

## ***First Steps - Developing a Planned Giving Program***

An effective planned giving program begins with simple bequest promotion. More than 90 percent of planned gifts are bequests. Bequests are attractive because they are easy to understand, simple to implement and can be changed at any time.

This program is designed to help parishes, schools and agencies develop a planned giving plan. The most successful programs will reflect the unique culture and needs of an organization. The archdiocesan Catholic Community Foundation staff is available to provide support with program development, resources and other needs that arise.

### **Level 1: Bequests**

See *Planned Giving Defined* on page 2 for the definition of a bequest and other planned gift vehicles.

- Use existing communications to promote bequests: bulletin, newsletter, parish and archdiocesan website. Time communications to occur throughout the year. Please see *Planned Giving Messages* on pages 5-7.
- Implement marketing techniques that suit your organization's resources and needs.
  - Dedicate a bulletin board or other parish, school or agency space for bequest promotion.
    - With donor permission, include the list of all people who have included your parish or ministry program in their will, regardless of gift size.
    - Display planned giving brochures on or near the board. Use the Planned Giving brochure template. Please request the *Planned Giving Brochure Template* from the Catholic Community Foundation.
  - Mail an annual letter from leadership that includes bequest information and a request to consider a bequest. See *Annual Bequest Letter* on page 9 and *Bequest Disclosure Form* on page 10.
- Record bequest commitments and gift designations electronically or in a paper file. Keep a simple list in a spreadsheet with the name of the donor, address, other contact information and gift details (including designation, if possible—parish ministry programs, school, specific program) See *Planned Gift Contact* on page 11.
- Ask the pastor, deacon, parish life coordinator or lay leader to write thank you notes each year to bequest donors.
- Honor bequest donors at an annual Mass and/or reception. Please see *Bequest Donor Mass and Reception Plan and Agenda* on page 12.
- Host an information session about planned giving for your most loyal annual donors, major gift donors and prospects. Please see *Bequest Information Session Plan and Agenda* on pages 13-14 and *Attorney Guide* on pages 15-18.