitation of a planned gift. This was a service-oriented message. It provided information on how supporters could benefit family through a charitable remainder trust. Second, messages that focus on **how to help your family** rate high among many peoples' deepest concerns. Many people worry about "How will my family fare when I'm gone?" and "What can I do to make sure my loved ones are well cared for?" This email message shows that UNC Chapel Hill understands the concern and, more importantly, that they are offering a possible solution.

This message motivates readers to want to learn more. Notice the **offer** for a free illustration at the end serves as a **call to action** aimed at motivating supporters to respond and discover the benefits for themselves.

Charitable Bequest Marketing



A charitable bequest is an easy way for you to help the Boys & Girls Clubs of Metro Phoenix.



A charitable bequest is an excellent way for you to leave a legacy and help further our mission. A bequest is also one of the easiest gifts you can make. Your estate planning attorney can include a provision in your will that leaves a lasting gift to us. It could be a gift of a specific asset, a dollar amount, or a percentage of your estate. A bequest could also be made from the residue of your estate or what is left after all gifts have been made to your heirs.

Please contact us to learn about all of the benefits of making a charitable bequest and how it can help us continue our important work.

Brad Kularis
V.P. of Advancement
Boys & Girls Clubs of Metro Phoenix

p: 602.343.1209
e: bkularis@bgcmp.org
w: bgcmplegacy.org

What are the best ways to market a charitable bequest by email?

It is estimated that 90% or more of planned gifts are charitable bequests. As part of this study, we wanted to analyze the top-performing charitable bequest messaging, related to gifts made by a will or trust. We also wanted to review charitable beneficiary designation messaging, related to gifts of assets that transfer upon death. These are transfers that occur outside of a will, such as a gift of a retirement account, bank account or insurance policy with a charity named as the beneficiary.

Here is a sample marketing piece sent by the Boys and Girls Club of Metro Phoenix. This message was sent to 1,555 recipients and had a 37.44% open rate. It resulted in seven donor visits and two seven figure gifts. Notice again in this email how the repeated use of the word **you** brings the focus back to the donor.

Titles and Topics

We reviewed analytics for similar bequest marketing messages and ranked them by performance. The top five performing emails based on our analysis included the following titles and had open rates ranging from 36.30% to 21.3%:

A charitable bequest is an easy way to help CHARITY NAME

Endowing your gift with a charitable bequest is an easy way to help CHARITY NAME forever

Have you thought about the future?

Do you have a plan for the future?

Have you made these important decisions yet?

Here are some lower-performing email titles with open rates ranging from 14.96% to 11.24%:

A charitable bequest is an easy way to change a student's life

A bequest of life insurance is easier than you think

The benefits of a charitable bequest

Don't worry, you don't need a will

Below are the TOP-PERFORMING email topics marketing planned giving seminars and webinars. Open rates for these emails ranged from between 31.3% and 24.2%:

[What is a trust and what can it do for me?](#)

[Making a will seminar](#)

[Wills training workshop is this weekend](#)

[Estate planning with retirement benefits](#)

[Leaving a legacy, charitable gifts made easy](#)

These topics did not perform as well:

[How to prepare for a meeting with an estate planning attorney](#)

[Gift annuities: Understanding the many benefits](#)

Segmentation

MESSAGES ARE NOT “ONE SIZE FITS ALL”

How do you define your donor base?

What types of email messages work best for specific donor segments or groups?

The most effective planned gifts marketers segment their messaging to reach groups of like supporters who may share common interests or goals. Our research demonstrated the effectiveness of email messaging directed toward common planned giving donor segments—seniors, women and legacy or heritage society members who have already created a planned gift. As you can see from the following examples, segmented messages work best when they use language and imagery designed to resonate with their particular audience.

GENERATIONAL MARKETING

Some planned gifts such as charitable bequests and charitable beneficiary designations may be marketed to a broad audience. However, there are times when the typical gift fits a certain donor population. Such is the case with a charitable gift annuity. While gift annuities are most often marketed to seniors and sometimes Baby Boomers, the sweet spot is a donor in their mid-70s.

Segmentation

This email marketing charitable gift annuities was sent by the University of New Hampshire to a list of 4,015 supporters age 55 and over and had an open rate of 16.1%.

There are several excellent marketing principles that are illustrated with this example. First, the email includes several response mechanisms, including a button with a link that allows an email recipient to run a charitable gift annuity illustration online. There is another link that allows a recipient to contact UNH directly to request an illustration. These response mechanisms are important to give potential donors two easy ways to take the next step and learn more about charitable gift annuities.

Second, notice the focus on benefits of a charitable gift annuity and the rate table included with basic ages and possible payments. This content is also providing easy-to-understand information about how a gift annuity would work for the recipient.

Third, the email also includes information about the UNH legacy society; the Benjamin Thompson Society is referenced and the email includes a hyperlink to further information. This is a very effective way to educate donors about the benefits of joining the society.

Also, the prominence of the UNH logo and use of the blue and orange school colors are good examples of branding, a topic that will be covered in more detail in this study.

Create a UNH Charitable Gift Annuity Today!

YOU CAN RECEIVE
PAYMENTS FOR LIFE
AND A CHARITABLE
INCOME TAX DEDUCTION!

[Click here to use the Gift Annuity calculator](#)

[Contact us to receive a personal CGA illustration](#)

Recently, we sent you a postcard in the mail about an opportunity to create a UNH Charitable Gift Annuity. Did you know that by creating a CGA not only will you be providing a legacy for future Wildcats but you will also be recognized as a member of our [Benjamin Thompson Society](#)?

Creating a gift annuity is easy. Fund one by transferring cash or property to us and create lifetime payments for yourself, for you and another person, or as a gift for someone special. Receive the satisfaction of knowing your gift made a difference.

Other benefits of a charitable gift annuity include:

- Income tax savings
- Capital gains tax avoidance
- Possible tax free payments

Sample Rate Chart for a \$10,000 Single-Life Gift Annuity		
Benefits	Defer Payments for 5 years	Immediate Payout
Annuity age at gift	60*	70
Annuity rate	5.5%	5.1%
Charitable deduction ¹	\$3,266	\$3,901
Annual payment	\$550*	\$510
Tax-free income (cash gift)	\$338.25	\$383.52

*Payments begin at age 65.
¹Deduction will vary slightly with changes in monthly IRS Discount Rate. Assumed rate 2%. Donors should always consult with their tax advisor before making a planned gift.

For more information visit our [website](#) or contact:
Theresa M. Curry, J.D.
Director of Gift Planning
p: (603)-862-4895
e: Theresa.Curry@unh.edu



**University of
New Hampshire**

Segmentation

What are the results for other gift annuity messages sent to a segmented list?

Here were the top-performing gift annuity marketing messages sent to a segmented group of seniors, with an open rate ranging from 16.1% to 14.0%:

Create a CHARITY NAME charitable gift annuity today!

What does security look like?

Your charitable gift annuity can support CHARITY NAME

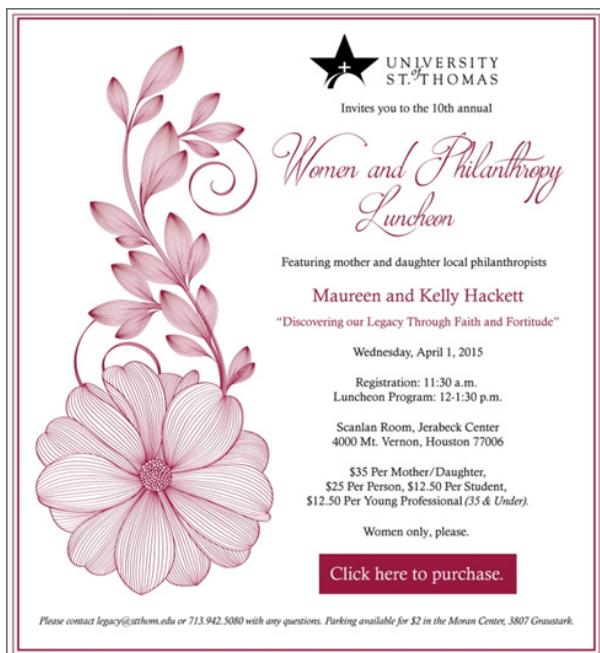
Discover lifetime security with a CHARITY NAME gift annuity

Gift annuities: understanding your many benefits

This message did not perform as well:

Security today, a brighter future for tomorrow

WOMEN



Messages sent specifically to women supporters often receive exceptionally high open rates. This email sent to 5,902 female supporters was opened by 1,699 (a 28.79% open rate) and resulted in many event RSVPs. Everything about this email was designed to appeal to women, including the flowery graphic, the color pink and the italicized type.

LEGACY/HERITAGE SOCIETY MEMBERS



WHAT...
WHEN...
HOW...
TO GIVE YOUR YEAR-END GIFT

[Click here for more information.](#)

This end-of-year gift message was sent to Dallas Seminary Foundation's email list of donors over age 69 who had made a gift to fund a charitable gift annuity, donor advised fund or scholarship. Those that received this message were very receptive to the content, as evidenced by a 55.83% open rate. The exceptional open rate

is no surprise. Emails sent to donors who have already made a planned gift generally have a high open rate—the organization has a stronger relationship with these email recipients. While the message here is simple, the three questions together with the link for further information are effective at motivating responses.

Branding

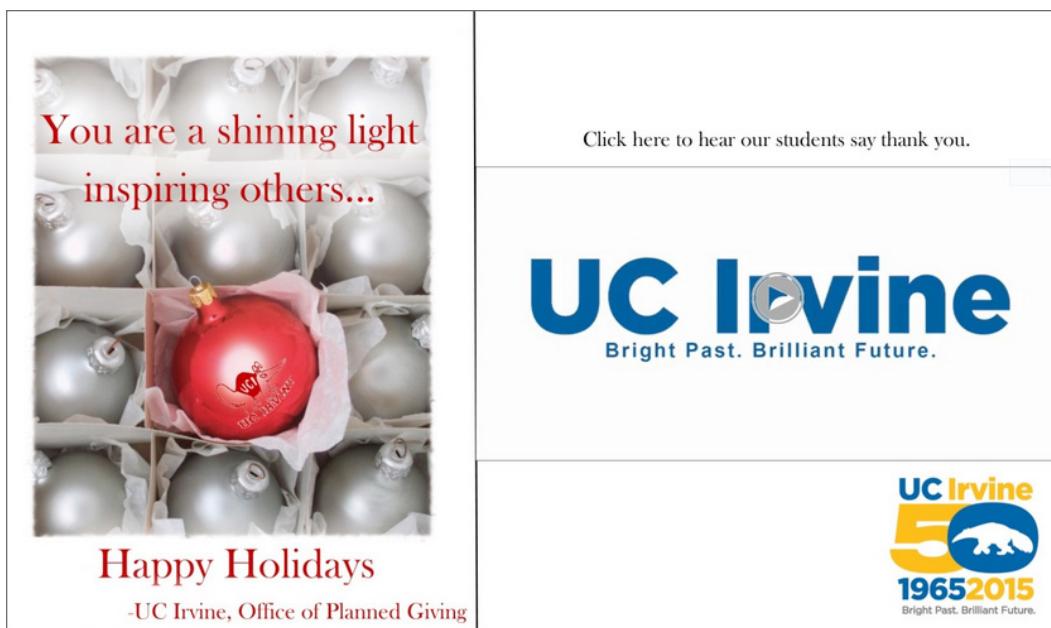
KNOWN ENTITIES GET MORE ATTENTION

Do your supporters know you from your marketing?

How can good branding help you attract and retain loyal donors?

What are the best ways to create identity and recognition through email branding?

Remember the holiday email sent by UC Irvine? If you look back at this image highlighted earlier, you will notice that the ball in the center has been branded with UCI and includes an illustration of the school mascot. A UC Irvine alumnus who receives this email knows exactly where it is coming from without even reading the message.



Branding



M | LEADERS & BEST giving

THE CHARITABLE IRA ROLLOVER IS HERE!

Don't miss the chance to make a charitable IRA gift this year.

Opportunity expires on 12/31/2014

If you are 70½ or older and own a traditional IRA, consider making an IRA charitable rollover gift this year. A gift of up to \$100,000 made from your IRA to the University of Michigan will:

- not be included in your taxable income.
- satisfy your required minimum distribution (RMD) for the year.
- reduce your taxable income, even if you do not itemize deductions.
- not be subject to charitable gift limitations.
- provide meaningful support for the University of Michigan.

ACT NOW! Opportunity ends on December 31, 2014.

Contact the Office of Gift Planning or your IRA plan administrator to make a qualified gift from your IRA to the University of Michigan. For more information visit our website at leadersandbest.umich.edu/giftplanning.

Office of Gift Planning
3003 S. State Street, Suite 9000, Ann Arbor, MI 48109-1288
Phone: (734) 615-2022 | toll-free (866) 233-6661 e-mail: giving2@umich.edu

PLAN FOR TOMORROW'S VICTORS TODAY!

You are more likely to get attention (and gifts) from your donors if they know who you are. Branding is the way that they identify with you. Good branding includes use of your organization's colors, logo, imagery and specific language that appeals to your unique constituents. Some of the best examples of email branding come from organizations that have consistent and recognizable branding, such as colleges and universities.

Everything about the email above lets recipients know the message is from the University of Michigan. The subject line refers to UM; Michigan's iconic Block M logo is prominently placed; the email incorporates Michigan's colors of maize and blue, which are recognizable around the world; it uses the phrase Leaders and Best and the phrase Victors, both references to their fight song, Hail to the Victors, and contains an image of Burton Memorial Tower, the clock tower located on Michigan's Central

Campus. What response is Michigan looking for from email recipients? I'm sure the Michigan development department would love to hear a Go Blue!

Branding

PURDUE
UNIVERSITY.

News from Planned Giving
UNIVERSITY DEVELOPMENT



Trying to roll the world's largest drum through a small door is a bad idea ...

Taking advantage of the **IRA Charitable Rollover**, on the other hand, will make you look pretty clever.

PURDUE
UNIVERSITY

Rolling your IRA required minimum distribution to Purdue is as easy as 1-2-3.

1. Go to purdue.giftlegacy.com.
2. Click on the IRA Button.
3. Make a gift to Purdue and enjoy the tax savings!

If you determine that making a gift using your IRA is right for you, please let us know so that we can receipt your gift correctly.

Call us at 800-677-8780 or email us at plangift@purdue.edu for more information.

The information contained herein is offered solely for general informational and educational purposes. You should seek the advice of an attorney for applicability to your situation

PURDUE
UNIVERSITY.

Philanthropy at Purdue
UNIVERSITY DEVELOPMENT



Trying to roll the world's largest drum through a small door is a bad idea ...

Taking advantage of the **IRA Charitable Rollover**, on the other hand, will make you look pretty clever.

PURDUE
UNIVERSITY

BANG A DRUM! The IRA Charitable Rollover is back for another year! Direct gifts to Purdue University from your IRA can:

1. Be an easy and convenient way to make a gift from one of your major assets
2. Be excluded from your gross income
3. Count toward your required minimum distribution

***For your gift to qualify for benefits under the extension:**

- ? You must be 70 ½ or older at the time of your gift
- ? The transfer must go directly from your IRA to Purdue University
- ? Your IRA gift(s) cannot exceed \$100,000
- ? Your gift must be outright and received by December 31, 2013
- ? All IRA Rollover contributions must be made payable to PURDUE UNIVERSITY. Purdue Foundation is not an eligible recipient under IRS regulations for IRA Rollovers.

If you determine that making a gift using your IRA is right for you, please let us know so that we can receipt your gift correctly.

Call us at 800-677-8780 or email us at plangift@purdue.edu for more information.

The information contained herein is offered solely for general informational and educational purposes. You should seek the advice of an attorney for applicability to your situation

While not an email sent during the period of our study, this is one of the best examples of branding we have seen in a planned giving email. Graduates and friends of Purdue University recognize the Big Bass Drum, known as the world's largest drum, played by Purdue's **All-American** Marching Band. This email was sent marketing the IRA charitable rollover. It's interesting to note that there were actually two versions of this email. The version above was shorter and to the point. It received a higher

open rate—31.04%—versus the longer version, which only achieved a 19.62% open rate. Critical to planned gifts marketing is the inclusion of an appropriate **response mechanism** to give recipients the chance to learn more, ask questions or take action. The use of three steps in the message on the left does this well, making it clear how a recipient can make an IRA rollover gift.

Branding

PURDUE
UNIVERSITY

News from Planned Giving
UNIVERSITY DEVELOPMENT



You take a plunge to stay cool when temperatures rise, but how can you stay cool when rates are plunging?

Have you considered a Charitable Gift Annuity?

PURDUE
UNIVERSITY

This future Boiler (Class of 2027) learned to swim this summer at Purdue's Boilermaker Aquatic Center. Similar to the time you spent at Purdue, her lessons will provide security and enjoyment for the rest of her life.

A **Charitable Gift Annuity** is an investment in the future that provides:

- Guaranteed lifetime income
- Attractive fixed rates
- Opportunities for various tax deductions
- A chance to show your Purdue Pride!

Your gift will have an immediate impact and will help to ensure that Purdue University will be even greater when our little swimmer gets to campus.

Call us at 800-677-8780 or email us at plangift@purdue.edu for more information.

This charitable gift annuity email is another excellent example of branding from Purdue. The reference to **boilers** reminds alumni of their affiliation with the university. The little swimmer girl's swimsuit was recolored by Purdue's graphic designers in the school colors as a further way to identify with alums and encourage them to give to **future boilers**. This email was sent to a list of 10,435 supporters and had an open rate of 25.81%.

A CHARITABLE BEQUEST IS AN EASY WAY FOR YOU TO HELP THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL.



A charitable bequest is an excellent way for you to leave a legacy and help further our mission. A bequest is also one of the easiest gifts you can make. Your estate planning attorney can include a provision in your will that leaves a lasting gift to us. It could be a gift of a specific asset, a dollar amount, or a percentage of your estate. A bequest could also be made from the residue of your estate or what is left after all gifts have been made to your heirs.

Please contact us to learn about all of the benefits of making a charitable bequest and how it can help us continue our important work.



**THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL**

Office of Gift Planning
University of North Carolina
at Chapel Hill
p: 1-800-994-8803
e: createalegacy@unc.edu
w: unclegacy.org

This is another charitable bequest eblast prepared by Crescendo for UNC Chapel Hill, similar to the Boys and Girls Club email shown earlier in the study. This email was sent to a list of 31,201 Chapel Hill supporters and had an open rate of 40.02%. The branding in this email is exceptional. The image on the left shows Kenan Memorial Stadium, UNC Chapel Hill's football stadium, with an image of graduates and the word CAROLINA. The image on the right is of **The Old Well**, a familiar campus landmark in the center of campus. Of course, the email also incorporates **Carolina Blue**, a color familiar to Tar Heel alum and basketball fans.

Engagement

ENGAGE AND THEY WILL RESPOND

Your donors want to be invited and encouraged to participate in your cause!

Does your marketing inspire your supporters to respond?

How can you use email to engage your supporters and encourage them to make planned gifts to your organization?

There are many effective ways to engage your supporters through email. Engaging emails use compelling images and verbs like **donate**, **visit** and **share**. Here are some ideas for engaging your supporters to take action and begin interacting with your organization.

SHARE WITH US!



This giving day promotional email sent from Saddleback Memorial Foundation received an open rate of 27.1%. Everything about this email says engagement. Notice the action words and phrases below each point—**donate**, **share** our link and **post** or **tag**. Each verb is used to motivate a different **sharing** action from supporters.

JOIN OUR LEGACY SOCIETY

SEATTLE UNIVERSITY.

» YOUR LEGACY MATTERS «

JOIN THE LEGACY SOCIETY TODAY

FOUNDED IN 1891
It now ranks #5 in the West. 

HAPPY ANNIVERSARY
In 2016-17 Seattle U celebrates its 125th year.

80% OF LEGACY GIFTS
are bequests by will. You can designate a certain amount of your estate to SU, or leave a percentage of your estate.

525 LEGACY SOCIETY MEMBERS
are already committed to securing SU's future.

MORE THAN 87% OF ALL UNDERGRADUATES
rely on scholarship and institutional aid to fund their education.

125th LEGACY CHALLENGE
Respond now to realize the benefits of Legacy giving!

MAKE A REAL IMPACT

We invite you to join the Legacy Society. As one of our most loyal donors, you understand the importance of Seattle University's legacy - for Jesuit education, this community, and for you personally.

The Legacy Society recognizes donors who have included SU in their estate plans. Legacy gifts come in many forms, including gifts by will, IRA beneficiary designations, and gifts of appreciated real estate, as well as charitable gift annuities and trusts. If you have already made these arrangements, or are interested in doing so, please let us know by clicking one of the gold boxes below!

Your legacy gift helps to ensure new opportunities for innovation, academic excellence, accessibility and outreach for the next 125 years. Your legacy commitment will support the vision President Sundborg, S.J. holds for SU to become the most innovative Jesuit university in the world.

125

Yes, count me in!

More information, please!

This email is focused on **joining** the legacy society at Seattle University. This email, which had an 18.37% open rate, was effective at achieving results because of the use of action buttons **Yes, count me in** and **More information, please**. The use of yellow and red is a mark of good branding that prompts recognition from supporters and alumni. The data provided on legacy gifts, legacy society members and students benefitted is compelling and aimed at motivating a response.

SAVE THE DATE

What types of planned giving seminar and webinar announcements by email get the best results?

Certain themes are used over and over again to market planned giving trainings on topics such as charitable bequests, wills, trusts and legacy planning.

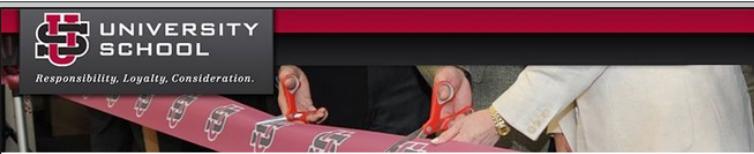
Do these ideas promote engagement?

The United States Air Force Academy Endowment sent this email to market a seminar to supporters on **planning your legacy**. The email was sent to a list of 1,031, and 402 recipients opened it, resulting in an open rate of 38.99%. Notice the button for **More Information** that invites action.

The image shows an email marketing template for the USAFA Endowment Legacy Seminar 2015. The header features the text "THE UNITED STATES AIR FORCE ACADEMY ENDOWMENT" above a blue background with a mountain landscape. The main title "Legacy SEMINAR 2015 COLORADO SPRINGS" is displayed prominently. Below the title, the text "SAVE THE DATE" is written in white. The body of the email contains information about the seminar: "USAFA Endowment Legacy Seminar" and "April 28, 2015 • Colorado Springs Marriott". A section titled "Planning Your Legacy" discusses estate planning. It includes a paragraph about the importance of an estate plan and a call to action: "Join us on April 28 in Colorado Springs, to hear from respected financial and legal advisors and learn about estate planning options that match your personal goals and wishes." A "More Information" button is located at the bottom of this section. The footer provides the address: "The USAFA Endowment 3116 Academy Drive, Suite 200 • USAF Academy, CO 80840 P: 719-472-0300 • F: 719-333-4194 • www.usafaendowment.org".

COMPLETE OUR ONLINE SURVEY

Sometimes a short textual message is all that is needed to produce strong results. Lutheran Social Services of South Central Pennsylvania used a simple, two-sentence, all-text email to promote a survey about their enewsletter, which resulted in an open rate of 19.75%.



Greetings!

I'm excited to present you with the questionnaire promised in the first installment of *News from The Headmaster's Club*. I hope you will take a moment to respond to the questionnaire and notify US of your future giving plans.

As I hope you know, The Headmaster's Club recognizes those alumni, parents and friends who have provided for US in their estate plans. The Headmaster's Club has continued to grow as one of the school's most prestigious recognition societies, thanking donors for their thoughtfulness in securing the long-term financial stability of the school. Membership in The Headmaster's Club is purely honorary, carries no obligations, and has no gift minimum. All are welcome!

Knowing many of you have made arrangements to support University School through your estate plans, I am hoping you may be willing to share those plans with the school by taking **30 seconds to complete the electronic questionnaire linked below** and let University School know of your intentions.

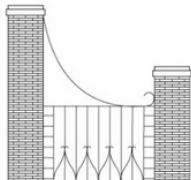
[CLICK HERE TO COMPLETE THE QUESTIONNAIRE](#)

University School made a significant impact on each of our lives. We can all point to a faculty member, coach, or fellow-Prepper who made a difference to us. Let's ensure the next generation of US boys learns Spanish from an El Díos, runs that millionth wind sprint for a Coach Molten or Coach Horner, and has a no-holds-barred chat with a Rowland McKinley. By including University School in your future plans, you honor the special relationships you formed at US and make a lasting contribution to US's long term prosperity. I hope you will take 30 seconds to fill out that questionnaire, and inform US of your plans.

Please join me in supporting US!

J.D. Sullivan '80
Trustee, US Board of Trustees
Chairman, US Gift Planning Committee

For more information or to discuss your particular planning questions, please do not hesitate to contact Lorie Hollington Smith, Director of Gift Planning, at lsmith@us.edu or 216-292-2142.



The Headmaster's Club



Periodically, planned giving charities survey their email list to assess their readership's preferences and make decisions to improve their contacts and services.

What difference does branding and color make to performance of survey emails?

This email sent by the University School to survey its Headmaster Club members about estate planning and gift intentions was sent to 6,453 people and had an open rate of 47.06%. Notice the colored link in the middle, which highlights how to begin completing

the questionnaire. The bold text emphasizes how quick and easy it is to complete the survey—it takes just 30 seconds.

VISIT OUR WEBSITE

Sending an email is an excellent way to introduce a new planned giving website. This email announces the launch of the newly redesigned Heifer Foundation planned giving website. Notice the use of bold to highlight the website address. The link to the video tour encourages recipients to check out the Book of Remembrance, donor stories and other features on the site. Ardyth Neill, President of the Heifer Foundation, said that this email has received positive comments: "We do expect it to generate conversations around giving options as we move into the end-of-year conversations and inquiries from donors."



The screenshot shows the Heifer Foundation website's homepage. At the top, there's a banner featuring a woman in a red dress standing in a field with hills in the background. The Heifer logo is in the top left corner, and a navigation bar with links for Press, Resources, About, News, and a search icon is at the top right. Below the banner, the text "HEIFER FOUNDATION" is prominently displayed in bold capital letters. A subtext explains that Heifer Foundation's mission is to give and help communities to support the work of Heifer International. It mentions various planned giving instruments like trusts, annuities, and bequests. Below this, a section titled "Create Your Own Legacy" is shown with four categories: W.I.L.L. SOCIETY, ENDOWMENTS, ANNUITIES, and TRUSTS, each with a small icon and a brief description.

Welcome to the NEW HeiferFoundation.org!

Heifer Foundation President Ardyth Neill introduces the refreshed **heiferfoundation.org** website. The new, easy-to-navigate platform features information about planned giving, estate planning, and other tools you can use to create your legacy. Let the Book of Remembrance and amazing donor stories inspire you to share your own Heifer story.

In this video, Ardyth talks about how the new site can better help you leave a legacy. Click the image to watch.



A portrait of Ardyth Neill, the President of the Heifer Foundation. She is a woman with short brown hair, wearing glasses, a dark blazer over a blue top, and a necklace. She is smiling and looking towards the camera. In the background, there are trees and a body of water.

Click here to take a look around the new website!

Personalization

EMAILS WITH COMPELLING SUBJECT LINES GET MORE OPENS

Are you maximizing use of subject lines to increase email opens?

What email subject lines produce the best results for planned gifts?

Our research shows that email subject lines drive open rates and web conversions. Subject lines create a first impression. They should be short and enticing so that email recipients are compelled to open the message and learn more. Personalizing the subject line (adding **you** and/or the **recipient's name**) and A/B testing (of the best subject lines) are other best practices that can increase the performance of an organization's planned gift marketing emails.

SUBJECT LINES

This email was sent in December of 2014 by Goucher College to a list of 1,485 supporters and had an open rate of 39.39%. The subject line read "Breaking News: IRA Rollover Extended." This email had a high open rate because it sent a strong message—this is newsworthy information and supporters should act quickly—and the message was one uniquely targeted to the recipients. The phrases "Don't delay!" and "Contact your IRA plan administrator right away" point to the urgency of the action required. Notice the use of bold type to highlight the rollover and expiration date. Goucher's Office of Gift Planning received 13 gifts as a direct result of this email.

The image shows a snippet of an email from Goucher's Office of Planned Giving. The subject line is "Planning Notes". The body of the email starts with "From Goucher's Office of Planned Giving". It features a section titled "Charitable IRA Rollover Extended!" which contains text about the Senate passing a bill extending the IRA Charitable Rollover. Below this, there is another section with text about taking steps now to put the rollover gift into action. At the bottom, there is a call to action: "If you're interested, please don't delay! Contact your IRA plan administrator right away. You may also call us at 800-619-7564 or [email us](#) for more information." The Goucher logo is at the bottom right.

Planning Notes

From Goucher's Office of Planned Giving

Charitable IRA Rollover Extended!

Yesterday the Senate passed the House bill creating a one year extension of the **IRA Charitable Rollover!** That is big news! The extension is retroactive to January 1, 2014 but the rollover will once again expire on **December 31, 2014**. The bill must now be sent to the President to sign the extension into law.

While this may take a few days before the IRA charitable rollover officially becomes law, you can take steps now to put your IRA rollover gift into action.

If you're interested, please don't delay! Contact your IRA plan administrator right away. You may also call us at 800-619-7564 or [email us](#) for more information.

GOUCHER | college

Personalization



The image shows a group of dancers performing a synchronized routine on stage. They are captured in various stages of their movements, some leaping and others in more grounded positions. The lighting is dramatic, with strong highlights on the dancers and a dark background.

UCIRVINE | Claire Trevor School of the Arts

Dear John:

With year-end around the corner, consider some options that may help you with your tax liability and support the University.

Time is Running out!

Charitable IRA rollover, if you are 70.5 or older and have a traditional IRA, consider using your IRA to support charity. You fulfill your required minimum distribution and (if done correctly) you won't have to claim the distribution in your taxable income.

Looking for additional income? Consider a charitable gift annuity or charitable remainder trust. Not only will you receive an income in exchange for your gift, you will also receive a charitable income tax deduction.

Contact Erin K. Ball to find out more.
949.824.8750

www.arts.uci.edu

With so many emails sent to market the IRA charitable rollover when it was in effect over the last three years, we thought it would be interesting to analyze the open rates of these emails based on the subject lines used. This end-of-year gifts email sent by UC Irvine School of the Arts had an open rate of 31.34%. It covered both the IRA charitable rollover and life income gifts. Notice the **Time is running out!** message and the use of bold and underlines to emphasize year-end giving options.

Personalization

Here is a sampling of the top-performing charitable IRA rollover email subject lines used by our clients. This analysis is interesting because it illustrates the type of language that supporters respond to and read and also language that may not be as compelling when marketing IRA rollover gifts in the future:

Special Announcement: IRA Charitable Rollover Signed!
ACT NOW! IRA Rollover Extended Through December 31
The IRA Charitable Rollover Is Back
Take Advantage of the IRA Rollover Extension
by December 31
Special End-of-Year Bulletin: IRA Rollover Passes
IRA Charitable Rollover Passed! Act Now for
a Matching Opportunity!
IRA Charitable Rollover Legislation Passed
The IRA Qualified Distribution Is Back for 2014
Special Message—IRA Rollover Reinstated
The IRA Charitable Rollover Has Passed. Act Now.

The subject lines with the highest open rates point to something **special**, **newsworthy** and **urgent**. Some use exclamation points and capital letters to make a point. It's interesting to note that subjects that focused on the tax benefits of making a rollover gift did not perform as well:

Reduce Your Taxes with an IRA Gift
Tax-Free Gifts to Charity with IRA Rollover
until December 31

Subject lines with little or no explanation were the lowest performers:

IRA Rollover—Planned Giving

Conclusion

How you use email—what you say and to whom—makes a difference in marketing. We hope these examples give you some ideas of effective ways to reach your supporters through email and engage them in a conversation about planned gifts.

If you have questions about any of the ideas presented in this study or wish to learn more about using email for good, please contact us. We wish you the best of success in your email marketing!

Authored By:



INTEGRATED MARKETING FOR PLANNED GIFTS

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