



**Best practices for gift planning programs that are growing, pipeline-focused and sustained over time.**

**Q: Why were the NSGPS™ developed?**

A: Successful gift planning programs can weather changing conditions and yield long-term benefits for donors and charitable organizations. The National Standards for Gift Planning Success describe the fundamental best practices of a well-constructed, sustainable gift planning effort.

**Q: How were the NSGPS™ developed?**

A: A task force of gift planners with experience in a wide variety of gift planning programs drafted the standards. They were refined by the CGP Leadership Institute and other volunteer leaders who have many years of experience as fundraisers, charitable planners and managers of gift planning programs.

**Q: How are the NSGPS™ organized?**

There are sixteen standards divided into three general categories. Each standard includes a statement of the best practice, a set of indicators that show the practice is in operation, and links to resources that support development of the best practice.

## Support from the Top

**Create policies, plans and metrics that encourage long-term investment in gift planning.**

**STANDARD 1** The nonprofit has a current organizational strategic plan with a powerful, compelling vision for the future.

**STANDARD 2** The nonprofit has a strong internal business case for gift planning embraced by management and Board.

**STANDARD 3** Each member of the nonprofit's management team is committed to relationship-based, collaborative fundraising and sees gift planning as an integral part of the donor experience across all lines of fundraising.

**STANDARD 4** The nonprofit has clear policies to manage risk and ensure accountability to donors and the nonprofit and the public.

**STANDARD 5** Management sets clear and realistic goals, strategies, and tactics that are designed to encourage and recognize collaboration across all lines of fundraising.

**STANDARD 6** The nonprofit has fundraising metrics for individual staff and program focusing on activities and outcomes that drive success.

**STANDARD 7** The development team has an appropriate budget for staff, administrative support, marketing, travel, training, stewardship, and advisor cultivation for its size, structure, and goals.

## Ability and Capacity to Execute

**Deploy people and data strategically to reach the right donors.**

**STANDARD 8** The nonprofit prioritizes disciplined, comprehensive donor data management.

**STANDARD 9** The nonprofit has an active prospect management process to keep donor portfolios right-sized and current and to move donors through the identification, qualification, cultivation, solicitation, and stewardship cycle.

**STANDARD 10** The development staff has discipline and accountability around filing call reports and other forms of donor engagement.

**STANDARD 11** The nonprofit has qualified staff in place to drive and support the gift planning process.

## Donor-Centric Engagement and Management

**Connect supporters to your mission and create transformational donor experiences.**

**STANDARD 12** The nonprofit has a compelling, urgent, visionary case for donor near-term and long-term organizational support.

**STANDARD 13** All donors and prospects are offered timely, accurate gift planning information to ethically maximize the donor's charitable impact and personal benefit.

**STANDARD 14** The nonprofit has a robust, well-executed stewardship plan across all lines of fundraising focused on engaging donors in a meaningful way, building long-term donor relationships and maintaining a high donor retention rate.

**STANDARD 15** The nonprofit integrates gift planning messaging in all its marketing, and all marketing and messaging position donors as partners/investors in mission and clearly acknowledges the donor's role in the nonprofit's mission success.

**STANDARD 16** The nonprofit has a donor-centric culture that meets the needs of each donor.