



Legacy as A Gift of Compassion

Planned Giving: The Missing Ingredient

S&W



Learning Objectives

- Understand the importance of planned giving, as part of any comprehensive development program.
- Learn to prioritize cultivation and stewardship strategies; and
- Be inspired to create and maintain a donor-focused mindset.

Fundraising Trends and Observations

- More money, but from fewer donors
- Mega donors – the control factor
- More channels – how to manage and be donor-friendly
- More giving methods
- A new generation emerging; more transactional
- Fuzzy charity
- Cautious donors – ethics and uncertainty
- Overwhelming amounts of data and its uses
- Fringe fundraising



TRENDS

Donor Pipeline





The essential ingredient

Planned giving was once considered the “final” step in the development process but should be considered an “essential ingredient” throughout the donor journey.

It is time to rethink the definition of planned giving – not necessarily beyond the donor’s lifetime; a “blended” form of giving and ALWAYS considers what is best for the donor

Make planned giving a visible and integral component of your overall development program – coordinate with annual giving, major gifts and campaigns

Steps Necessary to Create or Elevate Your Planned Giving Program

- Achieve Institutional Commitment to Planned Giving Culture and Strategy
- Board Acceptance and Engagement
- Secure legal and financial assistance; define staff authority and responsibilities
- Build Planned Giving Infrastructure
 - Gift acceptance policies
 - Investment services and spending policies
 - Budget and resources
- Create a Measurable Plan of Action
- Prioritize ways of giving; appropriate to your capacity and expectations
- Initial and ongoing Data Mining
- Active marketing



Double Down on Cultivation and Stewardship

- Donors are like Grandparents – they want to hear from you
- Insider Info
- Achievements and Success
- Storytelling
- Testimonials
- Recognition

