

**National Committee on Planned Giving
2007 Assembly of Delegates
Resources for Do-It-Yourself Council Programming**

Know Your Members

Survey your council members using the web-based questionnaire in the Council Leadership Resources Center. Results of the survey can help you:

- prioritize programming topics based on member demographics and interests
- identify speakers (including inviting all council members to volunteer as speakers)
- understand demographics of the individuals and organizations in your council to help target focus group discussions and diversify panels
- identify organizations competing for your members' attention and consider ways to cooperate with them

Use the Syllabus for Gift Planners

The Syllabus is a comprehensive outline of the knowledge and skills gift planners should have. Use it as an outline for your programming year and plan presentations that cover all major areas. Note that the Syllabus is the basis for the programming questions on the council members survey mentioned above. You can find the complete Syllabus in the Member Directory/Services section at www.ncpg.org.

Review Web Sites of Other Planned Giving Councils

Most councils list information about their most recent or upcoming programs on their web sites. The councils listed below also maintain multi-year archives of past program topics. These archives are a great source of ideas for program topics and speakers, with the opportunity to contact leaders from the other councils to see how a program was received by their group. All planned giving councils that have web sites can be accessed through links at www.ncpg.org/councils/council_websites.asp?section=12

- Planned Giving Group of New England (www.pggne.org/programarchive.html)
- National Capital Gift Planning Council (www.ncgpc.org/prosched.html)
- Pittsburgh Planned Giving Council (www.ppgc.net/meetings.php)
- Planned Giving Council of Miami-Dade County
(www.plannedgivingmiami.org/programs_events/programs_events_past.html)
- Planned Giving Round Table of Southern California
(www.pgrtsc.org/PDF/HistoryofSpeakers.doc)
- Planned Giving Group of Connecticut
(www.pggct.org/pdf/PGGCTpastProgramsSpeakers.pdf)

Case Studies

Assemble past council presidents or current board members to analyze a case study.
Encourage audience participation.

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- search for “case study” in the NCPG Online Library, or for the specific topic that you’d like to cover. Many articles include scenarios that can be expanded into case studies, although the authors have not specifically labeled them as case studies.
- develop case studies based on local organizations’ experiences implementing the NCPG Guidelines for Reporting and Counting Charitable Gifts or the NCPG Valuation Standards for Charitable Planned Gifts. Both of these documents are in the Ethics & Standards section at www.ncpg.org.

Planned Giving Design Center www.pgdc.com/usa/

- click on Case Studies in the left margin of the home page

Planned Giving Today

- “What’s Wrong with this Gift?” feature in every issue

Association of Fundraising Professionals

- Emerging Issues in the Ethics Section at www.afpnet.org

Research Update

Ask a board member who has an interest in research and trends to review recent studies related to planned gifts and present practical highlights.

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Journal articles in the NCPG Online Library, including:

Successful Bequest Fundraising: Lessons from Research

Authors: Sargeant, Adrian; Routley, Claire; Scaife, Wendy

Source: *Journal of Gift Planning*, Volume 11, Number 1, March 2007

Results of NCPG research projects, including the Survey of Charitable IRA Distributions and the Gift Planner Profile in the Resources section at www.ncpg.org

- www.ncpg.org/resources/research.asp?section=5

Research Links in the Member Directory/Services section at www.ncpg.org

(many of the resources listed below can be accessed via links from this section)

- www.ncpg.org/members/research.asp?section=4

National Center for Charitable Statistics (Urban Institute)

- <http://nccs.urban.org/>

Center on Wealth and Philanthropy (Boston College)

- <http://www.bc.edu/research/cwp/>

IRS, Statistics of Income Bulletins

- www.irs.gov/taxstats/index.html

Indiana University Center on Philanthropy

- www.philanthropy.iupui.edu/Research/

Best Practices Focus Group

Use the council meeting as a focus group (or divide into small groups) to identify best practices in the following areas. Prepare questions for discussion and produce a report of findings for distribution at a council meeting or in a newsletter, or on your web site.

- bequest/legacy society development
- gift planner performance measurement
- tracking and use of management metrics related to gift planning
- interaction of planned and major gifts functions
- relationship-building with donor advisors

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- search the NCPG Online Library for articles related to the topics you will discuss. These articles may suggest questions that will guide focus group discussion.
- call Barbara Yeager to request a localized report of the Gift Planner Profile 5 findings (available in 4th quarter 2007) and compare national practices with local practices