STELTER

(RE)LAUNCHING A PLANNED GIVING PROGRAM

Assuming a July/June Fiscal Year

YEAR 1	TASK	DETAILS
January	Make the case for your planned giving program.	Engage your board and stakeholders. Share data around the importance of a planned giving program to diversify fundraising revenue.
February	Assess your readiness.	Review your current program, policies and procedures, capacity and support to determine readiness.
March	Prepare/update policies.	Ensure gift acceptance and investment policies are in place and up-to-date.
April	Start securing budget and staff time.	Prepare budget for marketing, staffing and support. Obtain board approval on time and monetary investment.
May	Define Year 1 marketing needs. Identify and prioritize your planned giving prospects for one-on-one cultivation and marketing outreach.	Establish a model to uncover donor value, or utilize the RFM (recency, frequency, monetary value) analysis.
June	Confirm budget. Create a 12-month marketing calendar. Conduct staff training.	Reach a consensus on the marketing plan and realistic metrics for evaluating its success. (This is typically activity-based: number of marketing touches, calls, meetings and proposals.) Educate staff on planned giving, plans and expectations.
July	Begin prospect cultivation and marketing. Work with internal teams to promote planned giving in other organization publications.	Determine the combination of individual outreach and broader, multi-channel outreach that works best for your organization and its audience.
August/Sept	Survey donors and potential planned giving prospects and schedule follow-up activities. Have a dedicated planned giving web presence in place.	Identify current bequest donors, those interested in talking, and inform marketing messages.
October	(Re)Launch your Legacy Society. Try sending an invitation, a personal letter or a newsletter.	Don't forget to re-engage ignored society members, too.
Nov/Dec	Reinforce Legacy Society mailing with email campaign.	Use a call-to-action (CTA) to drive donors and prospects to visit your planned giving website or to take another desired action.

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YEAR 2	TASK	DETAILS
January	Mail planned giving mailing. Present the board with accomplishments and metrics from Year 1.	Focus on New Year's resolutions and planning for the coming year.
February	Follow-up print with planned giving email.	Reinforce print message with a cohesive CTA.
March	Take inventory of progress made in the last 9-months; report to board.	Evaluate survey, print and digital leads. Assess where you're at based on your stated goals.
April	Mail planned giving mailing. Look at Year 2 budget and make appropriate adjustments.	Focus on tax time and smarter planning and/or remind about Legacy Society.
May	Follow-up print with planned giving email.	Reinforce print message with a cohesive CTA.
June	Send target mailing around CGAs. Survey the next tier of planned giving prospects.	Target prospects according to organizational priorities, size and structure.
July	Continue staff training and follow-up on survey leads.	Ongoing education with staff is critical—not just technical, but soft skills as well.
August	Mail planned giving mailing.	Focus on back-to-school and getting organized and/or remind about Legacy Society.
September	Follow-up print with planned giving email.	Reinforce print message with a cohesive CTA.
October	Celebrate—and report on —Year 1 of the Legacy Society's relaunch.	Publicly thank and recognize those who participate in the society via direct mail, email or social media.
Nov/Dec	Send a simple year-end email reminder	Focus on IRA required minimum distributions and easy year-end gift ideas