



CLOSING THE (GIVING) GAP: **How Thompson & Associates Helps Produce Legacy Gifts for the Saint Louis Zoo Through Education and Empowerment**

ABOUT THE SAINT LOUIS ZOO

The Saint Louis Zoo has been a beloved cultural gem for over 100 years -- a leader in species conservation, research, animal care and education. Its mission is to conserve animals and their habitats, from fence to field. Beyond having top accolades for that worthy effort, the Zoo is adored by millions of people every year who enjoy seeing wild animals, connecting with the natural world, and spending time outdoors with their families at an affordable recreational venue. It is a **free-admission** zoo with over 50,000 members. The local community has repeatedly voted to tax itself in support of the Zoo, and complements that tax support with philanthropy. With all this "Zoo love," it seemed odd that legacy giving was not a bigger element. How could the Zoo widen the pathway for legacy support from its multitude of friends? How could the Zoo develop a culture of legacy giving to build its Endowment Fund with bequests? What could make legacy giving more approachable, understandable, and even joyful? How could Zoo friends be shown their "beyond imagination" potential for expressing their values for "Animals Always" in perpetuity?

In 2017, they found a valued partner in Thompson & Associates to help achieve all those dreams.

SUMMARY

Since working with Thompson & Associates, the Saint Louis Zoo has benefitted from:

- Stronger donor relationships
- Increased legacy giving
- Development team confidence with planned giving

Through interactions with other Thompson & Associates clients at a Nashville conference, the Zoo learned more about the ways and effective results of its services, and decided to hire them to support their development team.

Until that point, a significant obstacle for the Zoo was the perception that seeking bequests felt like a "death topic," a solicitation rather than offering an opportunity to leave a gratifying legacy. This was as true among the development officers as it was for their donors.

In just two years of working with Thompson & Associates, the Zoo's development officers have become more comfortable taking a different, more effective approach with engaging potential legacy donors. The Zoo has learned to listen with "different ears" and speak a different language, thereby better serving their donors. The development team has increased confidence in inviting donors to express their values by remembering the Zoo with a legacy gift, and are more comfortable stewarding existing legacy gifts to grow them as appropriate.



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CHALLENGES

The primary challenge faced by the Saint Louis Zoo was developing a comfortable process to move prospective legacy donors from Point A to Point B. Donors understood what was being asked, and embraced the concept, but didn't necessarily know how to make it happen. And even if they did, they were often paralyzed by procrastination.

The Zoo's planned giving program invests in print and digital marketing, a planned giving website, testimonial videos, donor surveys, events, and external advertising. These are great tools, but there seemed to be a frustrating stopping point for development officers who had done what they reasonably could with donors, then simply had to hope donors would "get around to doing an estate plan" to indeed remember the Zoo.

INSIGHTS

Thompson & Associates helped the Saint Louis Zoo identify how their program could be strengthened. There was a need to help donors who felt "stuck" to understand what their next steps are to achieving a more holistic giving plan. Indeed, to envision what they could do by seeing their own potential. The Thompson process picks up where the development officers are obligated to stop. Thompson's facilitated process is a powerful tool to overcome donor confusion, procrastination, and feeling overwhelmed by estate planning. Thompson & Associates turns those reactions into a self-paced, empowering and joyful experience.

In addition to the Zoo's planned giving director attending Thompson's annual client conference, testimonials from other clients highlighting success stories greatly influenced the Saint Louis Zoo to partner with Thompson & Associates. The heartfelt narratives of organizations that benefitted from Thompson's services were particularly compelling. Hearing other clients speak of the positive outcomes they and their donors experienced was an exceedingly influential aspect.

What the Saint Louis Zoo had suspected came to light – potential legacy donors were unaware of their full net worth. Once they had a fuller picture, they were more inclined to consider themselves candidates for planned giving, and Thompson & Associates facilitated a clear pathway for them to provide for the family, friends, and causes they love.

"We've learned to listen to our donors with different ears and how to invite them to explore their own potential to provide for those they love. It's great to have a truly donor-focused benefit to empower them to dream big and make it happen."

LORI A. SULLIVAN, FCEP
Director of Planned Gifts
Saint Louis Zoo



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IMPLEMENTATION

The Zoo set its stage for success by securing buy-in from volunteer leadership and senior staff to not only approve the program, but also to be champions for it. The Board's Planned Giving Advisory Committee members are terrific ambassadors of the process, and host an annual event to introduce the benefit to Zoo friends. One of the biggest outcomes has been helping donors understand how they can bridge the gap between the concept of legacy giving and the action to make it their story.

The Saint Louis Zoo looks forward to partnering with Thompson & Associates on donor meetings one day per month. In addition to providing highly specialized estate planning services, it is also a time for development officers to learn more about the motivations and ways donors give. The Thompson process has been an invaluable tool for team members to better understand the donors they serve and their potential to make meaningful gifts that they never realized they could make.

RESULTS

The overarching stewardship element of the program complements other avenues of giving. If people love the institution enough to support it after their lifetimes, it's rather natural to increase their annual gifts while they are alive and to support capital projects and special initiatives. They feel a family tie, so they follow through to do what they can to ensure long-term success.

Thompson & Associates' services have made legacy giving a consistent focus for the development team, senior staff, and volunteer leadership at the Saint Louis Zoo. One way that happens is emphasizing stewardship by celebrating donors for their partnership. Beyond the goal to garner support for the Zoo, donors feel the freedom to remember additional organizations in their legacy plans. This allows the Zoo to be a catalyst for helping other nonprofits in the community grow their legacy giving, strengthening the entire nonprofit landscape.

The development team and leadership of the Saint Louis Zoo **enthusiastically** endorse the work of Thompson & Associates for providing a partnership that strengthens its donor relationships by offering a gift of gratitude that serves their interests. When that happens, everyone wins!

Hear firsthand what David and Judy have to say about their experience through the Saint Louis Zoo by [clicking here!](#)

