



Turning Planned Giving from “Someday” into Strategy

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This Session's Working Question:

How can planned giving become a routine part of moves management?

The Reality of Moves Management

THE PROMISE

Everyone talks about moves management

Conferences discuss it

Consultants recommend it

CRMs are built around it

THE REALITY

Stagnant portfolios

Inconsistent donor strategies

Poor pipeline visibility

Too many “prospects” not enough movement

SOMEDAY

What was the Strategy before?

I just need to see them one more time...

“I don’t want to bring up planned giving yet...it might distract from their major giving...”

Friendraising instead of Fundraising

Where we were with Major and Planned Giving Prospects

Years of

- Immediate annual and campaign goals compete for attention
- Planned gifts can feel technical or premature
- Long decision timelines make progress harder to see

What the system reinforces

- Portfolios reward visible activity more than thoughtful discovery
- Ownership between major gifts and planned giving remains unclear
- CRM stages do not reflect the donor's actual decision process

Monthly visit (goal)	Visits this Month	FY visit (goal)	Total FY visits
9	2	108	92
			1
6	1	70	76
9	0	108	47
9	0	108	82
9	2	108	116
11	0	127	153
			5
9	11	108	86
9	0	108	75
71	16	845	733

McNair Society Form

Michigan Tech

Michigan Technological University

1400 Townsend Drive

Houghton, MI 49931-1295

906-487-3305

Michigan Tech Fund

giftplan@mtu.edu

McNair Society Declaration of Intent

Membership is reserved for individuals who have made a provision for Michigan Tech in their estate plans.

As an expression of my/our commitment to Michigan Technological University, I/we have made estate provisions to support the Michigan Tech Fund through my/our:

- | | | |
|---|--|--|
| ☐ Will | ☐ Charitable Remainder Trust | ☐ IRA/Other Retirement Assets |
| ☐ Living Trust | ☐ Charitable Gift Annuity | ☐ Life Insurance Policy |
| ☐ Donor Advised Fund | ☐ Other (please describe) _____ | |

Confidential: The approximate current value of my/our estate gift is: \$ _____

This amount may change due to market fluctuations or other circumstances.

Other (please describe) _____

- ☐ I/We have included a copy of the portion of my/our estate document, beneficiary designation form or other document that names the Michigan Tech Fund as a beneficiary.

I/We wish to direct my/our support to the following:

- ☐ Where the needs are greatest
- ☐ Other: _____

My/Our executor/trustee is: _____

They can be contacted at: _____

This Declaration of Intent is an expression of my/our present plans and is subject to change or modification by me/us:

Please print donor name(s) and graduation year(s), if applicable, for our records and for use in donor recognition, if permitted.

- ☐ I/We give permission to list my/our name(s) as a McNair Society member(s) with the understanding that the amount of my/our provision will be strictly confidential.
- ☐ Although the Michigan Tech Fund is currently included in my/our estate, I/we do not wish to be a member of the McNair Society or listed on the honor roll.

Donor Signature

Date

Donor Signature

Date

The undersigned, being duly authorized representatives of Michigan Technological University, do hereby accept this gift.

Advancement Director/Asst. Director

Date

AVP for Advancement & Gift Planning

Date

TRANSITIONAL PERIOD

Identifying the Early Warning Signs

Subtle Structural flaws that cap pipeline productivity:

- **Bloated Portfolios:** Large volumes of assigned, but entirely inactive, prospects.
- **Zero Recent Touchpoints:** Hundreds of prospective donors without activity for numerous quarters.
- **Activity Metrics Drag:** High fundraiser visit counts disconnected from actual conversion strategies.
- **Tower of Babel:** Individual fundraisers using custom, personal definitions of donor stages.
- **Blind Navigation:** Limited centralized pipeline visibility for campaign and university leadership.

Result: We were working hard but not moving donors forward.

Strategic Portfolio Cleanup

The Critical Questions We Asked

To establish baseline integrity, every single prospect record was vetted against four non-negotiable questions:

- Assignment Validity:** Should this prospect still be actively assigned to this specific fundraiser?
- Financial Capacity:** Are they truly capable of making a campaign-level contribution?
- Institutional Affinity:** Are they engaged and receptive to relationship building?
- Defined Momentum:** Is there a clear, documented next step planned?

KEEP	REVIEW	Total
26	59	85
18	119	137
20	94	114
26	38	64
116	0	116
206	310	516

Reporting Inconsistencies

Subtle Structural flaws without a proper stewardship plan...

- **Insufficient documentation on their planned gift**
 - Executor of their estate unknown
 - Documentation of wishes internally to the University
 - Percentage or fixed amount?
 - Redacted copy of the trust?
 - Gift agreement with articulated wishes

Result: Poor reporting to share with administration. Used this transitional period to ensure what was reported was accurate.

PROSPECT STAGES						
IDENTIFICATION	QUALIFICATION	CULTIVATION	SOLICITATION (Proposal Required)	STEWARDSHIP	LIFETIME STEWARDSHIP	CLOSED PROSPECT
Prospect Identification has to be verified.	Identified, but not Qualified	Qualified for Engagement	Cultivation Complete	Gift Received - More Anticipated	No More Giving Anticipated	No Giving Expected
Default Stage	Awaiting Qualification Activity	Move to Portfolios or Annual Giving	Ask Phase			

Who are the donors that are most likely to make a major or planned gift and do we have a clear strategy next step?

INTO STRATEGY

Before and After a Planned Giving Visit

Donor Visit Information

Do you need any information (i.e. visit report, illustration, proposal, packet assembly, etc...) prior to the trip? If so, please specify what you need and for what donor?

Your answer

Visit #1: For each visit, add the CRM ID, name of the person, the visit purpose, the ask amount, the giving vehicle, and the visit tactic. Feel free to add class year and major if you wish. *

Your answer

Visit #2: For each visit, add the CRM ID, name of the person, the visit purpose, the ask amount, the giving vehicle, and the visit tactic. Feel free to add class year and major if you wish.

Your answer

Visit Follow-Up & Action Items

Visit #1: For each visit, name the person, what the new moves management stage should be (Qualification, Cultivation, Solicitation, etc.), your strategy next step, strategy next step date, and any demographic/contact changes to their profile. Please have visit #1 line up with #1 on your pre-trip form and each subsequent visit number. *

Your answer

Visit #2: For each visit, name the person, what the new moves management stage should be (Qualification, Cultivation, Solicitation, etc.), your strategy next step, strategy next step date, and any demographic/contact changes to their profile.

Your answer

Visit #3: For each visit, name the person, what the new moves management stage should be (Qualification, Cultivation, Solicitation, etc.), your strategy next step, strategy next step date, and any demographic/contact changes to their profile.

Your answer

Frontline Fundraiser being equipped....

Before the donor visit, the frontline fundraiser meets with colleagues across campus to discuss the donor's interests and agree on a conversation strategy. That preparation equips the fundraiser to open a legacy discussion in the context of the donor's priorities.

- “What I heard last time we talked was that this program matters deeply to you. What would you hope continues for future generations?”
- “You mentioned wanting your support to have a lasting impact. What might that look like to you?”
- “As you think about the future of this work, what would you most want to see endure?”

Portfolio Detail for Review

Director	Assigned	Identification	Qualification	Cultivation	Solicitation	Stewardship	Lifetime Stewardship	Proposals	
A	78	0	1	44	13	13	7	18	
B	93	5	61	17	4	3	3	1	
C	125	0	0	54	36	28	7	37	
D	149	11	99	33	1	4	1	5	
E	100	2	2	87	2	4	3	2	
F	140	0	3	77	39	15	6	46	
G	105	23	3	52	17	8	2	19	
	790	41	169	364	112	75	29	128	Totals

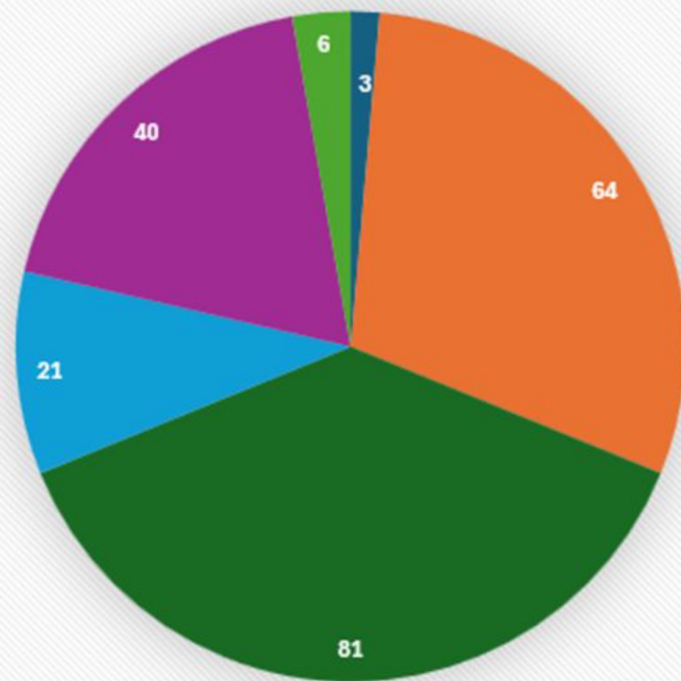
Monthly Professional Development

- Hold monthly planned giving strategy meetings focused on one giving vehicle.
- Let the fundraising team select each month's topic based on timeliness and donor needs.
- Explore national trends relevant to that giving vehicle.
- Cover how it works and when it may be a good fit.
- Identify what to listen for during donor visits—and questions to ask when opportunities arise.
- Discuss next steps and when to bring in planned giving expertise.
- Build confidence to “hit the wavetops”—a practical understanding of each vehicle, without expecting everyone to become an expert.



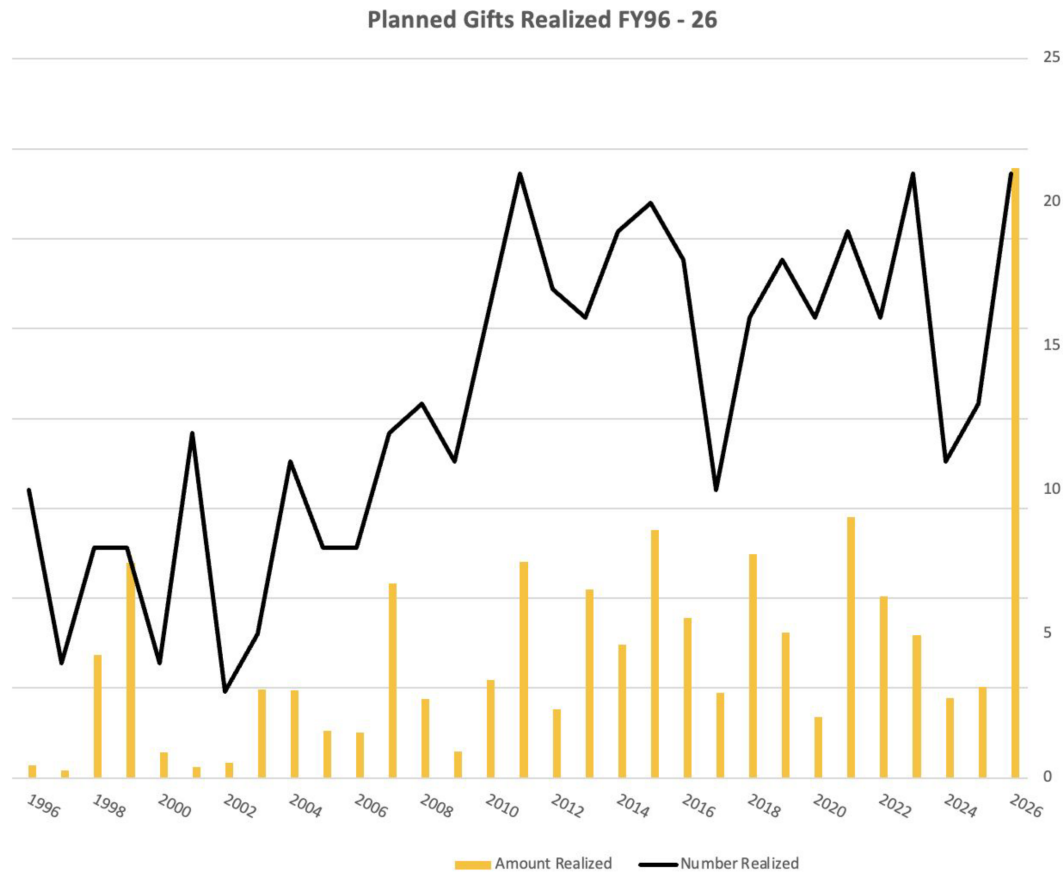
Reporting that supports action

- Qualified planned giving prospects and active opportunities
- Time in stage and opportunities without a current next action
- Progress from exploration to verbal or documented intent
- Completed gifts and realized estate distributions
- Stewardship coverage for documented commitments
- Referrals and shared opportunities across fundraising teams

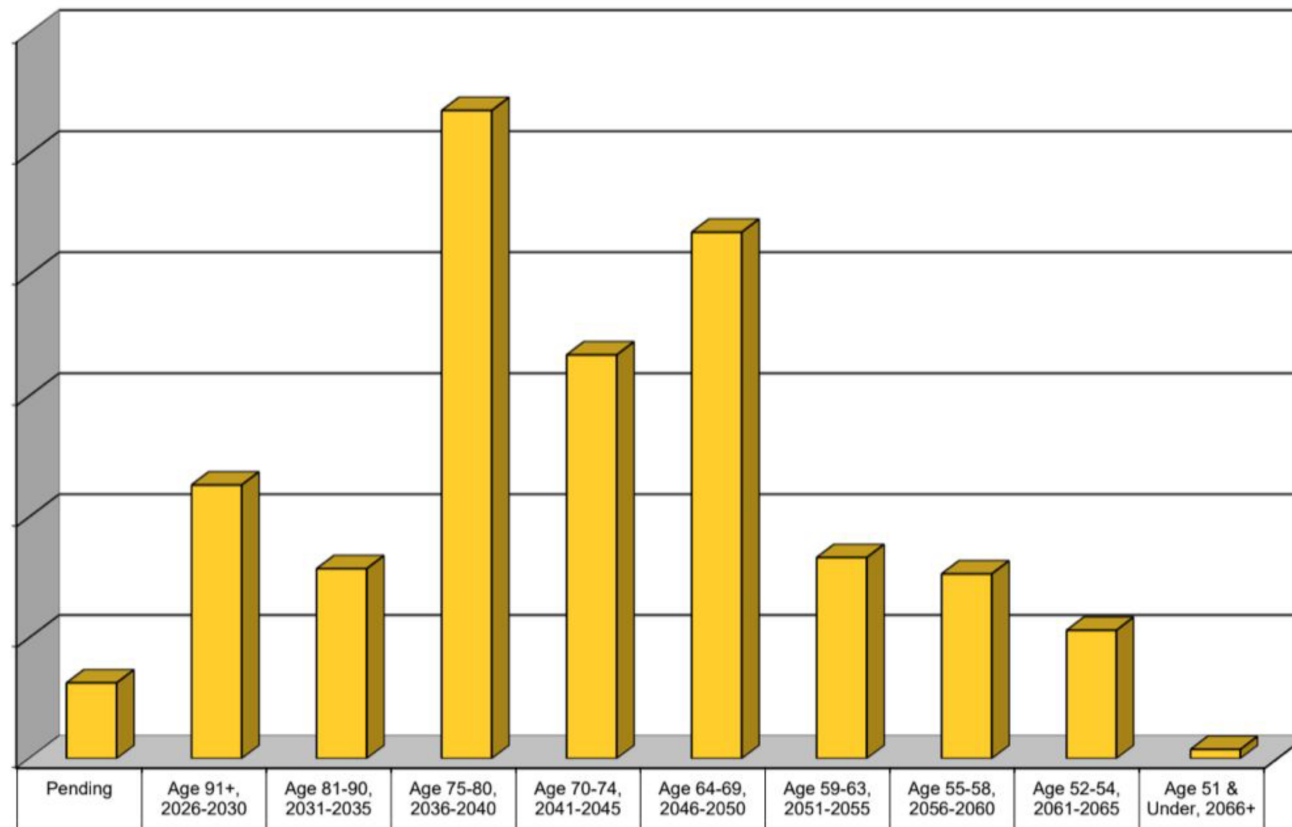


■ Identification ■ Qualification ■ Cultivation ■ Solicitation ■ Stewardship ■ Lifetime Stewardship

Planned Gifts Realized



Planned Giving Registry - Actuarial Expectancy by Age



From “someday” to the next conversation

One portfolio

Review current relationships for genuine planned giving signals.

One conversation

Use the donor’s words to open a discussion about lasting impact.

One team habit

Add planned giving evidence and next actions to regular portfolio review.

Opportunities Ahead: Building Tomorrow's Legacy Gifts

- **Prepare for the Great Wealth Transfer:** An estimated \$124 trillion will transfer in the U.S. through 2048, with an estimated \$18 trillion projected for charity.
- **Engage the next generation:** Build relationships with spouses, heirs, and emerging philanthropic decision-makers.
- **Look beyond today's gift:** Include conversations about assets, family priorities, and legacy in ongoing donor relationships.
- **Turn interest into intentional next steps:** Use moves management to track donor interests, personalize follow-up, and involve planned giving experts at the right time.
- **Build long-term support for your mission:** Start conversations today and sustain relationships as donors' plans evolve.

The opportunity: Make planned giving a natural part of donor relationships—one conversation and one thoughtful next step at a time.