

Planned Giving

**A One-Year Plan to
Optimize Your Program**

S&W



Week 1 - Personal, Staff, and Volunteer Growth in PG

Activity - Take one session you attended at Planned Giving Day and explain it to another member of your organization's staff.

Tips

- By ensuring you can explain it to someone else, you'll gain a deeper understanding.
- Plus, there will now be one more person in your office that has a better understanding of PG.

Progress Notes



Week 2 - Personal, Staff, and Volunteer Growth in PG

Activity - Read one of Russell James' recent e-books.

Tips

- *The Storytelling Fundraiser*
- *The Primal Fundraiser*
- *The Epic Fundraiser*
- *The Socratic Fundraiser*

Progress Notes



Week 3 - Personal, Staff, and Volunteer Growth in PG

Activity - Develop a giving information 3x5 card.

Tips

- The card should include:
 - Your organization's tax ID number.
 - Stock transfer information.
 - Your direct contact information.
- Share the cards with everyone in your office (anyone in the organization who answers the phone).
- Commit to readily responding to inquiries!

Progress Notes



Week 4 - Optimize Your Shop for PG

Activity - Establish a legacy society for PG donors (intentions and realized gifts).

Tips

- Many organizations use their founding year (e.g., 1876 Society, 1876 Legacy Society).
- Some organizations use a meaningful word or person, such as a founder (e.g., Magis Society, Green Tree Society, Sister Claire Helene Society).

Progress Notes



Week 5 - Optimize Your Shop for PG

Activity - Establish a legacy society coding structure for PG intentions and donors.

Tips

- Create an attribute or custom field in your database using legacy society name and apply to all members.
- Confirm recognition name for the legacy society with donor/family, when possible, and add to their record in your database.

Progress Notes



Week 6 - Optimize Your Shop for PG

Activity - Establish a gift/pledge protocol for PG intentions and realized PG.

Tips

- Capture intentions by entering them into the database as a pledge with the amount, if known, or \$0.
 - These do not get reported to the finance side until realized.
 - This applies to verbal confirmations *and* those with a signed intention/pledge form/gift agreement.
- Enter PG as you would any other donation but ensure the coding makes it clear it was a realized PG.
- Use notes fields to ensure all relevant details for intentions and realized PG are captured.

Progress Notes



Week 7 - Optimize Your Shop for PG

Activity - Create a legacy society logo.

Tips

- Create using your current organization logo with the legacy society name below it.
- Use the logo to brand all PG-related materials, correspondence, calls to action, etc.
- Consider creating a legacy society recognition installation in an appropriate location, assuming your organization has a physical “campus” that welcomes donors/prospects.
 - Such an installation can serve as a physical reminder to staff, volunteers, & visitors that your organization is “open for business” in PG and considered by many to be an appropriate and worthy cause for legacy giving.
 - Ensure the installation can grow over time as new members of the society are added.

Progress Notes



Week 8 - Personal, Staff, and Volunteer Growth in PG

Activity - Sign up for Bryan Clontz's (Charitable Solutions, LLC) email list and watch his free videos.

Tips

- It's free!
- Bryan teaches at The American College of Financial Services, the College that offers the Chartered Advisor in Philanthropy (CAP®) certification.
- Bryan's webinars explain technical matters in a two-tiered way.
 - Surface level - good for most
 - Deep dive for those that want it

Progress Notes

Week 9

Take a Break





Week 10 - Optimize Your Shop for PG

Activity - Bookmark trusted PG experts and resources to turn to for ad hoc advice and services.

Tips

- General Advice: Schultz & Williams
- Gift Counting: National Association of Charitable Gift Planners
- Marketing: Planned Giving Marketing
- Gifts of Property:
 - Charitable Solutions, LLC
 - Realty Gift Fund
- Gifts of Crypto Currency:
 - Infinite Giving
 - The Giving Block

Progress Notes



Week 11 - Optimize Your Shop for PG

Activity - Review and update your gift acceptance policy.

Tips

- Ensure it includes PG intentions.
- Ensure it explicitly conveys how, if left unrestricted, planned gifts will be directed to your operating budget, a special initiative or campaign, or to bolster your endowment.
- Ensure it details all asset-based giving options, reminding PG prospects that planned gifts are not always deferred gifts.
- Brand this document and make it readily accessible to donors/prospects via your website.
- Save PDF version on a shared drive for ready access to this version by staff.

Progress Notes



Week 12 - Optimize Your Shop for PG

Activity - Update protocols to ensure legacy society members are stewarded as major donors.

Tips

- Steward legacy society members and families in a manner consistent with recognizing and elevating the significance of the intended or realized gift. For instance:
 - Any event that includes major donors should also include legacy society members.
 - If you send major donors your annual report with a personalized cover letter from organizational leadership, do these same for legacy society members.

Progress Notes



Week 13 - Marketing & Stewardship

Activity - Integrate PG with your direct mail program.

Tips

- Include two checkboxes on reply devices:
 - I have included ORG in my estate plans.
 - I'm interested in including ORG in my estate plans.

Progress Notes



Week 14 - Optimize Your Shop for PG

Activity - Confirm as many existing legacy society members as possible.

Tips

- These are those individuals who have noted your organization is in their estate plans or the beneficiary to something like a life insurance policy, IRA, etc.
- This is important so that these individuals are properly stewarded as legacy society members.
- Ask donors and prospects in all appeals and donor communications to notify you if they have already included your organization in their estate plans so that you may recognize them as members of your legacy society. This is typically just a checkbox.

Progress Notes



Week 15 - Optimize Your Shop for PG

Activity - Develop a bequest intention form for new and existing (if still living) legacy society members.

Tips

- Make it simple and easy to complete.
- Include: "This is not a legally binding document."
- Include a space for the donor to articulate what they want to accomplish.
- This should be on your PG website, readily downloadable. Ensure it's clear to the donor where the completed form should be sent to.

Progress Notes



Week 16 - Optimize Your Shop for PG

Activity - Draft a legacy society acknowledgement letter to be used as needed for new PG commitments.

Tips

- Treat this acknowledgement like you would an acknowledgement for a major gift (e.g., add a personal note from your organization leader).
- Begin using it right away.

Progress Notes



Week 17 - Personal, Staff, and Volunteer Growth in PG

Activity - Research conferences, webinars, workshops, etc. related to PG that you are interested in attending in the coming year, seek budget approval, and add to your calendar.

Tips

- Planned Giving Council of Greater Philadelphia
- Association of Fundraising Professionals (Global and Greater Philadelphia Chapter)
- The American College of Financial Services (CAP® courses and certification)
- Charitable Estate Planning Institute
- Lilly Family School of Philanthropy

Progress Notes



Week 18 - Identify, Cultivate, and Solicit Prospects for PG

Activity - Establish a new habit with staff and volunteer leaders to ask donors why they give to your org.

Tips

- Understanding why loyal donors give is key to developing an overall sense of what motivates your donor base.
- Part of a personalized engagement with these donors should be asking them why they give and then noting that in their donor database profile.
- Make sure staff and volunteers know who to send donor responses to for recording in your database.
- This is also a form of stewardship!

Progress Notes



Week 19 - Marketing & Stewardship

Activity - Determine how many hours a week you can dedicate to outbound PG communication.

Tips

- This impacts your marketing.
- The worst thing you can do is ask someone to raise their hand, then ignore them.
- Can be phone calls or face to face meetings.

Progress Notes



Week 20 - Marketing & Stewardship

Activity - Review marketing and fundraising communications through the eyes of an older donor.

Tips

- Use black text on a light background.
- Use a larger font (14pt at minimum).

Progress Notes



Week 21 - Marketing & Stewardship

Activity - Add a section to your annual report where you can recognize members of your legacy society.

Tips

- This list should include all legacy society members, living or deceased, using their legacy society recognition name.
- This is really a marketing tool because your donors and prospects will note that you're "open for PG business" and who is already a member of this special society. Hopefully, that's enough to spark their own interest!

Progress Notes



Week 22 - Identify, Cultivate, and Solicit Prospects for PG

Activity - Administer an online survey to assess PG interest and identify current but unknown donors who have named your organization in their estate plans.

Tips

- Send to all active staff and donors who have an email address on file. Sample questions include:
 - How long have you been a donor to ORG?
 - Are you a current—or past—volunteer or participant in one or more of the ORG's volunteer programs?
 - Why do you support ORG?
 - Please rate where ORG falls among your giving priorities.
 - How likely are you to consider including ORG in your long-term planning with a bequest or beneficiary gift?
 - What three words best describe the mission and work of ORG?
 - How would you describe the frequency of communications from ORG?
 - How would you rate the value of the information in communications from ORG?

Progress Notes

Week 23

Embrace Downtime





Week 24 - Identify, Cultivate, and Solicit Prospects for PG

Activity - Conduct prospect identification modeling to identify new PG prospects.

Tips

- Modeling is used to determine who among your current donors is exhibiting giving behaviors that may make them more receptive to the PG conversation.
- Modeling asks:
 - What paths have existing PG donors taken?
 - Who are your most loyal donors?
- Modeling looks at:
 - Recency (Last Gift)
 - Frequency (How Many/How Often)
 - Monetary (How Much)
- You can use a trusted partner (e.g., S&W, DonorTrends)!

Progress Notes



Week 25 - Identify, Cultivate, and Solicit Prospects for PG

Activity - For a deeper understanding of your top PG prospects, screen your list.

Tips

- A screening will provide wealth capacity and philanthropic behavior, among other key indicators of PG (and major gift!) potential.
- Screening results will also enable you to more effectively prioritize your PG prospects (and could surface new major gift prospects in the process!).
- You can use a trusted partner (e.g., S&W, DonorSearch, iWave)!

Progress Notes



Week 26 - Personal, Staff, and Volunteer Growth in PG

Activity - Identify, review, and consider retained PG expertise. If desired, add this service to next year's fundraising budget.

Tips

- Outsourcing PG expertise is a cost-effective alternative to hiring a full- or even part-time PG officer.
- Your PG expert can be used to advance a PG prospect conversation to those more complex discussions about PG vehicles, joining you for prospect meetings or providing ad hoc, behind-the-scenes counsel.
- Your PG expert can also facilitate workshops, one-on-one and small group coaching, and other educational opportunities.
- This can be done through S&W, but there are independent PG experts available, as well.

Progress Notes



Week 27 - Marketing & Stewardship

Activity - Determine a budget for PG marketing.

Tips

- How much time do you have to dedicate to writing copy and design?
- How robust is your donor database?
 - How many records might you mail or email to?
- Will you outsource?

Progress Notes



Week 28 - Marketing & Stewardship

Activity - Identify, review, and consider PG marketing vendors.

Tips

- Vendors should:
 - Address your specific needs.
 - Provide personal attention.
- The two primary marketing vehicles to outsource are monthly emails and quarterly postcards.
 - We address your PG website next.
- S&W is one such vendor, partnering with Planned Giving Marketing (PGM) to deliver comprehensive, customized PG solutions.

Progress Notes



Week 29 - Marketing & Stewardship

Activity - Include PG on your website. If you plan to outsource your PG website, add this service to next year's fundraising budget.

Tips

- It is preferable to outsource to a vendor.
 - They will keep the information up-to-date.
- Focus on bequests and beneficiary designations.
 - These represent approximately 85% of all PG.
- Include your name, direct contact information, and professional headshot.
- This can be outsourced to a trusted vendor (e.g., S&W)!

Progress Notes



Week 30 - Marketing & Stewardship

Activity - Give PG a face by adding your (or another staff member's) photo to your PG website.

Tips

- This is actually a best practice for your website, in general. Give a face to all donation-related aspects of your website.

Progress Notes



Week 31 - Identify, Cultivate, and Solicit Prospects for PG

Activity - Add legacy society members and PG prospects to staff portfolios.

Tips

- Legacy society member relationships need to be actively managed until the PG is realized, even if the member is no longer making gifts to your organization. (Note that giving typically ceases approximately 3-5 years before the individual passes away.)
- Develop portfolios based on:
 - How much capacity staff/volunteer leaders have for outbound PG communication.
 - How many PG prospects surfaced after modeling/screening.
- Assigning legacy society members to appropriate staff members promotes customized stewardship.

Progress Notes



Week 32 - Marketing & Stewardship

Activity - Create a list of potential donor profiles.

Tips

- Review living members of your legacy society.
 - Do they live locally?
 - Are they known by your organization and community?
- Schedule a time to discuss this with them, preferably in person.
- Don't cold call this question!

Progress Notes



Week 33 - Marketing & Stewardship

Activity - Draft a case for support for PG.

Tips

- Be brief.
- Include how PG are handled (following each donor's intent).
- Include how PG ensure your organization continues its mission indefinitely.
- This can be outsourced to a trusted vendor (e.g., S&W)!
- Begin using this right away!

Progress Notes

Week 34

Lay Low





Week 35 - Marketing & Stewardship

Activity - Develop a PG marketing schedule.

Tips

- Ideally you will send monthly emails and quarterly postcards.
- Think through your organization's current messaging.
 - Saturdays?

Progress Notes



Week 36 - Personal, Staff, and Volunteer Growth in PG

Activity - Create a list of local, experienced gift planners.

Tips

- Include similar organizations.
- And different organizations.
- Develop a standard set of questions to ask:
 - What gifts are they working on?
 - How did they get into gift planning?
 - What organizations do they belong to?
 - Who do they talk to?
 - What do they read?
 - How many donors do they work with at a time?

Progress Notes



Week 37 - Personal, Staff, and Volunteer Growth in PG

Activity - Call one person on your “experienced list.”

Tips

- Invite them for coffee or breakfast.
- Ask them the questions you prepared.
- Ask them if there’s anyone else you should meet.

Progress Notes



Week 38 – Personal, Staff, and Volunteer Growth in PG

Activity - Identify 3 donors who are financial planners or tax professionals and invite one or more to coffee to explain the benefits of giving with assets vs. cash.

Tips

- Look for designations such as CPA, CFP, or CLU when searching.
 - Tailor your questions for each.
- Explain your purpose for contacting them. Depending on their experience or expertise, they might suggest someone else.

Progress Notes



Week 39 - Marketing & Stewardship

Activity - Send your first monthly email communication to PG prospects.

Tips

- Use the prospect list generated from the modeling/screening.
- Don't make your announcement splashy.
 - Act like you've always been doing this.
- Make it brief.
- Focus on how your organization is approachable.

Progress Notes



Week 40 – Personal, Staff, and Volunteer Growth in PG

Activity - Start reading a PG book to deepen your knowledge.

Tips

- *Wealth in Families* by Charles Collier
- *Planning Giving in a Nutshell* by Craig Wruck
- *Seeing through a Donor's Eyes* by Tom Ahern
- *Iceberg Philanthropy* by Green, McDonald, & Van Herpt
- *Personalized Philanthropy: Crash the Fundraising Matrix* by Steven L Meyers

Progress Notes



Week 41 - Personal, Staff, and Volunteer Growth in PG

Activity - Start a "Planned Giving Leadership Team."

Tips

- After discussing with your organization's team, invite your more active legacy society members to an advice gathering session about your legacy society.
- Listen to what members share.
- Invite them to be a part of the solution/change.

Progress Notes



Week 42 - Marketing & Stewardship

Activity - Draft and send an annual legacy society thank you letter.

Tips

- The letter should be signed by your organization leadership.
- Get this out right away.

Progress Notes



Week 43 – Identify, Cultivate, and Solicit Prospects for PG

Activity – Facilitate/host a workshop/session for Board members on the importance of PG within your organization.

Tips

- One goal of this is to ensure as many Board members as possible become your legacy society.
- The more you socialize and normalize PG with this group, the more comfortable they will become at being your best PG ambassadors.
- You can partner with or outsource this to a trusted vendor (e.g., S&W)!
- This is also a great thing to do when you're in a campaign that has an endowment component (PG aligns perfectly with endowment growth).

Progress Notes



Week 44 - Personal, Staff, and Volunteer Growth in PG

Activity - Start a "Planned Giving Advisory Team."

Tips

- If meetings were positive from week 38, reconnect with donors that are in the financial, tax, or legal professions.
- Invite them to join an "Advisory Team" that is willing to offer pro bono guidance for non-cash gifts.
- Use these advisors when you need official guidance for gifts.
- If you're able to secure 3 or more, you can offer the advisors space in a soft recommendation list.

Progress Notes



Week 45 - Personal, Staff, and Volunteer Growth in PG

Activity - Lead a session at a staff meeting on ideal PG donors and how giving with assets is beneficial.

Tips

- The more you talk about PG, the more comfortable you will become.
- Everyone at your organization (staff and volunteer leaders) should be on the lookout for signs that a donor/prospect may be interested in a discussion around PG.

Progress Notes



Week 46 - Identify, Cultivate, and Solicit Prospects for PG

Activity - Begin scheduling one-on-one cultivation meetings with top PG prospects beyond your Board.

Tips

- Prioritize those prospects who rose to the surface on your PG email dashboard.

Progress Notes



Week 47 - Marketing & Stewardship

Activity - Send anniversary or birthday cards to legacy society members.

Tips

- Send unique, preferably handwritten, messages to legacy society members.
- Send around their birthday, anniversary of their first gift, or Valentine's Day.

Progress Notes



Week 48 - Marketing & Stewardship

Activity - Review the responses and unsubscribes from your first 2-33 monthly emails.

Tips

- Answer the responses as they arrive.
- Do the responses have anything in common?
- Do the unsubscribes have anything in common?
- If using a vendor, review their dashboard.
 - Are there any surprises?
- Be sure to regularly update your database/contact management system with the unsubscribes.

Progress Notes



Week 49 - Marketing & Stewardship

Activity - Develop a legacy society stewardship plan.

Tips

- Review what, if any, legacy society type stewardship activities were done previously.
- Review stewardship activities for current/outright donors.
- Determine if you can add legacy society donors to current stewardship events.
- Think about low cost, yet impactful (typically programmatic focused) events you could invite legacy society donors to.
 - Examples are box filling for a food bank, scholarship/student award ceremony for a school, behind the scenes work at a historical organization, etc.

Progress Notes



Week 50 – Personal, Staff, and Volunteer Growth in PG

Activity - Create a comprehensive organizational Annual PG Plan.

Tips

- Include in the plan:
 - Marketing Plan
 - Communications Schedule
 - Stewardship Plan
 - Current Prospect Pool Stats
 - FY Goals

Progress Notes

Week 51

Celebrate Accomplishments





Week 52 - Personal, Staff, and Volunteer Growth in PG

Activity - Attend Planned Giving Day 2024!

Tips

- Make a plan for your day.
 - Review speakers and material.
 - Review fellow attendees for good matches.
 - Send introductory emails prior to the event and ask about connecting in person.

Progress Notes