

Next Steps — Growing a Planned Giving Program

Planned giving can grow to include fundraising and cultivation activities that market a broader array of techniques like charitable gift annuities and other gifting vehicles, using a variety of assets. Keep in mind that offering more complex, technical giving options is not necessary to have a successful, productive planned giving program.

Level 2: Committee Members and Legacy Society

- Step 1: Establish a Level 1 program.
- Step 2: Appoint 1-2 planned giving members to serve on the Stewardship Committee or other appropriate committee. Incorporate planned giving topics into meeting agenda 2-3 times a year.
- Step 3: With committee assistance, implement a communications plan, promote planned giving sessions, and monitor and enhance program. See *Planned Giving Communication Plan* on page 19.
- Step 4: Develop a Legacy Society (e.g., the St. John Legacy Society or St. Elizabeth Catholic Agency Legacy Society). See *Planned Giving Legacy Society Program* on page 20-21.

Level 3: Planned Giving Committee and Donor/Prospect Visits

- Step 1: Establish a Level 2 program.
- Step 2: Create a planned giving committee of 4-6 individuals as a subcommittee of the referenced Level 2 Committee or as a stand-alone committee. See *Planned Giving Committee and Job Description* on page 22.
- Step 3: Market other types of planned giving vehicles, such as charitable gift annuities, charitable trusts as well as gifts of different types of assets. See *Planned Giving Defined* on pages 2-4.
- Step 4: Develop an annual cultivation and gift solicitation plan for planned gift donors and prospects. See *Planned Giving Cultivation and Gift Solicitation Plan* on page 23. Use planned giving committee and staff to visit donors and solicit planned gift commitments. See *Identifying Planned Giving Prospects* on page 24 and *Planned Giving Visit Outline* on pages 25-26.

The archdiocesan Catholic Community Foundation is available to provide assistance. Contact Ellen Brunner, director of planned giving at ebrunner@archindy.org, 317-236-1427 or 800-382-9836, ext. 1427.