



YOUR  
PARTNER  
IN PLANNED  
GIVING  
SUCCESS



## Consulting Services

We offer everything you need to start, manage, and improve your planned giving program.

# Consulting Services

Whether you are just starting a planned giving program, or your program has been around for decades, we have everything you need.

## PG Calc's experts will help you:

- Create and manage infrastructure.
- Set goals for success.
- Create marketing strategies.
- Build development officer skills.
- Improve your working practices.
- Close more gifts.

You may lack a formalized planned giving program, but realize that it's something your organization needs. Or, you may have a long-standing planned giving program, but want to increase its momentum. Planned giving for you might be filled with complex gifts or marketing activities with many moving parts. It may be that planned giving is a priority, but you know you could do more.

Every program, regardless of its simplicity or complexity, can use a little help along the way. PG Calc has seen it all, from one-person shops struggling to get off the ground to offices with many gift officers carrying a full agenda of fundraising, programmatic, and organizational challenges.

## Program Evaluation and Strategy

If you want to improve your gift planning efforts, you have to know where you are, what you have, and where you want to go. We can help. Our written evaluations generate actionable advice to:

- Ensure you are properly resourced and organized.
- Improve your work practices.
- Establish achievable metrics and how to achieve them.
- Create best practice marketing strategies.
- Implement marketing techniques that motivate prospects.
- Mine your database to identify your best prospects for your portfolio and target marketing.
- Close more gifts.

Our team immerses itself in your operations. Through a combination of data review, interviews, and observation, we gather what we need to perform a comprehensive evaluation of your program. This review identifies areas that can be modified or enhanced, resulting in a program that is more productive and successful.

## Program Launch

Do you already have a planned giving program? If the answer is not yet, sort of, or we're working on it, you have come to the right place. It is common to find charities that have fundraised for years, but only dabbled, at best, in planned giving. We can pick up wherever you find yourself and build a planned giving program that gets results. To launch, formalize, or restart your gift planning program we would:

- Evaluate program readiness.
- Define appropriate program scope, given your resources.
- Establish your goals and metrics for success.
- Develop policies and budgets.
- Secure board approval.
- Train your staff.
- Create a marketing plan and implementation strategies.

# Consulting Services

How we help you.

Our consulting services take a variety of forms. You can retain us on a monthly basis, work with us to accomplish a specific project, or have us support you on an hourly basis.

- We provide subject matter expertise, tools, and professional leadership to succeed.
- We engage with you on an ongoing basis to guide you and improve your planned giving program.
- If you are a seasoned gift planning officer, we have expert resources for handling complex gifts.
- We go outside of your office – we provide consultation with donors and professional advisors.
- If you have a dormant program, we can provide the infrastructure to formalize its potential.
- We can identify how to reduce your CGA risk and ensure your CGA program is appropriately state compliant.
- We can share simple and sophisticated methods to improve your marketing results.
- We specialize in educating staff and board members on how to identify a planned giving prospect and what to do (and not do).
- PG Calc even offers a qualified appraisal service for donors who need an appraisal to support a charitable deduction of over \$5,000 for the early termination of a planned gift in favor of the charity.



## Why hire us?

The short answer is you will raise more planned gifts with our help. You will have a realistic assessment of your potential to raise planned gifts. We will show you how to use your resources effectively with the greatest return on investment. Your organization's leadership will have greater respect for the role planned giving plays in your advancement effort.

- Our clients have increased revenue and bequest notifications.
- We increase collaboration with major gift staff. New metrics, better training of MGOs, and the realization that collaboration results in bigger gifts foster this cooperation.
- We add value. Many of the gift officers we work with are more confident in their roles and will consider and accept more complex and valuable assets than before we started working with them.

# Praise for PG Calc's *Consulting Services*

“Vanderbilt University Medical Center (VUMC) hired PG Calc consultants on retainer in 2019. They work with planned giving staff, marketing, operations, and leadership to strengthen the planned giving effort at VUMC.

PG Calc developed and delivered a donor/patient survey that allowed us to learn more about our planned giving partners, as they shared their stories, passions, and interests in engaging more with VUMC development. Their survey responses provided invaluable information and significantly increased our Legacy Circle membership.”

— Christopher J Collins  
*Vice President for Development, Vanderbilt University Medical Center*

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“Jeff Lydenberg... and the entire team at PG Calc offer invaluable support to me and my Development colleagues at Mass General Hospital. Their work with us over the last many years as consultants has been wide-ranging and includes, but has not been limited to, assisting leadership in long range planning, working hand-in-hand to build program plans and providing guidance and advice in our work with donors and their advisors... Their expertise, steady counsel and creativity have been instrumental in the evolution of our program on every front. The PG Calc staff are responsive, collaborative and great champions for the organizations with which they work. We at Mass General consider ourselves so fortunate to have PG Calc's partnership in our daily work.”

— Elizabeth A. Murphy  
*Senior Director, Planned Giving  
Massachusetts General Hospital Development Office*