

Using the Case Statement to Raise Planned Gifts

Once you have your draft case statement, (see *Your Case* under *Getting Started*) work the case through the appropriate volunteer committees - planned giving, finance, development, etc. - revising the statement as you go along. *View each of these meetings as an opportunity to encourage planned gifts from those around the table.* Refuse to move the case statement to the next committee unless you have a volunteer who has made his or her planned giving commitment. By the time you reach the board, you should have two or three volunteers saying why they have included your organization in your estate plan. If you don't, the case has not been persuasive to those who care about the organization most, and is unlikely to motivate the broad community.

Have the board of directors sign off on the case statement by formal board resolution. By now your case should have a specific dollar goal, timetable, and agreed upon objectives. (If you don't have a written plan, use "Quick Plan" by clicking on item 8 in the Table of Contents under Section I. Getting Started.) Again, you and at least one volunteer, preferably a board member who has made a planned gift commitment, should present the case statement to the board. The volunteer should encourage board members to consider making their own planned gift arrangements, assuring them they will have support from you in understanding their options.

The development of a case statement is a fundamental fundraising technique and the cornerstone of your planned giving program. Imagine meeting with a foundation and requesting "a lot of money for a big building to support our good work." No self-respecting foundation would tolerate such a vague and lazy request. Yet most planned giving programs tell donors little more than that. Having a case statement that appeals both to the head (specific objectives) and heart (the benefits to those whom your organization serves) gives you and your volunteers something to talk about with prospects besides techniques - though you should not underplay the benefits of planned giving strategies.

Case-centered planned giving develops commitments quickly - especially from volunteer leaders - provides personal stories for your newsletter that will, at minimum, be read by those who know the individual planned giver you are profiling, and makes the planned giving program something your board takes seriously as a board responsibility, rather than seeing it as "(YOUR NAME HERE)'s project."

Case-centered planned giving, though seldom as tidy as I've presented it here, consistently gets planned gift commitments in a predictable period of time and gives focus and weight to the traditional methods of raising planned gifts: mailings, seminars, newsletter articles, and the like.