

PGTS – Digital Marketing Resource Center



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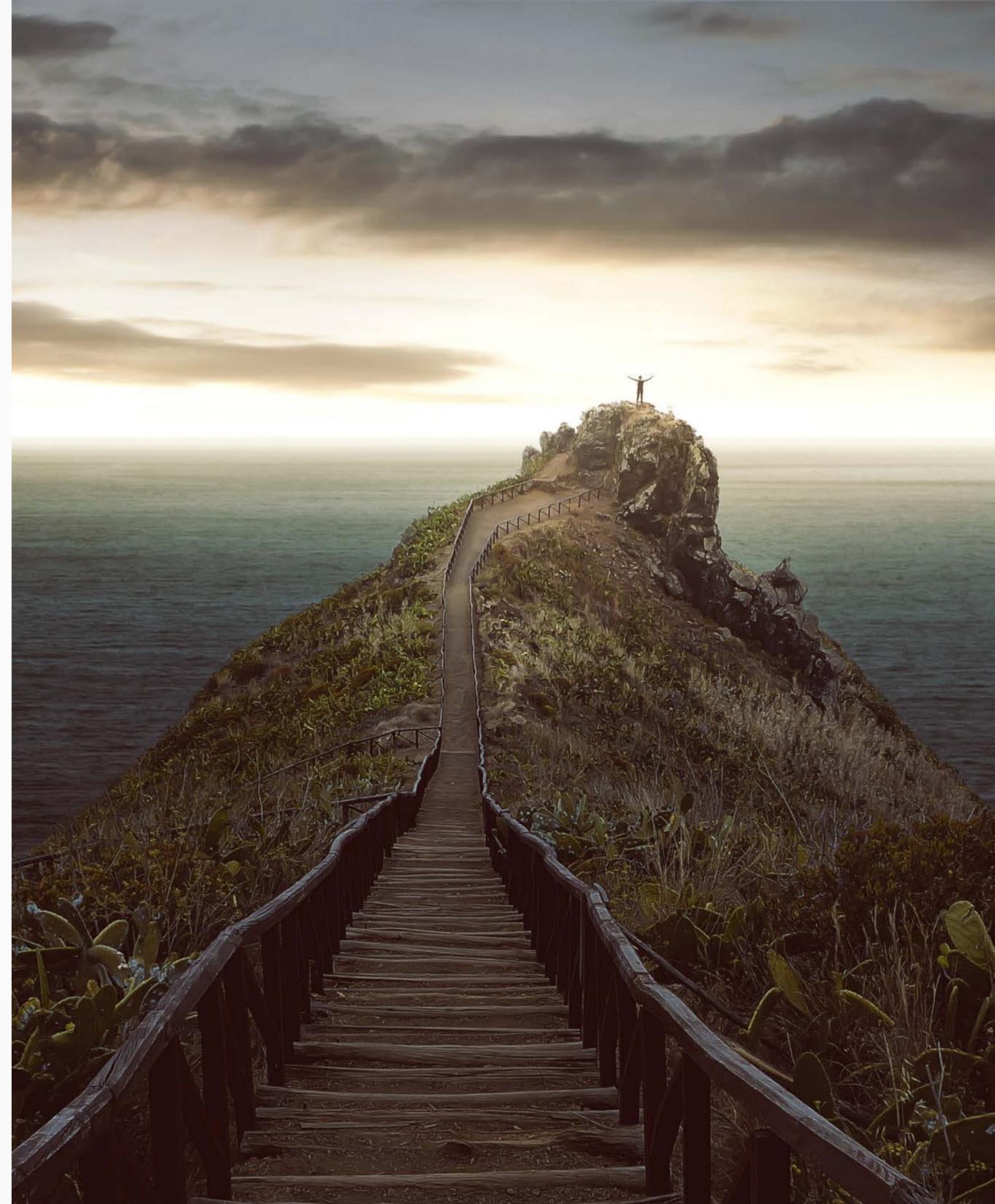
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GOALS + PURPOSE

CORE STUDY APPROACH

4 MAIN GOALS

- Establish and document current beginning-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.





Look for this Key Icon

 = marketing-design influencer.

You will notice this symbol throughout the deck. This means a point of data is vital as an influence on marketing materials and strategy.

STUDY METHODOLOGIES

CORE STUDY APPROACH

- **STUDIES 1 + 2:** PGTS OFFICER + DONOR - REMOTE INTERVIEWS

During a 1-1.5hr session, Planned Giving Officers and Donors were interviewed (separately) utilizing a structured question framework (*see Appendix for questions*);

- **STUDY 3:** FOCUS GROUP DISCUSSION

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

- **STUDY 4:** SURVEY (FOCUS ON MISSION STATEMENT)

Online survey (specifically focusing on the mission/value statement of GC OGTS) was conducted through a secure web-based tool;



PGTS Officers + Donors - Structured Interviews

KEY THEMES – PGTS OFFICER FOCUS

SUMMARY ANALYSIS



1. PGTS OFFICER INTERVIEWS – COMMON THEMES

PGTS OFFICER INSIGHTS WHEN ENGAGING WITH DONORS

- **Focus on creating a donor-centered experience,**
- **Engagement process begins with a robust marketing awareness campaign**
 - 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 influential, connected, previous donors etc.) from which face-to-face donor conversations can be facilitated;
- **Visitation is vital for relationship building**
- **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’ ;

2. CORE CHALLENGES

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. 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;**
- 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;**

3. RECOMMENDATIONS FOR PGTS DEPARTMENTS

PGTS - WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- 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**
- 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.
- 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**

KEY THEMES – DONOR FOCUS

SUMMARY ANALYSIS



1. DONOR INTERVIEWS – COMMON THEMES

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 guilty 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.
- The prevailing sentiment of mature donors (often Baby Boomers) 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.
- 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. 

3. RECOMMENDATIONS - DONORS

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Build trust early with young donors so that they will be much more likely to be highly engaged and active donors sooner than later;
- 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; **mi**
- 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**
- Make donors the central focus of the experience. Keep asking them for feedback, before, during and after each experience;
- 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**

Remote Behavioral Research (Focus Group)

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? ***

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, passions, and investment in a particular cause; **mi**
- The overarching perception is that PGTS only prepares wills;
- Participants were unclear as to whether PGTS is a ministry or a service; **mi**
- Further, if it is a ministry participants were uncertain as to whom PGTS is designed to serve – the church or its members;
- A bias exists that the church misappropriates funds and thus participants displayed a lack of trust in donating unrestricted funds; **mi**
- 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; **mi**

3. SUMMARY CONCLUSIONS *(cont.)*

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Participants were hesitant when asked if they would engage with PGTS. No immediate positive response was given;
- 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' .

Focus Group Feedback: Mission Statement

MISSION STATEMENTS – 3 OPTIONS WERE DISCUSSED

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

- 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
- Similarly, there is a perception that the mission of PGTS is to push the church’s mission forward via the use of donor funds
- 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**

Online Survey Feedback: Mission Statement

RESULTS SUMMARY OF ONLINE SURVEY FEEDBACK

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.

PROPOSED GUIDING VISION STATEMENT



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.

PROPOSED MARKETING THEME

**Experience
the Joy of Giving**



Creating Donor Centered Experience

Digital Marketing Playbook



Customizable Advertisements

Presentation Template



Behavioral Research

Logo, Video, Audio and Presentation Resources



Resources for Directors



Donor Journey Map



PROJECT: PGTS EXPERIENCE JOURNEY MAP: The Ideal Donor Experience

John Donor



John grew up in the Seventh-Day Adventist Church and was educated through the Church's School system thru College where he met his wife.

While on a mission trip building Churches and helping to repair schools, John became interested in the field of Architecture - always desiring to use his skills to 'give-back' to his Church and local community wherever possible.

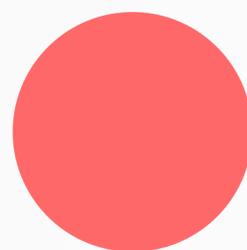
What keeps John awake at night is that his children are no longer involved in day-to-day church life. He longs to see the mission and institutions of the church continue and thrive and if possible find resonance with his children and grandchildren.

John and his wife have recently been discussing methods to give-back

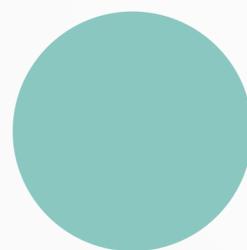
	PRE-GIVING	RESEARCH	1ST COMMUNICATION	DIGEST INFORMATION	FACE-TO-FACE	FOLLOW-UP	DECISION	ENGAGE PROS.	EXECUTION	POST-GIVING
	Becomes aware of PGTS	Motivated to engage with PGTS	Connects remotely	Assimilates information	Meets face-to-face with PGTS	Asks follow-up questions	Makes prayerful decision to give	Meets with allied professionals	Documents completed	Relationship Management
John's Story										
John's Goals	Learn more about planned giving and how it works.	Delve deeper into planned giving resources based on marketing awareness campaign.	Timely response (including answering his questions) and accommodation of his schedule for any follow-up meetings.	Assess if all the information that he has been provided can help in making a decision to give.	To validate the merit of PGTS through the representative and to have all the necessary information to make a decision to give.	Ensure there are no gaps in knowledge or understanding.	Finalizes his giving plan and how to maximize tax benefits.	Begin to formalize the decision and layout a roadmap and checklist leading to completion.	Have a clear understanding of the documents and looks to be walked-through the documents before signing.	Be kept up-to-date about how the gift is making an impact and how other gifts are being distributed.
John's Needs	Be clearly informed of the purpose of the products and services offered by PGTS.	Explore if PGTS program supports his unique giving plans and desires - perhaps based on a specific life event. Actively explore solutions to donor's giving needs. This is something that the organization would have to solve and provide you with. For example, if John wants his children to be more engaged with the church, how does making a legacy gift assist with that goal? Where is the correlation? Is there a program or method to engage the children - a gift celebration, a family giving fund, a naming recognition event, etc.?	An emotionally intelligent (EQ) conversation with the PGTS team. The PGTS team must be personable, and cognizant of his needs. The information must also match what John has experienced thus far - this aids trust building.	Based on the information given thus far, he needs to feel confident that PGTS can his giving goals. While most charitable gifts are "unselfish" in nature, it does not mean that the donor isn't still motivated, in part, by personal reasons. Those reasons may include tax savings, peer approval, adding purpose to one's life, joy of giving, modeling behavior to family and friends, etc. While delving into these areas is beyond the scope of this journey map, it is important that fundraisers are well-versed in the needs and goals of donors. Most donors don't have a primary goal and need to give money away (starting point for John's journey). They have a basic understanding of how to give money and can do so at any time. They are also likely giving money away annually already. Any additional giving especially planned giving, will need to get the donor inspired and educated. This is a key role of fundraisers throughout the journey.	That his and his family's best interests are front and center in the PGTS giving experience. A potential giving gap is the church's absence of: endowment giving options, restrictive or designation giving options, a giving menu with dollar amounts, tangible and intangible donor acknowledgment (including program and physical space naming). This part of the donor journey is missing I believe - where the fundraisers and donors customize, craft, and create unique pathways to give (for those donors who fit). Right now, all gifts may default to being unrestricted gifts, whether it is \$5,000, \$50,000, or \$5M.	To feel confident in the process and fully satisfied that all questions have been answered.	To clearly understand the next steps, estimated timelines and the continued role of the PGTS team.	To be at peace with his decision and the knowledge that the PGTS team are connecting him with the rightly qualified professionals.	Receiving copies of all documentation, contact details of key personnel and reassurance of timely follow-ups including how potential future changes will be handled	Stay informed on health of PGTS as an organization and that PGTS are being held accountable to their mission.

We Want to Hear From You

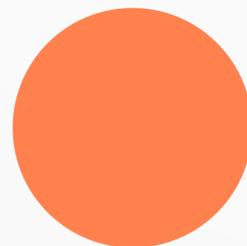
Drop us a line letting us know how you are using these resources, what is working and what recommendations you have for future marketing assets and resources.



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THANK YOU FOR LISTENING!

ANY QUESTIONS?