



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

PROFESSIONAL PLANNED GIVING AUDIT		ASSESSMENT						CATEGORY BEST PRACTICE				CATEGORY PEER TO PEER BENCHMARK COMPARISON						
Name of Charity		Organization Type: Hospital						58.63%										
#	AUDIT CATEGORY	ELEMENTS	Poor	Below Average	Average	Above Average	Excellent	No Assess	COMMENTS / RECOMMENDATIONS	Exceed	Below Average	Average	Above Average	Excellent	Much Worse	Worse	Equivalent	Better
1	Planned Giving History	# known planned gift expectancies (members in Society) 10 yr history – realized gifts Numbers and numbers/yr Avg. gift in \$ Previous campaigns / results Pipeline review																
2	Senior Management Support	Clear Organizational Vision / Mission Defined Strategic Plan and annual Fundraising Goals Agreed Planned Giving Goals Individual staff metrics Clear responsibilities Separate Planned Giving annual budget							Senior team is very supportive of Planned Giving There is a fundraising Strat Plan but no specific Planned Giving goals Staff have broad goals but no hard expectancy #'s There are clear responsibilities but PG is only part of some ID's and unlikely to be prioritized PG is tracked for revenue side but not expense									
3	Board Position	Official Board support for program Approved long-range plan Clear Board understanding of the business case Board goal setting for program Regular Planned Gift reporting to Board Board members (past / present) have been asked for a Planned Gift																
4	Planned Giving Case	Unique Planned Giving Case for Support developed Case is vital and relevant to current mission and vision Concurrent theme developed to reflect Case Case is applicable to all necessary uses																

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.

SENIOR MANAGEMENT SUPPORT

ELEMENTS	COMMENTS
<ul style="list-style-type: none"> Clear Organizational Vision / Mission Defined Strategic Plan and annual Fundraising Goals Agreed Planned Giving Goals Individual staff metrics Clear responsibilities Separate Planned Giving annual budget 	<ul style="list-style-type: none"> Senior team is very supportive of Planned Giving There is a fundraising Strat Plan but no specific Planned G goals Staff have broad goals but no hard expectancy #'s There are clear responsibilities but PG is only part of some and unlikely to be prioritized PG is tracked for revenue side but not expense

Assessment Legend: Poor, Below Average, Average, Above Average, Excellent

Overall Assessment: Below Average

SUMMARY

AUDIT CATEGORIES	BEST PRACTICE	PEER - TO - PEER
Planned Giving History	Average	Equivalent
Senior Management Support	Above Average	Equivalent
Board Position	Below Average	Worse
Planned Giving Case	Above Average	Much Better
Fundraising Database	Average	Better
Data Analysis	Excellent	Much Better
Policies	Below Average	Worse
Procedures	Poor	Worse
Marketing Materials	Above Average	Better
Marketing Plan	Average	Equivalent
Cultivation Plan	Above Average	Better
Solicitation Plan	Excellent	Much Better
Recognition Program	Above Average	Better
Stewardship Plan	Average	Equivalent
Estate Administration	No Assessment	Equivalent
Technical Expertise	Above Average	Better
Human Resources	Below Average	Worse

Best Practice and Peer-to-Peer Comparison Summaries

BEST PRACTICE	PEER-TO-PEER
<p>Assessment Legend: Poor, Below Average, Average, Above Average, Excellent</p> <p>59.35%</p>	<p>Assessment Legend: Much Worse, Worse, Equivalent, Better, Much Better</p> <p>▲</p>

Both versions facilitate PDF snapshots of the full audit

PROFESSIONAL PLANNED GIVING AUDIT																			
Name of Charity																			
Organization Type: Social Service																			
#	AUDIT CATEGORY	ELEMENTS	ASSESSMENT					COMMENTS / RECOMMENDATIONS	CATEGORY BEST PRACTICE					CATEGORY PEER TO PEER BENCHMARK COMPARISON					
			Poor	Below Average	Average	Above Average	Excellent		No Assess	Poor	Below Average	Average	Above Average	Excellent	Much Worse	Worse	Equivalent	Better	
1	Planned Giving History	<ul style="list-style-type: none"> # known planned gift expectancies (members in Society) 10 yr history -- realized gifts Numbers and numbers/yr Avg. gift in \$ Previous campaigns / results Pipeline review 																	
2	Senior Management Support	<ul style="list-style-type: none"> This is a key 'make or break' for any planned giving program. Review and assess each element in this category. Use this information to make an overall assessment of the category. Is there a clear vision and mission for the organization that supports the need for a planned giving program? Is there a defined fundraising plan that deliberately integrates planned giving as a distinct component? Does planned giving have clear annual goals measured by new and confirmed expectancies? Are the realized (received) gifts targets reasonable based on a 5 yr historical trend? Does senior management receive monthly reports on these measurements? Are the monthly results measured against the previous year and budgeted goals? Are all expectancy results reported in future and current dollars? (Note: current value calculated from future revenue using estimated mortality of constituency and prevailing discount rate) Are planned giving goals / results logically allocated to each staff 																	
3	Board Position	<ul style="list-style-type: none"> Does the board have a clear vision and mission for the organization that supports the need for a planned giving program? Does the board have a defined fundraising plan that deliberately integrates planned giving as a distinct component? Does the board have clear annual goals measured by new and confirmed expectancies? Are the realized (received) gifts targets reasonable based on a 5 yr historical trend? Does senior management receive monthly reports on these measurements? Are the monthly results measured against the previous year and budgeted goals? Are all expectancy results reported in future and current dollars? (Note: current value calculated from future revenue using estimated mortality of constituency and prevailing discount rate) Are planned giving goals / results logically allocated to each staff 																	
4	Planned Giving Case	<ul style="list-style-type: none"> Does the board have a clear vision and mission for the organization that supports the need for a planned giving program? Does the board have a defined fundraising plan that deliberately integrates planned giving as a distinct component? Does the board have clear annual goals measured by new and confirmed expectancies? Are the realized (received) gifts targets reasonable based on a 5 yr historical trend? Does senior management receive monthly reports on these measurements? Are the monthly results measured against the previous year and budgeted goals? Are all expectancy results reported in future and current dollars? (Note: current value calculated from future revenue using estimated mortality of constituency and prevailing discount rate) Are planned giving goals / results logically allocated to each staff 																	