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Q1 Contact Information

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Q15 Project Title

Gift Planning Marketing Communications

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

As the philanthropic community in Southern Nevada continues to experience strength and gift reliability, Vegas PBS, in 2016, had the opportunity to expand its gift planning program to further identify and cultivate legacy gift prospects.

Over 21 years ago, Vegas PBS established its first Planned Giving Council in attempt to cultivate a group of trained professional estate planning volunteers to assist with the cultivation and confirmation of planned giving donors. The council operated for a period of 8 years without a full-time staff member assigned to gift planning responsibilities.

For the last 13 years, a staff member has provided support to the Planned Giving Council and during this time the return on initial investment of the volunteer-based Planned Giving Council has begun to experience the benefits of relationships established in years prior. In the first 18 years, just over 2 million dollars in principal was generated for the station's endowment. In fiscal year 2017, over \$500,000 in planned gifts were realized. Fiscal year 2018 has gift expectancies anticipated to exceed \$1 million.

Given the long-term revenue potential from planned giving efforts that were initiated in the first 19 years of the program, it was deemed wise to invest further concentrated marketing efforts to intentionally cultivate additional legacy gifts. Efforts were focused on current supporting members with 10 years or more of continuous giving. To best cultivate current members, a variety of marketing communication tools had to be initiated.

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

Prior to 2016, community seminars resulted in an average attendance of 15 members per seminar. Seminars were offered starting in 2013, and through 2015 only 4 seminars were offered per year. In 2016 the community seminar program grew to 8 seminars per year through differentiated seminar topics and targeted marketing communications. That number grew to 10 in 2017.

Previously, not all areas of marketing support had been activated to maximize communication with current members. In-house branding was improved to ensure that the monthly ad in the membership magazine included the same design elements of style and color that were also included in the on-air 30-second voice over. The same content was reflected on the station's Planned Giving Council blog page and within the emails sent to the general membership.

Events began to grow, reaching just under 40 attendees. During 2016, a targeted list of members and viewers who self-identified their interest in planned giving was refined to ensure that future targeted communications were received by those with interest in the content. We did not want to exhaust members who did not have an active interest in leaving a bequest to the station.

In 2017, marketing efforts continued to strengthen with the addition of video messages included in our emails. Online trends indicate that users are searching for videos with the information they are seeking. As such, our blog page also included a video message to reflect the text portion of the content. Visit <https://www.vegaspbs.org/bequests/planned-giving-events/> to review our online blog and broadcast video message.

Further expansion in 2017 resulted in the additional community seminars being hosted such as Pet Trusts, Retirement Tax Topics, and Life Long Income Planning, just to name a few.

The growing attendance at each seminar forced us to alternate room locations on our campus so that we could accommodate the growing crowds. Currently, we host our seminars in Vegas PBS' Studio B as we began receiving more than 100 attendees at many of our seminars, especially those pertaining to wills and trusts.

The studio location in and of itself acts as a cultivation tool as it enhances the experience of coming to a television station and creates psychological ties between gift planning and Vegas PBS by virtue of this "insiders" location.

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

In 2016, our list of known planned giving intentions reflected 88 members in Southern Nevada, which includes the four southern counties and just over 700,000 households. At that time our membership reflected under 15,000 members. Over the next two years, we experienced additional growth of our total membership that now exceeds 17,000. Membership in our planned giving society has grown to 154 individuals who have identified their legacy gift intentions in support of the station. Moreover, in early 2016, a targeted list of members and viewers interested in planned giving was narrowed by applying more predictive criteria including event attendance and information requests. To date, this list now includes over 1,300 individuals who are responsive to information provided by mail, phone and email.

With the growth of our community planned giving seminars, external organizations have expressed interest in the targeted group that we have developed. In partnership with the Vegas PBS corporate sponsorships team we were able to monetize and secure sponsors of this program for 2018.

Sponsors are not only recognized at events and receive the opportunity to engage with the audience, but as added value, on-air recognition bookending programs of like content was also provided. Sponsors' dollars have off-set the costs of event supplies such as seminar information packets and a full lunch for all attendees.

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

We leverage the potential relationships between Planned Giving council members and potential donors. Content produced in association with our planned giving efforts includes messages from our council members. Council members receive the opportunity to record messages pertaining to tax filing season, year-end giving as well as recording a holiday message with their families to air on broadcast television. This is an additional marketing effort that allows our viewers to get to know our planned giving council members.

Council members present at each of our community seminars. The visibility through on-air, email and blog posts allows our members to form a connection with our council members. Members associate the level of brand trust that they have with PBS with the council members whom we stand behind. As trust increases, conversations between members and council members begin and more gifts are secured to ensure the sustainability of Vegas PBS.

Q20 Do you have any supporting materials or items to upload? (optional) **Yes**
