

Building donor relationships



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**FORMS**

Planned Giving Activity Tracking Evaluation Report

PGB2-1201

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 |

**Time required:** 1 hour

**What it covers:** Measuring the Success of Your Program

**Why:** People perform to that which is measured.

**How to get it:** [www.PlannedGivinginaBox.Com/PGB2-1201](http://www.plannedgivinginabox.com/PGB2-1201)

BACKGROUND

Congratulations! You made it through either all 12 weeks of Module II or all 52 weeks of The Box! In either case, give yourself a pat on the back for staying with it. We know it was not always easy, but you persevered because you knew it was what was best for your charity.

Back in week one, you created a report titled “Planned Giving Activity Tracking Report.” Hopefully you’ve been maintaining that report since then, filling the data as you went. In week five you created another group of reports, designed to measure dollars in the door.

When we measure the success of your planned giving program, the true effectiveness of your effort, it is all about the Activity Tracking Report. After all, whether it is the right time to make a planned gift is a personal decision based on the donor’s circumstances. You could have done everything right and still the donor elects not to make a planned gift because the timing is just wrong. By measuring **activity instead of dollars**, it ensures that you are doing the hard work every day that will make your program successful.

Long-term, your charity will be better off because you put a little bit of effort into planned giving every single week, 52 weeks a year.

PROJECTS

**Project 18: Evaluation Report**

Now it is time to evaluate just how well you did. Download [www.PlannedGivinginaBox.Com/PGB2-1201](http://www.plannedgivinginabox.com/PGB2-1201). It should look familiar to you, as it is largely the same as PGB2-0103, the Planned Giving Activity Tracking Report. However, the new version has added two new columns, to total your activity for the last year and to record your goals.

You may be wondering why the “goals” column is blank. The reality is, when you took on The Box, you took on a lot. In fact, if you completed all of the tasks in The Box, *you had a successful year*. You took on something much larger than you previously thought possible – creating a planned giving program. So by that measure alone, you were a success!

The purpose of the goals column is to set your goals for next year.

*Marketing and Outreach*To create your marketing goals, assume a 0.5% response rate for each of the different marketing pieces. That would be a reasonable goal by any measure, particularly for a new program. Only you know how many people from the identified audience will receive each piece, so only you can come up with those goals.

We suspect that you did even worse than 0.5% in the first year, but don’t get discouraged. It normally takes seven touches for prospects to start to “get it” when it comes to planned giving. This was your first year, so your marketing was probably a bit uneven and your messaging a little less than ideal. As you refine your marketing efforts, you’ll start to see greater responses and better results.

Have faith, and keep sending out those materials.

*Back Office Operations*

If you have a check mark in each row, you did a *great job* If not, then make sure that incomplete items are in your operations plan, timeline and goals for next year.

If you did over 80% of the tasks in operations, you are in better shape than most well-established planned giving programs around the country – but we want to see you at 100%.

For next year, you may need to adjust this section of the report to reflect the Back Office Operations portion of your operating plan. It should be easy to do: just take what is in the timeline and put it into this tracking report.

*Building Donor Relationships*

If you were a **full-time planned giving officer**, and all you did was visit donors, your activity goals for the year would be measured in number of meetings, contacts and visits as follows:

|  |  |
| --- | --- |
| **Activity (Full Time)** | **Number** |
| Strategy/Collaboration Meetings | 150 |
| Quality Contacts | 400 |
| Prospect Qualifying Visits | 30 |
| Prospect Cultivation Visits | 30 |
| Prospect Legacy Society Qualifying Asks/Visits | 30 |
| Donor Stewardship Visits | 30 |
| Professional Advisor Meetings | 30 |

But you are ***not* a full-time planned giving officer** with nothing else to do but create strategies and reach out to donors. You have many other responsibilities which take away from your time to build donor relationships. If you continue to spend one hour per week, that is 1/40th of your time, or 2.5% of your work time, on planned giving, you can see that your planned giving program is not going to get very far very quickly.

|  |  |
| --- | --- |
| **Activity (2.5% of Your Time)** | **Number** |
| Strategy/Collaboration Meetings | 4 |
| Quality Contacts | 10 |
| Prospect Qualifying Visits | 1 |
| Prospect Cultivation Visits | 1 |
| Prospect Legacy Society Qualifying Asks/Visits | 1 |
| Donor Stewardship Visits | 1 |
| Professional Advisor Meetings | 1 |

*This is really too bad, because you could raise a lot more money for your charity if you were allowed to focus on relationships. But since we cannot control your other assignments, we need to set your goals based upon how much time you actually spend on planned giving.*

The good news is there are multiple ways to increase the amount of time you work on your planned giving program without taking away from your other tasks.

1. First and best, engage your volunteers.   
   * There are many people who volunteer for your organization that believe in your long-term mission.
   * Ask them to review your planned giving prospect list and approach those individuals they know well about planned giving.
   * It will allow you to reach many more people and you don’t have to do the visits.
2. Second, start to integrate conversations about planned giving into your “regular” donor visits.  
   * You’ll find that many of the tools and techniques will be of interest to donors you are planning to meet to discuss major gifts, annual giving, events and more.
   * An integrated planned giving program does not take away from those efforts but augments them.
3. Finally, begin to work on reallocating more of your time to planned giving and away from less productive pursuits.  
   * A robust planned giving program can produce 25-40% of your total revenue from individuals at a cost of less than 10 cents per dollar raised.
   * When you compare that to events, which often cost 50-75 cents per dollar raised, planned giving is the future while events are the past.
   * If you can allocate administrative duties to others, this will also let you have more planned giving discussions.

In the end, **you decide** how to spend your time. If you spend it on planned giving, you will ensure a bright future for your organization.

DOCUMENT PGB2-1201

Planned Giving Activity Tracking Evaluation Report

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

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