

Integrating Planned Giving into Campaign Success

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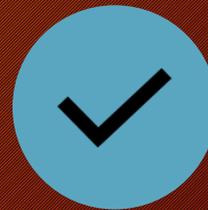
WHY WE'RE HERE TODAY



CAPITAL CAMPAIGNS ARE
MOMENTS OF VISION



DONORS ARE THINKING
LONG-TERM



PLANNED GIVING SUPPORTS
TODAY AND TOMORROW

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WHO IS THIS SESSION FOR?



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WHAT THIS SESSION IS (AND IS NOT)

This session is:

- Practical
- Donor-centered
- Experience-based

This session is not:

- Legal or financial advice
- A technical deep dive
- About asking every donor for a planned gift

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EXPERIENCE YOU CAN TRUST

Decades of combined gift
planning experience

Work with donors,
families, and advisors

Support simple and
complex gifts

Extensive capital
campaign experience

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TODAY'S AGENDA



Planned giving basics



Planned giving in a capital campaign



Roles for board, staff, and
volunteers



Key takeaways and next steps

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WHAT IS PLANNED GIVING?



GIFTS MADE THROUGH ESTATE
OR FINANCIAL PLANNING



OFTEN FUTURE-FOCUSED



ALIGNS DONOR VALUES WITH
MISSION

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COMMON PLANNED GIFTS

Bequests in wills or trusts

Beneficiary designations

Charitable gift annuities

Charitable trusts

Gifts of appreciated assets

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WHAT PLANNED GIFTS WILL YOU ACCEPT?

Examine what types of planned gifts you accept and if you will accept any new vehicles for the campaign

Make sure gift acceptance policies and procedures are up to date and revised

CRM changes and updates

Examine outsourcing the acceptance of complex gifts

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WHAT IS A CAPITAL CAMPAIGN?



Time-limited fundraising effort



Supports major priorities



Focused on growth and impact

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WHY PLANNED GIVING MATTERS

Expands
leadership
giving

Allows donors
to give beyond
current
capacity

Builds long-term
sustainability

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THE CASE FOR INTEGRATION



Campaigns inspire
legacy thinking



Planned gifts
complement cash gifts



Strengthens total
campaign impact

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HOW PLANNED GIVING FITS

Annual:
ongoing
support

Campaign:
project-
focused

Planned:
enduring
legacy

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PLANNED GIFTS IN THE CAMPAIGN



OFTEN COUNTED TOWARD
LEGACY OR ENDOWMENT
GOALS



RECOGNIZED DURING THE
CAMPAIGN



SUPPORT FUTURE STABILITY

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SET PLANNED GIVING GOALS



PERCENTAGE OF PLANNED GIFTS IN OVERALL CAMPAIGN TOTALS



ANNUAL PLANNED GIFT GOALS (NUMBER AND AMOUNT)



ANNUAL SOLICITATION AND CLOSURE GOALS



ANNUAL REALIZED BEQUESTS AND PLANNED GIFTS

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WHO ARE PLANNED GIVING PROSPECTS?

Loyal, long-term donors

Volunteers and board members

Mission-aligned supporters

Determine how to develop and prospect pool and engagement/solicitation plan

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ADVISORY COMMITTEE

- Consider creating a Planned Giving Advisory Committee
 - Attorneys
 - Financial Advisors
 - Business Owners
 - Outside Fundraising Professionals

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EDUCATION

- 
- Develop staff education programs
 - Host educational events or seminars with donors or other targeted populations
 - Create FAQs and other documentation on planned giving concepts for internal and external audiences

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MARKETING PLAN

- Examine existing and new vendor relationships
- Create Multi-Channel Materials:
 - Digital
 - Social Media
 - Newsletter
 - Print/Mail
 - Integration



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STEWARDSHIP MATTERS

Immediate
recognition

Ongoing
engagement

Legacy
societies

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PLANNED GIVING MYTHS

- “Only for the wealthy”
- “Too complicated”
- “Reduces current giving”

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01
Capital campaigns inspire legacy thinking

02
Planned giving strengthens campaigns

03
Conversations matter most

KEY TAKEAWAYS

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NEXT STEPS

- Add planned giving language
- Identify potential prospects
- Start conversations



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THANK YOU

Questions?

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