Planned Giving Institute

Nonprofits are under increasing pressure to develop sustainable plans for future funding. Planned giving is one way nonprofit managers and gift officers can cultivate and implement long-term funding opportunities. Our Planned Giving program gives you the knowledge, tools and skills to develop a planned giving program for your organization.

The Planned Giving Institute is an intensive 32-hour, week-long program focused on both higher education and smaller nonprofits. During the week you’ll work to develop a planned giving program tailored to your organization. Sessions concentrate heavily on the strategy of planned giving; on understanding donors; on communicating your message effectively; and on ensuring your back office administration and management processes are in place with an effective stewardship plan. Participants will also spend a day digging deeper into the technical “nuts and bolts” of planned gifts.

The Institute is ideal for planned giving professionals, major gift officers, CEOs and directors of development of small nonprofits, and career switchers.

Details and Registration
Online registration or paper registration form are available from our website: spcs.richmond.edu/iop

Dates: Monday-Friday, March 20-24, 2017
Cost: Early bird Rate: $1,550. After January 3: $1,750; scholarships are available. Fee includes wifi, lunches & snacks
Deposit: $125 nonrefundable; credited toward the final cost
Schedule: Review the weekly planning calendar on our website: spcs.richmond.edu/iop
Accommodations: Book a nearby hotel room and transportation or consider the Bottomley House on campus. Additional details available online.

Institute Outcomes
• Evaluate your donor’s perspective and develop a clear understanding of your giving constituency for planned gifts
• Evaluate the potential for planned giving for your organization and develop a strategy to implement a program
• Integrate the board into your plan
• Identify your planned giving and endowment audiences and develop your organization’s key messages to reach them
• Develop an effective communication and stewardship plan for your planned giving donors

Certificate Requirements
• Planned Giving Introduction – Leveling the Field
• Understanding the PG Donor Perspective
• Strategies & Techniques for Planned Giving
• Understanding Family Dynamics & Legacy
• Marketing for Planned Giving – Who, What, How
• Planned Giving in Practice/The PG Conversation
• PG Management, Evaluation & Administration of the Gift
• Stewardship of the Planned Gift

Work While You Learn: Complete the certificate during a one-week intensive program offered in the winter or summer each year. In this format, you will work on a development plan for your organization through hands-on interactive sessions focusing on your nonprofit.

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