

Tips for Enhancing Your Planned Giving Program

By Tom Giddens, Senior Consultant



A comprehensive planned giving program to be highly effective requires consistent and constant implementation of activities that focus on the identification, cultivation, and solicitation of planned gift donor prospects as well as the stewardship of planned giving donors. Several tips related to these activities are presented here with the hope one or more of them might prove useful to you.

1. Implement one or more of the following activities to identify planned giving donor prospects:

inserting an optional set of checkboxes at the checkout point of your online donation page which could include:

I would like to learn more about making a planned gift

I have making a planned gift on my to do list

I have already made provision for (the name of your organization) in my estate plans

using the following profile

a recent and consistent (number of years of consecutive giving regardless of the level of giving) donor who is a single woman 60 years or older

doing an analysis of your database using a 10-factor regression analysis formula which would produce a rank order list of prospects from the most probable to the least probable planned giving prospects (this analysis is available from Engaged Generosity upon request by contacting (insert name and email))

conducting a survey of your donors designed to elicit information about donor interests, assessment of your mission and programs, use of assets to make gifts and other factors which would help identify your best planned giving prospects (a template of such a survey is available from Engaged Generosity upon request by contacting (insert contact name and email address))

2. Implement one or both of the following activities as part of your cultivation of planned giving donor prospects:

develop a communications plan that includes email blasts, text messages, and direct mail that focuses exclusively on planned giving topics (i.e. profiles of existing planned giving donors, estate planning webinars, etc.) and distribute the communications in January, April, July and October outside the times that appeals for annual fund gifts are made.

When speaking to or communicating in writing with planned giving donor prospects keep in mind that you should not talk about death and instead talk about creating a lasting legacy, making a difference for future generations or honoring someone.

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use the following tag line on your letterhead, website, and the signature line of emails as well as in social media posts:

“Please remember (insert the name of your organization) in your estate plans. For information on how to do so please contact (insert the name, email address and telephone number of the person to contact)

3. Implement one or both of the following activities to solicit planned gift donor prospects:

create a moves management plan for each of the planned giving prospects identified starting first with the most promising prospects and use the plans you develop to personalize the interaction between you and the prospect.

When preparing a moves management plan for each prospect ask:
Who is the **right person** to ask the prospect for a planned gift?

What is the **right kind of gift** to ask the prospect to make?
Unrestricted/restricted endowment/non endowment

What is the **right level of gift** to ask the prospect to make?
4-5 X a prospect’s largest gift as a minimum

When is the **right time** to ask the prospect to make the gift?

employ the art of listening and asking questions about what motivates the prospect to give when soliciting a planned giving donor prospect.

4. Implement one or more of the following activities to steward planned giving donors

Thank planned giving donors multiple times during the course of a calendar year.
(at least twice or up to six times as recommended by Jerold Panas)

Create a named planned giving recognition society using the name of the first or largest planned giving donor, a prominent person in the history of your organization, or some important date in the history of your organization and invite prospects to join.

List planned giving donors in a special separate section of any listing of donors which is published.

Hold an annual special recognition event for planned giving donors

Survey all planned giving donors and ask how your organization is delivering on its mission and programs.