

Planned Giving When It's Not All You Do



Date: Time: Presenter: August 29, 2013 1:00 – 2:30 Eastern Time

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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



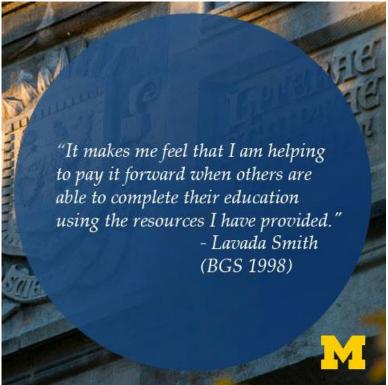
Where To Start - Marketing

- 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



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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



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Still Have a Question?

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