



FUNDRAISING: STEWARDED PLANNED GIVERS

Workbook





Internal Assessment

Use this space to reflect on and evaluate key areas of how your organization stewards planned givers.



Thank & Recognize



Show impact of similar types of gifts



Create legacy societies



Continue the relationship



Explain Future Plans



Timing Engagement Plan

Use this template as you plan your engagement timing for your planned giving donors.

	Thank You	Goals (Current & Future)	Impact	Other Types of Support	Survey & Share Ideas	Other
Jan						
Feb						
Mar						
Apr						
May						
Jun						
Jul						
Aug						
Sept						
Oct						
Nov						
Dec						



Channel Engagement Plan

Use this template as you plan your channel engagement for your planned giving donors.

	Thank You	Goals (Current & Future)	Impact	Other Types of Support	Survey & Share Ideas
Events					
Social Media					
Direct Mail					
Email					
Other					



Timing Engagement Plan

- [sgENGAGE Podcast Episode 149: Raising Major and Planned Gifts in the Current Environment](#)
- [sgENGAGE Podcast Episode 162: Why You Need a Planned Giving Strategy](#)
- [sgENGAGE Blog: Marketing Planned Gifts to Women](#)
- [sgENGAGE Blog: 4 Steps to Making Planned Giving More Effective Than Ever, Right Now](#)
- [npEXPERTS: The Great Reset](#)
- [Blackbaud Institute: The Root of Change](#)
- [Blackbaud Institute: The Opportunity of Collaborative Benchmarking](#)

Bonus! As a member of AFP, you have free access to Blackbaud University's *Organizational Best Practices* eLearnings. To request information about the *Organizational Best Practices* training subscription, visit <https://hello.blackbaud.com/Training.html>.

Notes



Thank You!

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