

## Benchmarks for a Successful Planned Giving Program

On a scale of 1 to 5, with 5 being the highest rating, rate your planned giving efforts using the following benchmarks:

- \_\_\_ Board Commitment. The level of commitment by the Board to the planned giving program is high.
- \_\_\_ Executive Director Commitment. The level of commitment by the Executive Director to the planned giving program is strong and supportive.
- \_\_\_ Fundraising Staff. Effective and adequate staff time is devoted to planned gift fund raising.
- \_\_\_ Financial Resources. There is an adequate budget to support planned giving fund raising activities.
- \_\_\_ Support Staff. Adequate support staff is provided for the planned giving program.
- \_\_\_ Goal Setting and Accountability. The planned gift fundraiser meets with the Executive Director annually to review planned giving results from the past year and set goals for the coming year.
- \_\_\_ Technical Resources. The planned giving program has computer software that can produce planned giving illustrations. In addition, access to legal counsel and other resources are available to provide tax and legal information necessary to close planned gifts.
- \_\_\_ Planned Giving Committee. The organization has an active, functioning Planned Giving Committee, comprised of both planned gift donors and volunteers from the allied professions
- \_\_\_ Ongoing Management of Planned Gifts. The organization's fiscal office does a good job of managing on-going planned gift commitments (e.g., gift annuity payments). (e.g., attorneys, CPA's, real estate professionals, trust officers, etc.).
- \_\_\_ Policies and Procedures. Written policies are in place for acceptance of planned gifts. These policies set the ground rules for what type of planned gifts will be accepted and how they will be processed.
- \_\_\_ Professional Growth Opportunities. The organization provides for staff membership in associations that offer educational opportunities in planned gift fund raising and related topics.
- \_\_\_ Identifying Prospects. The non-profit knows the characteristics of a planned gift donor and has a systematic method of identifying its planned gift prospects.

- \_\_\_ Personal Visits. One-on-one visits are the preferred method of cultivation and solicitation for planned gifts.
- \_\_\_ Up-to-Date Marketing Materials. The organization has up-to-date planned giving brochures and other printed materials.
- \_\_\_ Mailings. Targeted planned gift mailings are sent out three to four times a year to selected prospects. There is effective telephone follow up on the reply cards.
- \_\_\_ Internet. Your website has a planned giving component. Emails are sent out periodically to planned gift prospects. You have purchased appended email addresses for your planned gift prospect list.
- \_\_\_ Articles and Messages. Planned giving articles and messages appear regularly in the organization's ongoing publications and other materials.
- \_\_\_ Planned Gift and Estate Planning Seminars. Planned giving and estate planning seminars are held periodically for the organization's constituency groups.
- \_\_\_ Honorary Society. An active honor society (e.g., Heritage Society) exists to market planned gifts and to recognize planned gift donors.
- \_\_\_ Promote a Variety of Planned Giving Vehicles. The organization markets and accepts a variety of planned giving opportunities with an emphasis on charitable bequests.

Now add up your score and write it here: \_\_\_\_

A score of **80 or above** is excellent

A score of **60-80** is very good

A score of **40-60** is average

Don't be discouraged if you scored **below 40** – get busy!