

Building donor relationships



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**FORMS**

Form Number

PGB2-1002

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 |

**Time required:** 2 hours

**What it covers:** Operational Plan for Next Year

**Why:** Now that your program has gotten started, you don’t want to let it slide – plan for year two and beyond.

BACKGROUND

The Box is divided into three separate modules, each of which should become a core element of your year-to-year plan for planned giving. Whether you are nearing completion of all three modules of The Box, or you are only working on Module II – *Back Office Operations*, now is the time to plan for the future.

If you completed **Module I – *Marketing and Outreach***, you have a comprehensive plan that you can follow again in year two, adding some new elements and eliminating those elements which perhaps did not work well for your charity in year one. You will find that you can repeat most planned giving marketing for up to three years before you need to reinvent it, as the program is diverse enough that it will not get stale or old in that timeframe.

If you want new materials or ideas, consider content and tools you can download at [www.PlannedGiving.Com](http://www.PlannedGiving.Com). We are always adding new marketing materials based on a donor-centered approach.

Alternatively, for a modest fee subscribe to the Users Forum for a second year. When you re-subscribe, you maintain your access to all of the content materials in any module that you have purchased. we are constantly updating the marketing materials for Planned Giving in a Box and you’ll have access to the latest and greatest. Plus, you’ll retain access to all of the other users so you can continue to share ideas and solutions.

In completing **Module II – *Back Office Operations***, you have developed the core infrastructure necessary for a successful planned giving program. As you plan for the next year, include areas that you were unable to complete this time around. For example, your gift acceptance policies might not be quite finished, or you may have more procedures to document in a procedures notebook.

*Keep in mind that a program is not a program when it is inside of your head and not written down for others to use, follow and enhance over time.*

Complete your policies, have the Board approve them, and draft written procedures to effectuate them. Educate your staff about the procedures and provide tools for ease of administration. Over time, the policies and procedures become the backbone of your program, always growing and evolving.

You will also need to complete a program budget, which is also part of your core infrastructure.

In your multi-year plan:

* Note additional program offerings you may add in future years, including some of the more exotic life income gifts such as:
  + Gift annuities
  + Charitable remainder trusts
  + Charitable lead trusts
* Include proposed budget and staffing levels to ensure the Board is informed of the future investment required to grow the program.

If you completed **Module III – *Building Donor Relationships***, you have the tools to identify the best prospects to approach about planned gifts. You now need to create a program plan that emphasizes meeting these donors and forging a relationship between the donor and your organization. Planned gifts are completed when a donor realizes that he/she can meet a personal planning objective while also supporting your charity to meaningfully enhance your mission.

Sometimes the personal planning objective is the direct support of a particular program you offer, often through a current gift. However, planned gifts contemplate that for many donors, the personal planning objective involves creating a meaningful future for your organization, the donor’s family, or both.

*If you can communicate how donors can create immediate impact and long-term outcomes for your organization and society, while also meeting a personal planning goal, you will be much more successful in raising planned gifts.*

PROJECTS

**Project 16: Draft an Operating Plan for Next Year**

Planned Giving in a Box made year one of building your program easy. Writing and implementing your own plan for year two is **even easier**.

Download the plan template from: [www.PlannedGivinginaBox.Com/PGB2-1001](http://www.plannedgivinginabox.com/PGB2-1001), then customize it to meet your own needs. Include the things that worked during year one of The Box (which we hope are *all* of them!) and adjust or eliminate those which did not.

The template should provide an effective guide for putting together your plan for the coming year.

**Project 17: Draft an Implementation Timeline “At-A-Glance”**

While it is nice to have an operating plan, many individuals find it easier to stay on course by having an implementation timeline or grid for the plan. That is why throughout The Box we have used “At-A-Glance” grids. These grids helped you to know what do and when to do it, each week for 52 weeks.

Now it is time for you to put together your own grid from your plan. To help get you started, download the template from [www.PlannedGivinginaBox.Com/PGB2-1002](http://www.plannedgivinginabox.com/PGB2-1002). It is an Excel spreadsheet, so you can easily manipulate it to meet your own needs.

With the grid and the operating plan both in hand, you will be “go for launch” for the coming year.

DOCUMENT PGB2-1002

Planned Giving Operational Timeline Template

To access the template, double click on the Excel icon below and save it to your computer.

