

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

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

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