Amy Easton

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PLANNED GIVING ESSENTIALS

FOR SMALL SHOPS

WHAT RESPONSIBILITIES AM I JUGGLING?

Individual & Planned Giving: Manage donor portfolios, cultivate relationships, oversee acknowledgments, and lead stewardship efforts including planned giving and estate settlements.

Grants & Foundations: Oversee grant strategy, supervise proposal and reporting processes, and identify new foundation prospects.

Communications & Marketing: Lead content strategy and brand voice across digital, print, and social media; serve as spokesperson when needed.

Collaboration & Donor Engagement: Partner across departments to align donor strategies with events and mission programs; maintain board relations and donor research.

Operations & Strategy: Oversee budgeting, appeals, gift processing, and other non-event fundraising initiatives.

WHAT WOULD YOUR ORGANIZATION DO WITH \$1,000,000?

- Be Prepared
 - Dream Big
- Reflect Responsible Spending From Previous Gifts

TALK ABOUT IT!

- Website
- Be Accessible (or not)
 - Legacy Society
 - Emails
 - Print Materials
 - Workshops

ASK

- Talk to Your 'Likely Suspects'
- Involve Your Executive Director
- Current & Past Board Members
 - Prospect

WORKFLOW PLANNING: WHAT DOES YOUR YEAR LOOK LIKE?

Integrate / NOT ADD

- Fundraising Campaigns/Appeals
- Events: Gala, Volunteer Appreciation, Etc
- Online Messaging: E-News, Social Media, Blog
 - Print Materials: Annual Report, Newsletter

WHO ARE YOUR ALLIES?

- Estate Planning Attorneys
- Wealth Advisors / Financial Planners
- Other Planned Giving Professionals!

SMALL GROUP DISCUSSION (15 MIN)

- What are you doing in the realm of planned giving?
 Does your organization have a Legacy Society?
 - What aren't you doing?
 - What are your barriers?

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