

The Donor Experience Unlocks the Future of Your Legacy Relationships

@donorguru



LYNNE WESTER

DONOR RELATIONS GURU



For the first time ever, charitable giving exceeded the \$400 billion mark in 2017, spurred by growth from all four sources of giving.

\$410.02 billion

Where did the generosity come from?*

Giving by Individuals ↑ 5.2% **70%**
\$286.65 billion

increased 5.2 percent (3.8 percent when inflation-adjusted) over 2016

Giving by Foundations ↑ 6.0% **16%**
\$66.90 billion

increased 6.0 percent (3.8 percent when inflation-adjusted) over 2016

Giving by Bequest ↑ 2.3% **9%**
\$35.70 billion

increased 2.3 percent (0.2 percent when inflation-adjusted) over 2016

Giving by Corporations ↑ 8.0% **5%**
\$20.77 billion

increased 8.0 percent (5.7 percent when inflation-adjusted) over 2016

Contributions by source (by percentage of the total)

Giving by individuals increased \$14.27 billion over last year for a growth rate of 5.2 percent, on track with the growth in total giving.

Visit www.GivingUSA.org to learn more and to order your copy of *Giving USA 2018: The Annual Report on Philanthropy for the Year 2017*.

Giving to arts was the second-fastest growing subsector, with an 8.7 percent increase over the previous year to a total of \$19.51 billion in 2017.

Giving to foundations increased 15.5 percent in 2017, the largest gain of any subsector, far outpacing the growth in total giving.

Where are all of the charitable dollars going?

(as a percentage of the total)

The 6 largest subsectors all grew in 2017, but growth rates ranged widely from 2.9 percent all the way to 15.5 percent.

-  **31% Religion**  \$127.37 billion
-  **14% Education**  \$58.90 billion
-  **12% Human Services**  \$50.06 billion
-  **11% To Foundations**  \$45.89 billion
-  **9% Health**  \$38.27 billion
-  **7% Public-Society Benefit**  \$29.59 billion
-  **5% Arts, Culture, and Humanities**  \$19.51 billion
-  **6% International Affairs**  \$22.97 billion
-  **3% Environment/Animals**  \$11.83 billion
-  **2% To Individuals**  \$7.87 billion

Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.

AVERAGE

46%



FIRST-TIME

23%



REPEAT

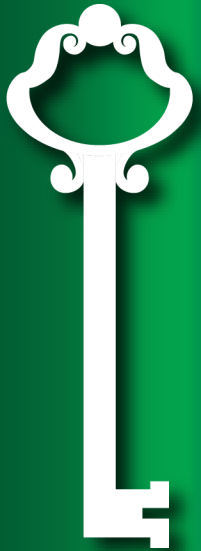
60%



MONTHLY

90%





*Start every board
meeting by having your
Board of Directors write
thank you notes.*

LYNNE WESTER
@DONORGURU

878-72

878-72

Text Message
Today 11:54 AM

Thu, Aug 31, 12:28 PM

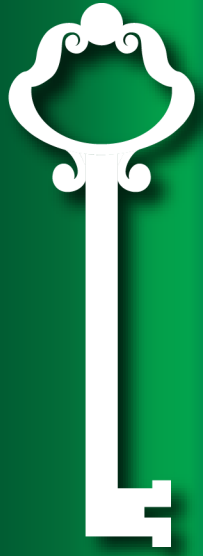


Team Rubicon's water rescue teams are in Houston conducting search and rescue. YOU made this possible. THANK YOU!

Team Rubicon lifesaving operations continue in Houston. Three of our floodwater rescue boat crews completed 42 rescues of survivors yesterday. You made that possible. Thank you.



Situation Report: Dozens of Residents Rescued | Team Rubicon
www2.teamrubiconusa.org



Hi Lynne,

My name's David Burke. Like many on our team, I started as a volunteer, quickly realized the tremendous impact Team Rubicon was having and joined full-time as Director of Field Operations. Back in July of 2015, we were responding to the devastating floods in Texas. More than 100 Team Rubicon members from across the country deployed to help those in need. One of those was Lissie Hagerman, an Air Force veteran.

Lissie came to help Texans in need, but ended up finding something much greater.

I knew to expect devastation and hard work. What I didn't expect is the confluence of events that places me with an incredible team already dispatched and ready to meet the challenges of the day. A marine, a soldier, two airmen, and a civilian, ready to muck and shuck all kinds of debris. We know exactly where we're headed, confident in the assurance that we can make a difference in the lives of these people who we encounter during our recovery ops. In a single day, we've managed to become brothers and sisters.

LISSIE HAGERMAN
USAF Veteran

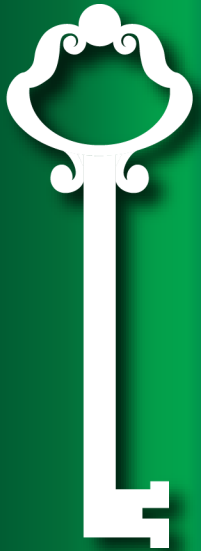
 **TEAM
RUBICON**



Through Team Rubicon, tens of thousands of veterans like Lissie have found that community in service. And with donors like you and the [Support Squad](#), we'll be able to continue to engage veterans and first responders in building community.

Thanks for helping us on our mission,

David Burke
Director of Field Operations



Disasters are our business.
Veterans are our passion.

Let us know how you want us to report impact. Examples of the kinds of communications we plan to send include: Situational Reports, photos and videos from the field, key stats, an After Action Report, our budget and breakdown of cost.

1. How frequently would you like a situational report?

Weekly



2. Which are your preferred channels?

- Text (don't worry, we won't send at strange hours)
- Email
- I'm old school, send me a printed report

3. What content is most meaningful to you?

- Photos
- Videos
- Homeowner and veteran testimonials
- Breakdown of our budget: revenue and cost
- After Action Report

Hi Lynne,

I joined Team Rubicon in 2014 because I was lacking direction in my life. After leaving the Marines, I couldn't find that same purpose or drive in civilian life.

But after my first service project with Team Rubicon, I knew I had found exactly what I was looking for.

My journey within Team Rubicon has taken me from a volunteer to regional manager to Clay Hunt Fellow to a full-time staff position as the Region II Administrator. I've deployed to help those affected by earthquakes in Nepal and Hurricane Sandy in New Jersey.

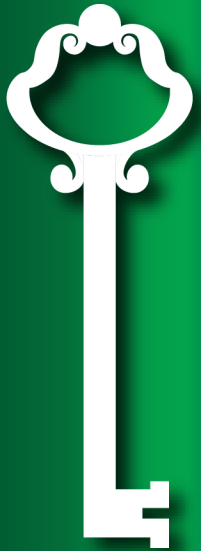
I'm not great at talking about myself, so I figure this video is a better way to share my story with you.



My experience with Team Rubicon is not unique; there are tens of thousands of veterans and first responders who find the same sense of purpose, community, and identity that I have found in joining this new mission.

I hope you'll join the [Support Squad](#) to help engage more folks like me in Team Rubicon. \$11 a month isn't always easy, but you are making a tremendous impact on our veterans and the lives of those affected by disasters.

Jon Connors
Region II Administrator



Hi Lynne,

Thank you for being a committed member of the Support Squad and for allowing our volunteers to respond to disasters without delay! Team Rubicon would love to show our appreciation by sending you an exclusive Support Squad t-shirt.



All we need from you is to fill out [this form](#) for sizing. Once we have this information, you can expect your Support Squad t-shirt in the mail within 2 weeks!

Best,



Just like that, with the click of a button,

your *generosity*
is changing a life.



► USE LIFE STAGES TO GUIDE MARKETING

Age is One of the Most Important Data Points



Ages 30-39

- 59% say they will make a planned gift
- Main reason they have not done so is because they haven't been asked to do it
- Ethnic minorities are more abundant in this group of future planned givers
- **Marketing:** Introduce to planned gift concepts



Ages 40-49

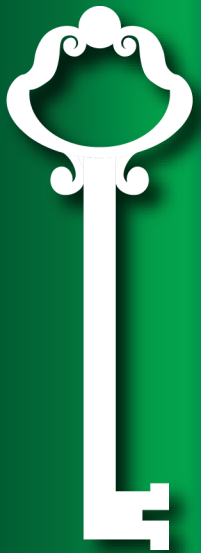
- Cash donors to charity but may have lowered amount
- Also say they will make a planned gift but that they haven't been asked to do it
- Consider 5-10% of their estate an appropriate gift level
- **Marketing:** Bequests and Beneficiary Designation Form Gifts



Ages 50-59

- Are current cash donors to charity
- Are less inclined to consider a planned gift at this life stage
- Paying off debt
- Thinking of the grandchildren
- **Marketing:** Bequests, Beneficiary Designation Form Gifts and Charitable Remainder Trusts

* Stelter Donor Insight Report: *Age Differences in Planned Giving*, 2009



► USE LIFE STAGES TO GUIDE MARKETING

Age is One of the Most Important Data Points



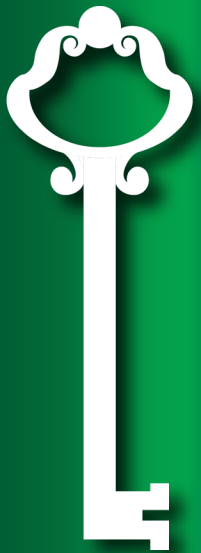
Ages 60-69

- Are current cash donors to charity
- May have received an inheritance
- Are familiar with the term "planned giving"
- More likely to leave estate to family and friends
- **Marketing: Bequests, Beneficiary Designation Form Gifts, Charitable Gift Annuities for Parents and Dependents and Deferred Charitable Gift Annuities**



Ages 70 and Older

- Income is at its lowest
- Have received an inheritance and plan on leaving one
- Least likely to change their estate plans or include a new charity in existing plans
- More likely to leave estate to family and friends
- **Marketing: Beneficiary Designation Form Gifts, Immediate Charitable Gift Annuities and Contingent Gifts**
- Urge this group to notify you of their planned gift, if one exists



ONLINE GIVING BY GENERATION

Donors 66 and older are now just as likely to make their contributions to charity online as younger donors, according to a US Dunham+Company/Campbell Rinker study.

59%

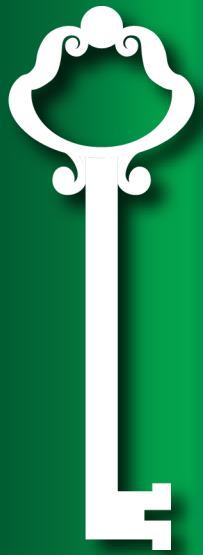
of donors 66+
give online

Only 29%
said they
gave
online in
2010

60%

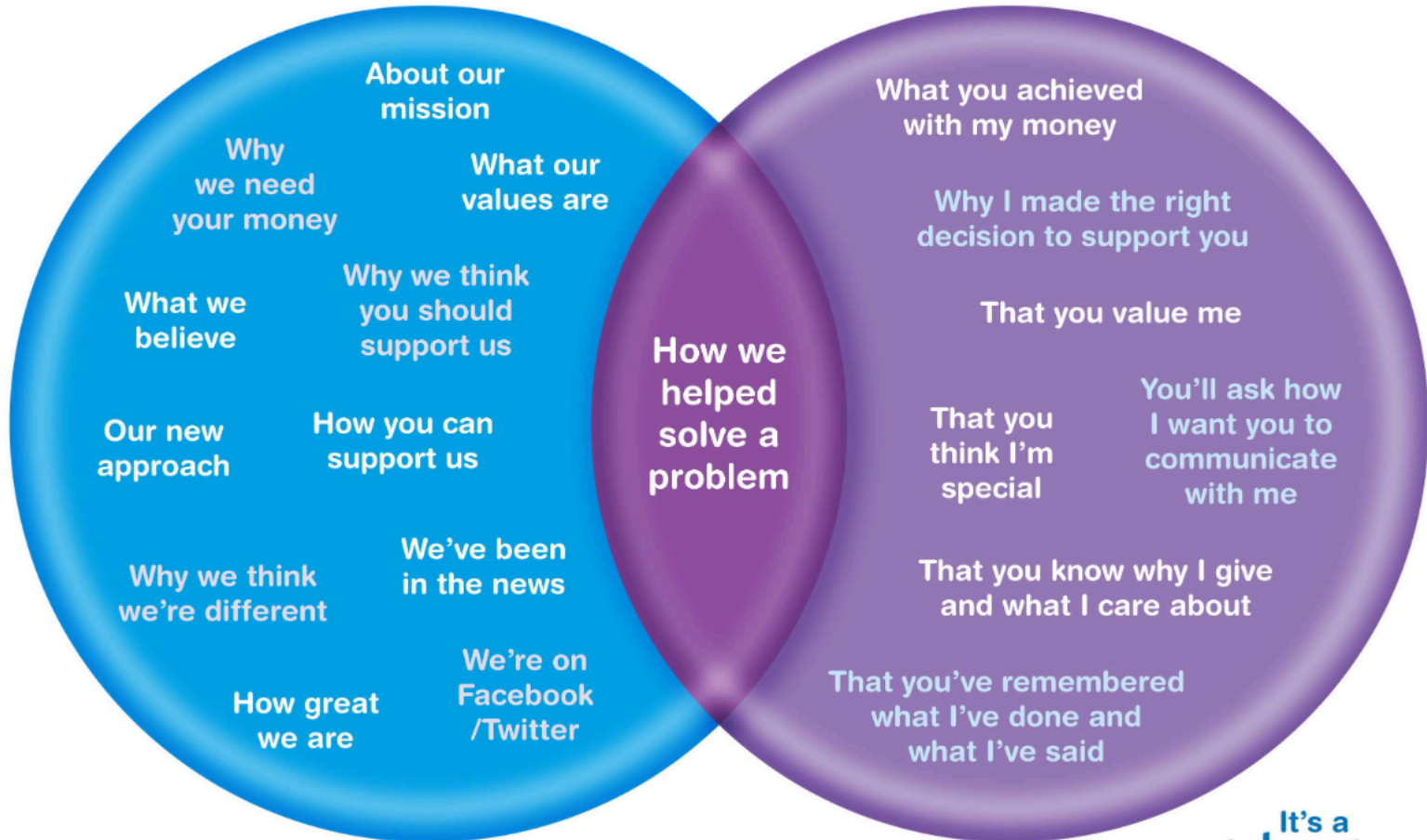
of donors <65
give online

60% said
they gave
online in
2010



Things that a charity wants to tell a donor

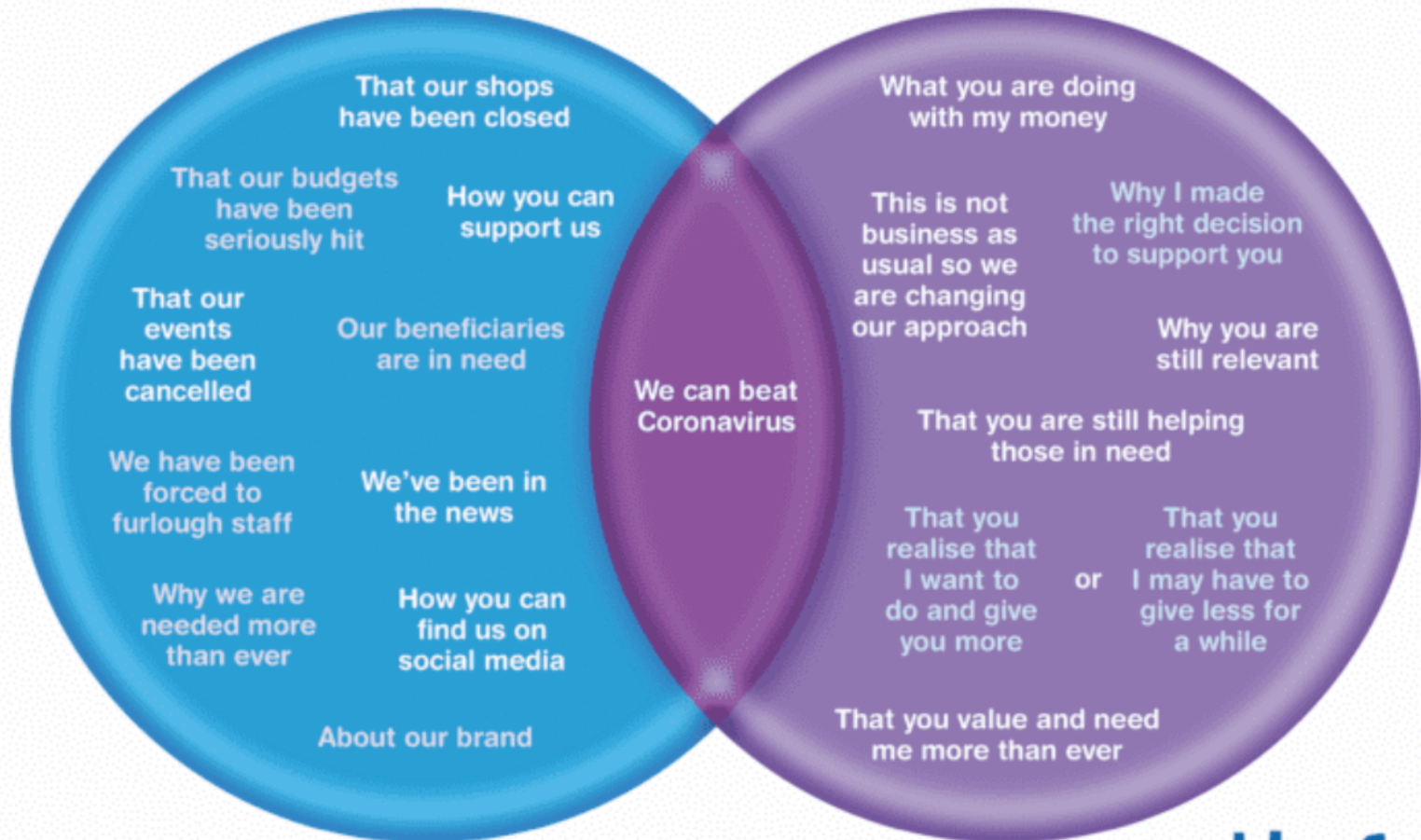
Things that a donor wants to hear from a charity



COVID 19 Edition

Things that a charity wants to tell a donor

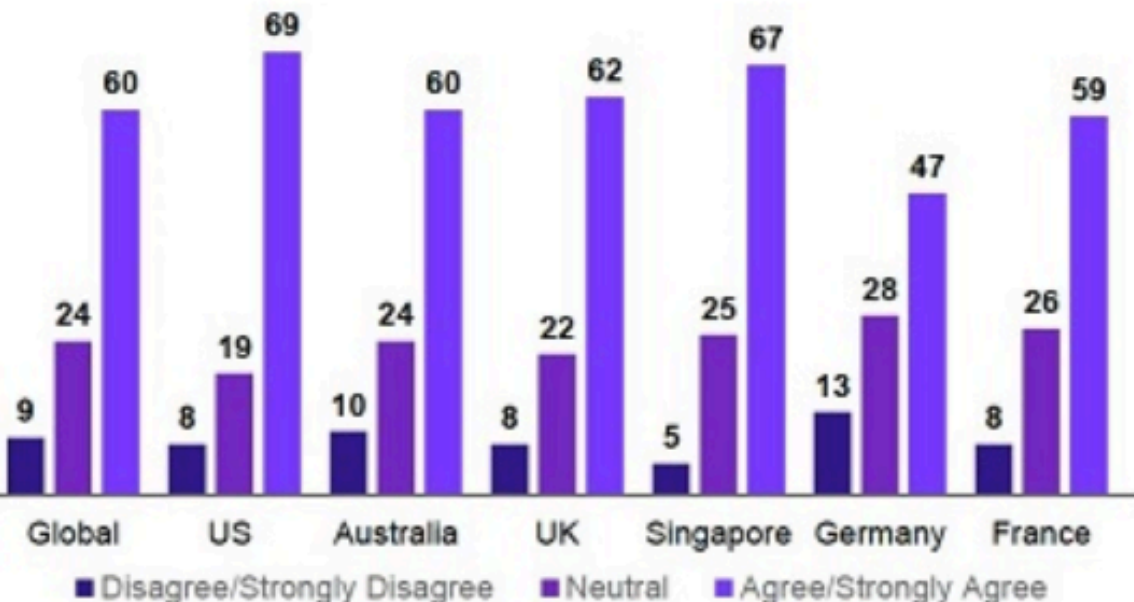
Things that a donor wants to hear from a charity



PERSONALIZATION IS KEY...

A strong majority (60%) value a personalized experience when interacting with nonprofits

It is important to have a personalized experience when interacting with an organization that I'm volunteering with or donating to.



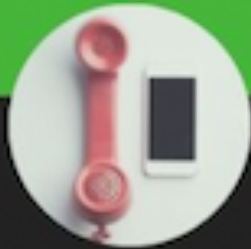
Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

What donors want most:

- Acknowledgement of gift received, preferably personal
- Assurance the gift was 'set to work' as intended
- Confidence the program is having the desired effect



Donor Crisis Communication



NEAR

Be in contact!

Leverage technology to remain in touch with your donors. Use social media, email, and other, more traditional means of communication to stay in touch.



DEAR

Express Gratitude

For major donors, video-conference, good old-fashioned phone calls, and hand-written cards (don't lick them closed, please!) all go a long way.



CLEAR

Be clear & honest

Donors need to know the reality of any crisis and how it is affecting your mission. Organizational leadership must put out meaningful statements about the crisis.

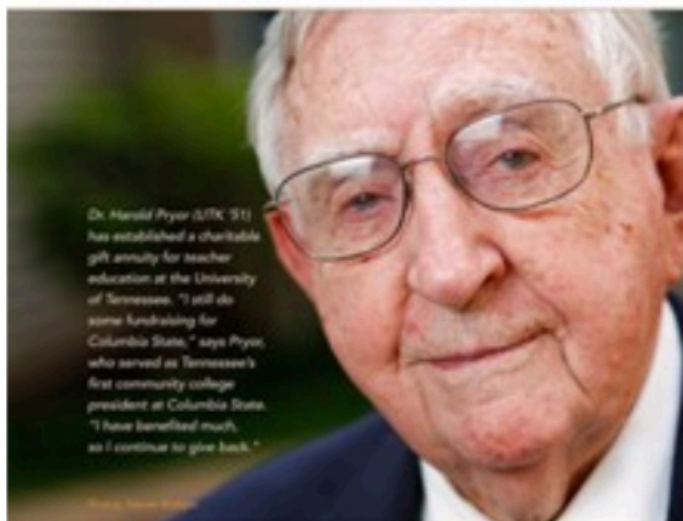


TENNESSEE UT LEGACIES

Fall 2012

News of the UT Family and gift planning options
for our contributors, volunteers, and friends

Eternal Student of Life Invests in Next Generation



Dr. Harold Pryor (UTK '51) has established a charitable gift annuity for teacher education at the University of Tennessee. "I still do some 'ungrading for Columbia State,'" says Pryor, who served as Tennessee's first community college president at Columbia State. "I have benefited much, so I continue to give back."

At 92, Dr. Harold Pryor is still being schooled.

His return to the classroom of life starts at his favorite mom-and-pop restaurant in Columbia, Tenn. He sits with a handful of other gray cohorts and enjoys a cup of joe. After much pontificating and solving the problems of the world, Pryor drives back to his quaint apartment for another lesson. "When you send an email where

does it go?" he asks rhetorically, with his iPad perched in front of him on the kitchen table.

"The answer is in understanding quantum physics," says Pryor. He offers an overview of *The Physics of the Microscopic World*, one of his many DVDs from *The Great Courses*, a catalog of college-level courses from academia's best lecturers.

"Studying microscopic levels of matter and

energy reveals how the world works," he says. "It's purely fascinating.

"After all, if you aren't learning, then you simply aren't living."

Pryor's unending pursuit of knowledge is part of his very being; it always has been.

A year after receiving his bachelor's degree from Austin Peay State College in 1946, he received a master's degree from George Peabody College of Vanderbilt University. He still wanted more, so he came to Knoxville. At UT, Pryor split his doctoral studies between higher education administration and geology and geography. He graduated in 1951.

"After all, if you aren't learning, then you simply aren't living."

—Dr. Harold Pryor, Tennessee's first community college president

His awe for learning led him to turn down a lucrative sales job early in his career to become the youngest faculty member to teach geography and geology at East Tennessee State University. Pryor went on to teach at Austin Peay, where he became a professor and director of teacher education.

In 1968, he was part of an education movement as Tennessee's first community

(Continued on Page 2)

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INSIDE:

- **FREE** Gift Annuities Brochure Offered
- From Andy Holt Scholar to UTC Philanthropist, Giving Back Comes Full Circle

THE UNIVERSITY OF
TENNESSEE **UT**

Stories of Commitment

An International Perspective

Steve '63 and Barbara Mendell Support Scholarships

"Those that can help create opportunities for others should do so," said Steve Mendell '63. The power of education inspired Steve and his wife Barbara to create the Mendell Award in Political Science, an annual scholarship that will be endowed through a bequest.

As a UC Santa Barbara student, Steve was involved in a range of activities which included his fraternity, student government as class president, and intramural sports, where he won the wrestling championship. He chose to create a legacy with UC Santa Barbara and the Department of Political Science because he believes that one of our most important responsibilities is to educate future generations and help ensure a civil public discourse.

UC Santa Barbara's political science program helped prepare Steve for his career in international business. After graduating in 1963, Steve studied French at the Defense Language Institute and was sent to Vietnam as an Army Intelligence Officer. A few years later, while stationed in San Diego, he met his wife, Barbara. Steve and Barbara were married in Belgium, where Steve led the counter intelligence section at NATO's Supreme Headquarters, Allied Powers Europe.

After attending graduate school, Steve joined the international division of Becton Dickinson, a large medical company. In the following years, Steve and Barbara moved many times in the U.S., Europe and in Latin America, while adding two sons, Brooks and Loren, to their family.

Since returning to California, Steve has been CEO of several medical and biopharmaceutical companies. Now retired, Steve enjoys helping others and has served as chairman or board member of numerous organizations, including the Chairman's Roundtable and the Young Presidents Organization Gold Chapter in San Diego. He has remained deeply involved with UCSB, serving as a former chair and longtime trustee of the UC Santa Barbara Foundation and as a member of the Alumni Association's board of directors. Steve is currently the co-chair of the San Diego Regional Leadership Committee, helping to expand the network of Gauchos in this region.



LEGACY

SEATTLE
UNIVERSITY

CREATE YOUR LEGACY: Build their future



Pictured left to right:
OWEN KAPUSUZOGULLU, '88
MICHAEL OSTERFELD
SUZANNE BURKE, '82
KERRY LARNEY
AMINA KAPUSUZOGULLU, '18
KURT KAPUSUZOGULLU, '12

THE BURKE FAMILY

LEGACY IN ACTION

“Every charitable board and every government board and political initiative I’ve been a part of, there is always someone there from a Jesuit Catholic background. If not from Seattle University, from another Jesuit university. They know they should serve and they know they can make a difference. After all we’ve got to help one another get through this life and beyond.”

@DONORGURU



The Crabb Family

Ethan's story
as told by Dad James

We were told that Ethan's arrival would be earlier than expected as he was diagnosed with "IUGR". This is a growth restriction in the womb which caused him to grow slower. What we didn't imagine was that he would arrive in such a dramatic fashion and 3 1/2 months early. Ethan was born at just 26 weeks gestation and weighed only 1 pound, 5 ounces.

My wife Ashley was diagnosed with "HELLP" syndrome which is an abbreviation for hemolysis - elevated liver enzymes and low platelet count. The condition could potentially be fatal for her, causing liver failure. With low platelets that prevent blood clotting, the surgery and delivery were more risky.

When Ethan was born he was rushed to the NICU where he was intubated, hooked up to wires, IV's and other equipment. The first week was a blur. Ethan suffered from two collapsed lungs, pneumonia, numerous blood transfusions and countless pokes and needles. His condition was a roller coaster.

We weren't sure if he would make it through each night, but he showed us how much of a fighter he was. During his stay, Ethan had 37 x-rays, 9 ultrasounds, 5 blood transfusions and one surgery.

Families expecting don't always anticipate what might happen with a baby born too soon. With my wife in critical condition, a toddler son who needed care and a newborn in such a precarious position, we are grateful and thankful for the generous donations from the Sandra Schmirler Foundation who provide critical life-saving equipment to the hospitals that care for babies like Ethan.

@DONORGURU



I WOULD STOP DONATING IF CONTENT IS...

35% Too vague

25% About programs I'm uninterested in

24% Dull and boring

24% Has incorrect info about me

19% In an inconvenient format

14% Not suited to my region

12% Not suited to my age

10% Isn't personalized

Source: Abila Donor





THANK YOU for surrounding our families with compassion, comfort and care while their children were sick.

Your generosity, not only throughout the holidays but the entire year, reached every family that came through our doors. Thank you for being the power behind our work.

We are deeply grateful.

Carolyn Schwarz
Chief Executive Officer

@DONORGURU





**You + OneJustice =
Life-changing help for those in need**

In our eyes, you are a super hero!

Dear Claire,

You did something really special. You gave the gift of justice.

Your donation to OneJustice means so much to us - thank you! And it will mean even more to the low-income veterans, kids, seniors, and families who will receive life-changing legal help this year - all because of you.

And so in our eyes, that makes you a hero! A justice super hero!

So we made you a little thank you video. OneJustice volunteers, supporters, staff, and board members from all over the state sent in video clips that come together with a heartfelt message, just for you. I hope you have as much fun watching it as we did making it for you!

I look forward to letting you know about all the great work made possible by your kind gift throughout the coming year. Thank you so much!

Wishing you all the best in 2015,



Julia R White



Dear Lynne,

Let me start off by saying THANK YOU! As we start another year, I hope that you take the time to reflect on the life-changing impact you have had on disaster-impacted families who, without your help, could have been pushed beyond their breaking point.

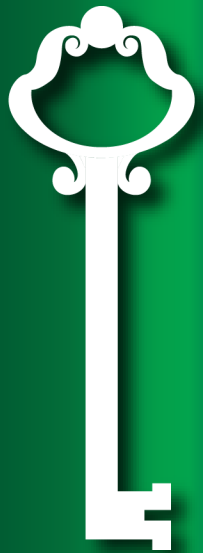
It's because of you – our volunteers, donors, and partners that **100 families across Houston were welcomed home in 2018.**

Please take a minute today or over the weekend to think about what your support meant to these families. Imagine losing all your belongings, couch-hopping for months, working extra shifts to pay rent and mortgage at the same time and not being able to give your children normal bedtime routines.

Because of YOU, 100 families have their lives back. You brought them HOME!

@DONORGURU





**SHOWING
GRATITUDE IS ONE
OF THE SIMPLEST
YET MOST
POWERFUL THINGS
HUMANS CAN
DO FOR EACH
OTHER.**

RANDY PAUSCH

WHY GRATITUDE NOTES MATTER TO ALL GENERATIONS



GI GENERATION 1901 – 1924

SILENTS 1925 – 1945

Letters are their most treasured or familiar way to communicate

BOOMERS 1946 – 1964

GEN X 1965 – 1980

Handwritten notes signify an investment of time, which is scarce.

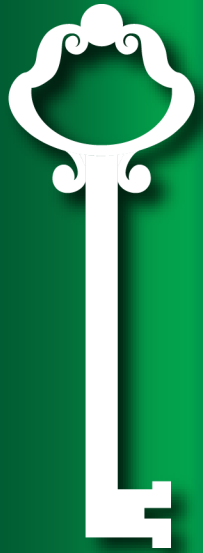


MILLENNIALS 1980 – 1993

GEN Z 1994 – 2014

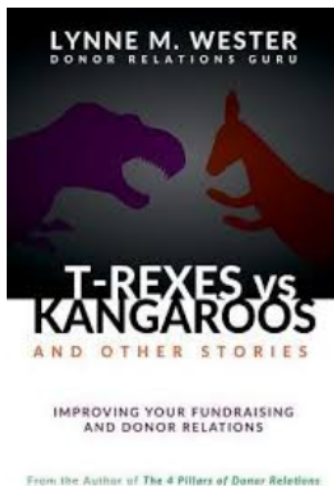
Personal notes are seen as artisanal, unusual, fun.





Thank YOU- Reach out to Me:

- Lynne M. Wester
- @donorguru
- www.donorrelationsguru.com
- lynne@donorrelationsguru.com



THE 4 PILLARS OF DONOR RELATIONS

By
Lynne M. Wester
Director of Alumni Programs and Engagement
University of North Carolina at Charlotte
Donor Relations Guru®

ACADEMIC
IMPRESSIONS

