



Planned Giving Initiative Guide

Catholic Foundation of Northeast Kansas

Celebrating more than 20 Years of Catholic Philanthropy



Building His Kingdom

Planned Giving Initiative

Congratulations! Your school is taking the lead by developing a successful planned giving program. Your example will help guide other Catholic schools and organizations across the Archdiocese.

In the next 12 months from the date of acceptance of the initiative your school will achieve all prescribed goals for year one. CFNEK staff is available to help the school and its leaders to achieve success.

The founders of our Church in Northeast Kansas were blessed by a human capital of priests and sisters. Over time this capital has decreased. We still have vibrant Catholic communities, but financial challenges can be felt in every parish, school and ministry. It is up to us to build a commitment to planned giving that represents our deep gratitude for God's many and varied gifts that will keep our Catholic community strong for generations to come.

We challenge you to exceed the basic goals we have established. We challenge you to bring your creativity and commitment to the Catholic faith to make this effort a success. Make leaving a planned gift a part of the culture of your school. Embolden those in your school community with the love of their faith and their neighbor. Help the Church to grow stronger. Inspire future generations with your timeless faith.

Ultimate Goal

The ultimate goal of the initiative is to foster a culture of planned giving across the Archdiocese of Kansas City in Kansas where all practicing Catholics have updated wills that include charitable gifts.

Building His Kingdom – Planned Giving Initiative

Year 1

You also may already be doing some of these steps. Please work directly with the CFNEK to design a plan to fulfill all the requirements in 12 months. This is not a one-year program, so set ongoing processes in place to make sure the message of leaving bequests to the church is strong and consistent.

Simple Steps to Implement “A Timeless Faith”

1. Create an endowment or fund with CFNEK (\$5,000 minimum).
2. Appoint Endowment trustees.
3. Track current and expected planned gifts.
4. Help launch a Catholic Legacy Society (CLS) in your school community (Four to ten meetings in the first year)
5. Coordinate ongoing planned giving promotion and appreciation efforts (Four meetings per year)

***At the conclusion of year one parishes and schools who have accomplished these steps achieve “Bronze Planned Giving Status.”**

It is important to notify the alumni and friends of the school of the school’s participation in the Planned Giving Initiative. Launching the initiative with an announcement, and ongoing communication in print, online and in personal meetings are all effective ways to create a fresh awareness and understanding of your school endowment and Catholic Legacy Society. The message of planned giving is consistent and year round.

Basics to promote Planned Giving and Endowment

- Endowment offertory envelopes
- Promote the endowment for memorials and bequests
- Notify local estate planning professionals and funeral homes of school bequest language
- Consider an estate planning seminar at least once per year with a section on bequests and charitable giving
- Print School Planned Gift Guide (use CFNEK template)

Building His Kingdom – Planned Giving Initiative

Year 2

Now that your school community knows that you have an endowment, and the Catholic Legacy Society has been explained, it is time to start targeting your message to alumni and friends of the school with a higher likelihood of giving a planned gift.

Catholic Legacy Society Prospecting and Appreciation

1. Update Endowment Trustees, and add new trustees as necessary
2. Report on endowment and bequest activity to school community quarterly. Also report significant deposits to or distributions from the endowment.
3. Evaluate donor giving history to identify households that have shown a commitment to the school community with consistent giving, not necessarily large gifts.
4. Add planned giving information to all new alumni communication.
5. Continue to give recognition and ongoing communication to Catholic Legacy Society members from year one. An intimate social event may be appropriate.
6. Publish testimonials from CLS members on why they chose to make a planned gift.
7. Develop a plan to personally contact prospects with a letter from the president and follow-up phone call from development staff or trustees. (Top 20 percent of loyal annual givers)
8. Collect CLS Surveys and use feedback to improve Planned Giving Initiative marketing

***At the conclusion of year two parishes and schools who have accomplished these steps achieve “Silver Planned Giving Status.”**

Silver Planned Giving Status:

- 1% of annual loyal parish and/or school donors are CLS members
- Active and consistent message of estate planning that includes charitable bequests to the church

Building His Kingdom – Planned Giving Initiative

Year 3

The culture of legacy giving is in place. It now needs to be nurtured, and this takes time. During this year you will add targeted mailings to potential gift annuitants. This will add an additional dimension to your planned giving message.

Legacy Giving Relationship Cultivation

1. Update Endowment Trustees, and add new trustees as necessary
2. Report on endowment and bequest activity to school community quarterly. Also report significant deposits to the endowment. If distributions are taken from the endowment, announce how they were used.
3. Annually recognize CLS members by publishing gift stories in the bulletin, and at annual appreciation event
4. Include planned giving information in all new alumni correspondence.
5. Continue targeted legacy gift solicitation through letters and follow-up phone calls. Add new parishioners who have been consistent givers for more than six months.
6. Send annual letter to all CLS members and prospects with list of life events that may result in a need to revise wills and estates
7. Send informational gift annuity targeted mailing. Consult CFNEK for help identifying potential gift annuitants.
8. Collect CLS Surveys and use feedback to improve Planned Giving Initiative marketing

***At the conclusion of year three parishes and schools who have accomplished these steps achieve “Gold Planned Giving Status.”**

Gold Planned Giving Status:

- 2% of annual loyal parish and/or school donors are CLS members
- Active and consistent message of estate planning that includes charitable bequests to the church

Building His Kingdom – Planned Giving Initiative

Year 4

You may have reached everyone on your targeted bequest list. It is now critical to maintain the culture of Catholic philanthropy. Update your planned giving and endowment message with new announcements and updates to the school on progress achieved during the initiative. Help CLS members get involved by being Endowment Trustees. Share successes and challenges with the Catholic Foundation.

Keep Planned Giving Relevant

1. Update Endowment Trustees, and add new trustees as necessary. Look to your CLS for potential new trustees.
2. Annually recognize CLS members by publishing gift stories in the bulletin, and at annual appreciation event
3. Report on endowment, gift annuity and bequest activity to school community quarterly. Also report significant deposits to or distributions from the endowment.
4. Continue targeted legacy gift solicitation through letters and follow-up phone calls. Add new donors who have been consistent givers for more than six months.
5. Include planned giving information in all new alumni correspondence.
6. Send annual letter to all CLS members and prospects with list of life events that may result in a need to revise wills and estates
7. Send informational gift annuity targeted mailing. Consult CFNEK for help identifying potential gift annuitants.
8. Collect CLS Surveys and use feedback to improve Planned Giving Initiative marketing

***At the conclusion of year four parishes and schools who have accomplished these steps achieve “Platinum Planned Giving Status” with the CFNEK.**

Platinum Planned Giving Status:

- 3% of annual loyal parish and/or school donors are CLS members
- Active and consistent message of estate planning that includes charitable bequests to the church

Building His Kingdom – Planned Giving Initiative

Year 5

Conduct a survey of your Catholic Legacy Society. Find out why they gave, and what they think could be done to encourage others to consider a bequest to the school. Involving the school community in the long-term planning is a great way to energize your message. Look to CLS members for potential endowment trustees.

Get feedback from your Catholic Legacy Society and listen

1. Conduct a comprehensive final survey of your CLS. Use input to improve Planned Giving Initiative communication.
2. Update Endowment Trustees, and add new trustees as necessary
3. Annually recognize CLS members by publishing gift stories in the bulletin, and at annual appreciation event
4. Report on endowment, gift annuity and bequest activity to school community quarterly. Also report significant deposits to or distributions from the endowment.
5. Continue targeted legacy gift solicitation through letters and follow-up phone calls. Contact new donors who have been consistent givers for more than six months.
6. Include planned giving information in all new alumni correspondence.
7. Send annual letter to all CLS members and prospects with list of life events that may result in a need to revise wills and estates
8. Send informational gift annuity targeted mailing. Consult CFNEK for help identifying potential gift annuitants.

***At the conclusion of year five parishes and schools who have accomplished these steps achieve “Diamond Planned Giving Status” with the CFNEK.**

Diamond Planned Giving Status:

- 4% of annual loyal parish and/or school donors are CLS members
- Active and consistent message of estate planning that includes charitable bequests to the church

Ultimate Goal

The ultimate goal of the Planned Giving Initiative is to foster a culture of planned giving across the Archdiocese of Kansas City in Kansas where all practicing Catholics have updated wills that include charitable gifts.

