

## About *The Workbook for Gift Planners*

*The Workbook for Gift Planners* is a compendium of resources provided by the National Committee on Planned Giving. It includes:

- *The Syllabus for Gift Planners*
- *The NCPG Bibliography and Resource Guide*
- *The Model Standards of Practice for the Charitable Gift Planner* and associated commentary
- Other ready-reference materials that will help members of NCPG's planned giving councils access the programs and services of their national organization.

NCPG recommends that you place the pages of the Workbook in a 3-ring binder immediately. The Workbook will be updated periodically as new information becomes available or as additional lists of resources are compiled. Updates will be distributed to all council members with instructions for inserting them into the Workbook.

## About the National Committee on Planned Giving®

The National Committee on Planned Giving was formed in 1988 as a federation of local planned giving councils. NCPG's mission is to facilitate, coordinate and encourage the education and training of the planned giving community, and to facilitate effective communication among the many different professionals in this community.

Members of NCPG-affiliated planned giving councils receive the following benefits:

- educational opportunities delivered via video, audiotape, print and online resources
- discounted registration for the National Conference on Planned Giving
- a network of government relations contacts working in Washington, DC, and around the nation to promote a favorable climate for charitable giving
- statistical information gathered through national survey research
- an opportunity to help raise public awareness of planned giving through the Leave A Legacy program
- a professional standard of ethical behavior and ongoing attention to situations which challenge this standard

NCPG council members automatically receive these national publications\*:

- *Gift Planner Update*: a monthly news bulletin
- *The Journal of Gift Planning*: a quarterly magazine
- *The Workbook for Gift Planners*: a looseleaf educational resource, updated periodically
- *The Directory of Council Members*: an annual directory listing over 10,000 gift planners nationwide

Council members may purchase other publications at reduced prices. Contact NCPG headquarters at (317)269-6274 or visit our web site at [www.ncpg.org](http://www.ncpg.org) for a current order form listing all available publications.

*\* In order to receive benefits from NCPG you must be a member of a council that participates in NCPG's ICDMS database.*

### **About The Syllabus for Gift Planners**

The Syllabus is a study guide for people involved in charitable gift planning. Its purpose is to identify areas of knowledge related to the acquisition and administration of planned gifts. The Syllabus is intended to assist gift planners in identifying subjects requiring additional study, independent educators in revising and expanding their course offerings, professional associations in organizing the gift planning segments of their conferences, and planned giving councils in designing programs and study groups.

Gift Planners should seek a general understanding of all subjects listed and an in-depth knowledge of those that most directly affect service to their donors, clients and charitable organizations. To this end, it is recommended that gift planners consult the Syllabus to plan a program of reading, seminars, conferences and other activities that will fill gaps in their knowledge. Private vendors, professional associations and planned giving councils can facilitate this learning process by coordinating their seminars and course offerings with the areas of knowledge as outlined in the Syllabus.

Although the Syllabus is devoted largely to the technical aspects of gift planning, humanistic concerns are equally important. While technical subjects are the planners' "tool kit," the heart of planned giving is in serving the needs of people who are motivated by a sincere desire to support the

purposes of a charitable organization. To succeed, gift planners must hone their communication skills, including the ability to speak credibly for their organizations and the ability to listen carefully to their donors. Technical expertise should reinforce the gift planner's commitment to providing the highest level of customer service to his or her donors or clients.

## Using the Syllabus

The Syllabus has been coded in order to assist both gift planners and independent educators in identifying and selecting subject areas. The codes indicate general subject divisions and more specific areas of concentration. For example:

- A seminar covering life income plans including specifically gift annuities, charitable remainder trusts, and pooled income funds would be coded NCPG 3.01.03-3.01.05.
- A seminar covering all giving methods would be coded NCPG 3.01.
- A seminar sufficiently comprehensive to encompass the entire unit on "Understanding and Designing Charitable Gifts" would be coded NCPG 3.00.

Gift planners are encouraged to begin with a review of the entire Syllabus in order to identify areas in which they feel well-informed and those which require further study. Thereafter, they may develop their own program of training and self-study, using the Syllabus to chart their continuing education.

## Evolution of the Syllabus

The Syllabus is intended to be a living document that will change with the needs of the profession. Updates will be distributed to all council members for insertion *in The Workbook for Gift Planners*. Users of the Syllabus are invited to submit comments or to recommend revisions at any time. Contact NCPG's Education Manager at (317)269-6274 to discuss the Syllabus or any other section of the Workbook.

### ***The NCPG Bibliography and Resource Guide***

A list of print resources follows each section of the Syllabus for Gift Planners. Each title has been coded to indicate the section(s) of the Syllabus addressed. As much publication information as possible has been included for each title. These resources should be obtained directly from the publisher or from a library or bookstore. NCPG does not fill orders for these titles, nor does it endorse or recommend any particular title.

A section of general resources follows the Syllabus. Titles listed here address all sections of the Syllabus. Future sections may be added to provide information on nonprint resources. These will be distributed as they are compiled. A listing of other types of resources, including software and promotional publications, can be found in the Business Pages section of the annual *NCPG Directory of Council Members*.

### ***The Model Standards of Practice for the Charitable Gift Planner***

The Model Standards define the ethical practice of gift planning. They are intended to apply to gift planners who are employed by charitable organizations and also to donor advisors who work in the many for-profit professions involved in the gift planning process.

NCPG-affiliated planned giving councils are asked to ratify the Model Standards as a condition of their affiliation with the national organization. Many councils also ask their individual members to formally endorse the standards. A national Ethics Committee exists to provide advice and commentary regarding the standards. This committee can serve as a sounding board in cases where the standards appear to have been violated. However, councils are encouraged to address such issues locally whenever possible.