

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 average score is over 50, we are **well positioned**. If the average score is 30-50, we have **some work to do**, but are still able to pursue planned giving. If our average score is under 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.