

Host Customization Options

1. Branded Banner

As a host, your site will include a branded banner along the top of your Planned Giving Design Center. Our web services team will match it to your existing homepage as close as possible or you have the option of designing your own. The organization logo will be linked to your homepage and any sponsor ads will be linked as well (as described in section 4).

Banners can be changed as often as you'd like; seasonally, milestone anniversary, special campaign, etc. If at any time your homepage is redesigned, simply let us know and we will update your PGDC site to match. Here are a few examples below:

THE CLEVELAND FOUNDATION




Bolder Giving

[Home](#)
[About Us](#)
[Blog](#)
[Contact Us](#)
[Donate](#)
[Staff](#)
2a


Bolder Giving's mission:
to inspire and support people
to give at their full lifetime potential.

3


Bolder Giving Features




POSTED ON 15 JUL 2013 | GROUP NEWS
[Bold Conversation with Philippe Cousteau - July 25th](#)
Philippe Cousteau will be the featured Bold Investor for our next Bold Conversation on July 25th and noon EST. If you know Philippe Cousteau as the dashing young anchor of CNN International's "Going..."



POSTED ON 5 APR 2013 | GROUP NEWS
[Bold Conversation with Terrence Meck - April 18th](#)
Terrence Meck will be the featured Bold Giver for the next Bold Conversation on April 18th at NOON EST. After his partner Rand was diagnosed with pancreatic cancer and passed away...



POSTED ON 6 MAR 2013 | GROUP NEWS
[Laura Emrich will be the featured Bolder Giver for the next Bold Conversation on March 21st at NOON EST.](#)
Join us to hear her describe her journey as an activist and philanthropist grounded in values imbued by her progressive Jewish family. These values took the Denver native from development work in...



POSTED ON 11 FEB 2013 | GROUP NEWS
[Bold Conversation with Boris Yakubchik](#)
Boris Yakubchik was the featured Bold Giver in February 2013. Boris has pledged to give 50% of his coming for the rest of his working life after encountering Giving What We Can which asks...

POSTED ON 11 FEB 2013 | GROUP NEWS
[3 New Videos Online Now](#)
Pat Eng, our new Director of Programs, was honored as part of the "MAKERS: Women Who Make America" series on PBS. She'll be at the red-carpet premiere with Katie Couric, Marlo Thomas...


6

7520 Rates: Aug 2.0% Jul 1.4% Jun 1.2% May 1.2%

BOLDER GIVING

Give more. Risk more. Inspire more.

Search group



Find us on **Facebook**

4a

Group details Contact Follow

- Bolder Giving**
 - About Us
 - Blog
 - Contact Us
 - Donate
 - Staff
- Inspiring Stories
 - Featured Givers
 - Story & Video Library
- Programs
 - Bold Conversations
 - Environmental Justice Initiative
 - Partnerships

2b

- Featured Givers
- Story & Video Library

5

2. Menu Tabs

Customized tabs appear in the group navigation menu (2a) as well as the right sidebar (2b). Each tab/menu item can showcase one full page of information or a list of multiple content items that link to additional pages. For example: About Us can include links to pages with your mission statement, foundation history, staff bios and more (2c).

Current tab options are:

- | | |
|--------------|-----------------|
| ■ About Us | ■ Jobs |
| ■ Blog | ■ News |
| ■ Board News | ■ Newsletters |
| ■ Calendar | ■ Our Board |
| ■ Contact Us | ■ Presentations |
| ■ Donate | ■ Resources |
| ■ Events | ■ Sponsors |
| ■ Forms | ■ Staff |

PGDC → Bolder Giving

About Us
2c

Home About Us Blog Contact Us Donate Staff

Bookmark

☐

What We Do
Bolder Giving's mission: to inspire and support people to give at their full lifetime potential.

☐

Who We Are
Click here for a list of our board and staff members.

☐

Advisors and Volunteers
We are grateful to all who have encouraged this project - most especially to all the Bolder Givers for the gift of their stories, and to our original advisors group below, Jessica Bearman...

☐

History
Bolder Giving was started by Anne and Christopher Ellinger, co-authors of the award-winning book We Gave Away a Fortune and founders of More than Money. As bold givers themselves, with decades of...

3. Mission Statement

This section can be used to highlight your mission statement, an introduction to your organization or describe the purpose of your site. Text can be various fonts, colors, justified, bulleted and include a graphic.

4. Ad Space

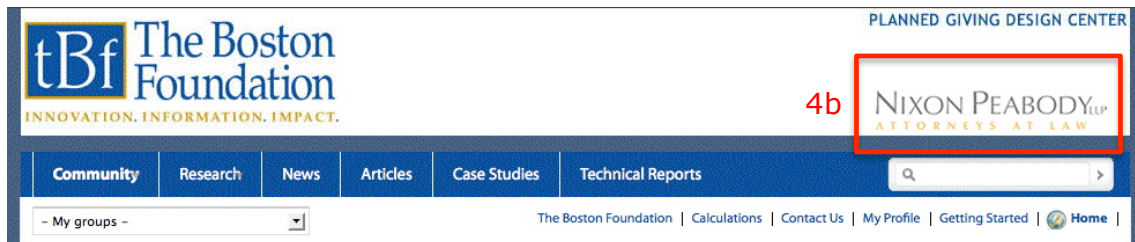
Ad space is valuable real estate on the PGDC. Some hosts use this space for promoting campaigns, sponsors, events, social media and other items.

Ads can be displayed in the sidebar of your group page (4a), in the banner (4b), in the email newsletter (not pictured) or a combination. You also have the option of having an ad in the weekly newsletter but not on the site. Sidebar ads will appear on the group page, on any group news items and the calculation center. Banner ads appear on every page of your PGDC site.

There is a limit of 3 ads in the banner, 4 ads in the sidebar and 10 ads in the newsletter. Optimal image size is 200w x 110h.

Ideas for ads are:

- Sponsors
- Campaigns
- Events
- Forms/Documents
- Awards
- Donor Stories
- Advisor Testimonials
- Social Media
- Affiliate Organizations
- Publications



For a detailed list of ad space options and samples, visit our [FAQ](#).

5. Sidebar Menu

If you have content that you would like to appear on your PGDC but doesn't necessarily fall under one of the menu tab options listed in #1 we can create custom menus to appear in the right sidebar. Examples of this would be donor stories, testimonials, campaigns, videos, etc. The sidebar menu is visible from every page within your group.

6. Group News

The PGDC not only provides professional advisors in your community with vital information about planned giving; it also provides them with ongoing information about your organization and helps you to maintain an active relationship with them.

Utilizing the Group News section of the PGDC is a great way to communicate with your subscribers, and it can help you build relationships with your subscribers. Group news is included in the national newsletter and is emailed to your members each week.

When group news is added to your PGDC it is automatically shown on the group page. It can also be assigned to appear under a News tab (2a). This is a great way to keep an archive of all the news that has been posted to your PGDC for members to access more easily in the future.

For your convenience we will put up your news for you. Simply email the item to support@pgdc.com and we'll be happy to add it for you. If an RSS feed is available on your homepage we can subscribe to it and automatically post news for you!


7. Anchored Links

Anchored links appear in the sidebar regardless of what page a member is on within your group, whether they're on the main group page or reading a group news item. Anchored links are great for showcasing important information you want members to see more often. They are displayed between the group search field and ads (if any).

Some examples of anchored links our hosts and groups are currently using:



- Forms & documents
- Legacy Societies
- Video Library
- Events
- Publications
- Sponsors
- Resources
- Advisor and/or donor stories

7520 Rates: Aug 2.0% Jul 1.4% Jun 1.2% May 1.2%



Search group

- Remember to Ask the Charitable Question
- Children's Mercy PG Home Page
- Donald H. Chisholm PG Council Roster
- Children's Legacy Society
- Children's Mercy Annual Report
- Mid-America Planned Giving Council



Find us on Facebook

Group details Contact Follow

- 431 followers
- Group manager: Pamela Miller

8. Email Newsletter Introduction

PGDC hosts now have the option of personalizing the introductions text to better suit your organization. Currently the "stock" intro message for the PGDC email newsletter is:

"As a member of the [Host Name] PGDC you are being sent this email to keep you up to date on the latest additions to the site."

Children's Mercy Hospitals is a great example of a host utilizing the custom introduction. Read the introduction and see the screen shot below of how it looks in their PGDC newsletter.

"Children's Mercy is honored to count you among our network of professional advisors and nonprofit representatives, and we are pleased to serve as your host of the Planned Giving Design Center (PGDC). As the local host, we seek to support you and our community with this free online service to further assist you as you advise your clients and donors about estate planning and charitable giving. As a member of the PGDC community, you are receiving this e-newsletter to provide you with the most current news, research, forums and other resources. At Children's Mercy Hospitals and Clinics, we are redefining pediatric medicine throughout the Midwest and beyond. If you would like to discuss charitable giving opportunities or learn more about how planned giving makes a difference in the lives of our children and their families, contact Pamela Miller at (816) 346-1350 or pmiller1@cmh.edu, Jane Lampo at (816) 701-4339 or jnlampo@cmh.edu, or visit us at www.childrensmc.org/plannedgiving. Thank you for helping us to be here for all children."



Children's Mercy Hospital & Foundation
2401 Gillham Road
Kansas City, MO 64108
United States
Phone: [816-346-1350](tel:816-346-1350)
Fax: [816-346-1377](tel:816-346-1377)
See map: [Google Maps](#)

[Dashboard](#) [Research](#) [News](#) [Articles](#) [Case Studies](#) [Technical Reports](#)

Dear Nancy B,

8

Children's Mercy is honored to count you among our network of professional advisors and nonprofit representatives, and we are pleased to serve as your host of the Planned Giving Design Center (PGDC). As the local host, we seek to support you and our community with this free online service to further assist you as you advise your clients and donors about estate planning and charitable giving. As a member of the PGDC community, you are receiving this e-newsletter to provide you with the most current news, research, forums and other resources. At Children's Mercy Hospitals and Clinics, we are redefining pediatric medicine throughout the Midwest and beyond. If you would like to discuss charitable giving opportunities or learn more about how planned giving makes a difference in the lives of our children and their families, contact Pamela Miller at (816) 346-1350 or pmiller1@cmh.edu, Jane Lampo at (816) 701-4339 or jnlampo@cmh.edu, or visit us at www.childrensmc.org/plannedgiving. Thank you for helping us to be here for all children.

National Publication Highlights

[IRS Approves Private Foundation's Investment in LLC](#)

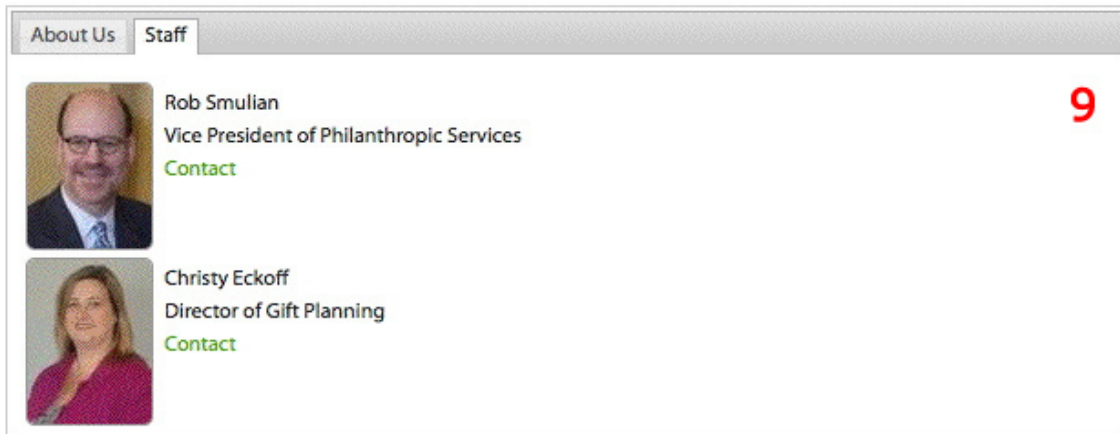
The IRS has ruled privately that a private foundation's investment in Class A membership interests in an LLC, that operates a hedge fund and is treated as a partnership for federal tax purposes, will not generate unrelated business taxable income to the foundation, will not cause the foundation to be liable for an excess business holdings



Find us on
Facebook

9. About Us & Staff Block

Each PGDC group has the option of displaying a block in the lower section of the group page featuring About Us & Staff information. The About Us section can be as brief or as long as you'd like or it can be hidden. The Staff listing includes name, title, contact button for email and optional photos.



As you can see, many of our customization options are interchangeable and can be used in multiple sections of the site providing various ways to display your information.

We will gladly review your homepage and provide you with a list of customization suggestions. Feel free to submit any questions or new ideas to support@pgdc.com.