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## **Gift Planning Assessment & Strategic Plan**

### **Does This Sound Like You?**

Your organization has the basics in place—but what's next? How can you take your program to the next level? Or perhaps, knowing the importance of planned gifts, your organization wants to launch a successful program. Where do you begin? And how can you most wisely use your valuable resources?

### **Expert Guidance**

With more than 45 years of experience, The Stelter Company is a leader in the gift planning industry. Stelter's Gift Planning Assessment & Strategic Plan service will help you identify priorities and focus energy and resources. After a thorough review of your current development program, you will have a road map in hand as to how to best implement a gift planning program or fine-tune your current program. Ultimately, you will receive a step-by-step strategic plan that your organization can implement to achieve success.

### **Assessment Service Features:**

- ❖ Audit of your current operations, including fundraising environment, board involvement, staffing, policies and procedures, software programs, fundraising and stewardship programs, and more.
- ❖ Recommendations with regard to the status of your current operations listed above, as well as suggested marketing, donor cultivation and stewardship efforts.
- ❖ A detailed two-year budget and timeline to assist your organization in prioritizing recommendations.
- ❖ A comprehensive appendix including samples, reference materials and more.

### **Find Out More**

To discuss your unique situation and how Stelter can help your organization strengthen its gift planning program, call (800) 331-6881.

**This service is conducted by Suzanne Mineck.** Suzanne is the planned giving consultant for The Stelter Company. Her extensive career in the field of development—including planned giving, major gifts and marketing—has been gathered from organizations ranging widely in size, mission and sophistication. Prior to joining Stelter, Suzanne was the senior director of gift planning for St. Jude Children's Research Hospital in Memphis, Tenn. At St. Jude, Suzanne managed the Major Gifts and Foundation departments, determining strategic direction and overseeing major prospect research, development and marketing. She has also held positions with The American Cancer Society, The University of Iowa, The University of Memphis and Hutchison School.