

Spend ONE hour a week on planned giving and you'll see results



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(www.CPGR.org)

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or



What is the experience in the room with Planned Giving?

- ___ Less than two years doing any kind of planned giving?
- ___ Two to five years?
- ___ Six to ten years?
- ___ More than ten years?
- ___

What kind of office do you work in?

___ Small shop (one or two people)

___ Large shop - have a planned giving department or staff

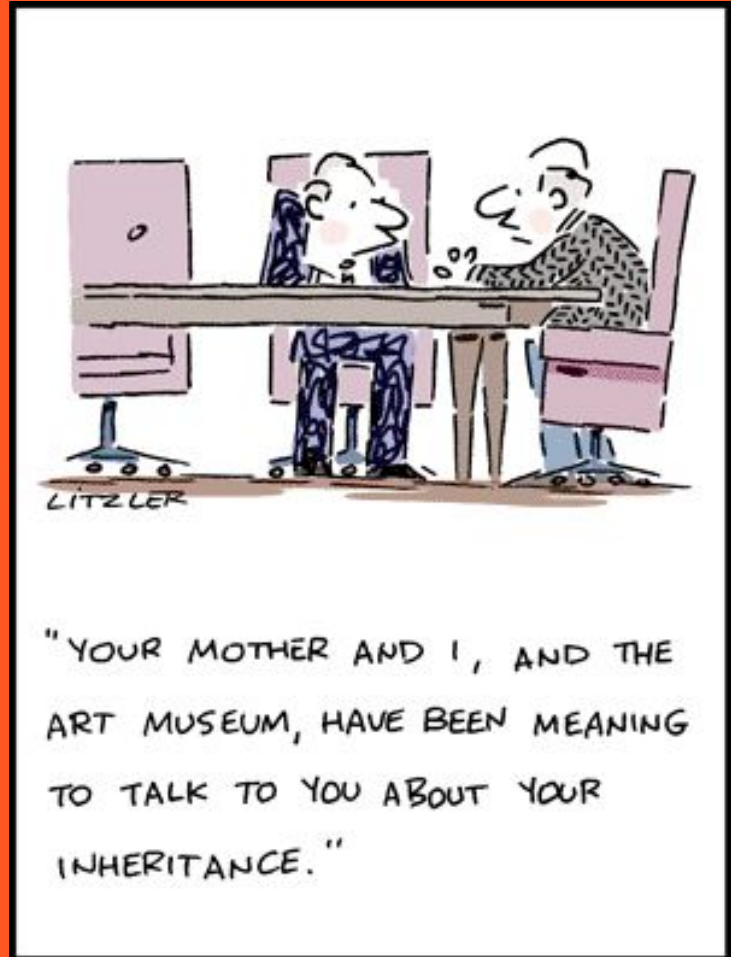
___ Consultant or Advisor

___ Other Scenario

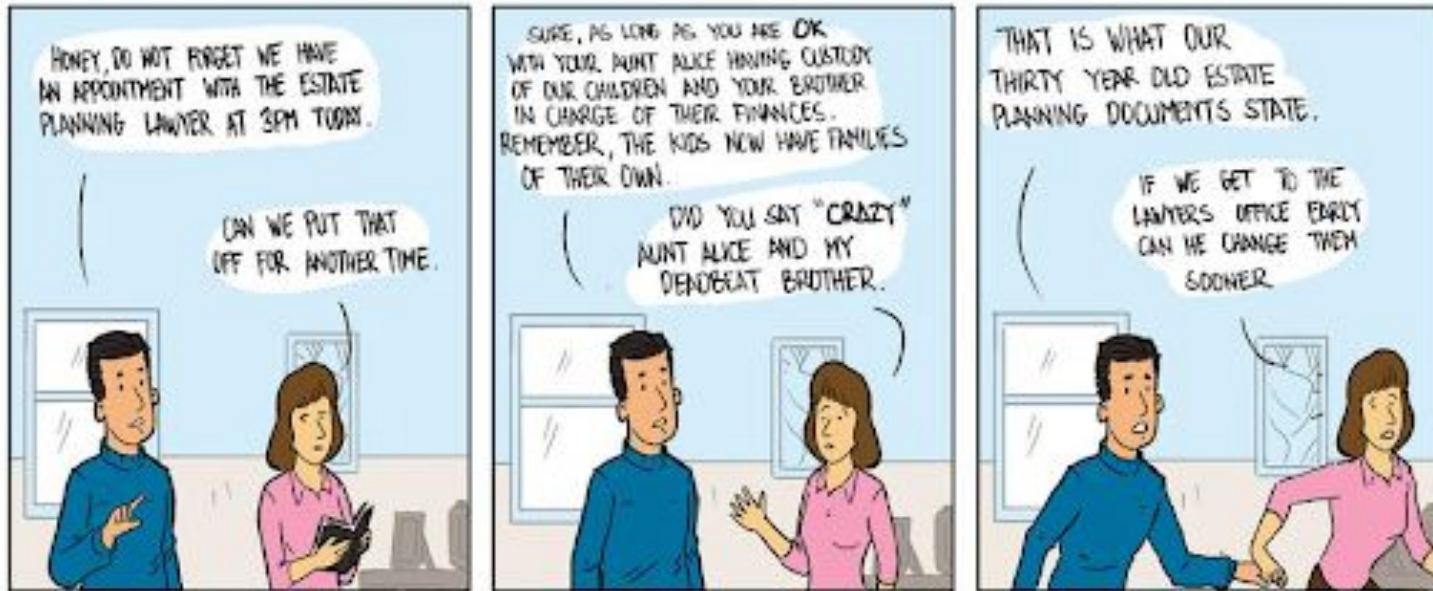


Who is afraid of the term Planned Giving?

It does not need to be
complicated!



Your donors may be afraid of planned giving:



Let's demystify Planned Giving

- Most planned gifts are simple bequests or beneficiary designations from retirement accounts or life insurance policies. Forget the others.



Try calendaring the same hour each week to work on Planned Giving.

- If there's a conflict for your time during that one hour then carve out a different one hour



What can you do during the one hour?



- Find out how the funds from a matured gift are used.
- Board Trustees - how many are Legacy donors? What about your staff? Any good prospects?
- Review your prospect list and make two calls. What is a prospect list & who's on it?

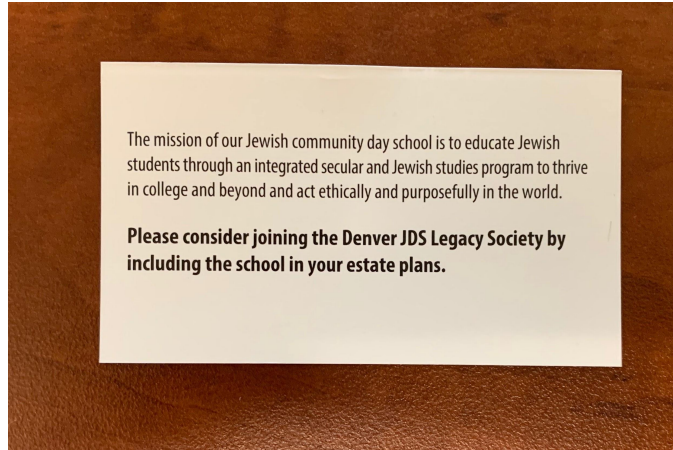
What else can you do during that one hour?

- Review your marketing pieces Why? (Always drive people to your website with marketing)
- Create of list of current Legacy donors
- Keep in mind consistency versus intensity - why?



More ideas for that one hour:

- Where are your messages currently seen?
- Do you have a leave behind simple Annual Campaign / Legacy Packet?
- Call a legacy donor and ask for a testimonial



Meeting with a prospective donor

What do you talk about?

- Schmooze first
- Donor's interests in your organization and why he/she gives.
- Thank them throughout the conversation.
- Talk about annual campaign **AND** planned giving.
- Do they have questions?
- Find out when you should get back in touch with them.
- This is great **relationship building** time.

What do you do after your meeting?

- Send a thank you note - within 24 hours.
- Get them any materials you promised to get to them.
- Make good notes about the conversation
- Calendar the next steps to occur during one of the hours you work on planned giving.

What can you do to make your job easier?

- **Do a planned gift yourself**
- **Find two or three champions on your board to help you**
- **Have a list of your Legacy members to share with prospects**
- **Consider a list of advisors close to your organization for donors**
- **Does your organization have a development committee?**

What are realistic expectations?



What are obstacles that get in the way of moving your planned giving program forward?

- Will a donor ask you about a Charitable Remainder Trust, Lead Trust?
- You don't have a **NAME** for your Legacy program thus you can't create materials.
- What do you put on your website?

What should you keep in mind?

- Keep getting your messages “out”.
- You are planting seeds.
- If we’re all doing this, we’ll see results over time.
- Stewardship - a whole other topic of conversation - but find ways to do it.



What else should you keep in mind?

- Donors don't always tell you about a bequest.
Why?
- Consider a donor event.
Why?
- You will enjoy planned giving!
- **CONSISTENCY** vs. **INTENSITY** applies to your time as well.



VS



Are there resources available to help you?

- Use one of the advisors from your list
 - Look to the AFP website for answers
 - Talk to colleagues
 - Take webinars or attend sessions on planned giving
 - Join CPGR and send your question to their board - they always answer
 - Call Krista
-

Just do it!



Call or email me any time:

Krista Boscoe

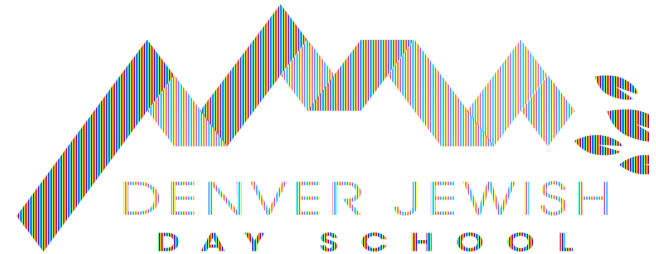
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Thank you!



Extraordinary Education. Timeless Traditions.