

Planned Giving Marketing 102 - Creative Ways to Get Your Point Across

Planned Giving Day

October 26, 2017

1:45 p.m. to 2:45 p.m.

An article in this month's Stanford Social Innovation Review, "Philanthropy's Missing Trillions," discusses the \$30 trillion wealth transfer opportunity and contends that charities are missing trillions of dollars because planned giving operates in a silo. The authors suggest strategies to gain access to these trillions that hinge on promoting the value and importance of planned gifts to fellow development professionals, marketing and finance colleagues, donors, and their advisors. During this roundtable session, we will discuss your stories about ways you can get your point across to these important colleagues and constituents.

I brought my stories that answer the questions below. But I'll ask participants to share your stories first.

I. Ways to get your point across to your DEVELOPMENT COLLEAGUES:

*Development colleagues in a Large Shop are Major Gift Officers, Annual Fund, etc.
Small Shop development colleagues could be your CEO or a program officer.*

How can you influence counting/crediting so they receive credit for planned giving?

How can you build training sessions around meeting their goals?

How can you help reach campaign goals with planned gifts?

II. Ways to share your ideas with your MARKETING COLLEAGUES:

What do your marketing colleagues want that you can supply?

What pieces do your marketing colleagues produce that you can get a free ride on?

IIa. Ways to enlist the support of your FINANCE COLLEAGUES:

What planned gifts have generated immediate cash?

Which planned gifts improved your organization's P & L Statement?

When has a planned gift saved your organization's fiscal year?

III. Ways to get your ideas across to DONORS: These are the ideas we speak about the most in professional development. The key is to help donors understand that planned gifts are tactics for achieving their philanthropic goals and dreams.

Have you met donors who could not accomplish their goals for their gifts with cash?

IIIa. Ways to enlist the support of ADVISORS:

How can you advertise the work of helpful advisors in ways that help their business?

Do you have any advisors on your campaign or development committees? How can increase the value of planned gifts in reaching their goals and enlist their advocacy?