



# Planned Giving When It's Not All You Do



Date: August 29, 2013  
Time: 1:00 – 2:30 Eastern Time  
Presenter: Shari Fox  
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# Agenda

- Where to start
- Road map
- Prioritizing
- Commitment and discipline
- Resources





# Where To Start

- Goal setting – start with honest assessment
  - Activity-based goals
  - Manageable and sustainable
  - Scalable; provide for growth
  - Consistent messaging
  - Identify champions – board, staff, donors, volunteers





## Where To Start – Goals

### Year One

- Board education and participation
- Communications
- Policies and procedures (review and revise)
  - Gift acceptance
  - Gift annuities
  - Charitable remainder trusts
  - Donor recognition/legacy society



## Where To Start – Goals

### Year Two

- Board participation
- Communications
- Policies (if still work to be completed)
- Donor visits
- Planned gift notifications



## Where To Start – Goals

### Year Three and Beyond

- Communications
- Donor Visits – increased goal
- Planned Gift Expectancies – increased goal
- Dollar Goals?



# Where To Start

- Marketing
  - **Use existing communication channels!**
  - Website
    - Donor stories
    - Impact stories
    - “How to”
    - **Organization’s legal name and tax ID number**



## Where To Start – Marketing

- Website (continued)
  - **Sample bequest language**
  - Legacy society
  - Contact information
- Direct mail and e-mail appeals





## Where To Start - Marketing

- Publications
  - Donor stories
  - Advertisements
  - Special content
  - Legacy society promotion
- Gift acknowledgments



## Where To Start – Marketing

- Targeted communications
- Social media





## Where To Start

- Prospect identification
  - Long-time donors
  - Volunteers
  - Major donors
  - Retirement-age donors, or nearing retirement
  - Special circumstances
    - Selling or transitioning business
    - Bonus or windfall





# Road Map To Success

- Know your capacity
- Start with bequests and retirement plan designations
- Mission and impact – not tax benefits
- Recruit help
- Hit the road





# Prioritizing

- Regular, consistent message
  - Easily accessible information
  - Promoting bequests in all media
  - Showing how planned gifts make a difference
- Bequests, bequests, bequests
- Personal visits – make it regular priority



# Prioritizing

- Procedures and systems
  - Recordkeeping
  - Integrity of information
  - Stewardship
  - Sustainable through staff transitions





# Commitment and Discipline

- Weekly priorities
- Champions, coaches, and partners
- Accountability – performance objectives
- Tyranny of the urgent – don't let others' priorities co-op yours



## Resources

- PG Calc
- Planned giving marketing firms
- Planned giving books, newsletters, websites
- Partnership for Philanthropic Planning and local planned giving councils
- American Council on Gift Annuities





# Questions and Answers





## Still Have a Question?

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