



BEQUEST PORTFOLIO

TIPS / TOOLS / TECHNIQUES

A GUIDE TO MARKETING BEQUESTS TO YOUR MEMBERS AND GENERAL AUDIENCE



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On the cover: Alice Sparks is an active and engaged citizen who appreciates the news and information programs on PBS. She wants this programming to be around for her grandchildren and hopefully her great-grandchildren. For this reason, Alice decided to make a planned gift for her local PBS station, CET, in Cincinnati, OH.

The materials in this portfolio are a product of the PBS Planned Giving Capacity Building Project, a collaboration between PBS and PBS Member Stations.





PAULINE STRAYHORNE is a dedicated volunteer who enjoys sharing her tips for a successful life with young people. She wants young people to know that the world is bigger than the place they are occupying at this time. For this reason, she has left her PBS station a gift in her will. Her local station is CET in Cincinnati, Ohio.

PART ONE:

TIPS FOR GETTING STARTED

Tips – Success Starts at the Top at East Tennessee PBS!



In 2013, **Vickie Lawson, President & CEO of East Tennessee PBS**, made a strategic decision to invest in planned giving. Under the leadership of **Judy Cutaia, Executive Director**, the station joined the PBS Planned Giving Capacity Building Project.

After learning what works from other stations, Vickie was ready to launch their new program. Her first action step was to call a meeting to inform and engage all-staff. During that meeting, she assigned key roles to staff in development, programming and engineering. The team then worked together to execute the marketing strategy recommended by PBS. ([See Flight Strategy](#)).

The contributions from this cross-functional team have produced incredible results - 500 new prospects and 50 confirmed gift commitments. The station has also become the recipient of contributions from donor advised funds, charitable trusts and IRAs.

The planned giving success at East Tennessee PBS is the direct result of a commitment that **started at the top!**



Top: Judy Cutaia, Executive Director Major Donors and Planned Giving; Vickie Lawson, President & CEO; Barbara Shipley, Chief Development Officer. **Left** Tony Poole, Chief Engineer; Russ Manning, Director of Programming.

MARKETING TIPS FOR MANAGERS

1. Communicate that planned giving is a STATION PRIORITY
2. Recognize planned giving success across all functional areas
3. EDUCATE, EQUIP and ENGAGE board and staff members
4. Integrate planned giving messages in Membership renewals and appeals - piggyback
5. Leverage board relationships to open doors with lawyers and other advisors
6. Be intentional - run at least 4 bequest campaigns per year
7. Utilize all communication channels to market - broadcast, digital and print
8. Capitalize on your broad reach by marketing during primetime hours
9. Measure success by the strength of your bequest pipeline, not dollars through the door
10. Be patient - planned giving is a marathon, not a sprint



GORDON OLSON enjoys volunteering in his community. He believes that he has made a difference. Some of the values that he has have come to him from PBS. For this reason, he's included his PBS station in his future plans. It's not a big gift, but something that will help his local station, KCTS 9 in Seattle, WA.

PART TWO:

TOOLS FOR COMMUNICATING WITH STATION SUPPORTERS

Tools for Marketing Bequests

A catalog of spots is available to help stations raise awareness about planned giving and more specifically, bequests. This evolving catalog includes testimonials that feature planned giving donors from stations across the system. These assets will help your station get started quickly.

The catalog also includes a suite of companion print ads, web ads and landing pages. To provide greater flexibility, the ads are available in two sizes (full page and half page) and two colors (full color and B&W)

Thank you to our contributing stations:

CET/ThinkTV, Cincinnati, OH

KCTS 9, Seattle, WA

KVIE, Sacramento, CA

SCETV, Columbia, SC

WNET, New York, NY



Spots, Companion Ads + Landing Pages

Still Images



BRUCE SMITH + PAUL CASTELLANO
WNET / New York, NY

Still Images



SHEILA + LARRY HANEY
SCETV / Columbia, SC



Print Ads



Print Ads



Landing Page

Web Ads



Landing Page

Web Ads



:60 spot



:30 spot



:60 spot



:30 spot

Spots, Companion Ads + Landing Pages

Still Images



PAULINE STRAYHORNE
CET / Cincinnati, OH

Still Images



BETSY ASHTON
WNET / New York, NY



Print Ads



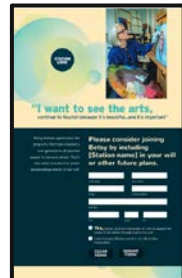
Print Ads



Landing Page



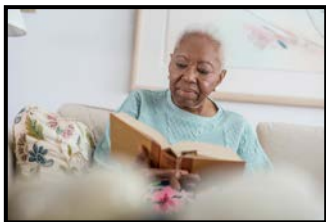
Web Ads



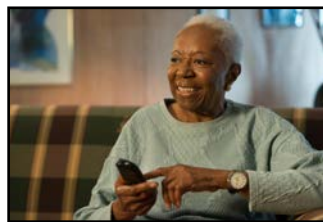
Landing Page



Web Ads



:60 spot



:30 spot



:60 spot



:30 spot

Spots + Companion Ads

Still Images



ED MAPP
WNET / New York, NY



[Print Ads](#)

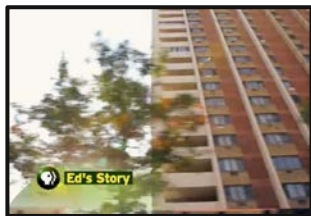
Still Images



GORDON OLSEN
KCTS9 / Seattle, WA



[Print Ads](#)



[:60 spot](#)



[:30 spot](#)



[:60 spot](#)



[:30 spot](#)

Spots + Companion Ads



LEEANN DICKSON
KVIE / Sacramento, CA

Still Images



Print Ads

Still Images



Print Ads



ALICE SPARKS
CET / Cincinnati, OH



:60 spot



:30 spot



:60 spot



:30 spot

Station Produced Spots

A number of stations have engaged their planned giving donors by asking them to share their personal stories. Here are just a few impactful testimonials produced by stations that will help inspire your marketing efforts:



[Tom and Karen's Story](#)
Mississippi Public
Broadcasting



Barb and Warren's Story
[Story A](#) and [Story B](#)
Iowa Public Television



Lorna's Story
[Story A](#) and [Story B](#)
Iowa Public Television



[Diane and Keith's Story](#)
OPB

Station Produced Spots

Informational and Tribute



WXXI

[Bob McKnight Tribute](#)

by Norm Silverstein, President & CEO



Twin Cities PBS - TPT

[Informational Spot](#)

by Jim Pagliarini, President & CEO



THIRTEEN

[Informational Spot](#)

by Neal Shapiro, President & CEO

[Download all spot scripts](#)

Do you have a testimonial to share with the station community? If so, please send a note to Lauren Cummings, Director, Philanthropy - lacummings@pbs.org.

Collatera

COLLATERAL MATERIALS are helpful tools to use as leave-behinds and workshop materials. You can customize and change all of the elements to satisfy the needs of the market you serve.

CHARITABLE INSTRUMENTS (Revocable)

- Wills & Trusts
- Beneficiary Designations

Keeping the Promise of Public Television
Giving by Will

Since 1961, **East Tennessee PBS** has provided a promise of public service to our local, state, and national television audiences. It is a promise to be made in the enduring legacy of a public community service that has inspired generations to give.

How do you consider giving **East Tennessee PBS** your share of the promise?

How to Give

Having a gift in your will can be a simple, starting with an estate plan and changing it as your circumstances change. You can also make a gift during your lifetime.

- You can give a specific dollar amount or property.
- You can give a percentage of your estate.
- You can give all or a portion of your estate, including all gifts and charitable assets such as your home and financial assets.
- You can be a contingent or special class beneficiary.

How do you know the best way to give? Call us to ensure the promise of public television is kept for generations in **East Tennessee** and beyond.

Write to us today
If you or your attorney need more information, please contact us. Call at 423-255-0222 or email info@easttennesseepbs.org

Wills & Trusts

Making Community Your Beneficiary
Giving by Beneficiary Designation

Did you know you can name **East Tennessee PBS** as a beneficiary of your pension account, stock account, retirement plan, or life insurance policy?

Having your beneficiary designation correctly set up can ensure that your assets are distributed to **East Tennessee PBS** in the event of your death. It's a simple step that can make a big difference in the lives of the people you care about.

How to Give

You can be named as a beneficiary of your pension account, stock account, retirement plan, or life insurance policy. Contact your financial institution, plan administrator, or insurance company to make your beneficiary designation.

Complete the forms designated by the company or corporation/beneficiary. Please note our 501(c)(3) EIN is 42-1722222 and our address is 111 E. Magnolia Avenue, Knoxville, TN 37917-0001.

Return the forms to your financial institution, plan administrator, or insurance company and their contact information is on the back of the forms.

How do you know the best way to give? Call us to ensure the promise of public television is kept for generations in **East Tennessee** and beyond.

Write to us today
If you need more information about naming **East Tennessee PBS** as your beneficiary, please contact us. Call at 423-255-0222 or email info@easttennesseepbs.org

Beneficiary Designations

Tax-Wise Giving
IRA Charitable Rollover

Nothing is more important to you than your IRA. It's also very easy to help others in the event of your death, needs and expenses.

How to Give

You can give to **East Tennessee PBS** through an IRA Charitable Rollover. It allows you to make a "qualified charitable distribution" (QCD) from your IRA. QCDs are a special type of distribution that allows you to make a charitable contribution from your IRA. The maximum amount you can roll over is \$10,000 per year. The rollover is tax-free and you can avoid the 10% early withdrawal penalty.

How to Give

Contact your plan administrator and request a "qualified charitable distribution" be made directly to **East Tennessee PBS**. It is important that you make sure the distribution is made correctly to your designated charity.

Write to us today
If you need more information about naming **East Tennessee PBS** as your beneficiary, please contact us. Call at 423-255-0222 or email info@easttennesseepbs.org

IRA Rollover

Amplify Your Impact
Appreciated Stock

Do you own stock that has increased in value? Have you owned the stock for more than a year? You may want to consider giving it to **East Tennessee PBS**.

How to Give

Having a gift in your will can be a simple, starting with an estate plan and changing it as your circumstances change. You can also make a gift during your lifetime.

- You can give a specific dollar amount or property.
- You can give a percentage of your estate.
- You can give all or a portion of your estate, including all gifts and charitable assets such as your home and financial assets.
- You can be a contingent or special class beneficiary.

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Appreciated Stock

CHARITABLE ASSETS

- IRA Charitable Rollover
- Appreciated Stock
- Retirement Accounts
- Life Insurance
- Personal Residence
- Personal Property

Planning for Tomorrow
Giving Retirement Assets

Did you know that retirement plan and accounts funded with pre-tax dollars are based when your children and other loved ones are named as your beneficiaries?

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Retirement Accounts

Securing Our Future
Giving Life Insurance

Do you have a life insurance policy that you no longer need? Like many of us, you may have purchased life insurance many years ago. Your needs and circumstances have changed and the policy is no longer needed.

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Write to us today
If you need more information about naming **East Tennessee PBS** as your beneficiary, please contact us. Call at 423-255-0222 or email info@easttennesseepbs.org

Life Insurance

Passing on Your Dream
Giving a Personal Residence

Thinking about selling your home? Make sure you think twice about the impact of estate taxes.

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Write to us today
If you need more information about naming **East Tennessee PBS** as your beneficiary, please contact us. Call at 423-255-0222 or email info@easttennesseepbs.org

Personal Residence

Sharing Your Treasures
Personal Tangible Property

A gift of tangible personal property can include items such as artwork, jewelry, antiques and other physical objects. It is important to consider the tax implications of giving these items to **East Tennessee PBS**.

How do you know the best way to give? Call us to ensure the promise of public television is kept for generations in **East Tennessee** and beyond.

Write to us today
If you need more information about naming **East Tennessee PBS** as your beneficiary, please contact us. Call at 423-255-0222 or email info@easttennesseepbs.org

Personal Property

Integrated Approaches

Bequest marketing can also be easily integrated into existing fundraising efforts. Multi-channel “piggyback” approaches won’t cost additional money or disrupt the original fundraising activity. Here are some examples of how stations are integrating bequests with membership, on-air fundraising and other priorities:



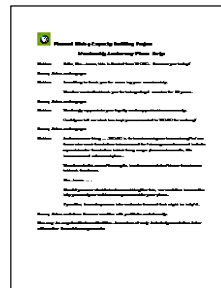
Kathy Reed



[Renewal letter w/ planned giving ask](#)
WXXI



Rob Hilbert



Pledge Script IPTV



Cindy Hall-Duran



Buck-slip in Gift Acknowledgements
Twin Cities PBS



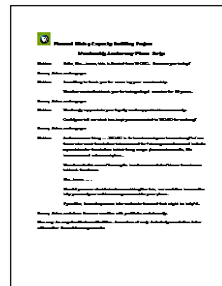
Sue Ellen Stuebing



[Membership Survey](#)
CET



Robert Sharpe Jr. Esq.



[Anniversary Call Scripts](#)



Kathy Kiar

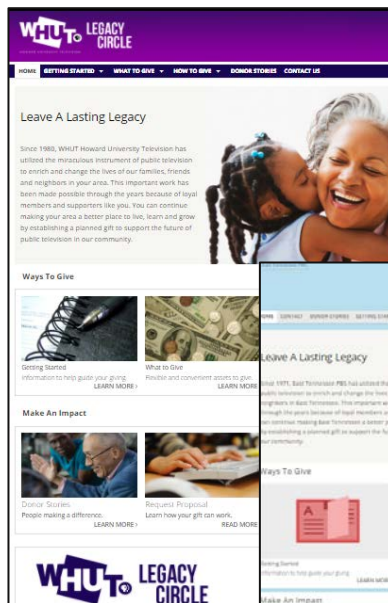


[Reply Device](#)
WTTW

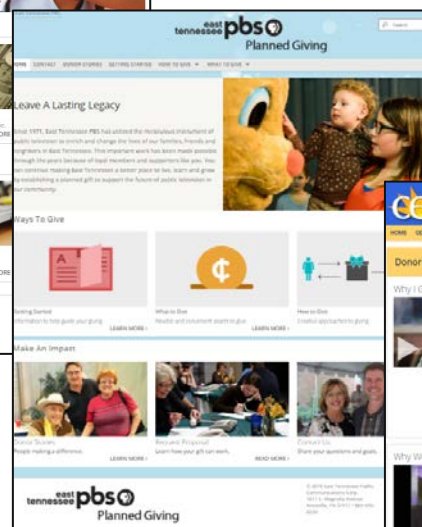
Planned Giving Website

PBS has leveraged its existing technology to provide a free and customizable planned giving website for stations. Station supporters will find the site visually attractive and user-friendly. The simple content will help users evaluate the benefits of giving both now and later. The website has also proven to be an effective cost saving tool for stations.

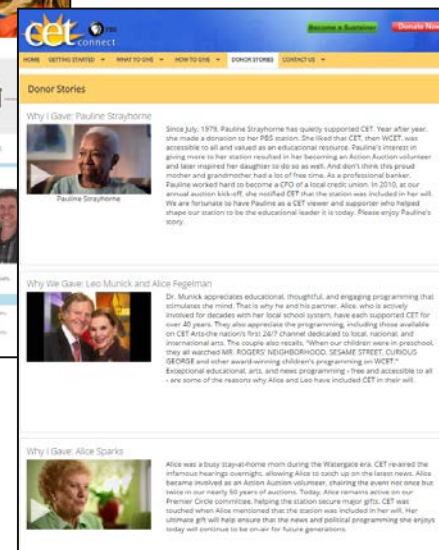
The website is maintained on the Bento platform. If your station site is not on Bento, the planned giving pages can be used as a microsite. Here's a checklist to help guide station teams during the evaluation and development process.



[WHUT](#)



[East Tennessee PBS](#)



[CET](#)

Tools for Responding to Inquiries and Thanking Donors

The most personal way to respond to an inquiry is to send your respondents a sincere letter.

A supporter who names your station as a charitable beneficiary has essentially elevated your station to the status of a family member. Here are sample letters that can help you get started:

RESPONDING TO INQUIRIES



Debbie
Eliason

[Response Letter](#)
[Ways to Give](#)
[Legacy Society Member Form](#)

WETA

AFTER YOU RECEIVE CONFIRMATION



Kathy
Reed

[Thank you and invitation to join Legacy Society](#)

WXXI

As a lover of the arts, **BETSY ASHTON** enjoys practicing her painting techniques as often as she can. She wants to see the arts flourish because it's important and its beautiful. PBS shares her values and for this reason, she has included her local station, WNET, in her will.



PART THREE:

TECHNIQUES TO HELP GUIDE IMPLEMENTATION

Techniques • Flight Strategy

Media is at the heart of public television and embedded in the DNA of stations. Access to mass media provides stations a clear advantage in a crowded fundraising environment. Stations can accelerate the growth of their bequest programs by leveraging all available communication channels.

The communication objective for bequest marketing is to keep station supporters aware of the opportunity to establish a bequest and favorably disposed to naming your station as a primary beneficiary. The requisite awareness and disposition must be maintained throughout the year since giving decision can be made at any time. Here's a quick summary of how the flight strategy works:

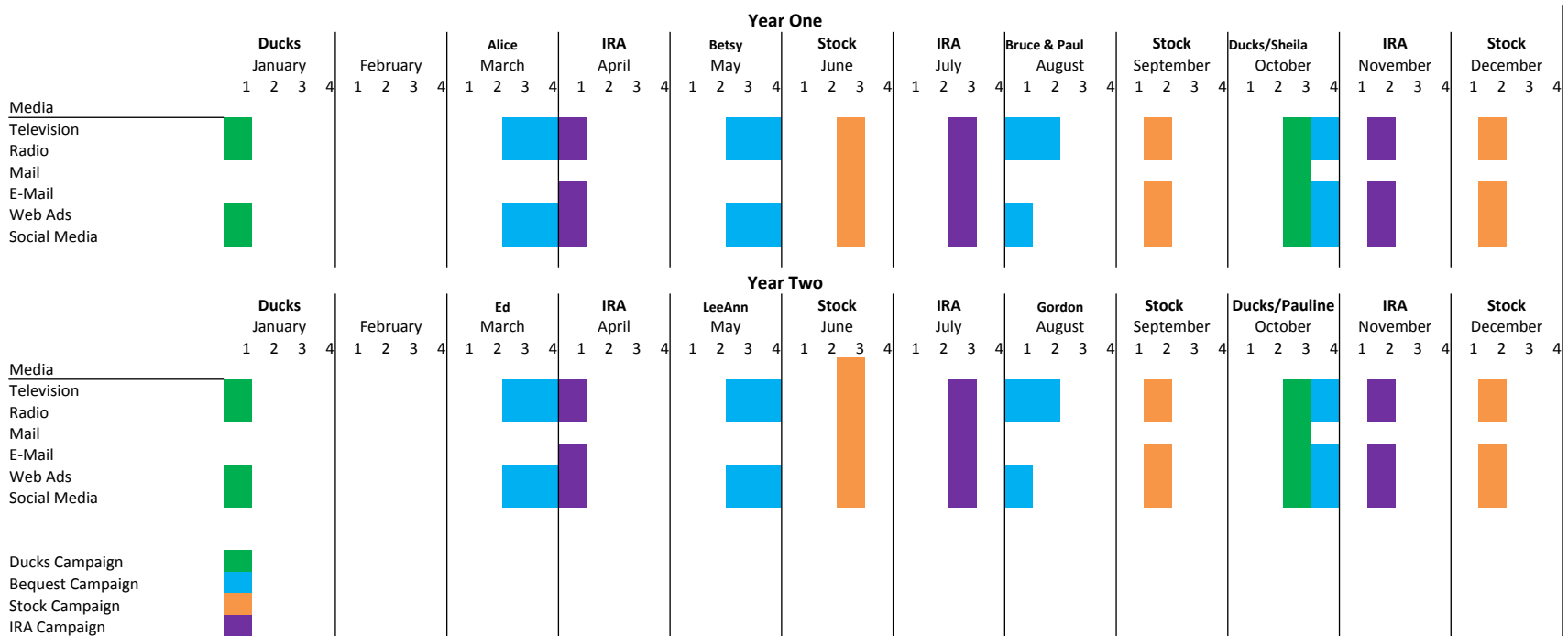
FLIGHT SCHEDULE | Run **four (4) cycles per year** for at most two (2) weeks.
The cycles should be spread out at wide intervals - much like on-air fundraising.

REACH | Aim for high reach upon all members of the target audience, individuals 55 and older. The on-air schedule of insertions should lean heavily upon times when there is a large concentration of older women viewers.

EFFECTIVE FREQUENCY | Strive for a minimum of eight (8) exposures per cycle on individuals within the target audience in order to have an impact on their disposition to take action. The desired action for bequest marketing is for a member of the target audience to contact the station and request more information.


Techniques • Flight Calendar

This is a sample marketing calendar for campaigns dedicated to bequests and outright gifts that commonly fall within the planned giving domain.



Techniques • Schedule of Insertions

| MARCH 2018 | | | | | | |
|---------------------------|------------------------|------------------------|----------------------|-------------------------|--------------------|--------------------|
| SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY |
| | | | | 1 Web ad Print Ad | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 Masterpiece 2 AM | 19 Antiques 2 AM | 20 FY Roots 2 AM | 21 Nature 2 AM | 22 NewsHour 2 AM | 23 8 PM 2 AM | 24 8 PM 2 AM |
| 25 Masterpiece 2 AM | 26 2 AM | 27 2 AM | 28 8 PM 2 AM | 29 2 AM | 30 2 AM | 31 8 PM 2 AM |

 Television

 Web

 Guide



ED MAPP grew up during the depression but was fortunate enough to attend college tuition free. He now sponsors a scholarship for one student as a way to give back. He has also decided to give back by including his local PBS station, WNET, in his will. PBS shares his values and he would like to pass it on to the next generation.

CONTACT US

Station Contributors

ROB HILBERT

Vice President, IPTV Foundation

KATHY REED

Asst. Vice President, WXXI

DEBBIE ELIASON

Sr. Director, WETA

CYNDE HORNE

Director, WNET

KATHY KIELAR

Sr. Director, WTTW

SUE ELLEN STUEBING

Vice President, CET/Think

KEVIN SMITH-FAGAN

Associate GM, KVIE

DAN VIRZI

Manager, CET/ThinkTV

DAWN DECK

ETV Endowment of South Carolina

JUDY CUTAIA

Executive Director, East Tennessee PBS

CINDY HALL-DURAN

Director, Twin Cities PBS