

Charity Gift Planning Program Plan For 1999-2000

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2.	Actively manage ___ major gift prospects, including the ___ solicited prospects (\$50,000+)	1
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2.	Before 03/30/00, personally visit all planned gift donors to 1) reaffirm their intention and determine their motivation for giving; 2) determine their ability to give another planned gift to CHARITY; and, 3) determine schedule of regular visits (i.e. annual, semi-annually, quarterly) needed to retain as planned gift donors.	1
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3.	May '00 "Gifts of Appreciated Securities" ; <i>Donor Stock Gifts</i> ; [CP of year and Charity Fellows] or "Charitable Remainder Trusts" ; <i>Donor X & Donor Y</i> ;	12
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2.	Oct '99 [gifts of securities; deadlines for gifts of property; planning of gift opportunities for clients -- qualify for CP of year in '99]	12
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A) Major Gift Development, Solicitation and Prospect Planned Giving Donor Newsletter

Personally manage ___ assigned prospect/donor relationships: develop and implement strategies for their cultivation; and make or orchestrate their successful solicitation. Generate new major and planned gift prospects.

1. Personally solicit or orchestrate the solicitation of ___ major gift asks (\$50,000+) during the 1999-00 fiscal year; ___ for outright gifts, ___ for deferred or estate gifts (See "A").
 - a) Gifts solicited will total \$_____ or more; Gifts/pledges commitments received will total \$_____; Cash received during 1999-00 will total \$_____.
 - b) By __/__/__, identify target solicitation dates for those asks.
 - c) Generate \$_____ from ___ "expectancies" during 1999-00 (See "A").
2. Actively manage ___ major gift prospects, including the ___ solicited prospects (\$50,000+)
 - a) By __/__/__ have strategies written for all prospects; by __/__/__, for top ___; by __/__/__, for top ___; by __/__/__, for all prospects
 - b) As appropriate, and with the concurrence of the Executive Director, reassign current major, outright, gift prospects to other major gift officers.
3. Make ___ moves/visits per year, with prospects, donors or other appropriate "natural players" for major gifts (\$50,000).
 - a) Average _____ moves a week and _____ moves per month
 - b) Review progress quarterly with Executive Director (10/15, 01/15, 4/15, 7/15)
4. Identify ___ new planned/major gift prospects (\$50,000+).
 - a) By __/__/__ identify ___ new planned/major gift prospects (\$50,000+) from the Charity's internal prospect pool (database screening) or from external sources (PGPAC references, fundraisers, administration [Deans, Assistant Deans, Department Chairs] newspapers/magazines, etc.);
 - b) Before __/__/__, add ___ prospects, from planned giving visits.
 - c) Before __/__/__, add ___ prospects, from all planned giving seminars.

B) Continue to Steward and Upgrade Existing Planned Giving Donors

Improve the Charity's method of stewarding and upgrading planned giving donors; refine the recognition of planned giving donors (Bequest Donor Recognition Group) via Annual Luncheon, and appropriate articles and advertisements in Charity and CHARITY newsletters and magazines; and, refine existing stewardship procedures.

1. Attempt contact with all known planned gift donors (as documented in "Cumulative Outstanding Planned Gift Commitments" report dated 06/30/99):
2. Before 03/30/00, personally visit all planned gift donors to 1) reaffirm their intention and determine their motivation for giving; 2) determine their ability to give another planned gift to CHARITY; and, 3) determine schedule of regular visits (i.e. annual, semi-annually, quarterly) needed to retain as planned gift donors.

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- a) Before 12/30/99, attempt to visit those donors with no documented gift value (approx. 30), ascertain that value and secure, where possible, documentation of their gift; (if unable to secure visit via telephone call appointment, send letter).
 - b) Before 03/30/00, personally visit all remaining donors (approx. 35).
3. Send appropriate holiday cards to Bequest Donor Recognition Group members (all cards and envelopes must be able to be run through the laser printer)
- a) Birthday Cards
 - (i) By 07/30/99 have designed the card and envelopes¹
 - (ii) By 08/30/99 have printed the cards
 - (iii) By 09/30/99 determine donor birthdays, using age overlay information
 - b) Valentine's Day card to all Bequest Donor Recognition Group members.
 - (i) By 11/30/99 have designed the card and envelopes²
 - (ii) By 12/30/99 have printed the card
 - (iii) By 01/30/99 have laser addressed and live-stamped the envelopes
 - c) Season's Greetings and Happy New Year Card
 - (i) By 09/30/99 have designed the card and envelopes³
 - (ii) By 10/30/99 have printed the card and envelopes⁴
 - (iii) By 11/30/99 have laser addressed and live-stamped the envelopes
4. Before 03/30/00, find two or more existing planned giving donors willing to publicly discuss their personal motivation for giving as a testimonial:
- a) Stories for May and Sep. '00 *Planned Giving Donor Newsletter*
 - b) Copy for new CHARITY magazine advertisement and/or potential story
5. Encourage enrollment in the Bequest Donor Recognition Group through *Charter Membership* program
- a) All who join during first three years of program (1997-2000) will be listed as "Charter Members"
 - (i) In honor roll in Donor Newsletter Annual Report⁵
 - (ii) In Bequest Donor Recognition Group program honor roll⁶
 - (iii) Specific Memento of Recognition⁷
 - b) Cite deadline of 06/30/00
6. Through the Bequest Donor Recognition Group, acknowledge all known planned giving donors who have made a planned or deferred gift to CHARITY.
- a) Provide an annual, personal acknowledgement opportunity (Bequest Donor Recognition Group Luncheon)
 - (i) Visit with CHARITY's President (provide President with briefing sheet for those donors who have advised us of gift amount and designation).
 - (ii) Have CHARITY BOT's host program and send invitations to BOT members.
 - (iii) Include CHARITY focused program.

¹ Focus design on Bequest Donor Recognition Group

² Use PGDC example for design

³ Focus design on Bequest Donor Recognition Group

⁴ Avoid all religious references

⁵ see Communication Plan

⁶ Printed and mailed with May issue of *Planned Giving Donor Newsletter*

⁷ Engraved Glass Paperweight

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- (iv) Acknowledge new members as part of the program.
 - (v) In Bequest Donor Recognition Group program honor roll⁸
 - (vi) Invite endowment donors (provide list of donors to Staff as appropriate)
 - (vii) Incorporate clients into program (brief them on subject matter – who is attending and why)
 - (viii) Use an interesting location at facility, yet close to parking.
 - (ix) Offer rides to donors who don't/can't drive (ask development officers to keep morning and afternoon available for driving)
- b) Before 12/30/99, in conjunction with the **DOR, FC, and DOSES**, write and implement procedures for tracking bequest expectancies and planned gift donor recognition within Donor Database (transition from the current, separately maintained, Excel database):
- (i) (See F) 2. Below for details and dates).
 - (ii) Establish set reports and recognition mementos delivery system (PG Assistant to run reports and “prod” delivery/visits):
 - (a) If gift is documented and irrevocable, and the present value of the future gift is equal or greater than \$50,000, donor to receive Charity dinner invitation.
 - (b) Annual luncheon/tea with President
 - (c) Glass memento and notepad cube engraved with logo
 - (d) Certificate of appreciation (to be created in '99-00)
 - (e) Honor Roll listing in Donor Newsletter (at donor discretion)⁹
 - (f) Record delivery of mementos and acknowledgement given or allowed by donor (i.e. has donor given permission for publicity).
 - (g) Adding selected planned gift donors to upgraded donor invitation list (upon concurrence of DOSES)
 - (h) In Bequest Donor Recognition Group program honor roll¹⁰

C) Administer, in concert with the Charity ED, the Board's Planned Giving Committee (PGCOM)

Increase the number and effectiveness of Committee members; solicit planned gift prospects among the Board members; communicate information about planned giving to the full Board; and, provide leadership about planned giving to outside constituencies (i.e. serving as hosts/hostesses at estate planning seminars)

1. Before 06/30/00, ask 100% of the Board members to consider adding CHARITY as a beneficiary of their estate plan, or if they've already done so, to determine if the level of gift is still appropriate. (*"Make a planned gift commitment by each board member a requirement of board service, similar to membership in the Charity's Annual Giving Club."*)
 - a) By 09/30/99, determine status of all committee members.
 - b) By 09/30/99, create and mail letter from Chairman, PGCOM Chair and Director of Planned Giving, inviting Trustees to visit or talk with any or all of the signatories or a member of the PGCOM (letter will give trustees an opportunity to opt out of the discussion).

⁸ Printed and mailed with May issue of *Donor Planned Giving Newsletter*

⁹ see Communication Plan

¹⁰ Printed and mailed with May issue of *Donor Planned Giving Newsletter*

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- c) By 10/30/99 begin follow-up calls as determined by letter response. Calls made by PGCOM Chair, DOGP and PGCOM members (as appropriate).
 - d) By 03/30/00, determine status of 100% of current board of trustees' estate/gift plans.
 - e) Before 09/30/99, increase the Committee size by two additional Board members capable of giving a planned gift and willing to solicit others¹¹. Confirm suitability of prospective members with current PGCOM members before soliciting.
2. Before 08/30/99, have Committee endorse, and Executive Committee commit to, planned giving information and presentations as part of, at minimum, two of the three annual board meetings.
- a) At Fall meeting of the Board of Trustees, explain concept and reason for contacting all BOT's about planned giving:
 - (i) Secure endorsement of PGCOM (Spring '99)
 - (ii) Secure endorsement of Executive Committee (Fall '99)
 - b) At Spring meeting:
 - (i) Report planned gift results, including expectancies and cash received. Categorize information according to type (revocable or irrevocable) and source (BOT or non-BOT?).
 - (ii) Presentation about charitable gift annuities.
3. During the fiscal year, coordinate at least two meetings (one by 10/30/99 and another by 04/30/00) of the Planned Giving Committee (PGCOM). Meeting objectives:
- a) Identify, qualify, prioritize, and assign prospective contacts among the BOT's: each member responsible for contacting at least three BOT's during the year.
 - b) Follow-up on status of their prospect calls/visits -- each member to have contacted/visited at least one prospect since previous meeting.
 - c) Inform about planned gifts/commitments received and pending planned gifts -- seek input on pending planned gifts -- include donor information as appropriate.
 - d) Inform about Charity life income commitments -- secure necessary committee endorsement, i.e. appropriate investments.
 - e) Specific meeting items:
 - (i) Fall '99 Meeting – October:
 - (a) Assign BOT's to individual committee members (follow-up to letter from Charity and PGCOM Chair)
 - (b) “Preview” Charitable Gift Annuities presentation (for Spring '00 BOT meeting)
 - (ii) Spring '00 Meeting – April: Review planned giving annual operating plans and secure endorsement and commitment of support.
 - f) Continue to meet in uncommon, yet professional, charity locales and offer unique supplemental information.
4. Meet with each committee member at least once during the fiscal year. Objectives:
- a) Review and reinforce committee mission, members' responsibility, and prospects' status.

¹¹ (XXXXXXXXXXXXXXXXXX)

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- b) By 10/30/99, have met with at least two members; by 12/30/99, at least four; by 03/30/00, all members;
- c) Ask members, who have made or are making planned gifts, to:
 - (i) Offer testimonials (XXXXXX, XXXXXX) at the fall '99 BOT meeting and in publications.
 - (ii) To serve as "hosts/hostesses" for planned giving seminars.

D) Continue to use and expand the expertise of the Planned Giving Professional Advisors Council (PGPAC) to advance CHARITY's Planned Giving Program

Manage the activities of the Planned Giving Professional Advisors Council (PGPAC): expand its membership and representation; provide training to Charity staff; and, "network" with the general professional estate planning community

1. Identify and recruit four members from accounting, financial planning and legal professions. By 09/30/99, identify prospective members, secure endorsement of PGPAC chair, and have solicited all prospective members for Charity's Associates gift and service on Council.¹²
2. During the fiscal year, coordinate at least two meetings of the PGPAC (one by 10/30/99; second by 04/30/00). Meeting objectives:
 - a) Inform, review and discuss:
 - (i) New planned gifts/commitments received and pending planned gifts
 - (a) Seek input on pending planned gifts -- include personal information about donors
 - (b) Seek assistance with gifts in probate.
 - (ii) Charity fund raising initiatives and priorities, i.e. Trustee planned gift commitment plan.
 - (iii) Planned giving publications for content and effectiveness.
 - (iv) Changes in local, state, and federal tax law affecting charitable giving.
 - b) Receive commitments from individual PGPAC to provide:
 - (i) Speaking opportunities for Director of Gift Planning (see below).
 - (ii) Their expertise as speakers for Charity seminars (see below).
 - c) Continue to meet in uncommon, yet professional, Charity locales and offer unique supplemental information.
3. Communicate regularly with committee members.
 - a) Meet with each at least once during the fiscal year. Objectives:
 - (i) Reinforce the committee mission, members' responsibility, and identify potential prospects.
 - (ii) By 10/30/99, have met with at least eight members; by 12/30/99, at least 12; by 04/30/00, all members.
 - b) Send monthly copies of appropriate articles from *Planned Giving Today*.
4. As seminar resources -- identify and recruit target audiences: underwrite seminar costs; and, serve as presenters for the following audiences and topics:
 - a) Current Women Donors/Prospects -- Estate Planning Issues for Women
 - b) Baby Boomer/"Young" Alumni -- Estate and Charitable Gifting Plans

¹² (XXXXXXXXXXXXXXXXXXXXXXXXXX)

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- c) Sun City -- Supplemental Charitable Retirement Plans
 - d) CHARITY Faculty -- Retirement Planning
 - e) Allied Professionals (realtors) – *Charitable Alternatives: Even When There Is No Sale*.
 - f) Training for CPA's – Use Chris Hoyt from Univ. of Missouri, Kansas
5. By 08/30/99, determine the schedule, topic, and individual presenters of training sessions (four, each approximately one hour) the PGPAC will provide for staff.
 6. Assist Charity staff in organizing and presenting CHARITY's annual professional estate planning luncheon seminar in May of '00 (see attachment for goals, strategies and logistics).
 7. DOGP to personally contact at least four new representatives each quarter from the accounting, financial, and legal communities who can provide new business to the planned giving program (attorneys, trust officers, bankers, financial advisors, and certified public accountants), by using the references of the PGPAC whenever possible.
 8. Participate in and materially support the “*Leave a Legacy*” campaign in Las Vegas, through presentations that increase other charitable organizations' awareness of planned giving opportunities and the existence of CHARITY as a planned giving resource.

E) Coordinate the Planned Giving Communications/Marketing Program

Working with the Director of Communications (DOC), direct the Planned Giving Communications/Marketing Program to: provide information about planned giving opportunities to prospective donors using direct mail newsletters (*Planned Giving Donor Newsletters* and *Planned Giving Advisors Newsletter*), advertisements (*CHARITY Magazine*), brochures (*Year-End Giving '98*) and articles (*Annual Giving Donor Newsletter* and *CHARITY Alumni Newsletter*); and, to expand the donor base, all while focusing efforts on CPA's and Estate Planning Attorneys.

1. For the following publications (see attachment VII for schedule of topics and specific dates and audiences):
 - a) *Planned Giving Donor Newsletter*
 - b) *Planned Giving Advisors Newsletter*
 - c) *Donor Newsletter*
 - d) *CHARITY Magazine*
 - e) CHARITY Alumni Newsletter
 - f) Charity Annual Report
 - g) CHARITY Sports Programs
2. Conduct the following charitable gift planning, estate planning, and financial planning seminars for donors, prospective donors, and allied professionals (see attachments for goals, strategies, and logistics on each seminar).
 - a) Seminar - *Women's Estate Planning Issues (Young Business Owners)*
 - b) Seminar - *Supplementing Retirement Income*
 - c) Seminar - *Estate Planning for Alumni*
 - d) Seminar - *Faculty Retirement Planning*
 - e) Seminar - *Charitable Alternatives: Even When There Is No Sale*

F) Interact with key internal staff, including DOR, FC, DOPM, and FLC, to refine the planned giving program and to restructure support areas providing services to the Planned Giving Program

Work with the Directors of Records (DOR), Property Management (DOPM), the Charity Controller (FC) and the Charity Legal Counsel (FLC), to identify additional planned gift prospects; refine the planned giving program; and, to restructure support areas providing services to the Planned Giving Program.

1. By 08/01/99, identify additional potential planned gift donors:
 - a) Assist the **DOR** in performing a donor segmentation and age screening before 07/01/99, using the following criteria, to determine best prospects for planned giving information:
 - (i) Donors with previous gifts of stocks and/or real estate
 - (ii) Donors with five or more years of continuous annual gifts
 - (iii) Donors or prospects that are 60-75 years old or older -- send specific planned giving information, such as information on charitable remainder trusts and charitable gift annuities.
 - (iv) Donors or prospects that are 45 to 60 years old -- send deferred gift annuity information.
 - (v) Refine the existing "Planned Giving Donor" mailing list to ensure that all priority prospects receive mailings, using the following services and criteria as appropriate: Age overlays and past giving history
 - (vi) Identify and target geographical areas for mailings by selecting donors living in zip code areas that indicate wealth.
 - b) Develop new prospects and generate additional gifts with pledge reminder inserts:
 - (i) By 06/30/99, have ordered a year-end tax letter/brochure that highlights the tax benefits of charitable giving, for inclusion with the Fall '99 *Annual Giving Donor Newsletter* (determine number required from **DOC**)
 - (ii) By 07/30/99, have created accompanying letter and reply card for brochure and prepare for production – reply to offer opportunity for receiving *Planned Giving Donor Newsletters*.
 - (iii) By 08/30/99, create procedures for responding to inquiries generated by inserts, to include:
 - (a) Response within two days (method determined by information provided: if existing donor with phone number or if number provided on reply – phone call; otherwise, mail)
 - (b) Tracking in Donor Database (initial inquiry, response sent, add to planned giving direct mail list)
 - (c) Follow-up (within one month from initial donor inquiry – contact method from (a) above)
2. Before 12/30/99, in conjunction with the **DOR** and **FC**, write and implement procedures for tracking bequest expectancies and planned gift donor recognition within Donor Database (transition from the current, separately maintained, Excel database).
 - a) To be able to report on bequest expectancies (living donors), pending (deceased donors whose estate is not yet distributed), and closed estate (donors whose estate gifts have been received by CHARITY).
 - b) By 05/30/99, identify the specific needs of the database and the appropriate codes.

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- c) By 08/30/99, create and write the procedures for entering those codes into the Charity database.¹³
 - d) By 11/30/99, update existing planned giving donor records with those codes.
3. Provide to ED and Staff, quarterly and annual reports on planned giving program:
- a) Within one month of the end of each quarter in the 1999-00 fiscal year, identify planned gift commitments received, planned gifts realized, and cash flows from previously realized planned gifts, using newly developed report formats.
 - b) Within one month of the end of each quarter in the 1999-00 fiscal year, identify planned giving inquiries, staff responses and activity, and gifts generated.
 - c) Categorize information according to type of gift (revocable or irrevocable) and source (BOT or non-BOT).
4. By 04/30/00, in conjunction with **FC** and **DOR**, refine existing procedures for recording, receipting, acknowledging, and, as necessary, administering planned gifts. Where appropriate, involve the outside planned gift administrator.
- a) By 08/30/99, incorporate the following steps as part of the Charity's planned gift acceptance policies and procedures:
 - (i) incorporate Philanthropy Protection Act "marketing/charitable intent" (section BB-21 through BB-23 [NCPG 1996 Conference proceedings]) as part of initial communication with donor; obtain signed acknowledgement citing CHARITY's performance of same;
 - (ii) Incorporate letter about "highlights/summary" of CRT/CGA (all life-income gifts); obtain signed acknowledgement citing CHARITY's performance of it.
 - (iii) Create a gift annuity application, incorporating the above into it.¹⁴
 - (iv) Revise minimum initial gift annuity minimum amount to \$5,000 and subsequent gifts to \$1,000
 - (v) Revise minimum current gift annuity age to 65 years old.
 - b) By 11/30/99, incorporate procedures for gifting retirement plan assets (section Q.III.d) and add appendix of letters/samples (incorporate section H-7 through H-22)
 - c) By 02/30/00, have completed review, revision, and implementation of procedures on charitable remainder trusts.
 - d) By 04/30/00, revised planned giving policy to preclude Charity from paying for donor's legal work (to avoid lawsuits by disgruntled relatives).
 - e) By 11/30/99, record and implement policies and procedures for accepting gifts of real estate to fund charitable gift annuities.

G) Educate development officers about trends in planned giving so that they are comfortable in presenting planned giving options to donors and prospects.

Manage an in-house training program to: re-acquaint Charity Development Officers with planned gift vehicles and opportunities; advise staff of schedule of planned giving seminars for possible additional prospect invitations; offer educational seminar to appropriate administration on basic planned giving opportunities.

¹³ Use Jim Potter's 6/25/98 e-mail as guide/template

¹⁴ Use Jim Potter's 1/1/99 e-mail as guide/template

Charity 1999-00 Gift Planning Program Plan

1. By 07/01/99, develop a training schedule with content appropriate to the level of staff expertise, using appropriate Charity staff and volunteers (PGPAC) to present information.
 - a) Provide four training sessions, approximately one hour each, to Charity staff:
 - (i) Review of Planned Giving Basics (Fall '99)
 - (a) Basic Planned Gift Vehicles
 - (b) Gifts accepted by Charity
 - (c) Social Capital Concept
 - b) Use outside professional to present case studies and day of review (Feb '00)
 - c) Include outside office, i.e. NPGR, NSFRE and attorney presentations
2. By 02/28/00, provide two training sessions for appropriate administrators, for the purpose of enabling administrators to identify prospective planned gift donors.
 - a) Presentation on Social Capital and Introduction to Planned Giving (Fall '99)
 - b) Use outside professional to present case studies and day of review (Feb '00)
3. Monthly: Copy and distribute appropriate articles from *Planned Giving Today* to fundraisers and other development staff (**FC**, **DOR**, and **DPOM**).

H) Employee Development Plan

1. Serve the regional and local fund raising community through the following leadership opportunities:
 - a) Through December 31, 1999, for the Las Vegas Chapter of AFP, serve as Committee Chairman, and Co-Chair of the National Philanthropy Day in Las Vegas Committee for 1999
 - b) Through June 30, 1999, for the Nevada Planned Giving Roundtable, serve as Government Liaison.
 - c) Through December 31, 1998, for CASE District VII, serve as Co-Chair of the Program Committee of the District Conference.
 - d) During 1999-01, serve on the CASE District VII Board of Trustees.
2. Improve my technical gift planning skills by participating in the following local, regional and national training programs:
 - a) NCPG conference in October '99 in Anaheim, CA
 - b) CASE District VII in December '99 in San Francisco, CA

Charity 1999-00 Gift Planning Program Plan
Planned Giving Communications/Marketing Program – Overview/Messages

A) For Allied Professionals

1. Emphasize services of the *Planned Giving Design Center* on the Charity Web-site
2. Focus communication and personal outreach efforts on CPA's and Estate Planning Attorneys:
 - a) For both groups
 - (i) Explain the concept of Social Capital
 - (ii) Leave a legacy – ask their clients if they've ever considered a charitable gift as part of their estate plan
 - (iii) Restate offer of planned giving projections/software (insist on being available for presentation to their client – “Don't try to do my business”)
 - (iv) Create a one page summary about Charity Planned Giving Program for personal appointments:
 - (a) What Charity does for CHARITY and the community
 - (b) Services we offer – software, legal and technical references, PGPAC free review
 - (c) My background and expertise
 - b) CPA's -- Offer to host seminars with them and for their client (explain/demonstrate opportunities of additional planning as income for CPA's)
 - c) For Attorneys -- Provide Private Letter Rulings (PLR) and Tax Advice Memorandums (TAM) in advance of lunch meeting and ask them to explain.
3. For insurance and financial planners, offer PowerPoint seminar about *CRT's and Wealth Replacement* -- target Insurance Company X and Insurance Company Y (ask PGPAC financial planners who else to invite)
4. For realtors, offer PowerPoint seminar about CRT's and CGA's (make it a three hour class available for continuing education credit)
 - a) Titled: *Charitable Alternatives ... Even When There is No Sale*
 - b) How to position property sale using CRT or CGA to avoid capital gains tax.
 - c) Offer in conjunction with the **DOPM**
 - d) Focus on realtors/brokers point of view
 - (i) What's their potential income/yield?
 - (ii) Avoid lack of commissions on 1031 and 1035 exchanges
 - (iii) Be a hero to your client for suggesting a solution and avoid taxation

B) For Alumni and consistent donors (5 years or more consecutive giving)

1. Age 35 to 45
2. Establish a legacy
3. Put us in your will or trust for a 5% percentage of your estate

C) Internal Markets

1. Review status of all previous donor requests for planned giving information
 - a) Was follow-up sufficient?
 - (i) Have they given outright gift or included Charity in will or trust?
 - (ii) Why not?
 - b) Is additional follow-up needed? Determine and take appropriate action:
 - (i) Schedule a personal visit
 - (ii) Send more information
 - (iii) Schedule / Tickle file for follow-up
 - c) Are they on the Planned Giving mailing list?
2. Review segmented donor market list [see F)1.a) above] and focus contact, cultivation and solicitation efforts on prospects that meet following criteria (in priority order):

Charity 1999-00 Gift Planning Program Plan
Planned Giving Communications/Marketing Program – Overview/Messages

- a) Charity currently in will or trust
 - b) No children
 - c) Female
 - d) Age 65 or older
 - e) Giving history of five years or longer
 - f) Alumni or volunteer
 - g) Small business owner
3. “Test market” seminars on faculty before sharing with general public
- a) Extend invitations to emeritus faculty and spouses

D) External Markets

- 1. Focus on Gift Annuities
 - a) Target specific audiences for gift annuity mailing
 - (i) In Sep’99 and Mar’00 (CD’s are traditionally established and “roll-over” in Oct. and Apr.)
 - (ii) All previous Charity “*IRA Gift Seminar*” attendees.
 - (iii) Age segmented donors (age 60 +)
 - b) Inform all audiences about Charity’s ability to offer CGA’s
- 2. Observations that will influence messages:
 - a) Six “C’s” motivate women to give: desire to change, create, connect, show commitment, collaborate, and celebrate. Women want their gift to make a difference. They are more likely to volunteer before giving, usually prefer personal to public recognition, prefer to work as part of a team toward a goal, and are generally uncomfortable talking about money.
 - b) Visibility, competition, and peer pressure motivate men to give. Men give out of loyalty to the institution, support the traditions of the institution to which they give, are more likely to give before volunteering, and are generally comfortable talking about money.

Charity 1999-00 Gift Planning Program Plan
Planned Giving Communications/Marketing Program – Overview/Messages

- E) *Planned Giving Donor Newsletters* "**Topics**"; *Feature/Human Interest Story*; Cover/Response Letter Topics [in brackets]
1. Oct '99 "**Charitable Gift Annuities**"; *Announce CGA status in Nevada*; [Estate Planning for Business Women Seminar; Year-End for Gifts of Land]
 2. Feb '00 "**Living Trusts/IRA's**"; *Donor Trusts*; [Bequest Donor Recognition Group Luncheon]
 3. May '00 "**Gifts of Appreciated Securities**"; *Donor Stock Gifts*; [CP of year and Charity Fellows] or "**Charitable Remainder Trusts**"; *Donor X & Donor Y*;
 4. Audience for Planned Giving Donor Newsletters: planned giving donors, BOT's, segmented donors & prospects (five years or more continuous giving of \$100 or more), PGPAC, faculty & staff, selected planned giving advisors, segmented professional advisors
- F) [Planned Giving Advisors Newsletter](#) (includes non-personalized cover letter to address timely/necessary additional topics [in brackets])
1. Jul '99 [Address information changes/e-mail survey; CP of year (photo from Charity's EP luncheon) and Charity Fellows]
 2. Oct '99 [gifts of securities; deadlines for gifts of property; planning of gift opportunities for clients -- qualify for CP of year in '99]
 3. Jan '00 [Bequest Donor Recognition Group luncheon for clients; send draft letters for their client ('98 EP lunch letters); any client's gifts in '98 that qualify for CP of year?]
 4. Apr '00 [Bequest Donor Recognition Group luncheon for them & their clients; upcoming Charity's EP Luncheon]
- G) *Annual Giving Donor Newsletter - "Ways and Means" Column* "**Topic**"; (Issues news/items to be covered)
1. Sep '99 "**Gifts of Appreciated Property & Charitable Gift Annuities**" (Deadlines for gifts of property; Seminar announcement: "*Supplementing Retirement Income*"; cite brochure insert "Giving at Year-1998")
 2. Jan '00 "**IRA Gifts Through Living Trusts**;" (Seminar announcement -- "*Estate Planning for Women Business Owners*"; *Estate Planning for Friends/Alumni*; " Bequest Donor Recognition Group Luncheon announcement)
 3. May '00 "Charitable Gift Annuities" (*Announce CGA status in Nevada*; or "Charitable Remainder Trusts")
- H) *CHARITY Magazine -- Advertisement* "**Title**"; (Issues promoted/covered)
1. Sep '99 "**Charitable Gift Annuities**"; (funded with Gifts of Appreciated Securities)
 2. May '00 "**Increase Your Income**"; (Gifts of Charitable Gift Annuities) or (Charitable Remainder Trusts)
- I) *CHARITY Alumni Newsletter* -- For two issues to all alumni:

Charity 1999-00 Gift Planning Program Plan

Planned Giving Communications/Marketing Program – Overview/Messages

1. Sep '99 Year-End Planning: "Gifts of Appreciated Property -- Real Estate & Securities."
2. May '00 How to Include CHARITY in Your Estate Plan -- Wills & Trusts; Alumni & Charity Scholarship Endowment
3. *Giving at Year-End 1999* -- Brochures (Inserted in Sep '99 *Annual Giving Donor Newsletter*)¹
4. *Gift Annuities* – Brochures (direct mail)
5. Charity Annual Report –

Charity 1998-99 Gift Planning Program Plan
Planned Giving Communications/Marketing Program -- Seminars/Events

"Women's Estate Planning Issues -- Established and Affluent Women"

A. Goals

1. Target current and prospective female planned/deferred gift donors
2. Present information about estate planning and planned/deferred gifts
3. Date: Oct. 1, 1998
4. Attendance - 65 out of 600-750 invitations mailed
5. Financial sponsor to assist in underwriting costs
6. Follow-up information presented to guests
7. Develop 10 new prospects
8. 10 requests for follow-up information; 1 gift proposal developed

B. Strategies

1. Affiliate with Trust Company
 - a. Use their marketing resources to increase attendance
 - b. "Acquire" their customers
 - c. Negotiate for follow-up contacts/use of respective lists
2. Use well known community names as hostesses/moderator to attract guests/prospects:
 - a. Trustee
 - b. Major Donor
 - c. TV Personality to serve as moderator
3. Ask hostesses to provide names of prospective guests/donors.
4. A presenter to ask the question: "Look at your checkbook or Visa statement. If someone reviews it when your gone, will it be full of Nordstrom's, Sak's and Neiman Marcus, or will it reflect some social causes and/or social changes?" "Ladies, add up what you have on – could you give some of the equivalent cost to support social change?"
5. Utilize good speakers with an interesting topic:
 - a) Set format so those participants can ask a lot of questions.
 - b) Financial Planner --
 - c) Tax Planning Attorney --
6. Use MAI to confirm RSVP's.
7. Review Charity donor lists and target additional guests.
8. Advise other fundraisers of upcoming event; seek suggestions for additional prospective guests.
9. Have speakers cite that additional information will follow.
10. Send thank-you notes and survey: survey - worthwhile? What did you want to hear that you didn't? Improvements? Would you bring a friend to hear this? Who? Include reply card request for additional information.

Charity 1998-99 Gift Planning Program Plan
Planned Giving Communications/Marketing Program -- Seminars/Events

"Women's Estate Planning Issues -- Established and Affluent Women"

C. Logistics/Timeline:

1. By 07/30/98 secure speakers and dates
 2. By 07/30/98 secure Las Vegas Country Club as location
 3. By 07/30/98 secure Trustee, Donor and TV Personality?
 4. By 07/30/98 ask Records & Research for list by 08/05/98
 5. By 08/05/98 review all major and planned giving prospects for appropriate invitations
 6. By 08/15/98 Trust Company's co-sponsorship of event through written proposal
 7. By 08/15/98 invitation mailing lists names to Trustee and Donor for review
 8. By 08/15/98 determine invitation copy and design
 9. By 09/01/98 meet with speakers -- Attorney and Financial Planner
 10. By 09/01/98 receive additional names from Trustee and Donor
 - a. Get additional names from Trust Company
 - b. Input names and addresses into database w/ code to show source of name
 - c. Review invite list w/ Trust Company?
 - d. By 09/05/98 mailed invitations (600-750) and RSVP list completed
 11. By 09/15/98 Write follow-up letter and thank you note copy
 12. By 09/15/98 All audiovisual needs identified and handouts prepared
 13. By 09/30/98 MAI remind/check RSVP's
 14. By 09/28/98 Determine final count for catering and copying
 15. By 09/28/98 Review list/profiles of RSVP's - determine priority order for greet/meet purpose
- EVENT DAY**
- a. **Pick-up AV material day before**
 - b. **Use registration form**
 - c. **staff arrive one hour prior for room set-up**
 - d. **Fundraiser to meet donors/prospects**
16. By 10/05/98 Merged and mailed thank-you notes; invite to call for more information
 17. By 10/10/98 Mailed follow-up survey with reply card for additional information (Stelter's *Estate Planning Issues for Women* pamphlet); include year-end giving brochure.
 18. By 10/12/99 Call to see about visit & follow-up
 19. By 10/30/98 Analyze event and responses

"Supplemental Retirement Income"

A. Goals

1. Target age specific, donor & non-donor, planned/deferred gift prospects in Sun City Summerlin and MacDonald Ranch
2. Present information about tax qualified plans (IRA's & 401-k's): How to invest and manage them; estate and gift planning (tax avoidance); the social capital concept and naming opportunities at CHARITY (\$100K and under).
3. Dates: -- **Nov. 16 and 18**, 1999 (two seminars, one each day in each location)
4. Total Attendance - 90 (50 at Sun City Pinnacle and 40 at McDonald Ranch)
5. 10 requests for follow-up information; 2 gift proposals developed
6. Financial sponsor to assist in underwriting costs
7. Develop 5 new prospects

B. Strategies

1. Affiliate with Brokerage House and Attorney for Underwriting
 - a. Use their marketing resources to increase attendance
 - b. Negotiate for follow-up contacts/use of respective lists
2. Use PGPAC members to present
3. Develop marketing/community awareness plan (PR's for Henderson Home News and Northwest and Southeast Views, Clubhouse flyers, Newsletter articles, PSA's, etc, run ad in Las Vegas Review Journal / Sun, Prime, Sun City, and Northwest and Southeast Views newspapers two weeks prior; Ask Mirage to include article in Silver) ***and responsibility for completion.***
4. Write press release/story about negative impact of IRA's in estate plan; cite \$625K per person (use as way of "qualifying/excluding" lookeloo's versus "real," prospective donor/clients).
5. Offer daytime seminar (2-4 p.m.) at the MacDonald Ranch and Summerlin Sun City Clubhouses with hors d'oeuvres.
6. Direct mail selected components of Charity donor base (use age and wealth segmented lists), Attorney and Brokerage House clients; cite "exclusive advance notice," "watch for ads in RJ" and "call now for reserved seating" in invites.
7. Advise other fundraisers of upcoming event; seek suggestions for additional guests.
8. Have speakers cite that additional information is available (each speaker to prepare a handout for distribution at conclusion of seminar).
9. Send thank-you notes.
10. Take RSVP's and telephone numbers: If room capacity is reached, advise respondents of standing room only option and take name; At event, check respondents in by name; if no RSVP, advise them to wait until all RSVP's have arrived
11. Do one page survey on-site: Worthwhile? What did you want to hear that you didn't? Improvements? Would you bring a friend to hear this? Who? Include reply card request for additional information.
12. Have speakers available following the seminar for questions and answers.
13. Prepare an "agenda" of the speakers for handout at door to guests; list firms, phone numbers, and addresses.

"Supplemental Retirement Income"

C. Timeline/Logistics

1. By 08/30/99 secure Brokerage House and Attorney's agreement to co-sponsor event through written proposal
2. By 08/30/99 secure speakers, dates and locations
3. By 09/15/99 meet with speakers -- (handouts a must!)
4. By 09/15/99 flyer copy and artwork ready; newspaper copy and artwork ready
5. By 10/15/99 flyers ready for distribution to Sun Cities for November Issue
6. By 10/15/99 follow-up letter, survey, and thank you note copy written
7. By 10/15/99 All audiovisual needs identified and handouts prepared
8. On **11/7 & 11/14/99** Run advertisement in RJ/SUN
9. By 11/12/99 Determine final count for catering and copying
10. By 11/15/99 Review list/profiles of RSVP's - determine priority order for greet/meet purpose
11. On 11/15/99 remind/check RSVP's

EVENT DAYS

- a. **Pick-up AV material day before**
 - b. **Use registration form**
 - c. **staff arrive one hour prior for room set-up**
 - d. **Fundraiser to meet donors/prospects**
 - e. **Hand out surveys in advance**
12. By 11/19/99 Merged and mailed thank-you notes; invite to call for more information
 13. By 11/22/99 Call to see about visit & follow-up
 14. By 11/30/99 Analyze event and responses