



#Altraining

STEWARDING YOUR PLANNED GIVING DONORS


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LEARNING OUTCOME

After participating...

...you will be able to more intentionally steward different planned giving donors.



AGENDA

- Strategic stewardship events and communication
- Impact reporting/communications



CHAT

What is the most challenging thing for you when it comes to stewarding planned giving donors?

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STRATEGIC STEWARDSHIP EVENTS AND COMMUNICATION



STEWARDSHIP SEGMENTS FOR EVENTS

TRADITIONAL

65 years old +

NON-RETIRES

Younger demographic

REVOCABLE BEQUEST

Donor's committing
to campaign through
their estate (min.
\$100,000)

GOLDEN GRADUATES

Alumni celebrating
their 50th reunion year



ANNUAL LUNCHEON: LOGISTICS



- Held each fall on a weekday
- Convenient location
- Social hour, plated lunch, speaking program, dessert/coffee

ANNUAL LUNCHEON: PROGRAM AND MESSAGING



- Programmatic theme - topic and speaker selection is key
- Connects donors to faculty, leadership, and students involved in projects
- Highlight institutional activity
- Include trustee emeriti to show commitment from higher level

ANNUAL LUNCHEON: PROGRAM TOPICS



- Student ventures
- Healthy aging
- Evolution of the library

ANNUAL LUNCHEON: GOALS



- Thank donors
- Bring donors “inside”
- Celebrate annual successes
- Connect with fellow legacy society members



CHAT

What other stewardship touches could you incorporate into your luncheons?



SUMMER OUTING



- Held each summer on a weekday
- Luncheon boat cruise
- Different location each year
- Transportation offered
- Casual affair



POST EVENT



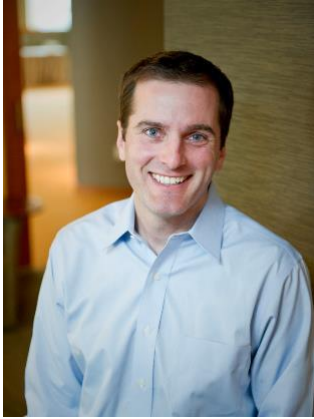
- Guest feedback
- Guest photo with enclosed thank you note

NON-RETIREEES

WHAT ABOUT OUR WORKING PROFESSIONALS?



■ NON-RETIREEES



- Evening/weekend event
- Sophisticated, convenient location
- Provide meaningful event stewardship
- Connect donors with leadership, faculty, and students
- Collaborate with existing campus event



■ NON-RETIREEES



- Individual meetings
- Committee development
- Identify viable options and programming





CHAT

**What else could you do for
non-retirees?**



■ REVOCABLE BEQUEST DONORS

- Donors who commit to campaign
- \$100,000 minimum
- Smaller cohort, but growing

THE CAMPAIGN FOR NORTHEASTERN UNIVERSITY

empower



REVOCABLE BEQUEST DONORS

- Provide an inside look so donors feel a deeper connection with the university
- “Behind the scenes” access is important
- Looking at hosting a lunch or dinner where guests hear from senior leadership
- Deeper program content

GOLDEN GRADUATES



- 50th reunion alumni
- Top prospects for gift planning
- Events held during commencement weekend

GOLDEN GRADUATES

- Celebrate anniversary year
- Promote legacy society
- Gift planning appeal letter from legacy society member to classmates
- Office of Gift Planning will sponsor various events throughout the weekend
 - Breakfast before commencement
 - Dessert at luncheon following commencement



CAMPUS EVENTS



- Compile campus activities
- Lectures, seminars, sporting events, musical performances, research presentations, etc.
- Mail to legacy society members twice per year (fall and spring)
- Offer RSVP service
- Identify legacy society members at campus events with signature ribbons
- Staff person present at certain events



CAMPUS EVENTS

If you are interested in attending any of these events, please contact
Charlotte Trojanowski, Director of Donor Relations, at 617.373.3026.



April 2014 Events

MONDAY, APRIL 7
6:00 PM — 9:00 PM

HUSKY STARTUP CHALLENGE DEMO DAY

More than 75 students, each of whom had a world-changing idea, were accepted to the Husky Startup Challenge in January. Now, after months of intense focus, they have turned their ideas into real companies.

Join us at the Husky Startup Challenge Demo Day, where you can meet and mingle with our budding entrepreneurs, examine their prototypes, review their pitches, and cast your vote for your favorite student venture.

THURSDAY, APRIL 10
10:00 AM — 5:30 PM

RISE:2014

RISE – the Research, Innovation, and Scholarship Expo – is a unique opportunity to explore the diversity of thought housed within the Northeastern innovation community. As the largest event of its kind in the nation, RISE has something that will inspire just about everyone in the innovation economy.

Join us at this extraordinary event and interact with the researchers, students, and entrepreneurs who make Northeastern a hub of discovery.

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CHAT

**What other specific segments
are you stewarding?**

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QUESTIONS

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IMPACT REPORTING / COMMUNICATIONS

■ IMPACT REPORTING

GOALS

- To show legacy society members that we are good stewards of their gifts and intentions.
- Allow donors to see the impact of a similar gift type.
- Illustrate institutional accountability.

■ IMPACT REPORTING

- Stewardship letters highlighting scholarship reporting of realized bequest
- Timed to go out after donors receive reports on their already established scholarships

IMPACT REPORTING

May 12, 2014

Mr. and Mrs. John Smith
123 Main Street
Boston, MA 02120

Dear Mr. and Mrs. Smith,

It is a pleasure to thank you for choosing to support Northeastern University through a planned gift. Your foresight and generosity will have a tremendous impact on the lives of future students, and I would like to tell you a little bit about a current student who is benefiting from a gift by donors like you.

Through their estate, John and Beryl Bunker established a scholarship to benefit full-time undergraduate students at Northeastern. The Bunkers had strong ties to the university, having earned a combined total of three degrees here, and they believed strongly in the importance of higher education.

John died in 2006, and Beryl passed away in 2010. Their legacy at Northeastern, however, endures. The John W. and Beryl H. Bunker Scholarship Fund was

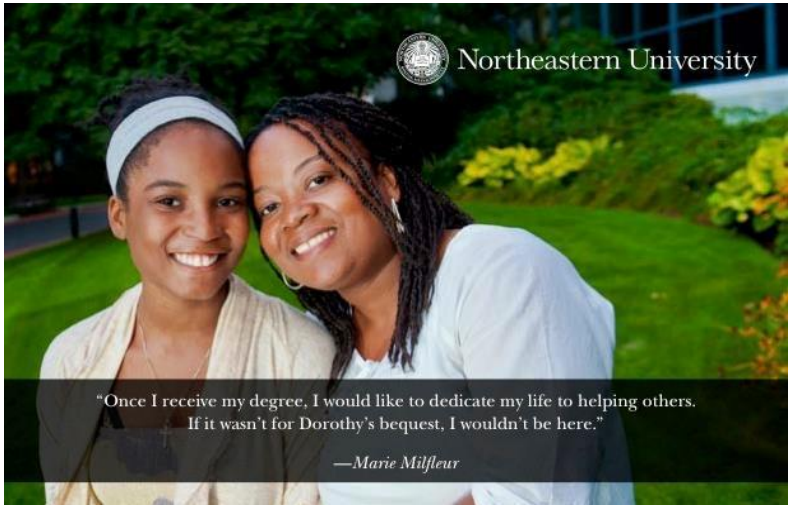
 29

IMPACT REPORTING - BEQUEST RECONFIRMATION

- Process of reconfirming bequest gift intention and designation of legacy society members
- Includes a letter, phone call, and personal visit
- 155 letters sent, 57 replies
- Promotes further engagement and conversations

 30

IMPACT
REPORTING



—Marie Milfeur

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IMPACT
REPORTING



"I'm the first college graduate in my family, thanks to the Northeastern supporters who funded my Torch Scholarship."
Nahomi Mochizuki, SSF15

BUILDING BETTER FUTURES

CALIFORNIA NATIVE Nahomi Mochizuki, SSF15, had never set foot in an airplane until she flew to Northeastern to be interviewed for a Torch Scholarship. Now, with a degree in political science and international affairs in hand, her life is taking off.
The Torch Scholars Program provides academic and social support to first-generation students with the goal of fueling the journey to earn a degree. Mochizuki's studies took her to the Dominican Republic, Cuba, and Japan. She also mentored high school students and promoted education through Boston's YMCA and Doss & Girls Club. Mochizuki, who has just signed in for night class, attributes a teacher's fair and kind behavior

to her success. "I never met one in the late Albert Tenney, whose bequest for scholarships came through his will. Tenney, who owned a janitorial services company, was born in the late 19th century. That generation was burned out by his 40-year business relationship with Northeastern, a client he considered family."
"Joe Tenney, Mr. Tenney, saw strength in young people. They may not know they have it," Mochizuki says. "They're here to find our path in the world."

Northeastern University
Office of Gift Planning
617.375.2000 • giftplanning@neu.edu
www.northeastern.edu/giftplanning

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IMPACT REPORTING

"Diana's scholarship has been integral in allowing me to pursue my career goal of becoming a public defender!"
—Tiffany Malcolm, CLUO, CLS (JC center, in red)

Building Better Futures

When the late Diana August, CLUO, 1991, arrived at Northeastern's School of Law, she never worked a day in the legal profession. True to tradition, Diana paved her way through law school and achieved great success in her legal career as a leader in trademark, copyright and patent law. Empowered by her success in representing some of the nation's largest corporations, Diana established a scholarship at Northeastern to help current students pursue the legal profession. Through a request in her will, Diane and her late father's generosity of donors will have the opportunity to influence the way it through the study and practice of law.

Today, Diana's scholarship recipients are living her legacy. With varying career and skills, the students are a true mix: going to court as justice in the classroom, the courtroom, and the world. These students embody Diana's spirit of perseverance and determination. Her foresight and generosity has helped these students build better futures.

617.373.2030 • giftplanning@neu.edu
northeastern.edu/giftplanning
Northeastern University
School of Law



COMMUNICATIONS

B-DAY / HOLIDAY CARDS

Signed by staff
Thanksgiving cards

PRINT NEWSLETTER

Sent annually in
spring

HONOR ROLL

Created annually in
fall/winter

NEW MEMBER PACKET

Mailed upon
membership



COMMUNICATIONS

Charitable and Financial Planning Insights from Northeastern University

Issue 1 | Spring 2014

Perspectives



Dorothy Cooley's Bequest Funds Marie's Scholarship **Single Parent Realizing Dream**



Marie Milleur, right, with daughter Sara.

Single parent Marie Milleur is realizing her dream of attending Northeastern due to a generous bequest established by the late Dorothy Cooley, a woman Marie never met. Yet they are linked by a love of helping others and the need to work while going to school.

Born in Haiti, Marie moved to Massachusetts with her family when she was a teenager. She worked at Brigham and Women's Hospital in Boston and dedicated herself to being a successful single parent. Once her children were older, she was finally able to pursue her dream to study psychology. But she needed financial assistance and the flexibility to attend classes while working and raising a family. The Dorothy G. Cooley Scholarship fund made Marie's dream a reality.

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COMMUNICATIONS

THE FRANK PALMER SPEARE SOCIETY

The Frank Palmer Speare Society is named for Northeastern's first president and recognizes alumni, parents, faculty, staff, and friends who have made estate provisions or other planned gifts in support of the university.

If you would like to join the Frank Palmer Speare Society, contact Sierra Rosen, director of gift planning, at 617-379-3030 or giftplanning@neu.edu.

Gloria A. Adams, LPT
 Robert J. F. 198, and Patricia J. Allen
 Barbara C. Adams, LPT
 Virginia J. Adams
 Larry A. Adams, and Joseph DeWayne Alvarez
 Daniel, Deborah, and Nancy J. Adams
 Jack Adams
 John A. and Billie Anderson
 Robert S. A'Hea, and Sara A'Hea
 Daniel F. Aquilino, R. FTS
 Daniel C. Auer, DDBS
 Juliana M. Auerbach, UT77
 Ted E. Avey, R. MBBS
 Albert E. Baker, J. DAP
 James C. Bakley, PFTC, and Valerie Hart
 Linda B. Baker, FTS, UT77
 Charles T. Barabian, FTS
 Steve S. Baril, FTS
 Donald F. Rubin, LARS, and
 Catherine Catherine-DeLo
 John E. and Priscilla H. Bealitz
 Margaret M. Bean
 Linda Lane Bean
 Stanley C. Beck, DDBS
 Mark R., Jr., FTS, and Audrey G. Becht
 Charles R. Beck, LARS
 Beverly and Benjamin LARS
 David M. Beeghly
 Alfred J. Beemer, FTS
 Renee M. Beemer
 Pauline M. Beemer
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 Kirk L., Jr., DDBS, and Frances S. Beeman
 Theodore M. Beeman, FTS
 David L. Beeman, MBBS
 Mark B., LARS, MBBS, and Wilson B. Beeman
 Stanley A. Beeman, DDBS
 Francis, DDBS, and Sarah C. Brody
 Michael C. Beemer, and Long H. Beemer, FTS
 Daniel M., FTS, and Lisa L. Beemer
 James C. and Judith B. Beem
 Michael B. Beem, LARS
 Richard, LARS, and Patricia C. Beemer
 Margaret B. Beem
 Ruth Myra Beem
 Steven E., DDBS, and Debra A. Baker
 Stanley M. Beckler, UT6, UT6
 Barbara Beemer, FTS
 Janet J. Beckler, MBBS
 Maurice E. Beckler, FTS

Ralph K. Beeman, FTS
 Arthur B. Beckler, Jr., DDBS
 Anthony J. Beckler, and Ann E. Cagliano
 Margaret J. Beckler, MBBS
 Robert E. Beckler, and Nancy K. Cain
 George J. Beckler, DDBS, and
 Linda B. Beckler-Campbell, MBBS, MBBS
 Robert A. Beckler, FTS
 Leah S. Beckler, FTS
 Robert L. Beckler, FTS
 Nancy S. Beckler, DDBS, MBBS, FTS
 Joanne Mary Beckler, LARS, MBBS
 John A. and Frances A. Beckler
 Jeffrey M. Beckler, FTS
 James J. Beckler, DDBS
 Loretta C. Beckler, FTS
 Just Barry Chinn, PE, FTS
 Peter C. Beckler and Leslie Chinn
 Gary H. Beckler, LDB
 Donald L. Beckler, FTS, and Joseph D. Beckler
 Robert A., DDBS, and Lois Deagan
 Robert L. Beckler, LARS
 Robert L., FTS, and Barbara Beckler
 Howard L. Beckler, and Rose M. Beckler
 Cindy Beckler, FTS
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 Joseph M. Beckler, LARS, MBBS
 Robert J. Beckler, and Amy Ann Beckler
 Flora L. Beckler, FTS
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 Flora L. Beckler, FTS
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 Wade Henry Beckler, FTS
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 Cecelia Fred Beckler
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John LaBelle
 Dean
 College of
 Professional Studies

COMMUNICATIONS

FRANK PALMER SPEARE SOCIETY



The Frank Palmer Speare Society honors and advances the astounding legacy of one man who guided the development of university from the very beginning and served as Northeastern's president.

The Frank Palmer Speare Society was established to recognize Northeastern alumni and friends who demonstrate their generos and commitment to the university through a planned gift. Such might include a bequest and/or charitable income gifts, such as charitable gift annuities, charitable remainder unitrusts, charitable remainder annuity trusts, or gifts of real estate.


As a member of the Frank Palmer Speare Society, you are invite special gatherings throughout the year and receive a commens gift and membership pin recognizing the lasting bond of your philanthropic support. Above all, you will have the certainty of knowing that your gift will continue to enhance Northeastern's tradition of excellence while providing for future generations of students.

- New member packet mailed upon confirmation of planned gift
- Includes letter, society information and history, pin, and crystal paperweight

COMMUNICATIONS: ANNUITY LETTER

- Gift annuity letter to those receiving payments
- Sent quarterly to gift annuitants
- Thank-you letter and updates from the university
- Institutional accomplishments and highlights

DIGITAL


March 8 at 11:32am

Frank Palmer Speare was born on March 31, 1866. In honor of his birthday, we're posting fun facts and photos all month long!
Did you know? In 1926, twenty-eight years after Northeastern's founding, the husky was chosen as our mascot!

Just over 89 years ago, on March 4, 1927, King Husky I arrived at Northeastern from legendary sled dog racer Leonhard Seppala's kennel in Poland Springs, Maine. President Frank Palmer Speare shook hands with Seppala and presented King Husky I to the university, as seen in the photos below.

The arrival of King Husky was a school-wide celebration – they even cancelled classes! King Husky I ruled as our mascot until his death in March 1941.

Want to read about the King and Queen Huskies of Northeastern history? Check out this great timeline created by Northeastern University Libraries: <http://ow.ly/YZ77n>

Go Huskie!



- Facebook strategy for stewardship and engagement
- [Video featuring legacy society member](#)



TAKEAWAYS

- Identify segments of your legacy society
- Create strategy based on those segments
- Use existing communication avenues and events
- Create event programming that brings donors “behind the scenes” and showcases institutional talent



QUESTIONS



EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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43