

Planned Giving and Capital Campaigns

Development Day 2025

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Agenda

Introduction + Issues
Integration
Methods
Prospects
Other Considerations

Development Day
2025

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Introduction

Is planned giving relevant in capital campaigns?
What is a “capital” campaign?
Comprehensive campaigns
Current practices

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Key Issues

Small shop vs. bigger shop

Case statements

The internal conversation

Goal formation

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Advocating for Inclusion

ROI argument

Opportunities for gifts

Types of gifts promoted

Donor's vs. organization's interests

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Integration

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Campaign Integration

Timing

Feasibility Study

Gift Table

Case

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Prospecting

Collaboration

Research

Development

Management

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Methods

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Practical Planned Giving →

The donor's interests

Framing the conversation

Broadening the conversation

Soliciting the gift

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Practical Planned Giving →

Combination gifts

Gifts by will

Other options

Proposals and gift agreements

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Prospects

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Other Considerations

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Housekeeping Matters


- Staffing and training
- Metrics
- Counting
- Gift acceptance policies
- Budget
- Recognition
- Stewardship

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Thank you

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