Agency “Time” & Technical Factors of PG

5% of agency’s time

Your PG Office’s Responsibilities

95% of the work

“Your PG Office”

Agency Contact ED/DD

TCF PG Program TAG

Agency & PG Program Management
- Agency & PG Program Management
- Communications & Marketing
- Donor Interviews & Gift Plan Design
- Donor Case Management
- PG Program Administration
- Legacy Society & Matured Gift Administration

- Strat Plan
- Gant Chart
- Marketing Plan
- Monthly Mtgs
- Integration
- Total Fund Dev
- Brochures
- Articles
- Web info
- Events/Seminars
- Letters
- Marketing Materials
- Presentations
- Interviews
- Analysis
- Plan Design
- Allied Professional
- Total Fund Dev
- Scheduling
- Donor Follow-up
- Coordinate w/ Allied Professional
- Gift calculation
- Agency/Donor / AP contact
- Work-in-progress
- Gift calculation
- Reporting
- Measuring ROI
- Future/Present Value
- Gift Forecasting
- Gift Reporting
- Branding
- Recognition Society
- Communication
- Events
- Matured Gift Administration

Materials
- AP contact
- Work-in-progress