SCHOOL OF INFORMATION
UNIVERSITY OF MICHIGAN

Estate Planning During COVID-19

CASE Award submission abstract

TITLE OF ENTRY

University of Michigan School of Information
Estate Planning During COVID-19

CATEGORY TITLE

Fundraising: Fundraising Pivot — Entries should demonstrate a new, creative way of conducting a key fundraising initiative, such as an annual giving day, class gift initiative or other targeted fundraising effort because of or relating to COVID-19.

INSTITUTION

University of Michigan, School of Information

NAME AND CONTACT INFORMATION FOR INDIVIDUAL SUBMITTING ENTRY

Greg Powell
University of Michigan, School of Information
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NAMES OF ALL INDIVIDUALS RESPONSIBLE FOR ENTRY

Greg Powell, Development Associate
Nick Campbell, Assistant Director of Development & Alumni Relations
Andrea Daly, Associate Director of Development & Alumni Relations
Rebecca Pagels, Executive Director of Development & Alumni Relations

GENERAL DESCRIPTION OF THE ENTRY

Attending the estate workshop gave me a sense of comfort when I documented my planned gift with the School of Information. The session was informative, creative, and answered the questions I had.

Sue Quackenbush ('75)
on attending the estate workshop

The University of Michigan School of Information (UMSI) launched its first estate planning workshop in partnership with UM's Office of Planned Giving in fall 2014. The on-campus workshop provided attendees with an overview of estate planning, tax considerations, durable powers of attorney, and other relevant considerations including estate gifts. Following the pilot estate workshop in 2014, UMSI and the Office of Planned Giving expanded this fall workshop to include units across campus, with invitations extended to alumni and friends in Southeastern Michigan. Results from the workshop included planned gift conversations, documented planned gifts, and feedback that the workshop is a resource and service.

When the university went to remote operations in response to COVID, UMSI decided to pivot from the broader campus estate workshop and hold its own virtual estate workshop specifically tailored to UMSI alumni. As part of this, UMSI built on a planned giving mailing sent to alumni between the ages of 50-85 at the beginning of the summer followed by two virtual estate planning workshops in August 2020. UMSI decided to hold two virtual estate workshops to ensure manageable numbers and better facilitate conversation. UMSI timed the workshops to occur 1.5 months after its planned giving mailing and, given the remote format, invited alumni across the country. Additionally, UMSI invited two other units with similar constituencies to join and collaborated with the Office of Planned Giving throughout the process. Both workshops had strong attendance with individuals across the country, feedback was positive, and follow up planned gift conversations have occurred.

METHODOLOGY AND STRATEGY

Key steps included the following:

- Met with Planned Giving office to establish objectives and parameters of workshop, June 2020.
- Identified and secured attorney presenter for sessions (Elizabeth Petoskey), end of June 2020. The attorney identified is one who had presented in previous years and had overwhelmingly received positive feedback from alumni surveyed who attended previous workshops.
- Defined the invitee pool: UMSI alums age 50 - 85. This pool was determined based on a UMSI planned giving mailing sent in May 2020. UMSI used this mailing to support follow up communication about the workshop. Identified two other units with similar constituencies (Rackham Graduate School and Clements Library) and invited them to participate.
- Coordinated promotion and invitations with Marketing & Communications team. Three invitations were sent in the month of July. Determined cap of 25 attendees/workshop to facilitate meaningful interactions and conversations.
- Held a prep meeting with the attorney to discuss key topics that might be of importance to the attendees. Held two workshops on August 4th and 5th, 5:30 - 6:30 pm EST.
- Following the two workshops, sent the ppt presentation provided by the attorney and a video of the workshop to those who RSVP'd.
- Gift officers scheduled follow up calls to get feedback and qualify attendees as planned giving prospects.

The Virtual Estate Workshop was a "must see" for anyone wishing to plan for the two certainties of life — death and taxes. The presentation gave novices a basis for understanding fundamental concepts of estate planning. It also contained useful pointers for those of us who are revising our existing plans. It's difficult to contemplate one's own demise, but speaking as an Executor, any planning that can be done in advance will earn the eternal gratitude of the beneficiaries. Inspired by the workshop, my wife and I have embarked on our third round of estate plan revisions.

Michael Nolte ('97)
on his experience with the virtual estate workshop

METHODOLOGY AND STRATEGY

Planned giving letter sent prior to virtual estate workshop

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Information changes everything.

June 2020

Kenlee Ray (AMLS '68)
on behalf of the School of Information
4322 North Quad
105 S. State St.
Ann Arbor, MI 48109

Dear <full name>,

I hope this letter finds you safe, healthy and well. During these uncertain times, I have been thinking about my estate and planning for my family and future. The University of Michigan offers terrific resources for alumni who are considering their legacy. The Office of University Development provides professional consultation for estate planning and other planned giving options. Alumni also have access to estate planning materials that you might find helpful. With this letter, you will find a table of contents for a comprehensive Personal Estate Lesson Book that you can access at plannedgiving.umich.edu/personal-estate-planning-kit.

As you think about taking care of your family and future, there may be other areas and causes that you value as well. You can utilize the Personal Estate Record Book on the U-M website to record important information for your family regarding the details of your estate. For example, the School of Information is a priority for me, and I have decided to include the school as a part of my legacy. UMSI or other nonprofit organizations may be meaningful for you as well.

If you have questions or would like additional resources, please contact the UMSI Development and Alumni Relations team at **umsi.development@umich.edu**. Included with this letter is a response device you can fill out and return to request further estate planning materials.

As graduates of the University of Michigan School of Information, we alumni are strong individuals who benefited from our education at a top university. I believe we have the resilience to weather these difficult times. I hope you find the university's planning resources helpful as we navigate towards a brighter future.

Sincerely,

Kenlee Ray (AMLS '68)

Mailing name
AddressLine1
AddressLine2
AddressLine3
AddressLine4
City, State, Zip Code

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Preferred contact method:

- ☐ Email ______________________
- ☐ Phone ______________________
- ☐ Other ______________________

Please check all that apply:

- ☐ I am interested in getting more information about estate planning
- ☐ I have already included UMSI in my estate plans
- ☐ I am interested in making a gift to the UMSI Student Emergency Fund

To give online, go to umsi.info/give
or write a check payable to the University of Michigan
or call 888.518.7888

Thank you for your gift!

ID: <LOOKUPID>

20797

METHODOLOGY AND STRATEGY

Email invitation to virtual estate workshop

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Virtual Estate Workshop
for UMSI, Rackham Graduate School and Clements Library

Tuesday, August 4, 2020
or Wednesday, August 5, 2020

The University of Michigan School of Information, in partnership with the Rackham Graduate School and the Clements Library, invites you to a virtual learning session on estate planning. This is an opportunity to demystify the logistics and tax issues around estate planning.

Ann Arbor attorney Elizabeth Petoskey, who specializes in estate planning and administration, will be presenting, followed by a Q&A with participants. She is a partner at Conlin, McKenney & Philbrick.

We are offering two sessions to accommodate your schedule.

Session 1: Tuesday, August 4, 2020
5:30-6:30 PM EDT

Session 2: Wednesday, August 5, 2020
5:30-6:30 PM EDT

Please RSVP indicating your preferred session using this link.

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UMSI Development and Alumni Relations

3421 North Quad, 105 S State St, Ann Arbor, MI 48109-1285

Unsubscribe - Unsubscribe Preferences

DOCUMENTED RESULTS, MEASUREMENTS OF EFFECTIVENESS

UMSI identified an immediate need for estate planning information and education as more people are creating and revisiting wills in response to COVID. Additionally, the school wanted to use the workshops to support an annual UMSI planned giving mailing and continue its estate planning workshop while expanding the workshop's reach.

The goals of this year's workshop were as follows:

1) engage UMSI alumni from across the country with an estate workshop

2) continue an annual workshop while tailoring it to the unique characteristics of UMSI alumni (i.e., alumni are more likely to work for nonprofits and universities, holding retirement assets in 401(ks) and IRAs)

3) identify new potential planned gift prospects

4) provide alumni with a service, in essence give back to UMSI alumni

The demographics invited were alumni ages 50-85 across the United States (approximately 3,000 invitations). This list matches the list of individuals who received the planned giving mailing from UMSI in early June. We scheduled two sessions on August 4th and 5th with the number of attendees capped at 25/workshop, including staff and the attorney, to allow for more meaningful dialogue and questions.

Success of the workshop was measure in the following ways:

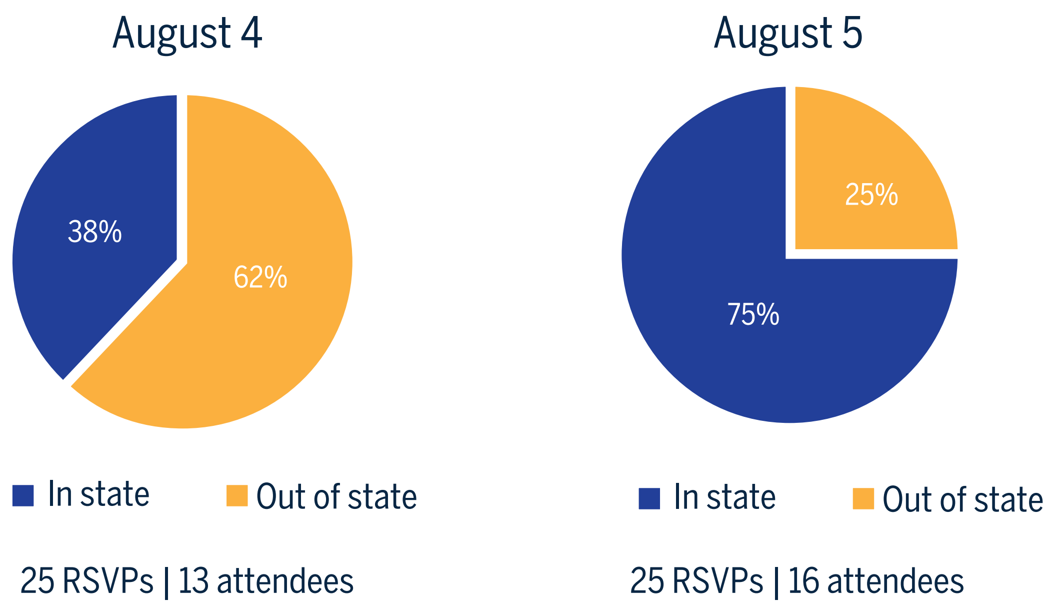
Number of attendees: **13** first workshop and **16** second workshop plus two staff and the attorney at workshop

Out-of-state attendees: **eight** and **four** respectively

Workshop engaged planned gift prospects: **Five identified prospects**

Follow up conversations scheduled to qualify potential planned gift prospects and gain feedback on the workshop: **seven to date**

DOCUMENTED RESULTS, MEASUREMENTS OF EFFECTIVENESS



Attendees shared that the attorney, Elizabeth Petsokey, was informative, clear, and engaging. They felt that the information provided helped them in their estate planning and that they would use this information in subsequent conversations with their estate attorney. One alumnus shared that he is inspired to move forward on an estate gift, and another alumna shared that she had attended several estate workshops in New York offered by other nonprofits; when comparing those to UMSI, UMSI's workshop was the best she had attended.

TOTAL NUMBER OF PROFESSIONAL AND SUPPORT STAFF WHO WORKED ON THE PROGRAM

Professional staff: 3

Greg Powell, Development Associate
Anna Lawrence, Digital Content Strategist
Elizabeth Petoskey, Volunteer Estate Attorney

1-2 development staff for each workshop

PROGRAM BUDGET AND UNIT COSTS WHERE APPLICABLE

Because this event was held virtually, and our attorney offered her time free of charge, this event did not require a budget.