



# Integrating Planned Giving into Your Development Program

Planned giving may be a missed opportunity for you—and your donors.

**Has planned giving become an afterthought at your organization?** We all know the pressure to demonstrate results quickly, so it can be easy to overlook the important role of a strong and consistent planned giving program.

Planned giving—combined with annual and major giving—is an essential part of an effective development program. Each piece has a role to play and complements the others. Planned giving brings its own unique benefits, including how to make a lasting impact on your organization while accomplishing the donor's financial objectives.

A thoughtful planned giving strategy will put you—and your donors—at ease. How do you establish your planned giving strategy?

➤ **Define your prospects.**

Major gift donors, yes. But also consider loyal annual donors. Your dedicated donors or advocates can be great prospects—those with a strong, long-term commitment to your organization, especially those who don't perceive themselves to be wealthy enough to have significant impact.

➤ **Communicate the options.**

Many of your donors may never have thought about a planned gift—so include information about giving gifts of non-cash assets and beneficiary designations on the website and in annual gift solicitations and other donor communications.

## Benefits of a Planned Giving Program

- Helps donors think holistically about their assets and the impact they can have.
- Gives donors an option to leave a legacy for the future.
- Engages more donors at a higher gift level, allowing them to have greater impact than they may have thought possible.



➤ **Listen to your donors.**

They will share their priorities with you and how those affect their giving. Be comfortable asking donors how they want to give, in addition to why. You can then offer ideas for different types of gifts that align with their planning priorities.

➤ **Integrate your asks.**

Be sure you include planned giving in your asks for major gifts, campaign gifts, and even annual gifts. A planned gift gives an opportunity for donors at any level to give their legacy gift.

A planned giving conversation is an ongoing conversation, not a transaction.

Build a lasting relationship with your donors and be sure to reach out when there is a life change. This not only shows that you care but is also an opportunity to listen for changes in their philanthropic plans.

Stewardship is critical! At least as important as cultivation, stewarding planned giving donors for the balance of their lifetime is a must. Keep in touch with them and invite them to stewardship events to remind them that your organization was a good choice.

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