Planned Giving for Nonprofits

Steve Boland, Next in Nonprofits
Terri Fishel, East Side Freedom Library
Peter Rachleff, East Side Freedom Library.
An in-process case study for the smaller org

- East Side Freedom Library
- Planned giving/Legacy Giving
- Purposes and benefits of planned giving
- Tools to help
- Implementation strategies – ESFL examples
- Your ideas and stories! Questions as we go, as well as discussion at the end
The East Side Freedom Library

• Founded in 2013
• Mission and programs
• Initial Fundraising
Planned Giving

• Legacy gifts are usually gifts/bequests in wills or estate documents to benefit a charity

• Nonprofits pursuing this strategy need to be thinking long-term both internally and with donors
Planned Giving Essentials

This four-part eLearning track is developed for the busy nonprofit leader seeking to incorporate gift planning into the organization’s fundraising approach. Comprised of some of the top-ranking sessions from our Legacy Giving at Lunch series, the Planned Giving Essentials track leads you from the very beginning concepts on how to start a planned giving program to some of the tools and tactics that most seasoned nonprofit professionals have experienced.
Planned Giving

• Endowments? Unrestricted? Big Swing?
What approach makes sense for your mission and your donors?
Getting ready

- Support materials on the website
- Identifying your first donor prospects, both ability to give and culturally connected to legacy giving
Print support

- Annual reports
- Case statement
- Sample letter of commitment
Database support

- Stewardship assignments
- Ongoing donation support
- Potential peer outreach support
Database support

- Task support
- Automated reminders
- Recurring tasks
Database support

- Wealth screening tools can integrate to databases
- Don’t assume ability or intent just from public sources or jobs
Connecting people

• The first commitments are likely your closest circles (board members, founders)
• Those people can help with initial meetings with peers and other donors
Valuing pledges

• Depends on the nature of the commitment letter
• May change over time and are often revokable, so may not be counted in long-term assets
Your ideas, questions and stories

Reach out with questions later

EastSideFreedomLibrary.org
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