

# ORGANIZATION

## PLANNED GIVING

### ≡ An Organizational Self-Assessment ≡

The following document is intended to serve as a self-assessment of an organization's prior efforts and activities as well as preparedness to secure planned gifts, e.g. bequests, charitable trusts, life insurance policies, life income annuities.

## ≡ An Organizational Self-Assessment ≡

### ORGANIZATIONAL OVERVIEW

1. Organization's fundamental mission:

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2. When was the organization incorporated?: \_\_\_\_\_

3. What year was 501 (c)(3) or 509 (a) tax status received from the I.R.S?: \_\_\_\_\_

4. What are the principle reasons given to encourage someone to consider a charitable contribution to your organization?:

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5. What are the characteristics of your organization that might encourage people to consider making a planned gift?:

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6. Organization's most recent annual operating budget: Year: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

7. Approximate percentage/dollar amount of annual operating budget attributed to gift income: \$ \_\_\_\_\_ ( \_\_\_\_\_ %)

8. Total market value of current endowment: \$ \_\_\_\_\_

9. Approximate percentage/dollar amount of annual operating budget attributed to endowment income: \$ \_\_\_\_\_ ( \_\_\_\_\_%)

10. Provide a brief description of any intended major funding requirements which will need to be addressed through a significant increase in both cash and planned gifts.

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**PLANNED GIVING OVERVIEW**

1. Indicate currently recorded gifts/gift intentions within the following categories noting as applicable the recorded dollar value.

<u>Category</u>	<u>Approx. Number</u>	<u>Estimated Dollar Value</u>
Bequests	_____	\$ _____
Charitable Remainder Annuity Trusts	_____	\$ _____
Charitable Remainder Unitrusts	_____	\$ _____
Charitable Lead Trusts	_____	\$ _____
Gift Annuities	_____	\$ _____
Life Insurance Policies	_____	\$ _____
IRA's	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

2. Total assets currently held in pooled income fund: \$ \_\_\_\_\_

**PLANNED GIFT SOLICITATIONS**

1. Indicate the methods currently used to represent the ways in which planned gifts can be made to your organization:

Direct Mail

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Seminars and Workshops

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Newspaper/Media Advertisements

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Personalized Correspondence/ Proposals

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other: \_\_\_\_\_

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Approximately how many individuals/couples are considered potential planned gift donors for the purposes of personal contact and cultivation? *Approximate number:* \_\_\_\_\_

*general criteria:*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**RESOURCES AND REFERENCES**

1. Does your organization currently employ a person who has been trained in planned giving?

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Does your organization have a probate/estate planning attorney, tax attorney, CPA or financial planner on the Board to provide advice and counsel in the area of planned gifts?

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Does your organization currently subscribe to a publication service(s) which provides periodic literature for distribution to prior and potential donors?

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Does your organization currently have a database software program which enables you to provide financial projections and proposals for potential donors of planned gifts?

comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**GOVERNING BOARD APPROVED POLICIES AND PROCEDURES**

1. Does your organization have Board-approved written policies and procedures pertaining to:

- Solicitation of planned gifts
- Acceptance of planned gifts
- Management and investment of gift assets
- Donor recognition for planned gifts

*comment:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Does your Board have a standing committee for the oversight, solicitation, acceptance and/or management of planned gifts, and does such committee(s) have a written description of their principal tasks and responsibilities?

*comment:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**DONOR RECOGNITION**

1. Does your organization have a special recognition society and/or name for confirmed donors of planned gifts? If so, what special recognition/benefits/privileges are offered?

*comment:* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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