

Planning for Giving
by Michael A. Sand, Sand Associates

Think of a new definition of Planned Giving.

Let's think about planning for giving.

Here's the plan for planning.

Take the name of every existing large donor to your organization and all prospective large donors. Then make an individual plan for each.

Let's say Mrs. Wilson gave \$5,000 last year in the organization's annual campaign. Develop a Wilson Plan.

Think of the possible reasons Mrs. Wilson contributed to the campaign?

- she strongly supports the mission of the agency
- she would like to donate funds in memory of Mr. Wilson who recently died?
- philanthropy gives her a purpose in life

When were the last three times Mrs. Wilson was contacted by the development officer, the board chair, other board members and other staff members? Keep a record of all contacts.

Has a system been set up so that Mrs. Wilson is invited to every major agency program at no charge? Does the board chair or the executive director take Mrs. Wilson to lunch at least once a year?

What is the "Wilson Plan?" One part would be several opportunities to donate funds to the agency in memory of Mr. Wilson. Another would be several specific ways of thanking Mrs. Wilson for her contributions. Invite her many times to the agency office to see the programs that are more effective because of her donations.

Are the major donors of the agency listed in every agency newsletter?

Are the major donors honored at an annual agency dinner? These may be additions to the plan of every large donor in addition to specific items just in their plan.

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