Foundations Planned Giving

Arch/Diocese	March - Original Schedule	March - Modified Schedule	April - Original Schedule	April - Modified Schedule	May - Original Schedule	May - Modified Schedule	June - Original Schedule	June - Modified Schedule	July - Original Schedule	July - Modified Schedule
Arlington	No plan due to abuse crisis								Possible newsletter	
Atlanta	No foundation/planned giving info received									
Baltimore	Monthly blog posts	No change	Monthly blog posts; semi-annual planned giving newsletter	Blogs discontinued due to remote support issues; newsletter mailed as planned	Board of Trustees meeting	No changes	Stategic Marketing re-group	No changes	None	TBD
Charleston	Bicentennial Campaign	Changed focus to parish offertory-SECURE	Bicentennial Campaign	Focused parish offertory-SECURE	Bicentennial Campaign	Focused parish offertory-SECURE	Conclusion & Celebration	Rescheduling big celebration	200th Anniversary of the Diocese	Smaller Mass for actual Birthday
Charlotte			April 20 - newsletter	April 20 - newsletter					July 13 - brochure	July 13 - brochure
Miami	No foundation/planned giving info received									
Orlando	2 Legacy Seminars at parishes; follow-up with previous attendees; meetings with donor prospects; visits with potential Planned Giving Advisory Council (PGAC) members	Last seminar held on 3/12, others postponed; suspend direct planned giving communications; included a Family Mission Statement activity in Foundation e-Newsletter; individual meetings changed to phone, video, email.	Hire additional Dir. Of philantrhopy; hold stwardship meetings w/Vivos Christi members and prospects; meet with pastors about holding Legacy Seminars.	Postponed hiring to 2021; "thinking of you" emails to membership; calls to those with visits scheduled; meetings with pastors delayed; focus on resolving pending planned gifts	PGAC meeting for professionals and guests w/special speaker; CGA mailing	Meeting rescheduled as virutal in June; included CGA info and donor story in Foundation e-newsletter; continued peronal calls and notes to those w/visits scheduled; resolve pending planned gifts		PGCA virtual meeting; FY21 planning - continued social distancing and 'new normal' taken into consideration; 2nd email planned for Vivos Christi members; webinars planned for Leaving Legacy Seminar; building a Family Mission Statement; Picture Your Legacy; continue personal call and notes		Continue Leaving Legacy Webinar; buidling a Family mission statement; Picture your Legacy. Collaborate on Podcast series - Your Philanthropic Journey (includes info on Planned Giving); continue personal calls and notes.
Palm Beach	None	None	None	None	None	None	None	None	None	None
Pensacola-Tallahassee	No foundation/planned giving info received	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Raleigh	Program & PG Asks; Donor & Prospect cultivation… phone, email, and personal visits; Wills Seminars scheduled; PG ad in dioc magazine	Restructured outreach by phoning & emailing donors/prospects with wellness checks; Wills seminars canceled (alternative virtual seminar-format offered); PG ad in dioc magazine	Program & PG Asks; Donor & Prospect cultivation… phone, email, and personal visits; Quarterly email update of Endow & Annuity Stmts to donors & beneficiaries; Wills Seminars scheduled; launch new FDOR website	Donor wellness checks; Quarterly email update of Endow & Annuity Stmts to donors & beneficiaries with COVID-sensitive offer of assistance-CARES Act info; Wills seminar canceled (alternative virtual seminar-format offered); launched new FDOR website; accelerated wills promotion	Program & PG Asks; Donor cultivation…phone, email, and personal visits; Wills Seminar scheduled; Spring Newsletter	Program & PG Soft-Asks; Donor cultivation…phone, email, and minimal personal visits; accelerated wills promotion; newsletter delayed	Program & PG Asks; Donor cultivation…phone, email, and personal visits	Program & PG Soft-Asks; Donor cultivation…phone, email, and minimal personal visits; Spring Newsletter sent; accelerating wills promotion in dioc magazine ad	Program & PG Asks; Donor cultivation…phone, email, and personal visits; Marketing/mailing prep for Fall; Quarterly email update of Endow & Annuity Stmts to donors & beneficiaries	Program & PG Soft-Asks; Donor cultivation…phone, email, and minimal personal visits; Marketing/ mailing prep for Fall; Quarterly update with COVID-sensitive offer of assistance, stimulus updates; accelerating wills promotion in dioc magazine ad
Richmond	Donor meetings-cultivation; Legacy Giving Seminars scheduled; legacy advertising	Donor stewardship via calls, emails and handwritten notes; legacy advertising	Donor meetings; beta mailing for CGAs; Legacy Giving Seminars scheduled; legacy advertising	Donor stewardship via calls, emails and handwritten notes; legacy advertising	Donor meetings-cultivation; Pilot, Wave 2 and Wave 3 Parish Legacy Giving Committees 5 Yr. Legacy Giving Program Planning meetings; legacy advertising	Donor stewardship via calls, emails and handwritten notes; legacy advertising	Donor meetings-cultivation; Wave 4 Parish Legacy Giving Committees on board; legacy advertising	Donor stewardship via calls, emails and handwritten notes / Work with select parishes on legacy messaging (those who have already gone through the program); legacy advertising	Continue with Wave 4 Parish Legacy Giving Committees on board; legacy advertising	Donor stewardship via calls, emails and handwritten notes / Work with select parishes on legacy messaging (those who have already gone through the program); legacy advertising
Savannah	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
St. Augustine					Print and email newsletter, cultivation, topic: CARES Act unpacked	No changes				
St. Petersburg	Donor meetings-cultivation; Legacy Giving Seminars scheduled	Donor meetings postponed via phone call, Legacy Giving Seminars postponed	Donor meetings-cultivation; Legacy Giving Seminars scheduled; new Donor Newsletter created and mailed; Board of Trustees meeting	Donor meetings postponed via phone call or rescheduled as Zoom, Legacy Giving Seminars postponed; new Donor Newsletter created and mailed; virtual Board of Trustees meeting	Donor meetings-cultivation; Legacy Giving Seminars scheduled; Launch Donor Advised Fund	Donor meetings postponed via phone call or rescheduled as Zoom, Legacy Giving Seminars postponed; personal calls to top donors of event; virtual Board of Trustees meeting	Donor meetings-cultivation; Legacy Giving Seminars scheduled; Mailing for Donor Advised Fund	Donor Advised Fund launch; personal calls and notes to top donors of annual appeal		Mailing for Donor Advised Fund
Venice	No foundation/planned giving info received									
Washington	CGA Outreach during tax season	All focused on parish	CGA Outreach during tax season; Foundation support for Schools	All focused on parish	Legacy Society Outreach; Foundation support for Schools	CGA initial outreach; Foundation shifting focus to parish pantries and other mission needs	Planning for FY21	CGA outreach; Foundation focus on schools and COVID-19 relief	Planning for Legacy Society Mass and Lunch	TBD
Wheeling-Charleston	Separate office - no info available									