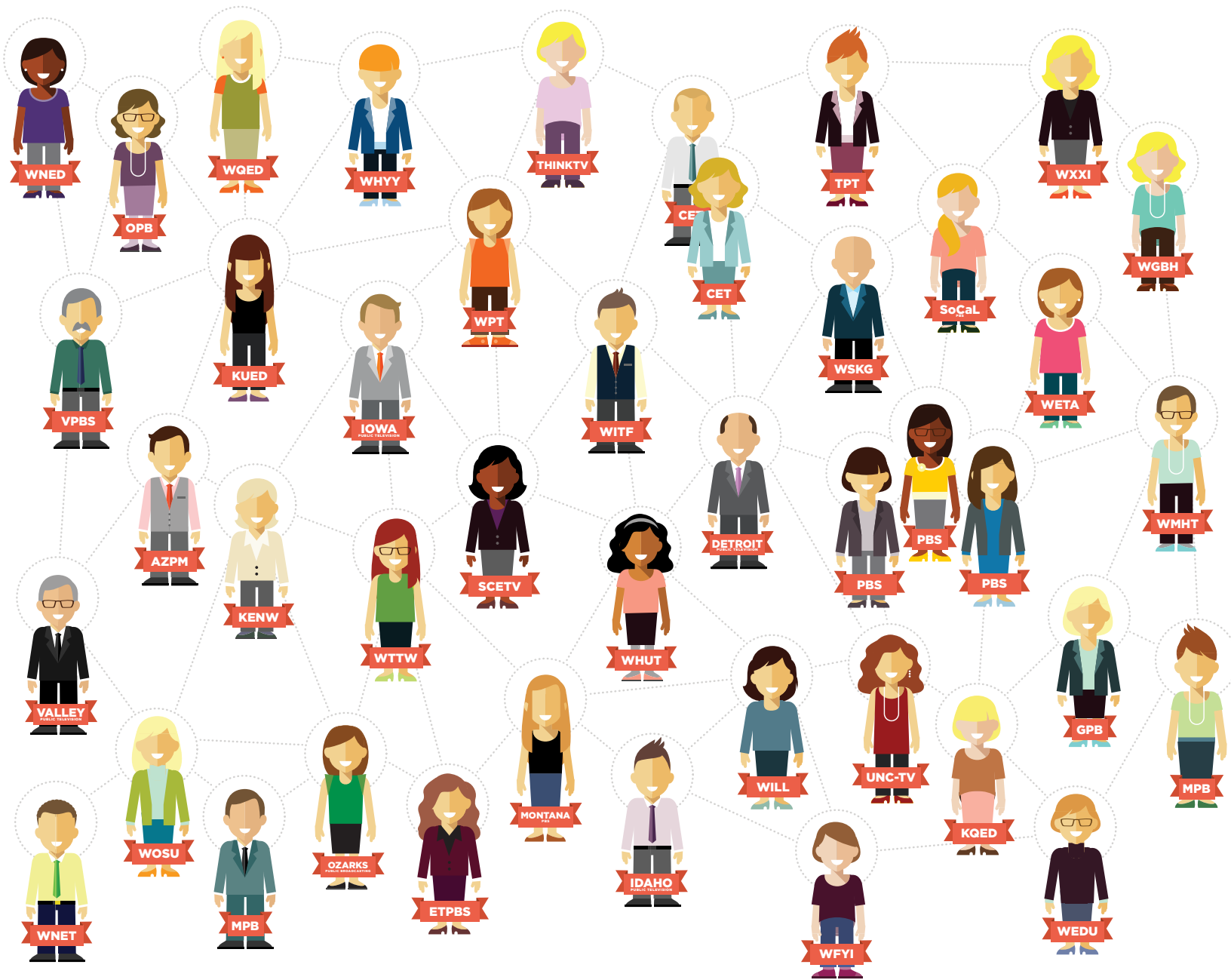


**FUNDING
THE VISION
TOGETHER!**



the
**Planned
Giving
Capacity
Building**
project

TABLE OF CONTENTS



THE OPPORTUNITY

The shifting media landscape is changing the way the American public consumes content. PBS and stations are responding to these changes by adopting strategies to transform the public broadcasting experience. The implementation of these strategies will require an amplification of resources – time, people, and **MONEY**.

Planned giving can provide the resources needed to help stations fund the vision of public media. We know the public television audience is extremely loyal and tends to skew older. These two conditions signal fertile ground for planned giving. And yet, less than 50% of stations report annual revenue from bequests and other planned gifts.



WHY? TIME, PEOPLE AND MONEY

By **2052**, it's been **estimated that \$41 trillion** will transfer from one generation to the next. A respectable portion of this wealth will be transferred to charities through bequests and other financial arrangements. In order to become more competitive in this crowded fundraising environment, stations should begin planting seeds today to ensure a prosperous tomorrow.



THE IDEA

SHARED PLANNED GIVING PROGRAM

Planned giving is a unique area of fundraising where stations can accelerate growth by working together. Hence, an idea was introduced to create a shared planned giving program for public television. To help shape this idea into a scalable and sustainable service model, PBS secured a multi-year planned giving capacity building grant.

Here's a recap of our collaborative capacity building story:



1.LISTEN

The planned giving capacity building project was kick-started by assessing the similar yet varied needs of stations. The insights gathered from this exercise helped inform the decisions made about specific assets needed to improve station fundraising performance.

2.LEARN

With the help of stations, PBS produced a bundle of planned giving marketing resources. These resources were then tested by a representative group of stations. Prototypes of planned giving spots, ads, websites and mail packages underwent rigorous testing. The lessons learned from the test helped PBS understand what worked and what needed further improvement.

3.LAUNCH

The planned giving assets have now been refined to the satisfaction of all stakeholders and are now ready for system-wide delivery. Even after the planned giving project has come to an end, PBS and stations will continue working to improve relentlessly and reinvent constantly. Our shared goal is to ensure the financial sustainability of all stations and the public television system as a whole.

THE VALUE PROPOSITION

The bundle of products and services available through PBS will help stations that want to start or grow planned giving without spending an exorbitant amount of time and money. The offerings range from self-help marketing assets to dedicated consulting support. The following sections provide more detail on the benefits available to PBS Member Stations:

SELF-HELP: spots + ads + website

COMMUNITY: Store + Share

COLLABORATE: National Estate Planning Awareness Campaign + collateral materials

PERSONAL: consulting + training



SELF-HELP RESOURCES

SPOTS+ADS

A catalog of spots is available to help stations raise awareness about the benefits of planned giving. The evolving catalog includes testimonials and informational spots to help stations market bequests, stock gifts, charitable gift annuities and much more. These turnkey assets will help stations get started quickly without putting a strain on time or budget.

The spots were produced for television but can be extended to the web and other digital platforms.

A suite of companion print and digital ads are included in the marketing bundle. To provide greater flexibility, the ads are available in a variety of size and color options.



SPOTS+ADS

SELF-HELP RESOURCES

CLICK PHOTOS TO VIEW THESE SPOTS!

"I want young people"
To know that the world is a much bigger place than the spot they are occupying at the time.

Please consider joining Betty by including [Station name] in your will or future plans.

NAME: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____

YES, I would like to be contacted by the station. YES, I would like to be contacted by the station.

CALL US AT 1-800-855-1234



"I want young people"
Click to learn more!

"I want young people"
Click to learn more!

"I want young people"
Click to learn more!



"I want to see the arts,
and it's hard because it's hard, and it's hard!"

Please consider joining Betty by including [Station name] in your will or future plans.

NAME: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____

YES, I would like to be contacted by the station. YES, I would like to be contacted by the station.

CALL US AT 1-800-855-1234



"Just like our travels,
Find out how!

"Just like our travels,
Click to learn more!

"We want to see"
More generations maintain these arts that we love so much.

Please consider joining Bruce and Paul by including [Station name] in your will or other future plans.

NAME: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____

YES, I would like to be contacted by the station. YES, I would like to be contacted by the station.

CALL US AT 1-800-855-1234



"We want to see"
Click to learn more!

"We want to see"
Click to learn more!

"We want to see"
Click to learn more!

"Just like our travels,
PBS has given us a broader view of the world."

Please consider joining Sheila and Larry by including [Station name] in your will or future plans.

NAME: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____

YES, I would like to be contacted by the station. YES, I would like to be contacted by the station.

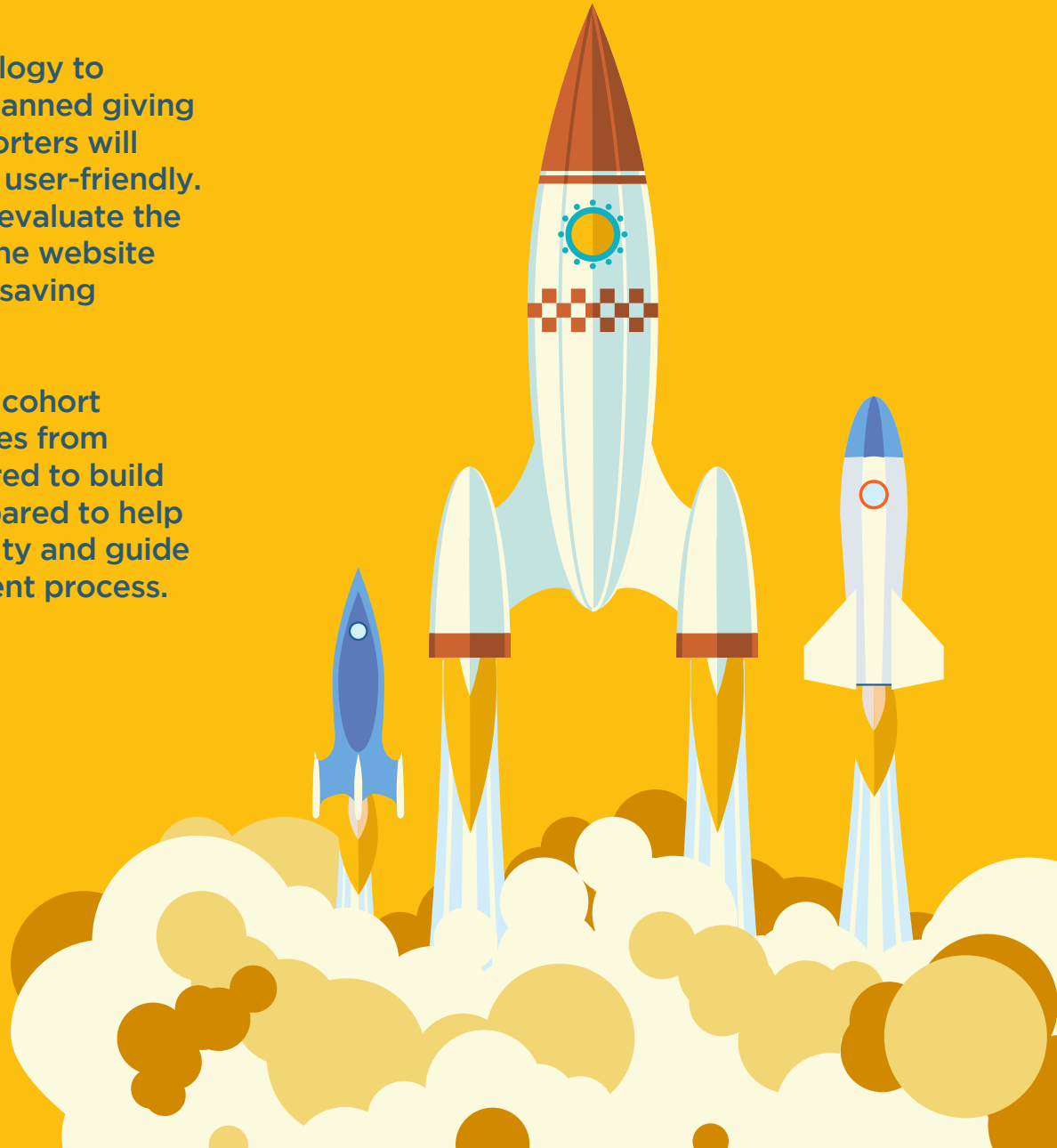
CALL US AT 1-800-855-1234

SELF-HELP RESOURCES

WEBSITE

PBS has leveraged 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 now and later. The website has proven to be an effective cost saving solution for stations.

PBS will start onboarding the next cohort of stations in September. Resources from development and digital are required to build the site. A [checklist](#) has been prepared to help station teams assess the opportunity and guide them work through the development process.



WEBSITE
SELF-HELP RESOURCES



PBS SOCIAL PLANNED GIVING



WHUT LEGACY CIRCLE



EAST TENNESSEE PBS PLANNED GIVING

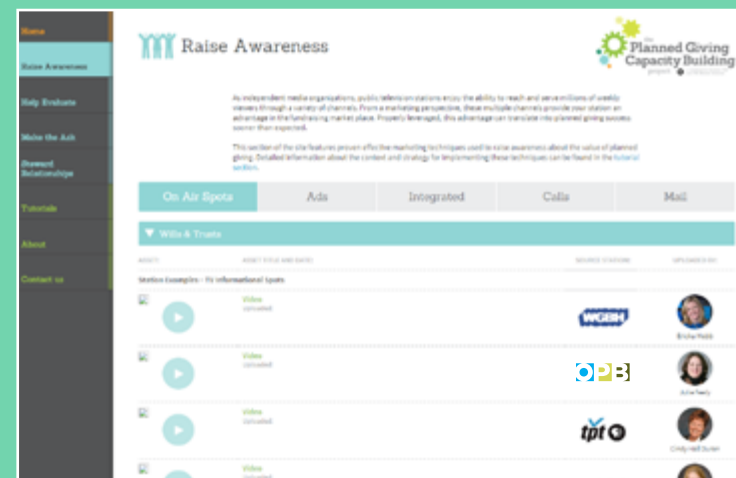
COMMUNITY

STORE+SHARE

The planned giving Store + Share platform provides an opportunity for stations to learn what works from one another. In the first phase of development, the site serves as repository for storing and sharing marketing and stewardship resources. The site also stores planned giving assets that stations have co-created with PBS.

For stations with new planned giving programs, the station examples can help provide ideas and guidance. For stations with mature planned giving programs, the site can provide an opportunity to share with other stations and learn from peers.

By contributing to the site, stations can strengthen the platform, build community and create lasting connections.



COLLABORATE



A co-op has been established to help stations do more with their planned giving marketing dollars. By coming together as a unit, stations can enjoy the cost breaks inherent with volume pricing. PBS is delighted to offer and coordinate two such opportunities:

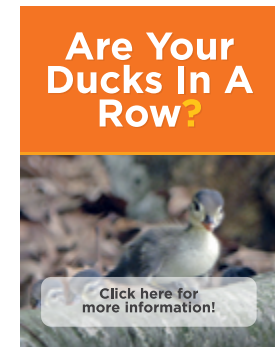
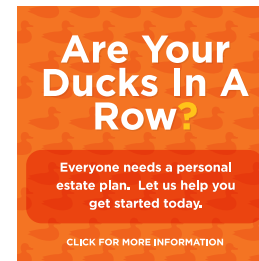
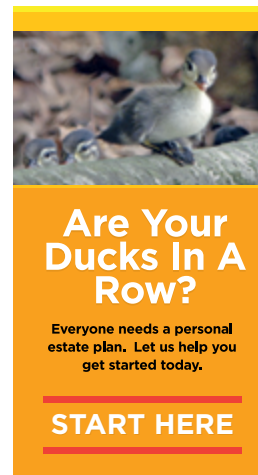
COLLABORATE

NEPAC - Are Your Ducks in a Row?

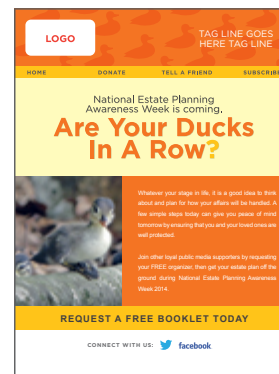
With the support of WNET and NATURE, PBS is sponsoring a system-wide effort to promote *National Estate Planning Awareness Week*. This public service initiative can help stations raise awareness about the importance of estate planning and, at the same time, identify planned giving prospects and discover established gifts. This educational campaign is supported by a full suite of marketing tools and resources. By joining stations in this national initiative, stations can enjoy deep cost savings and build lasting relationships.



TV SPOT



WEB ADS



E-MAIL BLAST



FINANCIAL PLANNING BOOKLET

COLLABORATE

Planned Giving Collateral

Collateral materials can help educate station supporters about the benefits of planned giving. The suite of customizable materials includes a comprehensive booklet and supplemental brochures. The collateral materials are designed to provide value to both TV only and joint licensee stations.



PLANNED GIVING CONSULTING

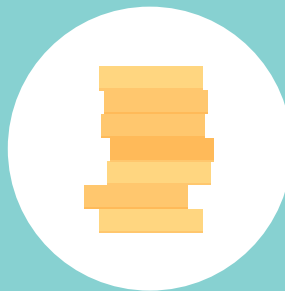
Need help with your planned giving program?

PBS can help! As a benefit of membership, PBS will offer dedicated consulting support to stations that want to start or revitalize a planned giving program. The engagement will follow a framework that begins with understanding station needs and ends with a road map to financial sustainability.



**GAIN
COMMITMENT**

+



**BUILD
PIPELINE**

+



**STRENGTHEN
RELATIONSHIPS**

=



**FINANCIAL
SUSTAINABILITY**

PLANNED GIVING CONSULTING

Stations enrolled in the program will receive personal support with developing actionable plans and implementing best practices discovered from peers within and outside public broadcasting.

- Free and reduced database enhancements and planned giving software programs
- Free onsite planned giving training for staff and boards
- Peer-exchanges with stations in the consulting cohort
- Private coaching opportunities with veteran development professionals

Our consulting approach is focused on meeting stations where they are with a personalized plan of action.



PLANNED GIVING TRAINING

Need help building planned giving knowledge and skills?

PBS Development Services is set to deliver a comprehensive planned giving training program. The trainings will be delivered on-site at regional and national gatherings as well as through webinars and on-demand options.

Trainings will be announced in the monthly PBS Development Services *Spotlight*.



QUESTIONS?

**CONTACT TIA J. GRAHAM, DIRECTOR -
PLANNED GIVING CAPACITY BUILDING PROJECT**



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TJGRAHAM@PBS.ORG OR
CALL 703.254.3974**