



Checklist for a Successful Planned Giving Program

We've made an exhaustive search for the best information available. Here are a few of the key links, organized as a checklist for launching a bequest program.

What to do	Resources and Examples from pg-now.org
1. Institutional assessment: Are you ready?	http://www.pg-now.org/resources/#Planning
2. Engage board and management	http://www.pg-now.org/role
3. Engage professional advisors	http://www.pg-now.org/thingsdo/#Enlist http://pgtoday.com/PGT/Articles/how_to_involve_professional_advisors.htm
4. Establish gift acceptance policies	http://www.pg-now.org/pdfs/KQED_policy.pdf http://www.pg-now.org/pdfs/MIREEGiftAcceptancePol.pdf
5. Establish bequest policy	http://www.pg-now.org/thingsdo/#EstablishPolicies http://www.pg-now.org/pdfs/MIREEGettingSerious.pdf
6. Establish marketing plan	http://www.pg-now.org/pdfs/OPBMarketing_Budget.pdf http://www.pg-now.org/pdfs/Recognition_Society.pdf
7. Identify prospects	http://www.pg-now.org/thingsknow/#Identifying
8. Begin simple marketing steps, create awareness	http://www.pg-now.org/thingswork/#Begin
9. Expand marketing through direct mail and web	http://www.pg-now.org/pdfs/OPB_MembSurvey.pdf http://www.pg-now.org/pdfs/teacher.pdf Also, search the web for examples from comparable organizations
10. Make personal visits with prospects and close the gift	http://www.pg-now.org/thingswork/#Relating
11. With success, expand into more complex instruments. Consider devoting full-time staff.	http://www.pg-now.org/pdfs/Bibliography.pdf

Other resources: Books we like

- Planned Giving for Small Nonprofits. Donald R. Jordan and Katelyn L. Quynn, Wiley.
- Planned Giving Workbook. Donald R. Jordan and Katelyn L. Quynn, Wiley.
- Planned Giving Simplified. Robert F Sharpe, Sr., Wiley.
- Asking. Jerold Panas, Emerson & Church.

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