

CALIFORNIA STATE UNIVERSITY, FRESNO
1911-2011



STEPPING INTO OUR NEXT CENTURY

Advancement Division Action Plans

FY 2010-11 and FY 2011-12

Planned Giving



CALIFORNIA STATE UNIVERSITY, FRESNO
University Development FY 2010-11 / 2011-12 Action Plan Details

Department: Planned Giving
Date: September 2010

Priority/Product	Criteria for Success	Tactics	Special Considerations
Planned Giving - General	<ul style="list-style-type: none"> • Identify and document new and existing bequests and trust gift designations. • Serve as planned gifts resource for DOD's and other Development staff. • Review, update and maintain planned gift donor files. • Negotiate charitable gift annuities, trusts and life insurance gifts as needed. • Maintain regular contact with planned gift donors. • Seek information about campaign countable bequests from existing Heritage Society members. 	<ul style="list-style-type: none"> • Provide technical and strategic support for DOD's, donors and their professional advisors. • Provide charitable trust and annuity projections and assist with proposals. • Systematically conduct complete review of all planned gift donor files. • Coordinate with donors and their professional advisors as needed. • Continue stewardship visits with trust and bequest donors. 	
Planned Gifts Marketing <ul style="list-style-type: none"> • Web site • IRA Rollover • Charitable Gift Annuities 	<ul style="list-style-type: none"> • Establish new Planned Giving web pages. • Send Mailing(s) • E-Mail reminders • Send Mailing(s) 	<ul style="list-style-type: none"> • Develop Web site content. • Usher through approval process. • Maintain & update regularly. • Target age 69+. Send pre April 15. • Use Leadership Blog /Campaign Insider/Tidbits/Bulldog Bites. • Target age 65+. Send spring & fall. • Use Leadership Blog /Campaign Insider/Tidbits/Bulldog Bites. 	<ul style="list-style-type: none"> • Use all available publications to announce new Web pages. • Awaiting Congressional re-authorization for 2011. • Try letters vs. postcard. • Try letters vs. post card. <p style="text-align: right;">(continued)</p>

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Emeriti Activities	<ul style="list-style-type: none"> • Host minimum of 3 Emeriti Coffees per year. • Present annual Emeriti Central Coast event. • Coordinate Emeriti Centennial Reunion. 	<ul style="list-style-type: none"> • Seek emeritus hosts to partner with Deans and DOD's. • Secure emeritus hosts to provide topics and educational tours. • Mailings to include save-the-date card. • Provide lunch, Centennial gift and President Welty address. 	<ul style="list-style-type: none"> • Encourage individual invites from DOD's. • Expand invite list geographically. • Consider package to encourage participation in the Parade, Tailgate of the Century and Homecoming Game.
Heritage Society	<ul style="list-style-type: none"> • Promote Heritage Society opportunities to all constituencies. • Assist Office of the President with annual luncheon. • Maintain and publish Heritage Society member list. • Create and distribute updated printed and digital promotional materials. 	<ul style="list-style-type: none"> • Send welcome letters to new members. • Unveil updated scroll or plaque at annual luncheon. • Coordinate publicity and photos from annual luncheon. • Continue to work with Communications on new Heritage Society materials. 	
Allied Professionals	<ul style="list-style-type: none"> • Continue Planned Giving Advisory Council. • Cultivate and strengthen relationships with attorneys, financial planners and other estate planning professionals. 	<ul style="list-style-type: none"> • Host minimum of two meetings per year. • Enhance agenda with relevant topics. • Extend invitations to new professionals. • Promote Heritage Society opportunities. 	(continued)

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Staff Development for Campus Community	<ul style="list-style-type: none"> • Provide continuing education for DOD's. • Provide planned giving primer for volunteer boards and other appropriate staff as requested. 	<ul style="list-style-type: none"> • As requested and as opportunities can be created. • Make presentations to "friends" groups selected by DoD's. 	
Gifts of Securities	<ul style="list-style-type: none"> • Facilitate and direct all gifts of securities. 	<ul style="list-style-type: none"> • Provide direction to DOD's, staff and donors. • Maintain effective relationships with Broker and Foundation to ensure prompt and accurate transfers. 	
Enhance expertise in all areas related to estate planning	<ul style="list-style-type: none"> • Completion of studies for 'Certified Gift Planning Associate' designation. • Networking with local allied professionals to pave the way for prospect referrals and identification of Heritage Society members. 	<ul style="list-style-type: none"> • Actively participate in professional organizations: <ul style="list-style-type: none"> ○ Financial Planners Association of Central California. ○ Fresno County Bar Association – Estate Planning Section. ○ San Joaquin County chapter / Partnership for Philanthropic Planning. 	