

COMMUNITY by DESIGN 2021

Create a plan to build a \$1 billion endowment through planned-giving efforts

McPherson College has a tradition of giving and currently has the largest endowment of any private institution in Kansas. The schools with \$1 billion-plus endowments can enhance quality and ensure perpetual success. McPherson College currently has the constituency with capacity to give and over the next two decades should focus on efforts to build a ten-figure endowment.

This year we will launch a pilot project which involves approaching a combination of existing planned giving constituents as well as our newer large donors we have cultivated through our automotive restoration program. The pilot will focus on asking potential estate donors to share non-binding estate commitments.

2017-18 Milestones

- Assign moves and complete interviews with constituency
- Research different planned giving models and vendors to use as part of a larger effort
- Evaluate interviews and scale process into planned giving efforts
- Report and celebrate progress

2017-18 Action Items

Responsibility

November

Finalize donor test groups and approach in coordination with new campaign feasibility study	VP Advancement
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February

Assign moves	VP Advancement
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March

Research planned giving models and potential vendors	VP Advancement
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April-May

Complete interviews	VP Advancement/AR/President
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June

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| <ul style="list-style-type: none">• Evaluate and create plan to scale to broader donor base | VP Advancement |
| <ul style="list-style-type: none">• Integrate planned giving initiative into the new comprehensive fundraising campaign | VP Advancement |

Future Years

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| <ul style="list-style-type: none">• Develop recording and reporting systems | VP Advancement |
| <ul style="list-style-type: none">• Initiate Endowment Assessment/Growth Plan given fundraising, spending rate, expenses and returns | VP Adv. and CFO |