ACG Audit Software for Planned Giving Programs

How is your organization's Planned Giving program doing? Is the program achieving the growth and results you'd like or that are expected? If you are unsure, it's a great time to re-evaluate to know exactly "what is" in order to transform your program. The best way to do that is to have highly experienced, objective professionals perform an audit of your program; and if you don't have an existing program, then an ACG Audit of your organization's readiness will be extremely beneficial.
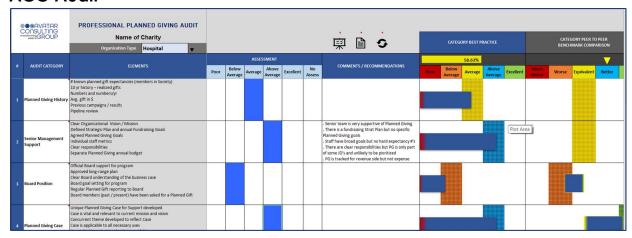
The ACG Audit Software has these benefits:

- You are confident that your program has been assessed in a disciplined and comprehensive way;
- Manage better by establishing clear measurements of your program;
- Compare your organization to both 'best practice' and 'like-type' charities to understand your strengths and weaknesses.
- Obtain clarity in knowing where to focus to get better or even where to start some activities that weren't operational.
- Plan better by revisiting the audit assessment annually - update and measure progress and define the next key steps in leveraging your program;
- Use the audit to define personnel needs and skill sets.

To accommodate all types of organizations at different stages of program development, Avatar Consulting Group has designed two types of audit Software. **The Standard version can be carried out by you or someone on your Planned Giving team. The Professional version is carried out by a consultant specialized in planned giving or by someone in your organization with more experience.** Which type is best for helping you to transform your philanthropic Planned Giving program to achieve your organization's goals? You choose. Or together, in consultation, we can determine the one that best fits your needs. Send us an email.
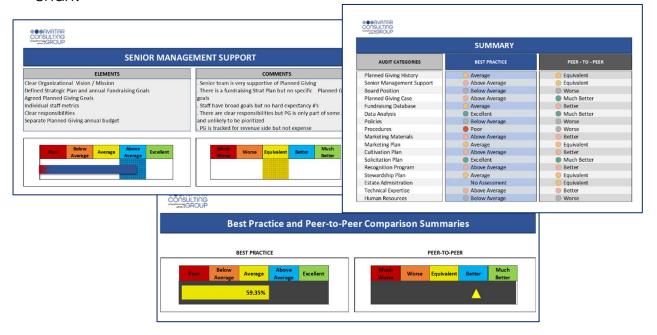
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ACG Audit

ACG Audit Version Features

Feature	Standard	Professional
Assessment Categories with 5-7 elements each	13	17
Choice of types of charities for comparison	10	10
Graphs each category and overall assessment	Yes	Yes
Compares assessment to 'best practice'	Yes	Yes
Compares assessment to peer organizations	Yes	Yes
PDF Generation	Yes	Yes
PowerPoint generation	No	Yes
Pop-up on-screen assessment guidelines	Yes	Yes
25-page assessment booklet giving detailed guidelines	No	Yes
Requires Excel, Adobe Reader and Microsoft PowerPoint (or equivalents)	All except PowerPoint	All

Sample PowerPoint Slides

The Professional Version creates a full slide deck with each category assessment displayed with comments along with overall assessment graphs and summary chart.

Both versions facilitate PDF snapshots of the full audit