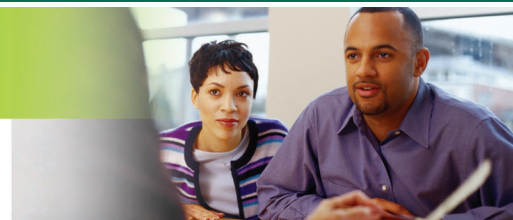


Planned Giving Program Audit

Steps to Realizing Your Program's Full Potential



Effective gift planning requires a familiarity with financial and legal arrangements designed to fulfill the charitable objectives of individual donors. Like other fundraisers, gift planners must listen well, be empathetic, and make use of various relationship skills. In addition, the most successful programs recognize the importance of deep technical and marketing expertise.

Gift planners are well advised to leave it to the right professionals to conduct a planned giving program audit that determines the program's potential and outlines the steps the charity should take to realize that potential.

A Planned Giving Program Audit from PG Calc typically includes:

- Interviews with gift planning staff, selected fundraising officers, gift administrators, and fundraising program leadership, all focused on understanding the responsibilities of the various persons and their reporting relationships.
- Analysis of the budget for the planned giving program to determine what resources are currently allocated to gift planning and what return on this investment is being realized.
- Assessment of the current donor base to obtain demographic information regarding the primary sources of planned gifts and the number of potential donors.
- Examination of gift activity reports to learn the number and dollar volume of various categories of gifts, including existing irrevocable deferred gifts, confirmed revocable deferred gifts, outright gifts that entailed gift planning, and distributions from estates and from terminated irrevocable deferred gifts.
- Review of fundamental policies, such as those addressing gift acceptance, investment, and endowment.
- Consideration of marketing material, including the existing marketing plan, collateral publications, and website.
- Projection of attainable goals for the coming years with respect to the number and dollar volume of new gifts arranged and identified for different categories.
- Benchmarking of the charity's efforts against successful gift planning programs of comparable institutions in terms of marketing initiatives that these institutions have found to be most effective, the metrics they use for evaluating staff performance, how they integrate major and planned gifts, and how they have incorporated and counted planned gifts in a capital campaign.

The **Planned Giving Program Audit** culminates in a written report typically consisting of four sections: **Assessment, Best Practices, Potential, and Recommendations**. The report details realistic steps to take in order to overcome existing barriers to success and includes specific recommendations that can readily be incorporated in a multi-year operating plan.

PG Calc's consultants are recognized as having exceptional expertise with planned giving programs along with broad knowledge of gift vehicles and processes. The team includes individuals who have decades of experience with all facets of planned giving.

