



IUPUI THE FUND RAISING SCHOOL

LILLY FAMILY SCHOOL OF PHILANTHROPY

Planned Giving: Getting the Proper Start

ONLINE COURSE AGENDA

Introductory Module

Module 1: Making the Case for Planned Giving

Lesson Overview and Readings
Narrated Presentation
Quiz
Assignment: Making the Case for Planned Giving
Discussion: Reflections on Making the Case for Planned Giving

Module 2: Planned Gifts That Help Now! Part I

Lesson Overview and Readings
Narrated Presentation
Quiz
Assignment: Planned Gifts that Help Now: Is Your Organization Ready?
Discussion: Reflections on Unlocking the Opportunity of Planned Gifts that Help Now

Module 3: Planned Gifts That Help Now! Part II

Lesson Overview and Readings
Narrated Presentation
Quiz
Assignment: Planned Gifts that Help Now: Is Your Organization Ready?
Discussion: Reflections on Unlocking the Opportunity of Planned Gifts that Help Now

Module 4: Planned Gifts That Help Later

Lesson Overview and Readings
Narrated Presentation
Quiz
Assignment: Planned Gifts that Help Later: If Your Organization Ready?
Discussion: Reflections on Unlocking the Opportunity of Planned Gifts that Help Later

Module 5: Planned Gifts That Pay Income to Donors/Their Loved Ones

Lesson Overview and Readings

Narrated Presentation

Quiz

Assignment: Charitable Gift Annuities: Are They Right for Your Organization?

Discussion: Reflections on Unlocking the Opportunity of Planned Gifts that Pay Income

Module 6: Case Study

Lesson Overview and Readings

Narrated Presentation

Quiz

Assignment: Analysis of Case Study

Discussion: Reflections on Case Study

Module 7: Marketing of and Prospecting for Planned Gifts

Lesson Overview and Readings

Narrated Presentation

Quiz

Assignment: Audit of Prospecting for and Marketing of Planned Gifts

Discussion: Reflections on Prospecting for and Marketing of Planned Gifts

Module 8: Managing a Comprehensive Planned Giving Program

Lesson Overview and Readings

Narrated Presentation

Quiz

Assignment: Assess Your Readiness for Planned Giving

Assignment: Planned Giving Work Plan

Discussion: Reflections on Creating a Comprehensive Planned Giving Program

NOTE: To be eligible for the Certificate of Completion, course work should be completed and submitted weekly with any outstanding course work submitted no later than the end of week 8. This is a firm deadline and late work will not be accepted.