Planned Giving: Getting the Proper Start

ONLINE COURSE AGENDA

WEEK 1: DEFINING AND MAKING THE CASE FOR PLANNED GIVING
Readings
Narrated Presentation
Quiz
Assignment: Making the Case for Planned Giving
Assignment: Discussing Your Work

WEEK 2: PLANNED GIFTS THAT HELP NOW!
Readings
Narrated Presentation
Quiz
Assignment: Planned Gifts that Help Now: Is Your Organization Ready?
Assignment: Real Opportunity for Real Estate Gifts
Assignment: Comprehensive Case Studies
Assignment: Discussing Your Work

WEEK 3: PLANNED GIFTS THAT HELP LATER
Readings
Narrated Presentation
Quiz
Assignment: Planned Gifts that Help Later: Is Your Organization Ready?
Assignment: Continue Working on Your Assigned Case Study (Due Week 4)
Assignment: Discussing Your Work

WEEK 4: PLANNED GIFTS THAT PAY INCOME TO DONORS/THEIR LOVED ONES
Readings
Narrated Presentation
Quiz
Assignment: Charitable Gift Annuities: Are They Right for Your Organization?
Assignment: Charitable Remainder Trusts: Who are Your Prospects?
Assignment: Case Study Response
Assignment: Discussing Your Work
Principles & Techniques of Fundraising

ONLINE COURSE AGENDA

WEEK 5: MARKETING PLANNED GIVING
  - Readings
  - Narrated Presentation
  - Quiz
  - Assignment: Identifying Planned Gift Prospects
  - Assignment: Marketing Plan Audit and Plan
  - Assignment: Discussing Your Work

WEEK 6: MANAGING A COMPREHENSIVE PLANNED GIVING PROGRAM
  - Readings
  - Narrated Presentation
  - Quiz
  - Assignment: Assess Your Readiness for Planned Giving
  - Assignment: Planned Giving Work Plan
  - Assignment: Course Evaluation
  - Assignment: Discussing Your Work