

Augmenting Planned Giving Cultivation, Solicitation and Stewardship with Board Volunteers

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The Planned Giving Committee

- Trustees (and others) who are legacy donors themselves; strong chair
- Defined role and responsibilities (job description)
- Meetings as a group, interspersed with one-on-one sessions with members
- Develop an initiative or goal with deadline to focus efforts
- Process for identifying prospects and selecting assignments; also, status/tracking of progress
 - Donor list of qualified planned giving prospects drawn from your constituency
- Training

Pros and Cons

Pros

- Peer to peer, in-person calls to donor prospects is an ideal way to ask for consideration of legacy gifts
- Committee members can gain access and have credibility based on proven relationships and status as trustees
- Engagement of trustees in development work strengthens institutional development effort
- Trustees serve as advocates for planned giving--motivates others when they see leadership providing that kind of support
- Trustees invested in planned giving program help ensure consistent staffing and level of effort for planned giving
- Working with volunteers is rewarding

Cons

- Time-consuming to manage volunteer efforts, especially the start-up--other priorities can interfere with management of volunteers
- Hard to keep committee work as top priority for volunteers; they are busy; call reluctance

Seattle Opera's Experience (March 2009--Present)

- Recruited committee of six members
- Prepared job description, annual plan, meeting schedule (quarterly meetings, with one-on-one to go over assignments and set detailed strategy)
- Developed planned giving initiative--secure 25 new members of legacy society (Encore Society) in celebration of General Director Speight Jenkins' 25th Anniversary
- Reviewed donor lists, made assignments, prepared solicitation materials
- Training (this is essential!)
- Began making calls; supplemented with articles in opera program, some featuring committee members
- Developed status report to track progress and motivate volunteers
- Focused in small, highly qualified pool of prospects
- YTD results--secured 20 new legacy givers toward goal of 25; hope to conclude effort successfully by 6/30/10

Sample Status/Tracking for Planned Giving Committee Assignments

	Total Prospects	Completed	Appointment Set	Invite Extended	Cultivation Contact	Hold	Cancel
Trustee 1							
Trustee 2							

Activity	Number
Total Number of Prospects to be Assigned:	
Prospects Assigned to Date:	
PROSPECT CONTACTS	
Number of contacts in process (may include phone calls, contacts with donors at performances or opera events, as prelude to setting up solicitation meeting) :	
Number of solicitation meetings scheduled:	
Number of solicitation meetings completed:	
Yes:	
No:	
Under consideration:	
On Hold:	
TOTAL CONTACTS	
New Encore Society members joining through other contacts--include in Legacy Initiative:	
Legacy Initiative--new members:	
Potential members:	
TOTAL NEW ENCORE SOCIETY MEMBERS	