



Unlocking the Power of Philanthropy: *Engage Donors, Increase Planned Gifts, Embrace Storytelling*



Presented by:
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AGENDA



- The Art of Donor Engagement
- Strategies for Increasing Planned Gifts
- The Transformative Power of Storytelling
- Learning Objectives
- Q&A

The Art of Donor Engagement

Innovative approaches to connect with legacy giving donors:

- Personalized stewardship
- Communication - regular
- Volunteer opportunities - Legacy Society Luncheon host
- The donor and the gift of a story



Strategies for Increasing Planned Gifts

- Cultivating relationships
- Providing regular charitable giving information
- Appreciating the importance of estate planning
- Case study: The long haul/stay the course



The Power of Storytelling

Crafting compelling narratives:

- Emotions – legacy and impact
- Share stories from diverse perspectives
- Donors and supporters from varied backgrounds and experiences are looking for authenticity.



Identify and articulate at least three innovative approaches to connect with donors on a deeper level.

1. Your organization? Direct mail, email, social media, AI, etc.

2. Touchpoints with legacy giving donors? Newsletters, quarterly updates, events.

3. August – Make a Will Month; National Estate Planning Awareness Week – 3rd week in Oct.



Action plan for increasing planned gifts within your organization.

Inform donors on planned giving options:

- Host workshops or webinars on planned giving.
- Provide materials (brochures): IRA QCD, bequests, charitable annuities, beneficiary designations, CRTs, etc.).
- Encourage donors to consult their professional advisors.



Present compelling stories that resonate with diverse donors

- Include diverse backgrounds, cultures, and identities – seek guidance from a focus group of donors, and volunteers, hire a consultant, etc.
- Avoid stereotypes and tokenism - authenticity is key.
- Showcase the impact of your organization across different communities.

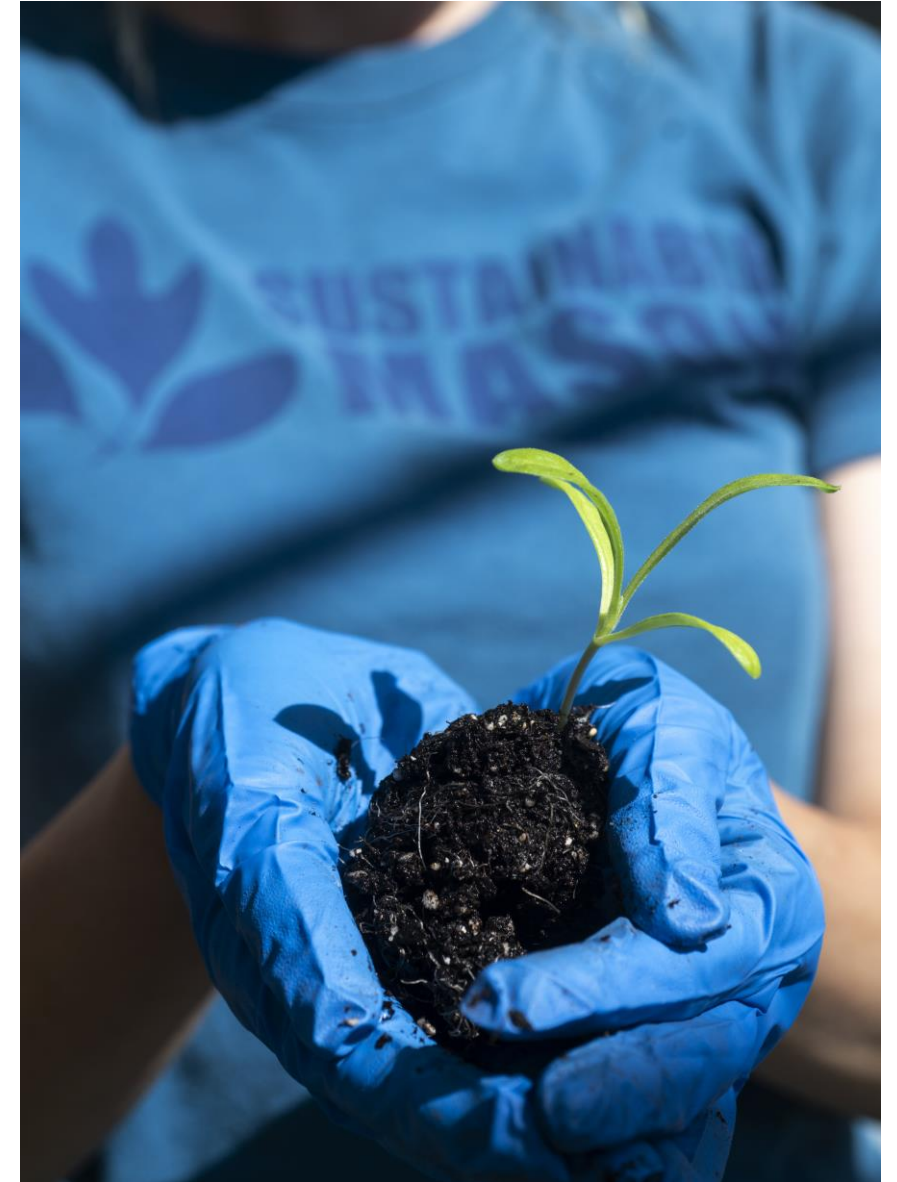


Call to Action and Impact: Inspire action through storytelling

Clearly state how donors' contributions make a difference:

- Encourage empathy and involvement
- End with a compelling call to support your cause

Powerful stories can move hearts and drive positive change



Questions?



Thank You!

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