Empowering Technology for Planned Giving Success

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The Role of Technology in Planned Giving

- Prospect Research and Resource Planning
- Cultivation and Proposals
- Gift Planning and Administration
- Donor Service and Stewardship
Prospect Research and Resource Planning

In this stage, you will:

- Identify the best prospects for planned giving
- Predict how they are most likely to respond (direct mail, events, personal visits)
- Determine the appropriate gift type and potential
- Determine a marketing segmentation and cultivation strategy

Also,

- Identify the best prospects for annual fund or membership programs to groom into future planned giving prospects
Prospect Research and Resource Planning

Technology should help you:

- Prepare for your future by pinpointing your most likely planned giving prospects

- Predict likelihood of a prospect to make each “type” of planned gift:
  - Annuities
  - Charitable remainder trusts
  - Bequests

- Improve your understanding of a prospect to make a successful ask more likely

- Create cost-effective and better targeted appeals

- Allocate staff and resources
Cultivation and Proposals

In this stage, you will:

- Analyze prospect research information in conjunction with fundraising history
- Begin or continue the relationship-building process
- Confirm prospects’ likelihood and capacity
- Provide feedback to prospect research team
- Develop strategy for moving prospect to next stage
- Document findings for future use
- Seek commitment for gift
Cultivation and Proposals

Technology should help you:

- Manage all the steps surrounding planned gift solicitation
- Segment mailings based on prospect research and statistical modeling results
- Evaluate success of solicitors to ensure your top solicitors are working with your top prospect
- Help solicitors be successful by easily identifying and rolling out institutional best practices
- Provide helpful pipeline management tools
- Provide reliable institutional knowledge
Gift Planning and Administration

In this stage, you will:

- Discuss with prospects about the financial details of planned gifts
- Acknowledge gifts and substantiate charitable deductions and tax implications
- Plan for institutional needs using distributions from planned gifts
- Comply with state and federal reporting requirements
Gift Planning and Administration

Technology should help you:

- Produce materials to illustrate gift concepts and benefits
- Model gift plans that meet the donor’s goals while benefiting your institution
- Create documentation that meets donor’s tax reporting needs
- Predict future cash flows to your charity from completed planned gifts
- Provide reports that fulfill state and federal requirements

If needed, technology will also help you:

- Generate payments and tax forms for life income beneficiaries
Donor Service and Stewardship

In this stage, you will:

- Thank your donor personally, repeatedly and in every interaction
- Make sure the established relationship remains positive
- Report back results of gift, showing good stewardship
- Keep the donor engaged in the life of the organization
- Use what you have learned to make good decisions and improve your planned giving program
Donor Service and Stewardship

Technology should help you:

- See a complete donor history
- Recognize and respect VIPs (current planned gift donors & their beneficiaries) at events, in newsletters, when mailing
- Manage gift valuation each year
- Accurately recognize revenue as time passes
- Provide accurate reporting of expenses toward funds
- Evaluate the types of planned gifts that offer you the best returns
Blackbaud technology helps throughout your organization to:

- Identify your best prospects for planned giving
- Plan and use resources most wisely for the best possibly return-on-investment
- Cultivate strong relationships with donors — loyal annual fund donors are your best planned gift prospects
- Build professional proposals reflecting your understanding of the donor’s needs
- Manage the technical aspects of a gift in a way that inspires the donor’s confidence
- Maintain lifetime relationships with your donors
- Account to your donors, board and other stakeholders on the value — and impact — of planned gifts
- **Be successful with your planned giving program!**
Blackbaud technology addresses the unique needs of nonprofits
Learn more:

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