

Is Your Planned Giving Program Thriving?

Evaluate Your Current Program

Place a check next to the items that are consistent with your planned giving program efforts.

- We are able to describe to people why they should care about our mission.
- We have prospect data on residence, age, loyalty and openness to relationship-building efforts.
- We reach out through direct mail.
- We communicate using email.
- We have a gift planning website.
- We use social media such as Facebook, Twitter and Instagram to connect with our supporters.
- We personally visit with donors and prospects on a regular basis.
- Our communication efforts are consistent.
- We have an understanding of the characteristics of donors who leave planned gifts to our nonprofit sector.
- Our communication is tailored by audience.
- We provide specific and compelling ways donors can support our mission.
- We report on our accomplishments and visibly show how donations are making a difference.
- We have a procedure in place for promptly thanking donors.
- We regularly ask our supporters their thoughts on how we are performing as an organization.



How did you do? The more items you were able to check, the more likely your planned giving program is on the path for success. Didn't check as many as you would like? The Stelter Company can help!



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