# Research Findings

OFFICERS/DONORS-BEHAVIORAL INSIGHTS

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Planned Giving
& Trust Services

Experience
Foundry

# CONTENTS



# RESEARCH VALIDTY


- **Behavioral Research (multi-faceted):**

  1. Structured interviews with PGTS Teams
  2. Structured interviews with Donors
  3. Remote Group Study (Focus Group)
  4. Online Survey

- **72** participants involved in research

- Over **20+** hours of structured interviews and group discussion data

# GOALS + PURPOSE

CORE STUDY APPROACH

## 4 MAIN GOALS

- Establish and document current end-to-end PGTS Officer and donor engagement process;
- Understand and explore challenges, including specific pain points and their potential solutions for PGTS Officers and Donors;
- Validate and propose research-based refinements to the vision and mission statement of the GC-level PGTS ministry;
- Explore the current and future resources that the GC-level Planned Giving and Trust Services organization can provide for local PGTS entities.

# PGTS Officers + Donors - Structured Interviews

# Methodology I

CORE STUDY APPROACH

## PGTS OFFICER - REMOTE INTERVIEW PROCESS

- The 'ideal' donor engagement process was first explored from the perspective of the General Conference PGTS Ministry;
- Planned Giving Officers and their key departmental members were interviewed utilizing a structured question framework (*see page **8** for questions*);
- The interview format specifically focused on ensuring that the PGTS officers felt comfortable to openly share feedback as well as ask the interviewers questions about the project;
- Each interview lasted between 1-1.5 hours and was conducted via either an audio or video conference call.

# Methodology II

CORE STUDY APPROACH

## DONOR - REMOTE INTERVIEW PROCESS

- Similarly, donors were interviewed utilizing a structured question framework (*see page **9** for questions*);
- Donors were not asked about specific donations but rather to explain the planned giving process from **their** perspective;
- Each interview lasted between 45- 50 mins and was conducted via audio-based conference call.

# PGTS OFFICERS – INTERVIEW QUESTIONS

1. What is the current experience like for individuals engaging with PGTS in your region?
2. What would you like to change?
3. What resources do you find are most beneficial?
4. What resources are most needed?
5. What do you feel are the positives in the process?
6. Where do you see the pain points for PGTS Officers in the process?
7. Similarly, where do you think the pain points are for Donors in the process?
8. In what ways can the process (including interaction) with Donors be improved?
9. In what ways do you feel PGTS at the GC can better provide resources and materials or training to you at the 'local' level?

# DONORS – INTERVIEW QUESTIONS

1. Was giving to the church something instilled in you from an early age? Were there any particular things you can point to that motivate you today with this in mind?

2. Why do you give to the church and/or it's institutions as compared to other worthy causes and charities?

3. Where would you identify points in the consideration process that are very critical moments?

4. What resources do you wish were provided or available that would have made or would make the engagement with a Planned Giving and Trust Services office more enjoyable?

5. What advice would you give to PGTS officers and personnel to make the donor experience more pleasurable?

# KEY THEMES – PGTS OFFICER FOCUS

SUMMARY ANALYSIS

# A Key Icon

mi = marketing-design influencer

# PROPOSED ENGAGEMENT PROCESS

GC PGTS - IDEAL PROCESS FOR ENGAGING WITH DONORS

## 1. ENGAGE & CONNECT WITH DONOR:

- Identify potential donors. What is their persona?
- Always look to setup face-to-face appointments, a phone call is secondary method;
- First meeting should be conversational/relaxed and PGTS officer should show genuine interest in the person's life (Christ's method), ask family questions (get to know one another. Ultimately, look to:
  - Determine Donor's objectives/goals and lead/accompany them on the planned giving journey. This includes answering their questions, connecting with professions (e.g. attorney's);
  - Make it clear that PGTS officers are not benefited by Donors – they are a service;

# PROPOSED ENGAGEMENT PROCESS

GC PGTS - IDEAL PROCESS FOR ENGAGING WITH DONORS

## 1. ENGAGE & CONNECT WITH DONOR (CONT.):

- Once goals have been identified – look to establish the allied professionals (either from PGTS side or Donor's side – e.g. Their own financial advisor)
- Walk Donor through what they ideally want within the context of what is permissible and feasible. I.e. if Option A is not possible, what would be an option B that would satisfy.

# PROPOSED ENGAGEMENT PROCESS (*cont.*)

GC PGTS - IDEAL PROCESS FOR ENGAGING WITH DONORS

## 2. FOLLOW UP & POST-CARE:

- Allow donor to digest initial material and schedule a follow-up (face-to-face ideally) meeting to include:
    - Sharing the plan and sharing what others have done with similar goals. Allow time for Donor to provide their input and questions and if needed go back to the 'drawing board' for more modifications and setting up another appointment;
    - Once a plan is approved, then bring in the allied professionals and family members;
    - Stay in close contact with the individual through the process;
    - Ask the Donor when it would be appropriate to reconnect and provide suggestions also;

# PROPOSED ENGAGEMENT PROCESS (*cont.*)

GC PGTS - IDEAL PROCESS FOR ENGAGING WITH DONORS

## 2. FOLLOW UP & POST-CARE:

- Once a gift has been made, a personal follow up thank you and recognition is in order.. If possible show the impact that gift has made;
- Stay in touch, birthday card, holiday card, implement appropriate and modest gratitude, no embellishment.

# 1. OFFICER + DONOR ENGAGEMENT PROCESS

PGTS OFFICER PROCESS FOR ENGAGING WITH DONORS

- Some PGTS programs place a strong emphasis on creating a donor-centered experience, i.e. establish and work by a philosophy of putting the donor at the center or the experience – (e.g. PGTS program at LLU)
- Engagement process begins with a marketing awareness campaign as part of the awareness strategy followed by focused event-based meetings. As PGTS officer from LLU stated: "The PGTS officer's job is to create awareness. Awareness is key."

# 1. OFFICER + DONOR ENGAGEMENT PROCESS

PGTS OFFICER PROCESS FOR ENGAGING WITH DONORS

- Awareness campaigns vary but often include the following common elements:
  - Magazine ads, postcards, booths at events (e.g. camp meetings) and preaching appointments with a follow-up event;
- Marketing plans are often (but not typically) planned 12 months in advance;
- The marketing awareness campaign creates a pool of people (those that are are influential, connected, previous donors etc.) from which face-to-face donor conversations can be facilitated;

# 1. OFFICER + DONOR ENGAGEMENT PROCESS (*cont.*)

PGTS OFFICER PROCESS FOR ENGAGING WITH DONORS

- Visitation is vital for relationship building and maintain regular contact before, during and after the giving process.
- Post-care is critical in many functions, e.g. as VOP states – "we have stewardship calls even after the gift is made and send out cards for birthdays"
- Video testimonies appear to hold value for many PGTS departments in engaging donors or 'igniting a conversation' ;
- Some Planned Giving models of operations are very precise and specific. For example, the PGTS department for British Columbia sates that 90% of gifts are for a bequest. Further, all BC members are offered this Will preparation (undertaken by an attorney) as a free service from the PGTS department who also funds a will maintenance review by an attorney every 5 years.

# 1. OFFICER + DONOR ENGAGEMENT PROCESS (*cont.*)

PGTS OFFICER PROCESS FOR ENGAGING WITH DONORS

- In a simplified model, the BC office publishes 'The Will Guide' – a series of questions in four main areas related to making a donation. Such questions include:
    1. Would you like to tithe your estate?
    2. If you are going to give to the BC Conference, do you want to use tax differed investments to make a donation?
    3. Do you have any investment that will face capital gains?
    4. Would you like to make a gift and/or a % of your estate to evangelism, local church, school, University of worthy student?
- Interestingly, over 85% of members who go through the Will Guide process leave a gift to some entity in the BC conference.
- **Open question** – *does a simplified/focused approach yield more fruitful results in the long-term?*

# 1. OFFICER + DONOR ENGAGEMENT PROCESS (*cont.*)

PGTS OFFICER PROCESS FOR ENGAGING WITH DONORS

- Self-created resources are varied. For example, LLU provides:
  - "Philosophy of Giving" presentation;
  - "What's your plan" booklet – utilized as an entering wedge into a planned giving conversation;
  - Post-Giving care/management - a one-page giving history that allows the donor to see how their gifts has/is making an impact.
- Other entities (e.g. SAU) provide 'Ask the Attorney' Workshops and include such topics as Wills, Trust, POA, Investing, Tax Benefits, and Estate planning

# 2. CORE CHALLENGES (*cont.*)

IDENTIFYING PAIN POINTS

- Often, the Donor's perception that they will eventually "have to write a check" – can often stall discussions;
- Church-based events – such as a PGTS weekends are not as successful as personal 1:1 visitations;
- Similarly mailings appear to gain the least traction with respect to donor engagement of all methods;
- Currently, there is no formal method for measuring the success of awareness campaigns;
- Family dynamics (e.g. children, beneficiaries who seek to benefit) can be a barrier to discussions and often derails process;
- Similarly, financial advisors can often impede discussions and decision to commit. A quote from LLU stated that a donor's financial advisors often make the conversations with PGTS officer's "so complicated that is paralyses the donor";

# 2. CORE CHALLENGES (*cont.*)

IDENTIFYING PAIN POINTS

- Trends point to an increase in giving of restricted versus unrestrictive gifts;
- There is often a lack of timely follow-through if a potential donor demonstrates interests;
- There are often mis-statements given by the PGTS officer– a combination of both lack of education/experience;
- There is a common desire to have "digital and printed marketing designs that can be edited locally" – Andrews University
- **Open question** – *how can PGTS officers work more effectively together at regional events - marketing to the same consumer?*

# 2. CORE CHALLENGES (*cont.*)

IDENTIFYING PAIN POINTS AND POTENTIAL SOLUTIONS

- Crescendo is often used a general resource 'one-stop-shop', however, many entities (e.g. VOP) create their own resources because they often need to personalize/customize content beyond the logo type;
- Engaging a younger generation remains problematic – appears to be an image issue and lack of understanding of how PGTS is relevant to 35s and under;
- Boomers desire more accountability in their gifts;
- Often PGTS departments do not have the bandwidth to do extensive marketing and will follow the same paths that have been utilized before. For example, the PGTS dept. at Andrews University stated: "Most of our tasks are responsive"

# 2. CORE CHALLENGES (*cont.*)

IDENTIFYING PAIN POINTS AND POTENTIAL SOLUTIONS

- Similarly, PGTS are challenged in finding time to brainstorm to address issues and concerns;
- Desire for a national database (that is regularly maintained) of reputable lawyers that can be easily accessed. For example: " If a person lives in Washington State but wants to give to Andrews in Michigan. The regulations in Washington don't make it easy. GC PGTS is better suited to help interstate CGA's and various services."

# 3. RECOMMENDATIONS – PGTS DEPTS.

PGTS - WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Greater emphasis is needed to reimagine how PGTS can have a greater impact in their respective local regions. This may require strict prioritization in order to create the necessary time to plan/brainstorm;

- The donor base is riddled with misconceptions with regards to the goal, purpose and mission of PGTS beyond core services such as Will creation; mi

- PGTS departments need to continue focusing on establishing a brand that clearly communicates purpose and mission as well as identifying  target audiences to market too; mi

# 3. RECOMMENDATIONS – PGTS DEPTS.

PGTS - WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- The above means a long-term vision is needed to begin to reimagine what PGTS can offer church members. If young families can feel as though a free service is provided as a benefit of their membership in the Seventh-day Adventist Church or as a supporter/alumni of an institution, the likelihood increases exponentially that these young families will consider the institution as they accumulate wealth and have the ability to give back; mi

- This requires careful/detailed communication that considers the **very words** that are used to build the respective relationships. For example, the PGTS dept. of an institution could offer genuine support for young families – partnering with them (provide support material) as their family and deemphasizing any focus on need for including the institution out of guilt or obligation. mi

# 3. RECOMMENDATIONS - PGTS DEPTS.

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Donors and potential donor relationships need to be viewed as long-term and greater consistency is required in the post-care period after a gift has been made;

- Greater emphasis in sharing (primarily in a video-based format via an accessible database) 'Giving stories' and Testimonies. This is a powerful tool for establishing both the validity of the PGTS organization and engendering trust; mi

# 3. RECOMMENDATIONS - PGTS DEPTS.

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- The methodology of reaching and younger audience and a more mature audience are unique and distinct. Two different marketing and engagement plans should be created to effectively reach both most effectively; mi

- Often, donors are influenced by church dynamics that are outside of the view and control of the local PGTS office. (E.g. misuse of funds at high administrative levels that are made known to the global Church) Understanding these dynamics and striving to review/revisit the inquiry questions or discussion with donors and potential donors on a regular basis, (augmenting the questions/discussions as relevant), will increase trust and aid to solidify the PGTS dept. as a relevant organization. mi

# KEY THEMES – DONOR FOCUS

SUMMARY ANALYSIS

# 1. DONOR-CENTERED ENGAGEMENT PROCESS

KEY FINDINGS FROM THE DONOR'S PERSPECTIVE

- Donors are passionate about the mission of the Seventh-day Adventist Church;
- They are unafraid to voice concerns about leadership and the responsibilities they feel are not often being executed correctly by some institutions in and around the church;
- These concerns are influencing their opinions on how to give and who to give to;
- Donors expressed a growing desire to be more involved on the details of how their gifts will be used. They also would like to be more informed along as to the state of the various institutions that they are giving to;
- Donors are increasingly uncomfortable with leaving undirected/undefined gifts to a local PGTS office for fear that mismanagement would lessen the impact of their gift;
- Donors are looking to be more consistently informed on how current gifts are being delivered.

# 2. KEY CHALLENGES

PAIN POINTS FROM THE DONOR'S PERSPECTIVE

- The concerns of younger donors is primarily that they feel obligated or guilted into giving to the church or including the church/institution in their will or trust even though at such an early stage in life, managing current debt with limited resources feels more pressing.

- Often younger donors are not in a position, or are emotionally able to think through the process of what it means to give to the church in the event of their passing. This was also a noted obstacle when undertaking interviews with various PGTS departments;

# 2. KEY CHALLENGES (*Cont.*)

PAIN POINTS FROM THE DONOR'S PERSPECTIVE

- The prevailing sentiment of mature donors is that there is a growing sense of distrust with how the Church at large is using their resources i.e. tithe and offering. This is influencing their consideration of larger gifts to the church in their wills and trusts.

- This is particularly concerning with respect to Baby Boomers who are currently the generation who are in the position to most freely give to the Church or an institution;

- A number of donors expressed the above thoughts and corroborated many of the expressed reservations highlighted by PGTS officers;

# 2. KEY CHALLENGES (*cont.*)

PAIN POINTS FROM THE DONOR'S PERSPECTIVE

- One of the most expressed sentiments is " I want to know specifically how my/our money is being used by the conference/institution." It appears that undesignated gifts are becoming increasingly less desirable;
- Many committed Seventh-day Adventist families increasingly have children that are not in the Church any longer. This means that more feel a growing tension from giving to the church or giving to their families who often may pressure them to do so. The manner in which PGTS offices will deal with this growing tension moving forward is crucial;
- Families play a very large role in the giving process. Whether supporting the giver or discouraging the gift-giving process and often, adding significance pressure in this process. mi

# 3. RECOMMENDATIONS - DONORS

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- As evidenced by the targeting strategy of large enterprise organizations who look to build relationships with younger audiences who may not yet be a customer, it is clear that building trust early on in the relationship is critical. The premise is simple: making good impressions early on in life will have lasting results throughout the customer life cycle. It is recommended that PGTS departments focus a significant portion of their time/resources on growing genuine, open-ended, low-pressure relationships with potential younger donors (perhaps in the form of financial tips/advice etc. – i.e. non-traditional PGTS offerings); mi

- Mature donors need to be reassured of the integrity in leadership of the institution(s) that they are considering as they give back to the Church. Many feel they have "given plenty" over the years and that the church has not truly appreciated them or their gifts;

# 3. RECOMMENDATIONS – DONORS (*cont.*)

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Make donors the central focus of the experience. Keep asking them for feedback, before, during and after each experience; mi
- Identify different strategies to reach different audiences and measure your effectiveness against those stated objectives;
- Focus on the ever-changing family dynamics and its influence on the relationship between the PGTS departments and the donor/potential donor. Explore ways to bring families into the discussion sooner as relevant, test and measure different engagement strategies. mi

# 3. RECOMMENDATIONS - DONORS

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Consistent and open dialogue between leaders/PGTS officers and donors (including prospective donors) is critical. This is essentially a trust rebuilding exercise. This can be done by testimonies of how gifts have been and are being used and the effectiveness of those as well as the lives changed by giving. mi

# Remote Behavioral Research (Focus Group)

# Methodology

CORE STUDY APPROACH

### FOCUS GROUP – FEEDBACK & DISCUSSION PROCESS

- Participant criteria: Men/Women; Diverse, 40-60+; North America (including Canada); Disposable income and open to giving;

- Participants were interviewed utilizing a structured question framework (*see next page for questions*);

# Methodology (*Cont.*)

CORE STUDY APPROACH

**FOCUS GROUP – FEEDBACK & DISCUSSION PROCESS**

- The discussion format specifically focused on ensuring that the participants felt comfortable to openly share feedback as well as ask the interviewers questions about the project;

- The focus group discussion lasted between 1-1.25 hours and was conducted via a video-based conference call.

# FOCUS GROUP DISCUSSION QUESTIONS

CORE QUESTIONS

1. What do you understand by the term 'giving'?
2. What role do you think giving should play in your everyday life?
3. How much thought goes into giving $5 into an offering plate vs. $1,000 check?
4. In trying to explore whether to use the term 'estate gifts' or 'end of life giving', which term resonates more with you?
5. When you hear PGTS what immediately comes to mind?
6. Would you consider planned giving and trust services to be a ministry or a service?
7. Would you ever think to work with planned giving and trust services to give a gift during your lifetime?
8. Participants were read three different PGTS proposed mission statements and asked to provide in-depth feedback on the merits of each statement (*mission statements on next slide*).

# KEY THEMES – FOCUS GROUP

SUMMARY ANALYSIS

# GIVING AND MOTIVATION



**1. What do you understand by the term giving?**

Participants primarily discussed **giving in terms of monetary gifts**. Specifically, tithe and offering. One participant discussed 'legacy giving' in terms of monetary gifts to God's work that will outlive a person. It was mentioned that tithe is a return – whereas giving goes beyond tithe.

- "Tithes is just returning to God what is His but giving is actually giving a gift back to God of our thanks for what he's done for us."
- "...being intentional about furthering God's work on earth by setting aside your tithes, your offerings, and then... being intentional about giving additional offerings..."
- "...I think it's important even when you're younger to think about how you can leave a legacy and give means to God's work that will outlive you."

# GIVING AND MOTIVATION *(cont.)*

GC PGTS – REMOTE BEHAVIORAL STUDY

**2. What role do you believe giving should play in your everyday life?**

- "… It shows a commitment. If you're involved, if you're part of a group whether it's a church or an organization, the fact that you're willing to support it above and beyond, shall we say, our tithe, to me it shows a level of commitment.

**3. How much thought goes into giving $5 into an offering plate vs. $1,000 check?**

The majority of the participants understood this question as pertaining to gifts outside of regular tithe and offering. The consensus amongst the participants was that a **larger amount involved more intentionality or buy-in to the purpose or cause than a smaller donation**. Participants indicated that larger monetary gifts were often motivated by personal conviction, or investment in a particular cause. Participants also expressed they were motivated by a desire to be a blessing to others.

# GIVING AND MOTIVATION (*cont.*)

GC PGTS – REMOTE BEHAVIORAL STUDY

**3. How much thought goes into giving $5 into an offering plate vs. $1,000 check? What is the motivation? (contd.)**

- "…I think I would be somewhat more bought in to … In that intentionality, be more bought in to the mission or whatever I'm giving to. I heard before someone mention really, really giving back to something that has personally touched you. I think there's more of a buy-in or an intentionality about that when you give a higher amount."
- "But for stuff above and beyond [tithes and offerings] …there's other times where you really feel **a deep connection and a burden** maybe because of your upbringing, maybe because of things that you've seen through life that have really touched you. It could be overseas, it could be in the U.S., and you feel invested. You want them to know that you appreciate them, and you value them…."

# ‘ESTATE GIFTS’ OR ‘END OF LIFE GIVING’



**4. In trying to explore whether to use the term ‘estate gifts’ or ‘end of life giving’, which term resonates more with you?**

The term ‘estate gifts’ resonated more with participants. Many felt that **‘end of life giving’ sounded too final** or brought to mind the thought of one about to die. One participant noted that the meaning of ‘estate gifts’ was clearer.

# PLANNED GIVING AND TRUST SERVICES

GC PGTS – REMOTE BEHAVIORAL STUDY

**5. When you hear 'Planned Giving and Trust Services' what immediately comes to mind?** mi

The first response was that **PGTS assists in will preparation**. Many participants agreed that upon hearing PGTS, they immediately think that the **conference wants their money** or that there is an expectation from the conference that one will leave a donation to them.

- "...they help you write a will. That's kind of one thing they are known for."
- "sometimes when I hear that I think, **Oh, the conference wants my money**."
- "I think that's a great service, but I think from the member's side or perspective there's an expectation or an assumed expectation that the conference or the entity doing it has an expectation of leaving something to them."

# PLANNED GIVING AND TRUST SERVICES

GC PGTS – Mission Statement Focus Group

6. **Would you consider Planned Giving and Trust Services to be a ministry or a service?**

Participants were unsure as to whether they considered PGTS a service or ministry. There were **varied ideas on whom the ministry was intended to serve (the church or its members)** – some thought PGTS as a ministry should serve to fund other church ministries while others believed it should serve members:

- "That's the question that my conference is wrestling with right now because if it's a service, then it doesn't matter if people are giving. It doesn't matter if year by year we're actually gaining anything from it. It's a ministry. But I think… our purpose is to help the members to fund the ministries of our conference, and if they can't do that, then maybe we're not the right fit…"
- "I think they need to be synonymous in some way. If it's not a ministry, it's got to serve the people in some way via ministry in that process."

# PLANNED GIVING AND TRUST SERVICES

GC PGTS – REMOTE BEHAVIORAL STUDY

**7. Would you ever think to work with planned giving and trust services to give a gift during your lifetime?**

Participants were **hesitant to give an outright positive response**. Participants expressed that they would be willing to work with PGTS only in the case that the funds were used as they designated.

- "I think that would depend on what they project or what it was going towards… I think most people would rather have more information about what is the money going to go for… people are wanting to have more input on how that money may be spent."
- "In my case, if I were to do it, it would be very designated for something specifically that I believed would have a greater good, not just open-ended money."
- "I also think if there was a larger gift, it would be nice if you could designate it to things that help support the church but not directly the church as well."

# MISSION STATEMENTS - REVIEW

GC PGTS – REMOTE BEHAVIORAL STUDY

1. Planned Giving and Trust Services assist people in conveying their Christian values through planned gifts. Our goal is to connect the donor's passion with the mission of the Seventh Day Adventist Church so their gift will advance God's work.

2. Planned Giving and Trust Services guides people in conveying Christian values through extraordinary gifts and the final distribution of assets. We achieve this by connecting spiritually and professionally with individuals to ensure the Seventh Day Adventist Church will continue to advance God's work.

3. Planned Giving and Trust Services is designed to spiritually and professionally connect with individuals to assist in passing on Christian values, ensuring the work of the Seventh Day Adventist Church will continue to advance God's work through special planned gifts and the final distribution of assets.

# MISSION STATEMENTS *(cont.)*

GC PGTS – Mission Statement Focus Group

Responses to the proposed mission statements were widely varied. There was a **focus on specific words and phrases** – these were key in participant responses. Overall there was a **preferential leaning toward statement #1**. Many felt that this statement most effectively and clearly communicated the mission of PGTS. Participants mostly responded to mission statements #1 and #2. Interestingly, participants did not specifically engage with or respond to mission statement #3.

- Statement #1 was preferred by majority of participants with the following being noted;
  - **Donor-driven**; emphasis on discovering the donors' values and passions mi
  - **"assisting rather than guiding"** – participants felt that the term "assisting" communicates that PGTS helps the donor with their desired distributions rather than guiding the donor toward a particular donation mi

# MISSION STATEMENTS *(cont.)*

GC PGTS – Mission Statement Focus Group

- Across all statements specific words/phrases were noted as obstacles to an effective mission statement;
  - Unclear what it means to “connect spiritually”
  - Extraordinary;
    - Connotes large gifts
    - Deterrent to those with less to give
    - Causes feelings of inadequacy
  - Final distribution of assets;
    - Preference to remove “final” from the phrase – “final” sounds too morbid
    - “It sounds like somebody coming to pillage through my stuff upon my death”
    - Specific to end-of-life – lack of engagement with younger generation

# MISSION STATEMENTS *(cont.)*

GC PGTS – Mission Statement Focus Group

- "Guides" (statement #2) sounds self-serving on the part of PGTS
    - "achieve this by making sure you connect with us, and when you connect with us, you're going to give to the Adventist Church" mi
    - Sounds as if PGTS is directing rather than assisting with donations
- There is a **strong perception that if PGTS' services are used, the church expects a gift in return**
- It was unclear whether the core mission of PGTS is to help donors, or to fund church ministries

# MISSION STATEMENTS *(cont.)*

GC PGTS – Mission Statement Focus Group

- It was unclear whether the core mission of PGTS is to help donors, or to fund church ministries
- Similarly, there is a perception that the mission of PGTS is to push the church's mission forward via the use of donor funds mi
- Noted was a strong desire to control use of funds and to direct to specific areas of donor choosing
- There was concern that none of the mission statements mention distributions other than to the church
- Participants felt that the PGTS mission statements target end-of-life donors and that engagement with younger generations is critical to life-long donor engagement mi

# 3. SUMMARY CONCLUSIONS

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Participants displayed difficulty in being able to differentiate between the mission of PGTS and stewardship; mi
- Participants did, however, express that '**giving**' to them, did indicate gifts beyond tithe; mi
- In deciding where/when to donate funds the participants are often motivated by **personal** conviction, mi passions, and investment in a particular cause;
- The overarching perception is that PGTS only prepares wills; mi
- Participants were unclear as to whether PGTS is a ministry or a service;
- Further, if it is a ministry participants were uncertain as to whom PGTS is designed to serve – the church or its members;

# 3. SUMMARY CONCLUSIONS *(cont.)*

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- A bias exists that the church misappropriates funds and thus participants displayed a lack of trust in donating unrestricted funds;
- Similarly, participants **expressed concern that in donating through PGTS they would not have the control to be able to direct donations to their desired areas** – this was indicated as a barrier to engaging with PGTS;
- Participants were hesitant when asked if they would engage with PGTS;
- Regarding the mission statements, key areas of focus were on particular phrases and/or words that didn't resonate with participants;
- Participants repeatedly expressed the feeling that if PGTS is used, the church expects a donation in return.
- Similarly, there was a general sentiment that the Church just 'wants their money' .

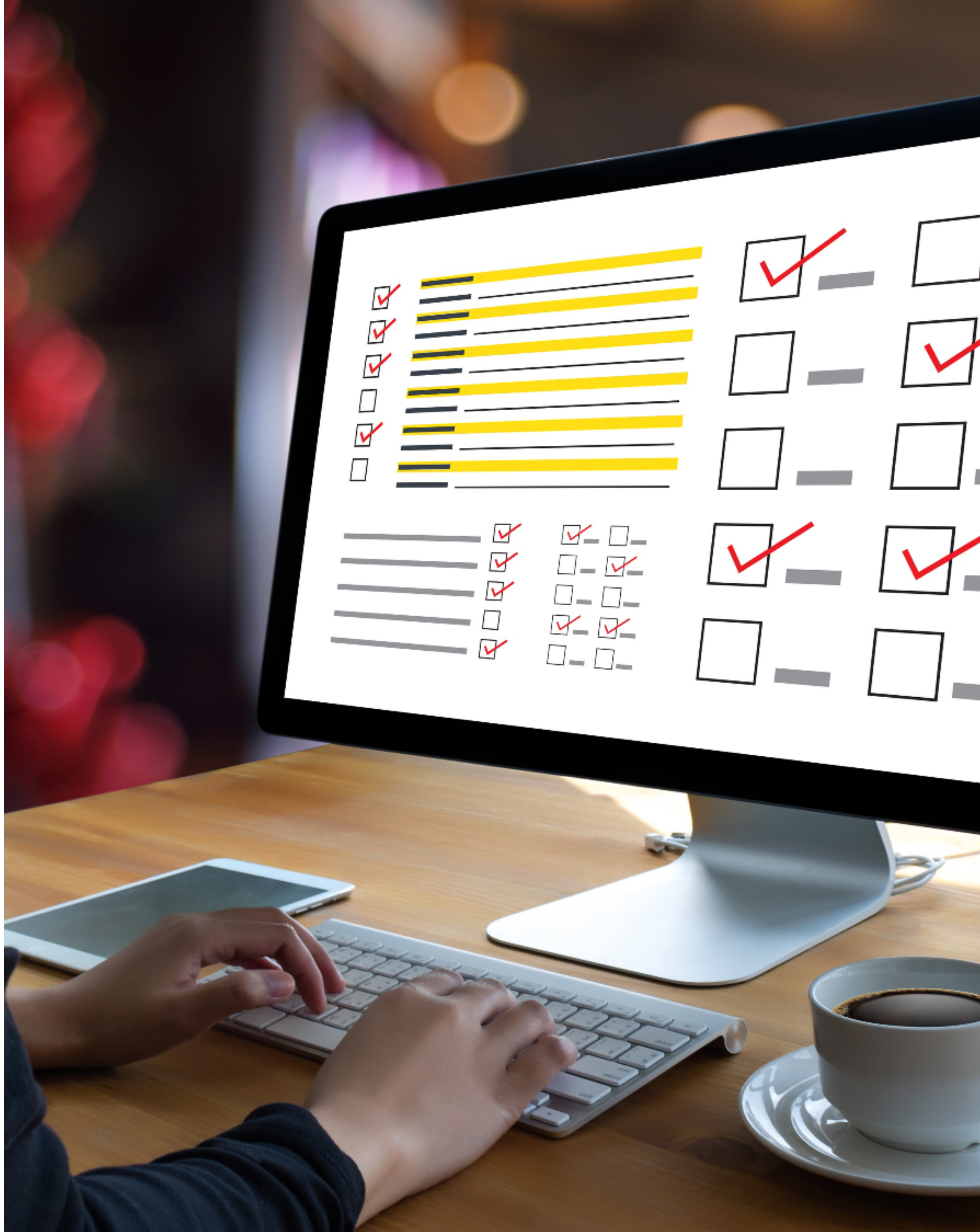
# Survey Focus: Mission Statement

# Methodology

CORE STUDY APPROACH

## SURVEY DIRECTION

- Online survey (specifically focusing on the mission/value statement of GC OGTS) was conducted through a secure web-based tool;
- Recruiting respondents through Social Channels, both Men and Women were asked to respond to the survey;



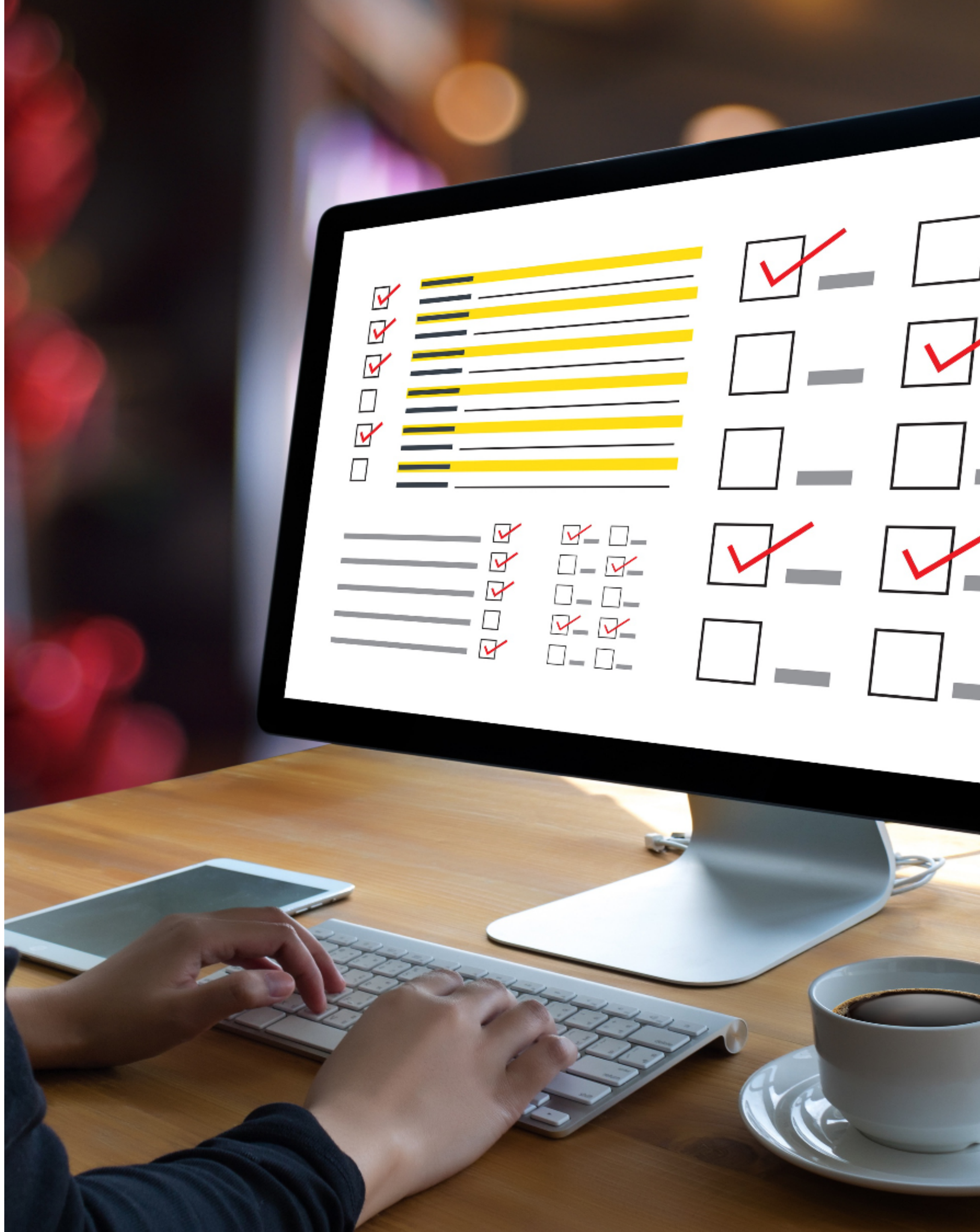
# Methodology (*Cont.*)

CORE STUDY APPROACH

## SURVEY DIRECTION

- We recruited for a range of ages, looking for respondents in ranges of ten years from the age of 40 and grouping 40 and under into its own category;

- All responses/data were anonymously recorded.



# RESULTS SUMMARY I

DEMOGRAPHICS

- 56 respondents completed the survey;
- 66% (31) were Female and 34% (25) were Male;
- Age Ranges:
  - 60 and above = 21*
  - 50-59 = 13
  - 40-49 = 10
  - 40 and under = 12

** While there was a slightly larger number of respondents in the 60+ age range, there was a fairly even split of responses across all the other age range categories;*

# RESULTS SUMMARY II

GENERAL FINDINGS

- 50% of respondents planned to leave some type of financial gift to the church. The remaining 50% did not plan on leaving a gift to church either in their will or in estate planning;
- When reviewing the following 2 statements - more than two thirds (67.31% or 35 respondents) **preferred STATEMENT 2** in comparison to STATEMENT 1 - see below:

  **STATEMENT 1: Planned Giving and Trust Services assists people in conveying their Christian values through planned gifts. Our goal is to connect the donor's passion with the mission of the Seventh-day Adventist Church so their gift will advance God's work.**

  **STATEMENT 2: Planned Giving & Trust Services assists individuals in giving throughout their lifetime to expand the Kingdom of Heaven. Our mission is to connect a donor's passion with the mission and work of the Seventh-day Adventist Church.**

# RESULTS SUMMARY III

GENERAL FINDINGS

- A number of respondents commented that STATEMENT 2 was more positive in nature and overall, felt more applicable to the entire life rather than an end-of-life event;

- Specifically, in response to Q5 that asked participants to denote any words or phrases that stood out to them, the words **"lifetime", "Giving throughout their lifetime"** received the most frequent highlights. Further, one participant explained the following: **"lifetime: giving culture must be evident, encouraged not only at the end of life but throughout one's life time."** mi

# RESULTS SUMMARY IV

GENERAL FINDINGS

- Thus, it is postulated that the second statement may be understood as more relational and less transactional in the context of the feedback.
- The results from this survey strongly correlate with in-person interviews as well as the results of the remote focus group providing robust validity to the findings; mi
- Based on the corroborated survey data and responses, we refined Statement 2. **Please see next page for a recommendation for a revised mission statement:**

## Recommendation:

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Planned Giving & Trust Services helps individuals experience the joy of life-long giving. Our goal is to connect a donor’s passion with the mission and work of the Seventh-day Adventist Church to expand the Kingdom of Heaven.

# Experience the Joy of Giving

# Thank You

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