



Making Planned Giving FUN

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7 Steps to Charitable Gift Planning

- Evaluate
- Goal Setting
- Understand your Case(s) for Support
- Practice your presentation and “ask”
- Work toward the GOAL
- Stewardship
- CELEBRATE

Step 1 EVALUATE

1. List all the board and committee members since the organization started.

2. Who has already given a planned gift? Make an appointment to visit the family.

3. Who has identified they intend to leave a legacy? Make an appointment to visit ASAP.

4. Who are the top annual and monthly donors? Who has given for five years?

List 20 People who are highly invested in your organization

Step 2 GOAL SETTING

I want to start with a list of _____ prospects.

I will schedule and complete _____planned giving prospect visits.

I will hold _____ information sessions this calendar year.

We will have _____ identified planned giving donors by _____.

Step 3 Understand Your Case(s) For Support

Long-Term Vision
Capital Projects
On-Going Need Based Projects

Step 4 PRACTICE PRESENTATION PRACTICE the ASK

What do you want to say in a presentation?

What do you want to take with you to a presentation?

What do you want to say in an Ask?

What do you want to take with you to an Ask?

Step 5 WORK TOWARD THE GOAL

Did you create a Statement of Work for Planned Giving

Have you engaged your support team?

Record contact information as ACTIONS in database

Follow the timeline

Step 6 STEWARDSHIP

Visit

Send cards and hand-written notes

Make notes of all that you learn (dog's name, grandchildren, donor birthday and anniversary)

Offer to give something so you need to make contact on multiple occasions

Step 7 CELEBRATE

Host an Event

Jump up and down when the check is delivered

Share your success internally and externally

Review steps 1-7 , revise and repeat

THOUGHTS/NEXT STEPS
