



COUNTING BEQUESTS IN A CAMPAIGN:

Taking the Road Less Travelled

Presented by Chris Yates

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- I. Making the case for bequest intentions in a campaign
 - a. Why do they matter?
 - b. Why include them in a campaign?
 - c. Where do they fit in a campaign?

- II. Deciding how to count bequest intentions in a campaign
 - a. CASE standards
 - b. PPP (formerly NCPG) standards
 - c. The road less travelled (Stanford's model)
 - i. Participation based – goal is number of new BIs, not \$\$
 - ii. The benefits of this approach
 - iii. The costs of this approach

- III. Planning your bequest intentions campaign
 - a. Who do you need to influence?
 - b. Making strategic allies out of colleagues
 - c. Where do you get the resources?
 - d. Volunteer leadership

- e. Marketing approaches
 - i. campaign branding and messaging
 - ii. consistency
 - iii. tools for increasing efficiency
 - iv. paper vs. electronic

- IV. Executing your bequest intentions campaign – Stanford’s approach
 - a. Silent Phase: build a solid BI base while planning the public phase
 - b. First Phase (public): Announce the campaign and initiate a broad general marketing outreach to all prospects
 - c. Second Phase (public): “Inreach” – recruiting, equipping and incentivizing fellow development officers
 - d. Third Phase (public): Activating your volunteers to bat “clean up” with the goal of a home run

- V. Summary/Other Thoughts/Questions