

**Christian Brothers Services  
Catholic School Management**

**WEBINAR**

**2015 Fall Webinar Series**

**September 24, 2015**

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**Christian Brothers Services  
Catholic School Management**

**Planned Giving  
A Long-Term Financial Strategy**

**September 24, 2015**

 **2015 FALL WEBINAR SERIES** 

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**Opening Prayer**

*Creator God, through your world  
and people that surround us, we  
pray that we may grow more aware  
this day of your life giving presence.  
Open our minds and hearts to apply  
the knowledge from today's  
webinar for the good of all.  
We ask these things in Jesus' Name.  
Amen*

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**Christian Brothers Services**  
**Catholic School Management**

**Planned Giving**  
**A Long-Term Financial Strategy**



**Joe Bracco**  
 Adjunct Consultant  
 Catholic School Management

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## Welcome and Overview

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- Webinar will cover:
  - The “case” for planned giving
  - Assessing your school’s readiness
  - The Key Elements for a successful planned giving program
  
- Challenge, Response, and Plan of Action



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## Webinar Objectives

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- Recognize the value of planned giving as a long-term financial strategy
- Understand the importance of planned giving in the overall development process
- Assess the steps you need to begin to develop or to revitalize a planned giving program



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## The Case for Planned Giving

- Holds more potential to provide funds for long-term sustainability
- Offers opportunity to build an endowment
- Offers donors a variety of charitable giving options
- Rarely a conflict among school's fund raising activities
- If you are not asking, someone else certainly is!

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## Readiness Assessment

- "Case" for future support
- Existing donor base
- Board understanding and support
- Communicate with donors on a regular basis
- Established presence and perceived as financially stable
- Established development program
- Commitment of staff and budget resources

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## Role/Expectations of the School Board

- Believe in the need for planned giving
- Understand that planned giving is a long-term process
- Willing to allocate resources for the planned giving program
- Willing to arrange own planned gift
- Assist in identifying and cultivating donor prospects
- Can influence, connect, provide access to others
- Receive regular updates on the program

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## Developing the “Case Statement”

- Fundamental for building an effective planned giving program
- Articulates why your school needs and is worthy of planned gifts
- Elements to consider and process for developing the “Case Statement”



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## Forming a Planned Giving Committee

- Role of the Committee
- Individuals who are:
  - Committed to the school
  - Willing to make their own planned gift
  - Capable of identifying and cultivating donor prospects
  - Serve as a sounding board for marketing activities
  - Able to assist with donor recognition



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## Donor Identification

- Who are your best planned gift prospects?
  - Predictors
  - Motivation
  - Natural constituent groups
  - Others



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## Donor Identification (continued)

- Developing a “Top Prospect” List
  - What do you know about your donors?
  - Review donor records – frequency and consistency of giving
  - Apply predictor and constituent group criteria
  - Involve key volunteers and school leadership
  - Develop individual prospect sheets




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## Cultivation Strategies

- Engage donor interest; strengthen relationships
- Communications that create awareness and interest
- Create opportunities for prospect to connect with school
- Invitations to events in the life of the school




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## Solicitation Strategies

Most frequently cited reason for making a gift:  
*“Because someone asked me”*

- Person-to-person outreach to top prospects
- Tips and suggested process:
  - Preparation
  - Personal Visit
  - Follow-up




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## Donor Recognition

- Forming a Legacy Society
- Recognizing donors publically and privately
- Host a donor recognition event
- Use of “donor stories”
  
- Stewardship




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## Communications and Marketing

- Marketing Objectives
  - Promote mission and accomplishments
  - Create awareness frequently and consistently
  - Provide information designed to inform and educate
  - Generate inquiries




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## Communications and Marketing (continued)

- Marketing Strategies
  - Promote awareness of need and opportunity for support to all school constituencies
  - Design targeted appeals to segmented donors
  - Personalize conversations and relationships with “Top Prospects”




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## Communications and Marketing (continued)

- Marketing activities:
  - Use of existing publications
  - Print materials (brochure)
  - Direct mail promoting
  - Check-off boxes
  - Web presence
  - E-mail communications
  - Wills Information Kit (response to inquiries)
  - Seminars and informational presentations
  - Social Media tools

- Communication/Marketing Plan




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## Building Relationships with Professional Advisors

- Advisor outreach
  - Identify local professional advisors
  - Initiate contact and engage, share school/program information
- Role of the Advisor
  - Serve as a resource for technical issues/questions
  - Assist with educational aspects of program, e.g. seminars
  - Promote charitable giving with clients
  - Resource for donor referrals




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## Organizational Requirements

- Dedicated staff time
- Commitment of budget resources
- Reliable data base, record keeping system
- Communication/Marketing Plan
- Gift acceptance policies and procedures
- Access to professional resources




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## Achievable Goals

- Scope of marketing activities
- Number of top prospects identified
- Number of personal visits
- Number of new members to Legacy Society




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## Integration

- Incorporate Planned Giving into school-wide Strategic Plan
- Complements other fund-raising initiatives
- Provides donor with additional giving options
- Coordination with major gift solicitation




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## Common Types of Planned Gifts

- About donor's needs: financial, family, philanthropic
- Types of Planned Gifts:
  - Revocable Gifts:
    - **Bequests**
    - Beneficiary designations (qualified retirement plan assets, life insurance)
  - Irrevocable Gifts:
    - Charitable Gift Annuity, Charitable Remainder Trust, Charitable Lead Trust, Life Estate Reserved




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## Summary and Review

- Key components for a successful Planned Giving Program:
  - Institutional commitment/leadership
  - Compelling “case” for planned giving
  - Donor development
  - Communication/Marketing Plan
  - Infrastructure to support planned giving program
  - Start with bequests

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**For Questions Regarding  
Planned Giving**

**Questions** **Q & A** **ANSWERS**

**Contact:**  
Maria Ribera at  
[office@catholicschoolmgmt.com](mailto:office@catholicschoolmgmt.com)  
or by phone 203.421.5169.

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For the link to the handouts from today's webinar email:



[cbs.webinars@cbservices.org](mailto:cbs.webinars@cbservices.org)

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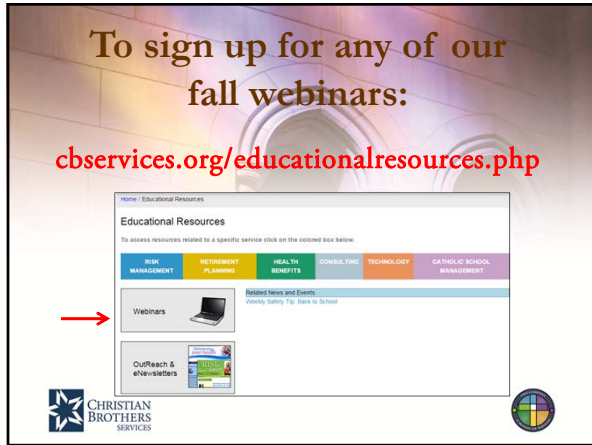
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