

Consulting Services

Is your planned giving program as good as it could be?



Consulting Services

Our consultants can help you grow your skills in areas critical to planned giving success.



Success in planned giving: the requirements

To be successful in planned giving, our consultants believe an organization must:

- ▶ Be fully committed to planned giving as a way to support its mission
- ▶ Have the long-term support of its Board and senior management
- ▶ Be financially sound
- ▶ Have a constituency of donors and potential donors who have demonstrated their loyalty to the organization's goals and mission
- ▶ Have the ability to create and sustain interest among that base of support
- ▶ Be able to administer the gifts it receives in a timely, flawless way
- ▶ Be able to measure and document its successes

At PG Calc, we've spent more than 20 years paying serious attention to what makes some planned giving programs more effective than others.

In our experience, the best programs belong to those organizations that successfully address these objectives:

- ▶ **Their senior management and Board recognize the importance of planned giving and demonstrate a firm commitment to it.**
- ▶ **Their planned giving team has created an infrastructure that facilitates disciplined management and evaluation of results against well-defined benchmarks.**
- ▶ **They have a vision of the long-term impact of their organization's mission, and that vision is communicated effectively to donors and potential donors.**
- ▶ **They have gift administration capabilities, either in-house or through external sources, that accentuate their good stewardship.**

The work we do is designed to help organizations grow and develop their strengths in these and other areas.

Our consultants bring an insider's perspective to the process

What most of our consultants did previously is what you do now – raise money through planned gifts for missions you feel passionate about.

Because we come from your world, we understand planned giving from your perspective – the responsibilities, pressures, complexities, and satisfactions. Perhaps that's why we have such good working relationships with our clients and why they are so responsive to the support we provide in areas critical to planned giving success.

Serving new and growing programs

Organizations that are just beginning to develop planned giving programs value the step-by-step guidance we provide, often on-site, to help their programs get up and running. At the same time, those that are already accepting some planned gifts look to us for support as they seek to expand the types of gift vehicles they accept, seek a wider diversity of gifts, or train staff members to obtain a deeper understanding of more sophisticated gifts.



- ▶ **Building the infrastructure.** We'll work to help you understand how planned giving fits within your organization's overall fundraising efforts. What are your staffing requirements? What are your budget parameters? How will you define the roles and responsibilities among your team? What will it take to get buy-in from your Board?
- ▶ **Establishing objectives and guidelines.** We'll guide you in assessing the potential of your program and establishing metrics to measure your success.
- ▶ **Achieving your goals.** We'll help you determine who your most likely planned gift donors are, the marketing initiatives you'll need to implement to reach out to them, how you translate that outreach into real prospects, and how you can accelerate and improve your close rate.

Enhancing established programs

Organizations with active planned giving programs often call on us to analyze and evaluate their efforts by reviewing policies and procedures, identifying strengths and weaknesses, examining marketing materials, improving donor prospecting techniques, streamlining proposal preparation, and much more.

- ▶ **Risk analysis.** It's common for us to spend considerable time doing risk evaluations for organizations to answer a myriad of questions such as, "How likely is it that our gifts will result in positive remainders for our charity?"
- ▶ **Strategic marketing.** You can work with us to enhance every aspect of your planned giving marketing program. We can help you define your marketing goals in terms that make sense for you, such as the number of new leads generated for a specific gift vehicle, or help you forecast desired results for the tactics you employ so you can objectively determine whether they are providing an acceptable return on investment.
- ▶ **Prospecting.** We have been instrumental in helping development professionals and planned giving officers understand that their time is often better spent qualifying leads and moving them to closure rather than always searching for more leads. The approach we advocate costs less, moves more quickly, and can lead to larger gifts.

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For more information
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PG Calc

At PG Calc, our mission is to help fulfill yours.



Considerable additional help

- ▶ **State gift annuity registration.** We can make sure that your gift annuity program is registered in any of the 27 states that currently require it. We escort your charity through the process of completing letters, forms, and agreements. Your role typically entails simply responding to some questions, providing back-up material as needed, and signing your completed applications.
- ▶ **Advice on unusual gifts.** We can help you with unusual gifts – mega gifts, for example, or gifts from Canadian donors or from American donors with Canadian property – by providing both gift design recommendations and detailed financial overviews.
- ▶ **Donor solicitation.** We can extend the reach of your program by interacting directly with your donors to guide them toward the gift plan that best satisfies their charitable and financial objectives.
- ▶ **Advisor relations.** Consider us your emissaries in dealing with donors' advisors, who may recognize the financial ramifications of donor gifts but often fail to understand the emotional ramifications.
- ▶ **Gift administration.** No planned giving program is complete without systems and people in place to address the challenges of gift administration. Towards this end, we can supplement the skills and personnel required to deliver exceptional gift administration.



How we work with you is up to you.

- ▶ **Monthly retainer**
Take advantage of our deep expertise in planned giving without having to keep your eye on the clock. Retainer clients have priority access to our consulting staff.
- ▶ **Hourly consulting**
Call on our specialized skills whenever a need arises.
- ▶ **Products and services bundles**
Choose from several alternative combinations of the products and services typically needed to get a planned giving program up and running.
- ▶ **Projects**
We'll work with you to define a scope of work and provide services on a flat-fee basis.



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