



BACK OFFICE OPERATIONS



*This toolkit will transform your
career in gift planning. Period.*

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Congratulations!

Most fundraisers just don't get it. But you do.

Why do so few fundraisers pursue planned gifts when it's so easy? Because planned giving is proactive, and most folks are reactive. If all fundraisers were proactive, their nonprofits' endowments would be bursting at the seams, and fundraising drives wouldn't have all the urgency of a fire drill.

Yet after surveying 2,000 fundraisers, the majority are still singing the "We need cash now!" blues — the same tune they were singing 30 years ago. What is it they don't get? You simply can't get different results by repeatedly doing things the same way. In fact, that's the definition of insanity.

But you're different. You get it. You recognize the importance of planned giving to your organization, to its endowment — and to your career. You know the time for planned giving is *now*. And you've equipped yourself with a powerful tool to propel you and your organization to success.

As Zig Ziglar says, see you at the top!

Disclaimer

The advice contained herein, as well as the documents, are not intended to provide legal, tax, investment, or other professional advice, and it should not be relied upon as such. It is a group of tools to help you build a top-notch planned giving program. For assistance in specific cases, obtain the services of a competent attorney or other professional advisor.

Results cannot be guaranteed should you use this product. Each nonprofit has a unique mission and audience, requiring customization of these materials by the purchaser.

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Outline of Documents

The weekly timeline is an implementation suggestion only. All these documents come with detailed instructions and forms.

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		TOPICS
SUGGESTED WEEK-BY-WEEK STEPS	1 - 2	Are You Ready? Evaluating Your Mission
	3 - 4	Getting Your Board on Board
	5	Infrastructure – Counting and Valuing Gifts
	6	Infrastructure – Gift Acceptance Policies
	7	Infrastructure – Gift Agreements
	8	Infrastructure – Estate Administration
	9	Infrastructure – Ethics and Complying With Regulations
	10-11	Planning for Next Year
	12	Program Evaluation

A Question to Start With...

Why do most start-up planned giving programs fail to produce results? Because the organization jumps directly to the most complex gift vehicles and strategies without putting their own house in order first. This is a crucial and easily overlooked step that helps ensure the long-term success of your planned giving program.

Here's how to start out right

What this Toolkit Is

Who It's Designed For

What Back Office Operations is Not

What Else Will You Need?

- Planned Giving Committee.
- Get Opinions from Your Board.

SPECIAL NOTE ABOUT BOARD MEMBERS

- Customize!

A Few Recommendations

Before Your Implement

Learning and Doing

“Personalization” Pays

Keep It Simple

We recommend you try to *keep this product as intact as possible*. Like all of our materials **Back Office Operations** has been painstakingly designed and integrated to work for you straight out of the box. All you must do is execute the plan. Why tamper with perfection?

We've done all the preparation, **so you can focus on what you do best**: meeting with prospects and raising money! Ready?

Each Step At-A-Glance

Each Step comes with specific instructions and accompanying forms (if any).

Weeks 1 – 2

Are You Ready? Evaluating Your Mission

BACKGROUND	Donor-Centered Planned Giving Defined
	Not Just Cash and Stock
	The Importance of Legacy Gifts
	Gifts That Continue, Even in a Down Economy
	Broad Appeal – Everyone is a Planned Giving Prospect
	Increased Overall Support
	Examples of Planned Gifts
PROJECTS	Complete the Readiness Questionnaire
	Create Your Volunteer Committee
	Ask Your Volunteer Committee to Complete the Readiness Questionnaire
	Start to Measure Your Success
DOCUMENTS	PGB2-0101 – Readiness Questionnaire
	PGB2-0102 – Planned Giving Committee Memorandum
	PGB2-0103 – Planned Giving Activity Tracking Report

Weeks 3 – 4

Getting Your Board on Board

BACKGROUND	Purpose of the Planned Giving Case
	Intended Audience
	Content
	Goal
	Focus
	Uses
PROJECTS	Draft Your Own Internal Case
	Board Member Visits
DOCUMENTS	PGB2-0301 – Sample Internal Case
	PGB2-0302 – Internal Case for Planned Giving Template
	PGB2-0303 – Planned Giving Leadership Questionnaire

Week 5
Counting and Recognizing Gifts

BACKGROUND	The Importance of Policies
	Standards Development
	Implementing a Gift Counting and Recognition Policy
	Ensuring Complete Transparency for Donors
PROJECTS	Draft Your Gift Counting and Recognition Policy
	Create Your Planned Giving Tracking Reports
DOCUMENTS	PGB2-0501 – Gift Counting and Recognition Policy Summary
	PGB2-0502 – Planned Gifts Tracking Reports Template

Week 6
Gift Acceptance Policy

BACKGROUND	Gift Acceptance Policies Prevent Problems
	What You Can Accept
	What You Can't Accept
	How to Evaluate Gifts Offered
PROJECTS	Drafting Your Gift Acceptance Policy
DOCUMENTS	PGB2-0601 – Gift Acceptance Policy Template

Week 7
Gift Agreements

BACKGROUND	Establishing Understanding Between Your Nonprofit and Your Donor
	One of the Most-Often Overlooked Program Components
	Preventing Loss of Future Support
PROJECTS	Draft Your Binding, Non-Binding and Estate Gift Agreements
DOCUMENTS	PGB2-0701 – Binding Gift Agreement Template
	PGB2-0702 – Non-Binding Statement of Intent Template
	PGB2-0703 – Binding Estate Gift Agreement Template

Week 8
Estate Administration

BACKGROUND	Estate Administration Process and Procedures
	My Donor Has Died — Now What?
	Notice of Administration/Probate
	Open the File
	Be Patient, But Not <i>Too</i> Patient
	The Distribution is Finally Here
	Closing the Estate File
	Retirement Plans, Life Insurance Policies and Payable-on-Death Accounts
PROJECTS	Customize Estate Administration Procedures
	Customize Estate Administration Letters
	Put the Process to Use
DOCUMENTS	PGB2-0801 – Estate Administration Procedures Template
	PGB2-0802 – Estate Administration Template Documents

Week 9
Ethics and Complying with Regulations

BACKGROUND	Rules of Ethics
	State Regulation
	Registration to Do Business
	Registration to Solicit
	Registration to Issue Charitable Gift Annuities
PROJECTS	Adopt the Model Standards of Practice for the Charitable Gift Planner
	Review Compliance with State Regulations
DOCUMENTS	PGB2-0901 – Current Model Standards of Practice

Weeks 10 – 11
Planning for Next Year

BACKGROUND	Where You Are and Where You're Going (Module I)
	Where You Are and Where You're Going (Module II)
	Where You Are and Where You're Going (Module III)
PROJECTS	Draft an Operating Plan for Next Year
	Draft an Operational Timeline
DOCUMENTS	PGB2-1001 – Planned Giving Operating Plan Template
	PGB2-1002 – Planned Giving Operational Timeline Template



Week 12
Program Evaluation

BACKGROUND	Congratulations!
	The “Planned Giving Activity Tracking Report”
	Measuring Activity Instead of Dollars
PROJECTS	Evaluation Report
DOCUMENTS	PGB2-1201 – Planned Giving Activity Tracking Evaluation Report

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