

# The \$100,000 Question

## Managing Your Planned Giving Resources

### Internal Staff Model

- ≈ No Marketing Materials
- ≈ No System
- ≈ No Gauge of Success
- ≈ No Support Structure
- ≈ No Accountability



80k

One Staff Employee



20k

Marketing Efforts



OR



### Enterprise Model

- ≈ Marketing Materials
- ≈ RSF Supervision
- ≈ Multiple Specialists
- ≈ Multiple Advisors
- ≈ Consistency
- ≈ Accountability



20k

Philanthropy International



80k

Marketing Efforts

The \$100,000 question is, "How does one effectively spend a planned giving budget?" Whether the charity's planned giving budget is \$100,000 or \$1 million, most organizations will spend 80% on salary and benefits for a planned giving officer and support staff. This only leaves 20% to invest in marketing their planned giving program.

The Internal Staff Model does not provide adequate funding for marketing materials, there is no system in place, no marketing strategy, no method to measure success and therefore no accountability.

The Enterprise Model is the reinvention of planned giving. A charity is invited to become a Partner Charity with Philanthropy International, costing approximately \$20,000 per year.

A marketing strategy will be created for each Partner Charity. Reproducible and customized marketing materials and consumer-oriented video presentations are included in the contract fee. These materials provide a message that is consistent, conservative, comprehensive and compliant.

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