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Page 2: Tell us who you are!

Q1 Contact Information

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Page 3: Award Categories

Q2 Select a category. **Philanthropy**

Page 6: Philanthropy

Q15 Project Title

Centennial Planned Giving Campaign

Q16 What was the overall goal of project, problem it sought to solve or opportunity it sought to leverage? (suggested word count 100-250)

In 2017 Wisconsin Public Television (WPT) celebrated the centennial of the founding of public broadcasting, launched by the first broadcasts of what would become Wisconsin Public Radio. Knowing that we had an opportunity to focus our fundraising efforts in a centennial campaign, we determined on an ambitious goal of securing 100 new planned gifts in the centennial year. For each bequest to be eligible to be counted toward the campaign goal, it would have to be documented by a Letter of Intent (LOI) signed by the donor(s). The LOI is a non-binding document but serves as a tangible expression of commitment by the donors. LOIs from existing Heritage Society (our society for planned giving donors) members, that were previously undocumented, would also be eligible for counting toward the campaign goal.

This campaign was designed to respond to the tremendous opportunities currently available through planned giving. Planned gifts are a great philanthropic vehicle for a large segment of the population at this point in time. And WPT had already spent years in building awareness of planned giving with viewers and members. Dating back to the early 1990s, the planned giving program at WPT has seen steady growth, but always with the sense that there was substantial room to continue to grow. From 1992 to 2016, planned giving efforts resulted in a total of 140 documented bequests, or an average of 24 documented intentions per year. Seeking 100 bequests, backed by a signed LOI, in a single year was an aspirational challenge.

Q17 Describe the activity, what it achieved, and why it was successful. (suggested word count 200-400)

Prior to the campaign, encouraged and supported by our board to make further investments in planned giving, we had restructured our Planned Giving team to include two full-time positions focused on planned giving – a development officer and a back-of-house strategist – working alongside a major gifts team and supported by development leadership. This structure maximized the time and focus of the Planned Giving Manager with donors, allowing her to travel the state, deepen relationships, and set the tone for the campaign. Simultaneously, the Associate Manager handled the administrative side of the project: managing the prospect pipeline, advancing the documentation, and enabling the manager to be on the road as much as possible.

The Planned Giving team's campaign capitalized on increased communications and visibility, with clearly written materials, a strong website presence, new :15, :30, and :45 on-air spots introducing audiences to planned giving and the Planned Giving Manager, and three longer :60 spots highlighting donors in different stages of their lives to show the breadth of those able to make a planned gift.

The communications incorporated a cross-platform approach including:

1. On-Air Spots: In-house productions of donor stories, memorials, and messages from our Manager of Planned Giving. These spots run throughout the year and are increased during National Estate Planning Awareness week (NEPAC) in October.
2. Self-identifying opportunity mailings: Annual Membership survey sent to over 60,000 households; NEPAC mailing sent to 5,000 households; Heritage Society Buckslip sent with all membership acknowledgements.
3. Online: Three branded e-blasts during NEPAC week; on-going use of the Crescendo Planned Giving website tools including a weekly e-newsletter, and regular requests for our 'Wills Guide'.
4. Events: Two planned giving seminars; 18 locally produced program screenings at area retirement communities; annual donor event; special events such as Antiques Roadshow Green Bay, with each event featuring branded PG materials and with PG staff present.
5. Recognition: Annual Report; new Heritage Society member list and donor profile in a bi-annual donor newsletter; full list in the September Airwaves Guide.

This increased visibility, along with data-driven prioritization of the best prospects and using the LOI as a relationship building tool rather than a hard ask, were all keys to the campaign's success.

2018 Development Awards - Application Form

Q18 Tell us any metrics or benchmarks that show the success of project. Please consider quantitative and qualitative data. (suggested word count 100-250)

- The 100 planned gifts goal was exceeded, securing 118 documented bequests in calendar year 2017 -- more than the previous 10 years combined (116 during that time).
- Of the 118 LOIs, 46 donors disclosed an estimated gift amount, totaling an estimated expectancy of \$2,734,500.
- An additional 36 donors disclosed that they are leaving a percentage of their estate to WPT with an average percentage of 22%.
- During our centennial year we received our largest bequest to date: a gift of over \$1.2 million. We also received our smallest – a gift of \$50 from the estate of a long-time donor.
- From 1992-2016 WPT averaged 24 bequests per year. The centennial effort saw an average of 9 bequest LOIs per month.
- To date in 2018 we have secured an additional 19 LOIs, for a total of 277 LOIs on file.
- Our current estimated planned giving expectancy is \$7,158,500 with an average estimated bequest of \$25,936.

Q19 Tell us how the project leveraged national or local content (primetime, KIDS, pop-out, etc). (suggested word count 100-250)

Our Heritage Society donors love a wide variety of programming, often describing an evening spent watching whatever we're showing... be it local content, national programming or even pledge drives. In all of our conversations we discuss the programs they love and how their gift of support will perpetuate those programs for future generations.

National and local program imagery and titles are incorporated into our marketing materials and on-air recognition spots, including an informational Heritage Society and planned giving vehicles booklet, an introductory Heritage Society brochure, and a buckslip inserted into all membership acknowledgement letters introducing the Planned Giving Manager and a simple request for information.

Q20 Do you have any supporting materials or items to upload? (optional) **No**

Page 11: Tell us what you thought!

Q32 This year, we've created an online form to streamline the application process. Please tell us what you thought. **Not sure**