

Building an airplane ... mid-flight:

Launching a planned giving program from scratch
(while balancing everything else)

- Leadership
- Look before you leap
- Ready shoot aim
- Mind the gap
- Working your plan



Leadership:

Setting expectations and getting clearance

- Why are you here?
- What is their perspective and time-line?
- Charting your flight plan
- What will you give up?



Look before you leap

With the end in mind, what is your process

- Organizational readiness-what can you put in place?
- Building your team-who can support my efforts?
- You're in my will!-great, now what?



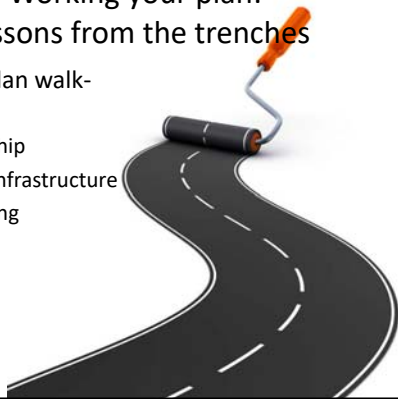
Ready, Shoot, Aim: Knowing your goals

- The Big Score
- A HUGE response
- Active & Passive tools
- Culture of Planned Giving



Working your plan: Lessons from the trenches

- Sample plan walk-through
 - Leadership
 - Create infrastructure
 - Marketing



Q & A



Cal State East Bay

Planned Giving Services
Vendor Comparison



CAL STATE
EAST BAY

	VENDOR A			VENDOR B			VENDOR C			VENDOR D			CONSULTANT A		CONSULTANT B	
	Software includes website, custom pages, e newsletters, eBlasts, royalty free desktop printing/literature, Board training, gift calculator, ongoing support. One month service to set up a planned giving plan.			Includes email marketing platform, analytics, mobile optimization, online gift brochures, video gift tutorials, royalty free content library, online content editing. Offers digital surveys			Requires that we use their software/website in conjunction with printing services. Web services include interactive calculator, live links advisor reference, electronic marketing support.			Prospect response tracking system with a landing page. Specializes in digital and direct mail surveys. Does not provide print brochures and newsletters.			N/A		N/A	
Planned Giving Software	Set-up fee		\$0	Set-up fee		\$1,000	Set-up fee		\$1,000	Set-up fee		\$5,000	N/A		N/A	
	Software		\$3,500	Software		\$5,500	Software		\$4,995	Software		\$5,940				
	Desktop software license		\$220													
			\$3,720			\$6,500			\$5,995	Total		\$10,940				
	Quantity		Cost	Quantity		Cost			Quantity		Cost	N/A		N/A		
eNewsletter/drip email system	52 weekly newsletters		Included with Gift Legacy	4 quarterly newsletters		Includes digital marketing	N/A			4 drip emails over 8 months		\$5,000	N/A		N/A	
	Vendor does not print newsletters and brochures, prices are for preferred printer. 8.5" x 11" newsletter, 4-color. Includes reply card.			6-panel, self-mailing newsletter, 4-color package, includes tear-away response card, mail processing services			4 page, 4-color newsletter. Can also deliver print-ready PDFs of newsletter and reply card to our printer with license to print up to 10,000 copies for \$2,750.									
Newsletter: Print/Mail	Quantity	Price per item	Cost	Quantity	Price per item	Cost	Quantity	Price per item	Cost							
	4,000	\$ 0.91	\$3,633	1,500	\$ 2.59	\$3,883	5,000	\$ 1.32	\$6,600							
	4,000	\$ 0.78	\$3,135	2,500	\$ 1.83	\$4,580	7,500	\$ 1.09	\$8,150							
				5,000	\$ 1.16	\$5,810	10,000	\$ 0.92	\$9,200				N/A		N/A	
							15,000	\$ 0.79	\$11,800							
	Price with mailing cost. 8.5"x11" newsletter			4 panel, 15"x9" brochure, custom full-color design			6-panel tri-fold standard brochure. 8-panel legacy customized									
Brochure	Quantity	Price per item	Cost	Quantity	Price per item	Cost	Quantity	Price per item	Cost							
	4,000	\$ 0.37	\$1,467	1,000	\$ 2.47	\$2,471	2,500	\$ 1.28	\$3,200				N/A		N/A	
				2,500	\$ 1.23	\$3,064	5,000	\$ 0.71	\$3,550							
				5,000	\$ 0.72	\$3,579	7,500	\$ 0.52	\$3,900							
	Average 7% total response for public universities. Drops of 2500 recommended to allow directors time to follow up with leads.									Average 8% total response for public universities.						
Survey: Digital	N/A			Quantity	Price per item	Cost	N/A			Quantity	Price per item	Cost	N/A		N/A	
				6000 (2 drops of 3000 each)	\$ 1.38	\$8,250				7,000	\$ 0.75	\$5,250				
				10,000	\$ 1.02	\$10,175				10,000	\$ 0.75	\$7,500				
				10,000 (4 drops of 2500 each)	\$ 1.27	\$12,650										
Survey: Print	N/A			Quantity	Price per item	Cost	N/A			Quantity	Price per item	Cost	N/A		N/A	
				3000 (2 drops of 1500 each)	\$ 2.06	\$14,058				10,000 email and 3,000 direct mail	\$ 2.05	\$13,644				
				4000 (2 drops of 2000 each)	\$ 1.72	\$17,983				10,000 email and 5,000 direct mail	\$ 1.72	\$16,085				
				5000 (2 drops of 2500 each)	\$ 1.51	\$21,877										
				6000 (2 drops of 3000 each)	\$ 1.38	\$25,791										
Consulting Services	N/A			N/A			N/A			N/A					Requires that we sign up for Vendor C products in order to use consulting services.	
													Annual Fee	\$ 16,000.00	Annual Fee (\$1,900/month)	\$ 22,800.00
													Travel stipend per day	\$ 1,200.00	+ reimbursement of travel costs	
													+ reimbursement of travel costs			

* = lowest price in category