

## Planned Giving Readiness Questionnaire

This questionnaire will help determine if our nonprofit is ready to pursue an active planned giving program.

In the spaces provided, indicate the degree to which you agree with the following statements, on a scale between 1 and 10, with 1 being "I disagree completely," and 10 being "I agree completely."

1. We have a mission statement. \_\_\_\_\_
2. Our mission will still be relevant in 50-100 years. \_\_\_\_\_
3. We have a compelling need for charitable support to sustain our mission. \_\_\_\_\_
4. We have an effective strategic plan to implement our mission. \_\_\_\_\_
5. Our staff and board leadership are interested in pursuing long-term support. \_\_\_\_\_
6. We are financially stable. \_\_\_\_\_
7. We pursue endowments to ensure our long-term future. \_\_\_\_\_
8. We regularly garner support from individuals. \_\_\_\_\_
9. We have a group of loyal donors who have supported us in the recent past. \_\_\_\_\_
10. We have 1 hour per week for the next year to invest in planned giving. \_\_\_\_\_

**Total Score:** \_\_\_\_\_

Please total your score on this questionnaire and return it to me. I will add up everyone's scores to assess our organization's positioning in reference to pursuing a planned giving program.

If our score is more than 50, we are **well positioned**. If the score is 30-50, we have **some work to do**, but are still able to pursue planned giving. If our score is less than 30, **we have some more work to do** on fundamentals.

The results of this questionnaire will help us focus on key organizational issues so we start building our planned giving program right.

Thank you for your help.