A Planned Giving Program on One Hour per Week

Weekly Activity

Recommendations:

1. Carve out a specific one-hour block on your weekly calendar to devote to planned giving.
2. Commit to implementing a planned giving program; honor your commitment.
3. Don't be too hard on yourself if you miss a "Date Scheduled." We're only human.
4. Create and maintain a planned giving notebook. Keep track of what you do!
5. Find a colleague at another organization, at your knowledge level, with whom you can learn. Challenge each other and stay in touch!
6. Find a colleague who is more experienced who you can call with questions.
7. Keep your boss / board informed of your activity.

No.	**Topic / Task**	**Date Scheduled**	**Date Completed**	**Needs Revisiting?**
1.	**Leave-A-Legacy: Call Tina Drum at CPGR (303-932-6168, CPGR@MSN.com)** to get your copy of the NEW LAL disc. Review. Using the LAL CD, select a logo and place it on your website and on your letterhead. Look at the Graphics and Usage Manual.			
2.	**Update Communications** material to include reference to Planned Giving ("Please remember…") and Leave-A-Legacy. Create list of all communications; create tickler to include reference as new publications are updated. (For letters, you can simply include the information on the Word document, rather than ordering new letterhead.) o Newsletters o Direct Mail appeals o Gift acknowledgements o Letterhead o Business cards o Brochures of all kinds o Annual Reports o Press Releases o Board / Committee meeting agendas o Event Programs			
3.	Review **"Fact Sheet for Donors" Template.** Modify for your organization with your complete name, mission, vision, preferred bequest language, tax ID, contact information, etc. Print copies to have on hand.			
4.	Review **"Ways to Give" Template**; modify for your organization. Print some copies to hand out to board members, have on hand, or send to donors.			

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5.	**Update Your Website** to include reference to Planned Giving ("Please remember…"), Leave-A-Legacy logo, "Fact Sheet for Donors," and "Ways to Give" in strategic locations.			
6.	**Leave-A-Legacy:** Select "Brochure." Enter your data and print. Take to your next staff meeting, board meeting, etc. Place in high-traffic areas.			
7.	**Leave-A-Legacy:** using the LAL CD, select an advertisement that applies to your organization. Customize and place it in your newsletter.			
8.	Make a list of all **donors who have given in each of the last three years**, or otherwise exhibited loyalty. If this list is too big, use four years or more. With your next communication, send along a LAL brochure. "Thank you for your loyalty. We hope that you'll consider remembering us with a bequest."			
9.	**Volunteers:** create a list of your senior or very active or loyal volunteers. Send a thank you letter along with a LAL brochure, and offer to connect them with an estate planning attorney.			
10.	Write an **article for your newsletter** about your org's need for long-term funding. Include *"Have you ever considered an estate gift to (your org)? A charitable bequest provides an opportunity to give something back to your community, helping our programs and services long into the future. We would be honored by your support. Please feel free to contact (name and contact info) with any questions. Thank you for your confidence in our efforts."*			
11.	**Create a PG Notebook:** buy a 3-ring binder and label it. Review www.CPGR.org site; note educational events and dates. Sign up to attend! Create "Planned Giving" **subdirectory** on your computer, to store PG materials.			
12.	Make a list of all your **PG donors (if any)** and create a schedule to call each one once per quarter to say hello. Plan on a few minutes per call. Start calling! Stewardship is essential!			
13.	Identify a PG or long-term donor. With their permission, interview them and write a story / **testimonial** about them for publication in your next newsletter. (This may take a few weeks at one hour per week!)			

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14.	At board meeting, ask board members to consider leaving a small bequest or beneficiary designation to your org. Easy ask: 1% of their 401k, 403b, or IRA, implemented via beneficiary designation form from employer or IRA custodian.			
15.	Create a tickler to **discuss planned giving at every event** that your organization has. ◦ All board and committee meetings, preferably at the beginning of each meeting. ◦ All thank you or donor recognition events. ◦ All education events, etc. Messages. Internal meetings: PG can become a large source of funds for us. Provide update on PG activities. Donor events: discuss your org mission, and the importance of funding. Ask audience to "please remember us in your will or estate planning." (This doesn't have to be complicated.)			
16.	With your **"Loyalty List"** of donors, after you have sent to them a letter with PG info, **start calling** to thank for their loyalty. Ask, *"did you get my letter? Have you ever considered including (your org) in your estate plans?"* Be quiet and listen to the response.			
17.	Review your **Gift Acceptance Policies** for PG. Go to www.CPGR.org and download the GA Policies provided by Betsy Mangone. Save, print, and compare with yours. File for the next time your board wants to review policies.			
18.	**"Check boxes."** Add a PG check-off box on direct mail coupons and reply envelopes, so that donor may request information on PG. Also include a check box allowing donors to let you know that they have named your org in their estate planning.			
19.	Explore how planned giving donors could be implemented into your **donor recognition** program (if you have one). Perhaps you could establish a "heritage" society.			
20.	Review **"Information for Advisors" Template.** Modify for your organization with your complete name, mission, vision, preferred bequest language, tax ID, contact information, etc. Print copies to have on hand.			

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21.	Discuss completed **"Information for Advisors"** with Executive Committee. Request an opportunity to discuss with board.			
22.	At board meeting, request that each board member make a warm referral for you to one of their **advisors**, preferably an estate planning attorney.			
23.	**Professional Advisors**: call the professional advisors your board has referred to you. You may have to schedule a specific time. (If leaving a message: *"My name is ___ and I was referred to you by Joe Smith,"* and provide phone number.) Discuss the referring board member's involvement with your org and what you do. Ask if they have a list of nonprofits to share with clients interested in making bequests, and ask if they will add your org's name. Offer to email "Info for Advisors," and add contact to your mailing list.			
24.	After you have implemented some of the basic concepts, ask your board to establish a **"Planned Giving Committee"** to assist with program decisions.			
25.	After you have implemented some of the basic concepts, explore creating formal **Planned Giving Policies.** This document could authorize the formal planned giving program, identify the types of gifts that will be accepted (bequests, beneficiary designations, etc.), identify minimum contributions for named funds, and discuss issues such as donor focus and legal counsel.			
26.	**Find a colleague** at another org who is at your level of PG experience. Attend programs together, stay motivated, and stay in touch.			
27.	**Find a colleague who is an expert in PG** to call to discuss questions or evaluate setbacks. CPGR has many to choose from!			
28.	**Keep your boss informed** of your PG activities.			
29.	**Keep your Executive Committee informed** of your PG activities. Ideally, recruit a board member to by the "champion" for the PG cause.			
30.	**Education:** Read the Partnership for Philanthropic Planning Model Standards of Practice for the Charitable Gift Planner. On the www.PPPNet.org site.			

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31.	**Education:** Go to the Partnership for Philanthropic Planning website and look around. www.PPPNet.org Look at the Resource Center. Review the "Syllabus for Gift Planners."			
32.	**Education:** Go the American Council on Gift Annuities website and look around. www.ACGA-web.org			
33.	**Education:** Go to The Center on Philanthropy at Indiana University website, and look around. Go to the "Precourse Readings" section of The Fundraising School, and print out and read the PDF "Establishing a Planned Giving Program." Read it. www.philanthropy.iupui.edu (Other "Precourse Readings" may also be of interest.)			
34.	**Education:** Go to the Planned Giving Design Center website and look around. Go to "Articles," "Case Studies," "News Stories," and "Technical Reports." www.PGDC.com			
35.	**Education:** visit Dick Livingston's website, www.BestWaysToGive.com, which discusses planned giving from a donor's point of view, including fairness and accuracy in PG marketing.			
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