

Sample Planned Giving Program

MONTH	TASK	MORE INFORMATION
June 2014	Make your case for a planned giving program.	Gather statistics and information on the benefits of a planned giving program.
July 2014	Assess your readiness.	Review your current programs, policies and mission to determine your organization's readiness.
August 2014	Conduct staff training.	Educate your staff, board and volunteers on the importance and basics of planned giving.
September 2014	Identify measurable planned giving activities and goals.	Plan for personal visits and stewardship. Create a marketing calendar.
October 2014	Obtain executive leadership and board approval.	Set budget, staffing, goals and timelines.
November/ December 2014	Prepare policies for gift acceptance, endowment, recognition and stewardship.	A sample gift acceptance policy is provided with Stelter's planned giving webinar.
January 2015	Conduct ongoing training. Share policies with staff and board.	
February 2015	Define, identify and prioritize planned gift prospects.	
March 2015	Cultivate and solicit top planned giving prospects.	This includes personal visits, phone calls, emails, letters and educational seminars.
April/May 2015	Implement a multichannel marketing program.	This could include newsletters, emails, articles and advertisements in organizational materials.
June 2015	Launch/promote legacy society; invite charter members.	Produce materials: society name, brochure, letter of invitation, letter of intent, bequest language.
July 2015	Conduct ongoing staff training.	
August 2015	Mail a print newsletter.	
September 2015	Deliver a planned giving eNewsletter.	
October 2015	Host a professional advisor luncheon with CEO.	
November/ December 2015	Send letter addressed by CEO promoting year-end giving.	
January/ February 2016	Create a website.	Ensure it is user-friendly, interactive and educational, with photos and testimonials.
March 2016	Conduct ongoing staff training.	
April 2016	Launch a planned giving website.	
May 2016	Mail a print newsletter.	
June 2016	Deliver a planned giving eNewsletter.	