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**COMPLETE**

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Page 2: Tell us who you are!

**Q1** Contact Information

Name	<b>Alysha Fisher</b>
Title	<b>Major and Planned Giving Officer</b>
Station	<b>WCMU Public Media</b>
Email	<b>alysha.fisher@cmich.edu</b>
Phone Number	<b>989-774-1540</b>

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Page 3: Award Categories

**Q2** Select a category. **Philanthropy**

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Page 6: Philanthropy

**Q15** Project Title

Ducks in a Row – Estate Planning Awareness Campaign (NEPAC)

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

We had three primary goals for this campaign. 1. Educate our audience on the importance of estate planning. 2. Uncover potential planned giving prospects. 3. Identify individuals that have already included WCMU Public Media in their estate plans.

Our major and planned giving program is relatively new. We are taking great strides to define all aspects of the program. This campaign specifically allowed us to lay a foundation for planned gifts by building a pipeline of potential prospects and an internal culture that values planned giving.

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## 2018 Development Awards - Application Form

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

WCMU partnered with PBS on this campaign. Our station had to apply and be selected to participate. PBS oversaw the development of the campaign theme and brochure creation. It was up to each selected station on how to use the provided materials. We made the strategic decision to participate to the fullest extent possible in order to foster a new, vibrant planned giving program at the station. We used the following activities to achieve this success:

- Direct mail piece with reply device to approximately 5,000 households. These names came from our existing membership database. Reply options were: request an educational brochure, indicate if you wanted more information on leaving WCMU in your estate plans or indicate that you already had left WCMU in your estate plans.
- Developed a dedicated web page to answer questions and collect prospect information.
- We are a joint licensee with PBS Television and Music/NPR radio stations. For the entire month of October we ran flights on both TV and radio highlighting the campaign and directed them to the web page or contact us directly.
- Sent out a series of emails to our entire email list (45,000 emails) featuring the Ducks in a Row campaign and encouraging people to get more information.
- Sent a letter to estate planning and trust attorneys in our viewing/listening area to educate them on the campaign.
- Featured the campaign in our program guide (mailed to 14,600 homes) and in the carousel on the station's home web page and a banner ad on various sub-pages on the site.
- Press release was sent to all media contacts in viewing/listening area.

We saw a 947% growth in response rate from the previous year's campaign. Though the partnership with PBS and the Ducks in a Row campaign technically ended in October, we have continued to leverage the goodwill created by the initial campaign and it is now the cornerstone of our planned giving program. We continue to receive replies in the mail and calls for more information. Because of the continued interest, and our goal to capitalize on the original response, we are hosting an estate planning seminar in May. This will be a first for our station and we intend to travel our extensive viewing/listening area to hold more in the near future.

In the end, we believe the real success of the program was the connections we have been able to make with donors, the staff's understanding of the value of planned giving and the leads generated to document future planned gifts.

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

This was the second year WCMU participated in this campaign. The first year we had 46 households request brochures. This year we had 436 households request brochures. Of the 436, 57 people requested more information on leaving WCMU in their estate plans and nine indicated they have already left WCMU in their will.

In addition to mailing our constituents, we also sent an informational letter to estate planning/trust attorneys to offer them a copy of the booklet. We had 12 requests for the booklet from this group and several applauding our efforts.

WCMU was a recipient of a campaign award from PBS: "On-Air Excellence Award". We had 173 response from our TV spots. We have new planned giving leads and high hopes to turn these leads into documented gifts. We were very pleased with the return on our investment.

Since the end of the October campaign we have been able to document 3 planned gifts with donors totaling \$2,025,800. We are in the process of documenting additional planned gifts. After the May seminar, we anticipate further commitments.

## 2018 Development Awards - Application Form

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

We would not be where we are today in our planned giving efforts without participating in the PBS Ducks in a Row national campaign. With the resources provided, the guidance offered, and our full commitment to utilizing the tools, we have laid the foundation for long term planned giving success.

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

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Page 10: Additional Items

**Q31** Please upload all materials as a single document.

**WCMU Supporting Materials.pdf (531.8KB)**

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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. **The online form was helpful**

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**Q33** The Development Awards are a key annual project of the Development Advisory Committee (DAC). Please let us know how else the DAC can serve you, your station or the system as a whole.

I found the online form to be simple. My only wish is that I could have uploaded more than one document. I would have loved to share our TV and/or radio spot as well as some other supporting materials.

Thanks for all you do!

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