

Your Planned Giving and Endowment Building Program: Step-by-Step

The following is a sample marketing plan for the first year of your Planned Giving and Endowment Building Program.

Prayer – Ongoing

- Pray for the success of your Planned Giving and Endowment Building Program

Build Your Team – Months 1-3

Recruit

- [Recruit a chairperson](#) who will lead the team and coordinate with the Roman Catholic Foundation
- [Recruit 4-8 additional team members](#), depending on your organization's size

Educate

- Schedule an on-site orientation for the team with a Foundation representative
- Ensure that all team members have knowledge of the Roman Catholic Foundation, the endowment fund and various planned giving opportunities
- Invite all team members to establish their own planned gifts to the endowment fund

Develop Your Plan – Months 3-6

Set Goals

- [Set goals for your Planned Giving and Endowment Building Program](#)

Prepare Your Strategy

- Establish a marketing plan & [communications calendar](#) to educate and engage your donors
 - Order [customized endowment fund brochures](#)
 - Schedule a date for a Planned Giving and Endowment Building Program kick-off weekend(s), which should include:
 - [Announcements](#) at all masses and/or major events
 - Planned giving team members available to answer questions afterward
 - [Posters](#) displayed and informational materials available
 - Update your organization's website with [planned giving messaging and a link to rcfstl.org](#)
 - Print and display [planned giving posters](#) for the parish/organization lobby
 - Begin following your marketing plan and [communications calendar](#) to include [planned giving content](#) in newsletters, social media, e-blasts, pulpit announcements, bulletin articles and annual appeal mailings
- ### Identify Prospects
- Use [point system](#) to determine best prospective planned giving donors
 - Develop master tracking spreadsheet to monitor team's activity

Execute Your Plan – Months 7-10

- Implement direct mail campaign to top donors
 - [Personal Visit Letter for Top Donors](#)
 - [Customizable Endowment Fund Brochure](#)
- Conduct personal visits with those who received mailing
 - [Appeal Letter for Top Donors](#)
 - [Customizable Endowment Fund Brochure](#)
 - [Ways to Give Summary](#)
 - [Planned Gift Intention Form](#)
- Execute general direct mail campaign
 - [General Appeal Letter](#)
 - Response Device
 - [Customizable Endowment Fund Brochure](#)
- Host kickoff weekend
 - [Announcements](#) at all masses and/or major events
 - Planned giving team members available to answer questions
 - [Posters](#) displayed and informational materials available
- Continue following your marketing plan and [communications calendar](#) to include [planned giving messages](#) in newsletters, social media, e-blasts, pulpit announcements, bulletin articles and annual appeal mailings

Follow-Up – Months 11-12

- Invite parishioners/donors, especially your best prospective planned giving donors, to attend a Legacy Planning Seminar or your deanery's presentation of The Conversation: A Catholic Perspective on End-of-Life Issues, where Charitable Gift Planning will be a primary topic
- Continue engagement with the Foundation through regularly scheduled Planned Giving Symposiums and resources and communications such as the monthly Legacy Link (newsletter)
- Continue following your marketing plan and [communications calendar](#) to include [planned giving messages](#) in newsletters, social media, e-blasts, pulpit announcements, bulletin articles and annual appeal mailings
- Conduct an annual review of your planned giving marketing plan and communications calendar
- Report annual progress to the parish/donors in bulletin/newsletter or personal letter