

Getting Started in Planned Giving (Canadian Edition)



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Campus

Module One – Introduction

- Course navigation
- Course guide
- Explanation of course resources
- Course objectives
- Planned giving can mean long-term security
- What is planned giving?
- Planned giving is an important fundraising tool
- Review of module one

Module Two – Definitions

- Introduction to module two
- Definitions
- Resource: Planned giving terms
- What is planned giving? (5 screens)
- Resource: Definition of planned giving
- Quiz (x2)
- Most common types of planned gifts
- Quiz
- Planned giving vs. gift planning
- Review module two

Module Three - Are you ready for planned giving?

- Introduction to module three
- Self-assessment is necessary
- Six factors for successful planned giving
- Status under Canada Income Tax Act
- Organization and financial stability
- Quiz (x2)
- Donor base - planned giving donor profile
- Quiz (x3)
- Donor retention and communication (3 screens)
- Quiz
- Administrative capacity
- Board and management commitment
- Resource: Readiness checklist
- Review modules two and three

Module Four – Ten steps to success

- Introduction to module four
- Step 1: Establishing realistic short-term and medium-term goals
- Resource: Setting realistic goals
- Step 2: Obtaining board support
- Step 3: Recruit and expert advisory group
- Quiz
- Step 4: Budget and staffing considerations (3 screens)
- Quiz
- Step 5: Writing a case for support
- Resource: Sample case for support
- Step 6: Policies and procedures (2 screens)
- Resource: Planned giving policies and procedures
- Step 7: Administrative and financial systems
- Quiz
- Step 8: Creating a marketing plan
- Quiz
- Step 9: Recognition and stewardship program
- Resource: Donor recognition and stewardship
- Resource: Recognition and stewardship case study
- Step 10: Measuring progress
- Resource: Measuring progress
- Quiz
- Review module four

Module Five – Planned giving and endowments

- Introduction to module five
- How endowments work with planned giving
- Operating an endowment
- Quiz
- Partnering with a community foundation
- Quiz
- Resource: Partnering with a community foundation
- Review module five

Module Six – Review

- Course review
- Additional references
- Wrap-up