

## Legacy Giving Group

The Legacy Giving Group is a proven partnership between two of Canada's leading fundraising organizations – Strategic Communications Inc. (Stratcom) and Hewitt and Johnston Consultants (HJC).

**In** collaboration with other best practice partners, we have designed a targeted and thorough new approach to marketing planned giving - one that is designed to solidify existing bequests expectancies, and generate momentum and success in obtaining new ones.

Our approach employs a synergy of proven fundraising techniques and has resulted in a track record of success. We can translate the enormous reservoir of good will, passion and intensity of your supporters into an extraordinary financial resource to meet future needs.

### The **Legacy Giving Group** offers a unique planned giving approach in a number of ways:

- ▶ It is research-based and donor/member-centred.
- ▶ It's a logical and intelligent way to invest appropriately in the fastest growing area of fundraising today.
- ▶ It is highly flexible and readily tailored to fit your capabilities, budget and culture.
- ▶ It synergizes elements of professional market research, planned giving, major gift fundraising, direct response marketing and new media.
- ▶ It brings structure, organization and direction to a planned giving program.
- ▶ It is focused on the motivation to make a planned gift rather than the (often confusing) mechanics of the various legal and tax-savings vehicles available.
- ▶ It ensures that your best opportunities for substantial planned giving are identified, cultivated and have regular follow up contact—something in-house efforts seldom have the resources to do.

The elements of the legacy approach are tried and true. What's new is our combination of research, direct response marketing, new media and ongoing support to both the charity and its donors.

The Legacy Giving Group is always looking for improvements to our survey approach and we think we've come across an important new addition. We've discovered a way to find major gift and middle donor leads at the same time we find you legacy donors.

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## The Pillars of the Legacy Giving Group System

While our tactics can be very flexible to meet your requirements, the Legacy Giving Group is built upon two key strategic pillars:

### **Touching the heart—Stirring the soul.**

The Legacy Giving Group's focus is on the 'why' rather than 'how' of planned giving. In other words, it is designed to get your donors to the point where they are motivated to make a bequest. Once the motivation is there, the details can be managed—either in-house or with our assistance.

### **The focus is on bequests.**

Ninety percent of all planned giving revenue comes from donors' wills. The Legacy Giving Group System is designed specifically to bring your donors to the decision to include your organization in their wills. We think that many planned giving programs actually confuse donors with lengthy explanations of charitable remainder trusts, gifts of securities and gift annuities. The Legacy Group keeps it simple for the donor—and makes it easier to get to "Yes."

## How It Works

Outlined below is a description of the full program for bequest identification and solicitation. It can and should be tailored to meet the particular needs of your organization and fully integrated into your existing planned giving efforts. We would work collaboratively with your team to ensure that it is integrated into your existing planned giving efforts and overall fundraising strategy.

### Phase 1 Research

We believe that effective fundraising is built on a solid research base. So we start with data analysis to determine which donor segments are most loyal to your mission and programs. Once we have identified planned giving prospects, we conduct focus groups to determine the best way to position a planned gift case for support.

The final step in the research phase is one of the most important elements—contacting prospects by telephone and utilizing a sophisticated and scored questionnaire along with analytical techniques—to discover those with the highest capacity and highest propensity to make a bequest gift.

**At the conclusion of the research phase, we will have determined:**

- ▶ Which segments of your donor file have the highest propensity to upgrade to a bequest

- ▶ What arguments, messages and messengers are most persuasive with them
- ▶ Which individuals within the prospect segment are actually the most likely bequest donors

where prospects feel they are a part of the family in a way that opens up bequest potential.

### Phase 2 Cultivation

Once we know which donors are your best prospects and how they can be best communicated with, we concentrate on the best prospects utilizing detailed information gathered to guide a highly personalized relationship.

We test the most promising prospects with customized direct mail and phone cultivation appeals. The overall goal of the cultivation stage is to bring the bequest prospect to the point

### Phase 3 Solicitation

Once the cultivation strategy has been executed, we utilize phone and mail to solicit prospects' support. Tone and language are critical and "the ask" needs to be made in the most appropriate manner.

The Legacy Giving Group offers an innovative, proven way to generate legacy revenues in an effective and efficient manner. It is designed to say the right things to the right people in the right way—and ultimately generate bequest donations. Our approach generates bequests, expectancies and prospects that can be stewarded and cultivated for years to come.

Interested in more information? We'd be happy to meet with you for a non charge consultation on how this program can benefit for your organization. Just give us a call.

## About Us

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Strategic Communications Inc. (Stratcom) is an innovative Canadian consulting firm founded in 1991. Stratcom specializes in services to enhance the effectiveness of Canada's NGOs and unions, offering services in the fields of opinion research, communications, and campaign strategy.

We have full-service offices in Toronto, Vancouver, Ottawa, London and over 20 years of experience as a key Canadian leader and innovator in communication techniques for the non-profit and political sectors.

[www.stratcom.ca](http://www.stratcom.ca)

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