



Planned Giving Best Practices: A Benchmarking Study



Date: December 19, 2013
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Vice President, Consulting

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Marketing Consultant





What is working best in the real world?

- Relationship between planned and major giving
- Planned giving staffing and budgeting
- Marketing, recognition, and stewardship
- How performance in each of these areas correlates with planned giving dollars realized

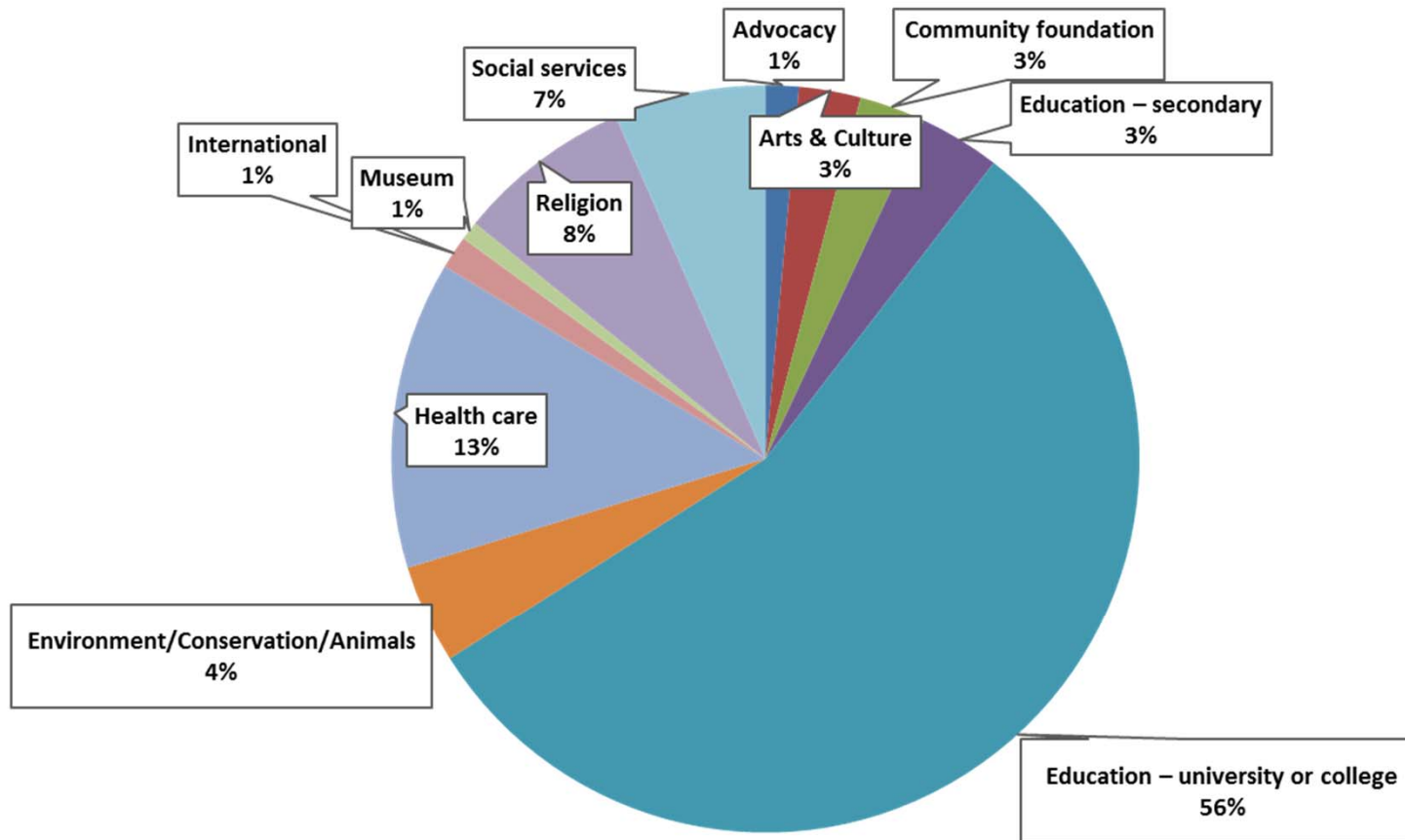


Survey Respondents

- 2,200 individuals - 310 organizations
- 495 responses (23% response rate)
- Colleges & universities accounted for 56%
- Healthcare accounted for 13%
- Other industries accounted for less than 10% each

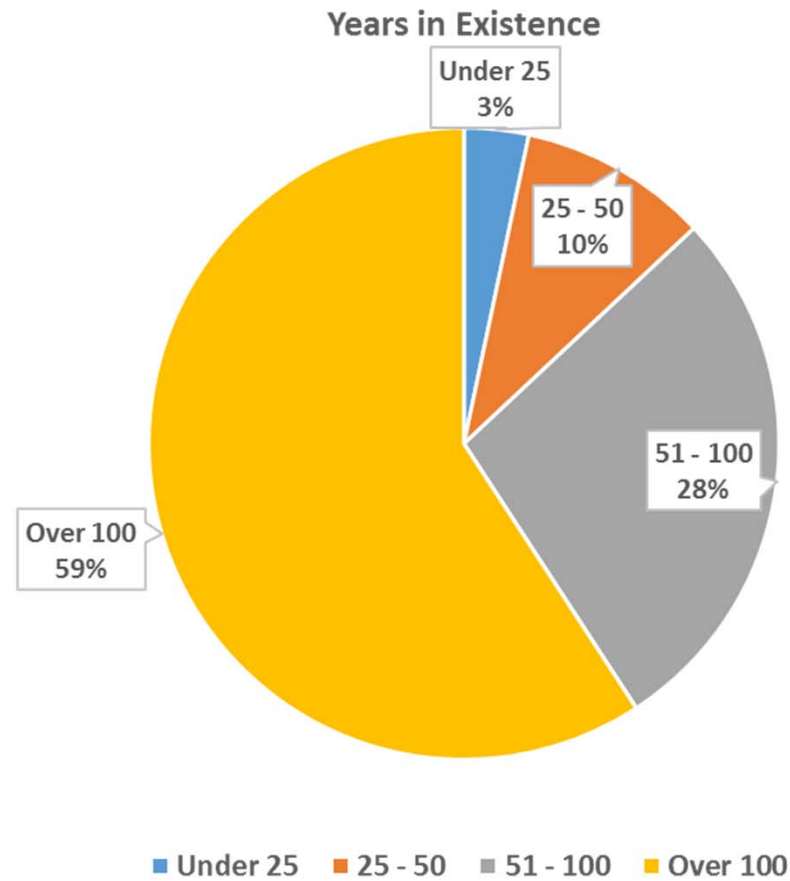


Survey Respondents





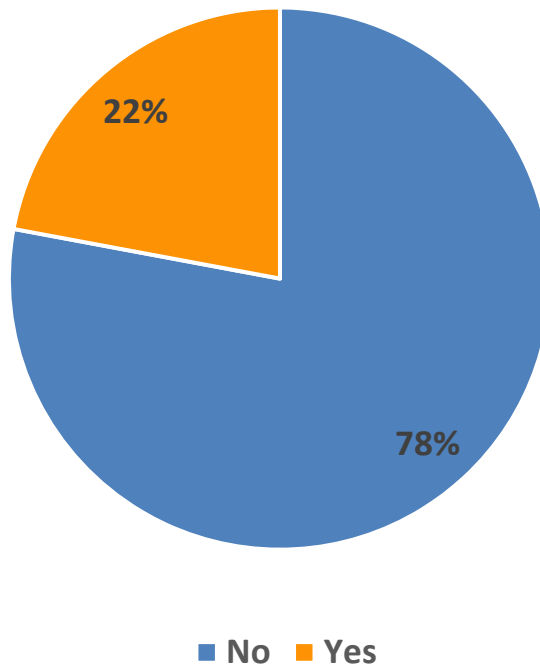
Survey Respondents





Volunteer Leadership

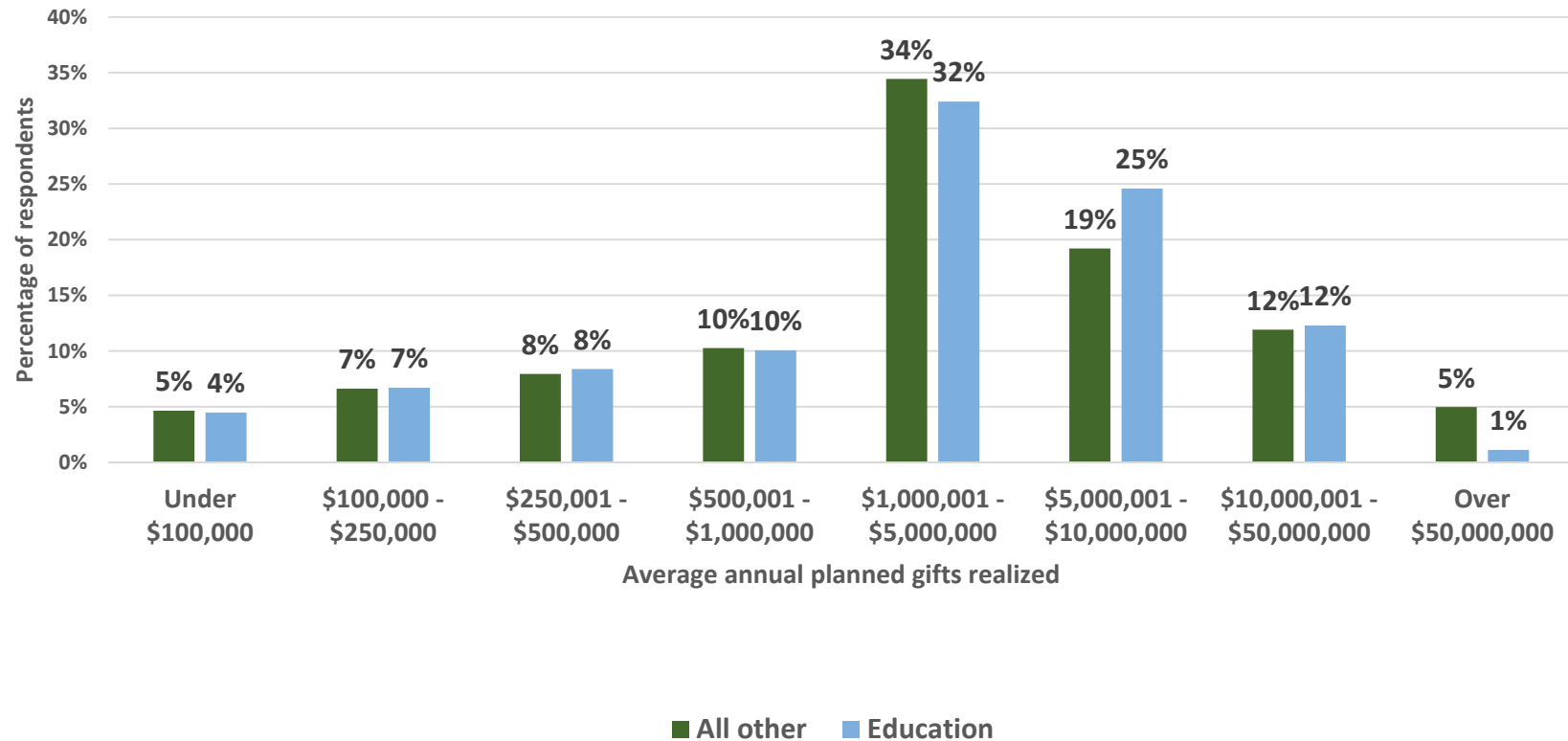
Are board members expected to make a planned gift?





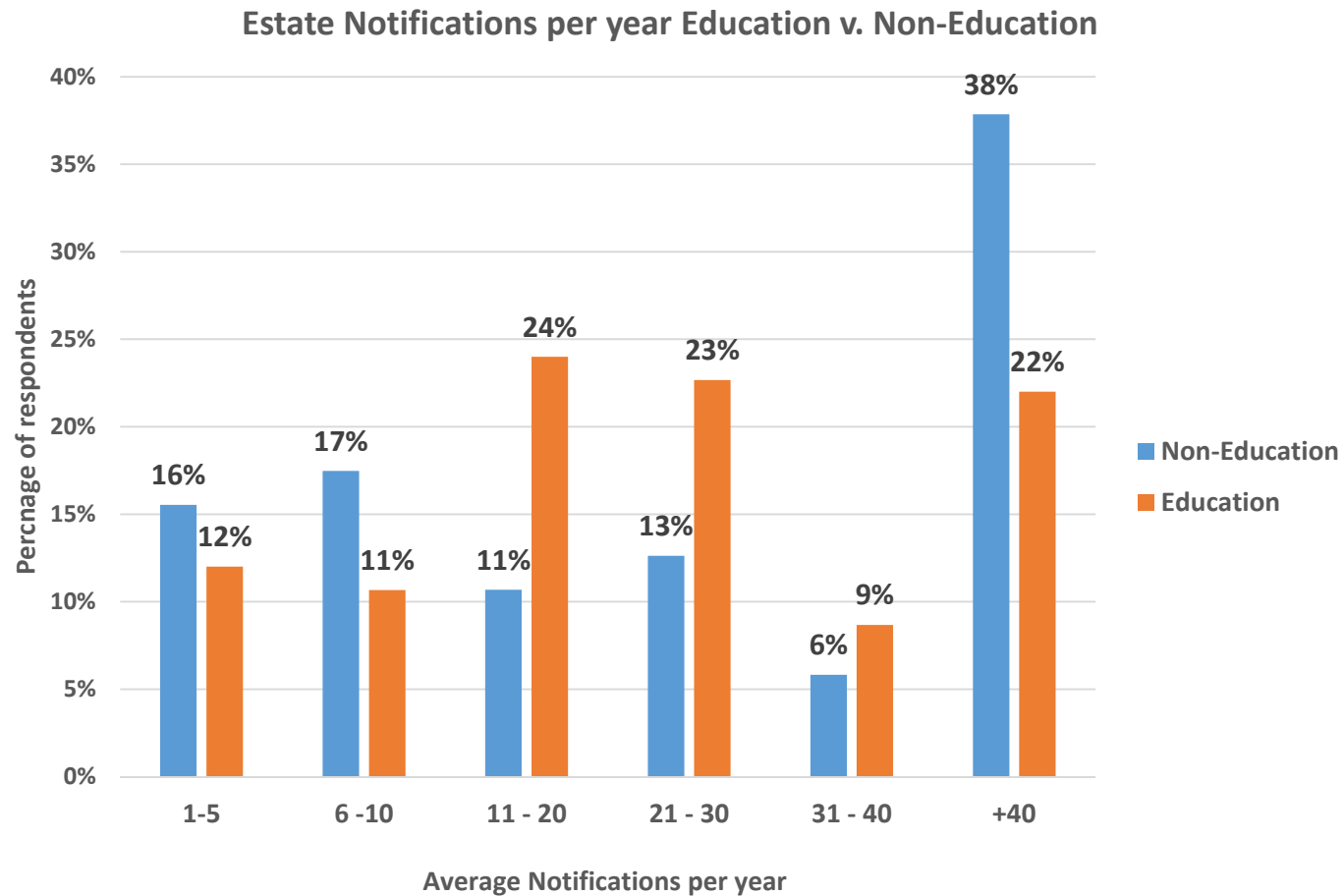
Does industry matter?

Education compared to Non-education respondents





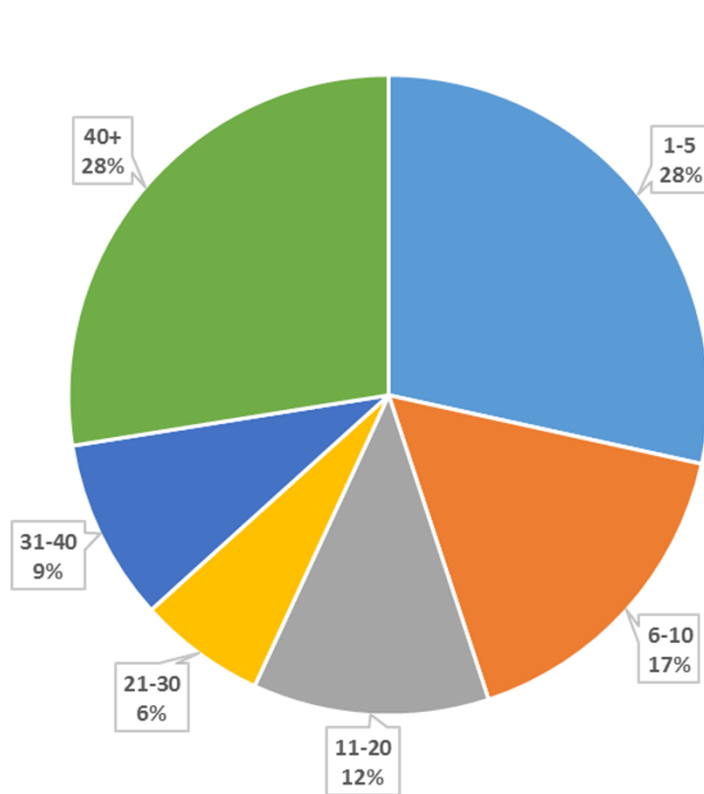
Does industry matter? Bequests



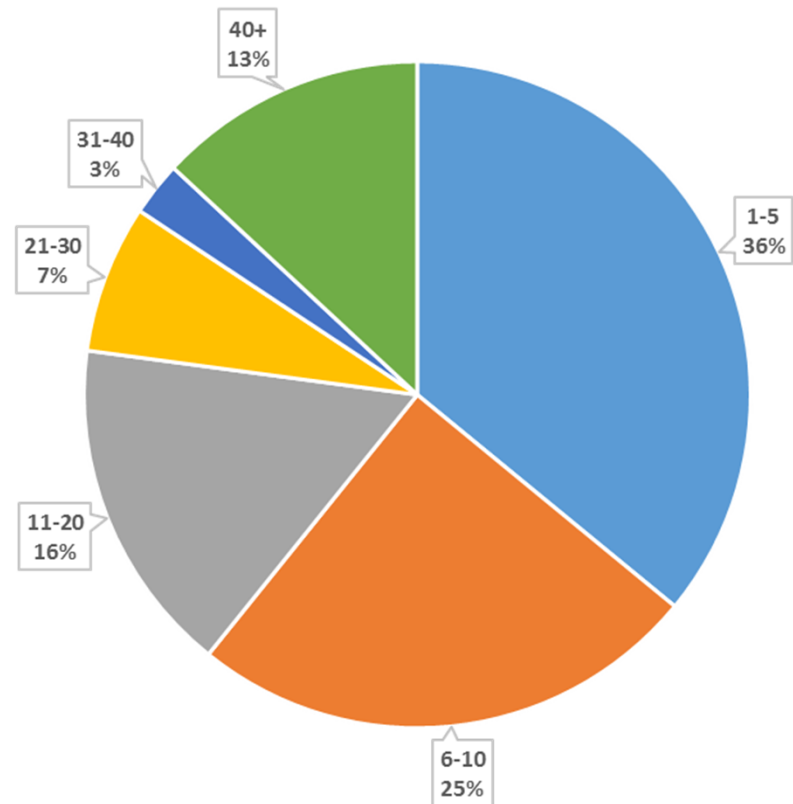


Does industry matter? Gift Annuities

Average annuity volume among non-education respondents

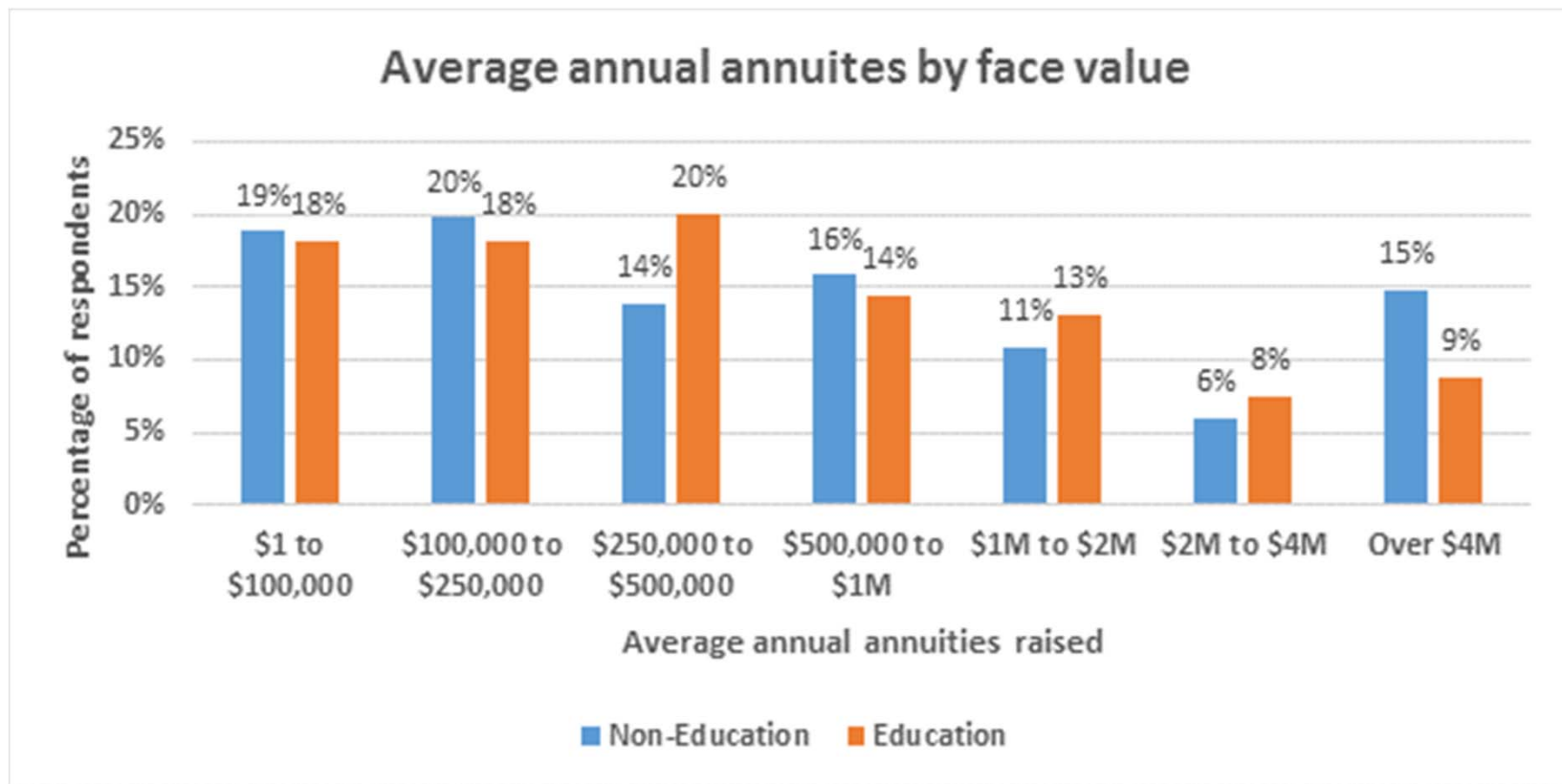


Average annuity volume among education respondents





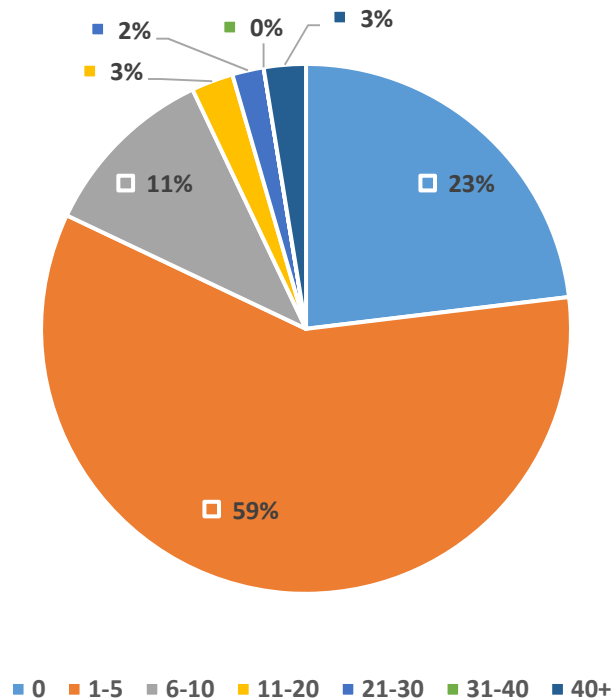
Does industry matter? Gift Annuities



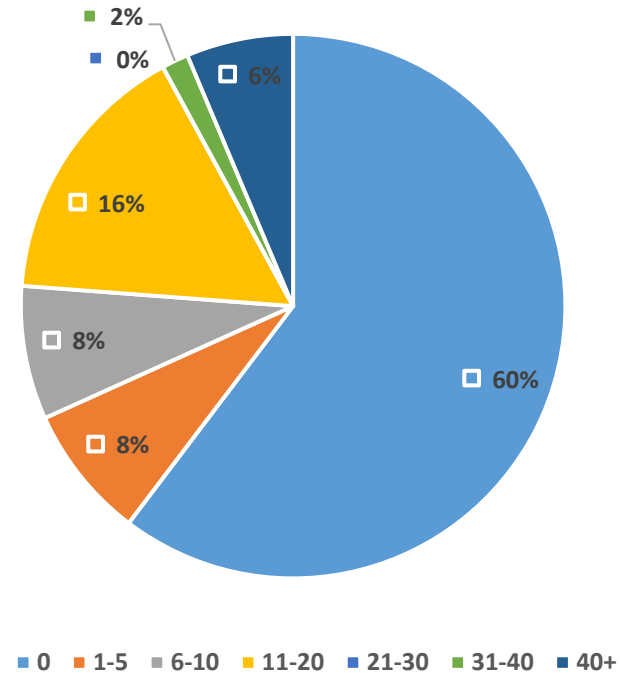


Does industry matter? Remainder Trusts

CRTs among Education Respondents

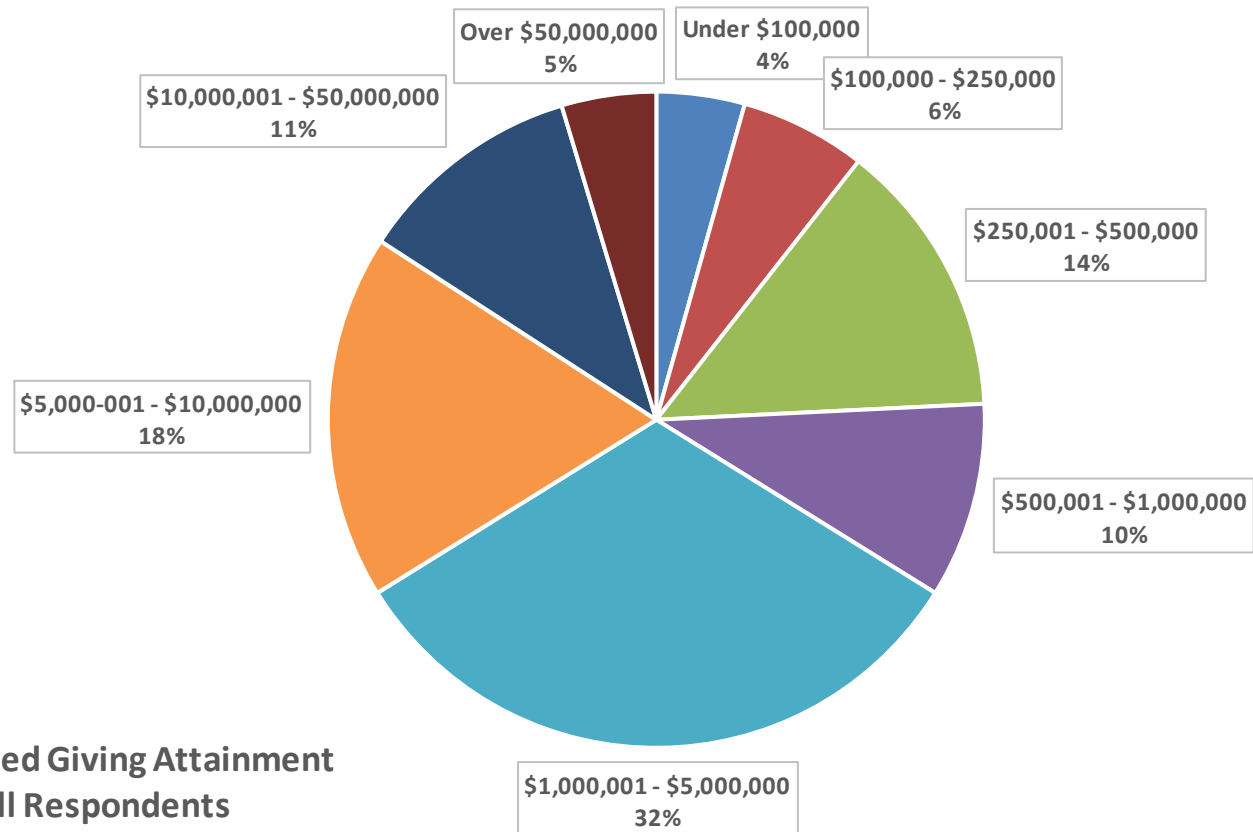


CRTs among Non-Education Respondents





Planned Giving Revenue Attainment

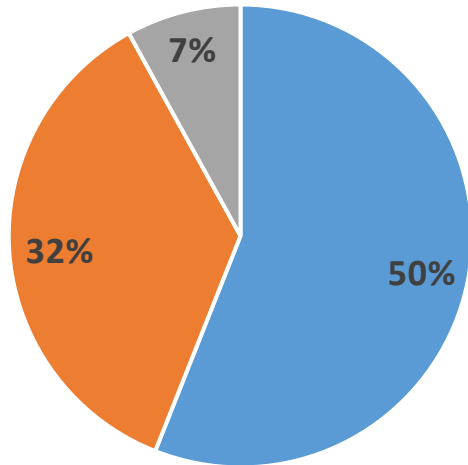


Total Planned Giving Attainment
Of all Respondents

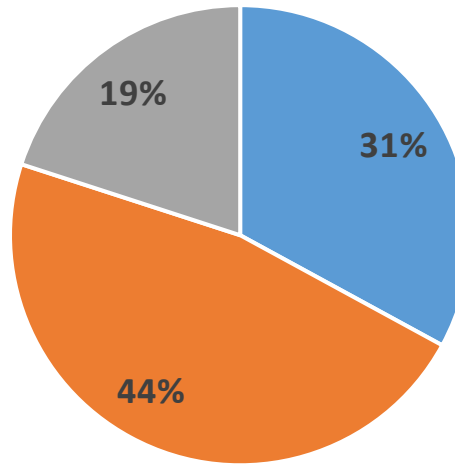


Planned Giving Revenue Attainment

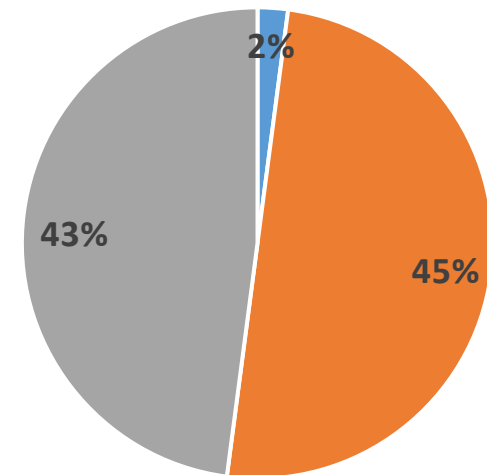
**Planned Giving Realized
\$500,000 to \$1,000,000**



**Planned Giving Realized
\$1,000,001 to \$5,000,000**



**Planned Giving
Realized \$5,000,001 to
\$10,000,000**



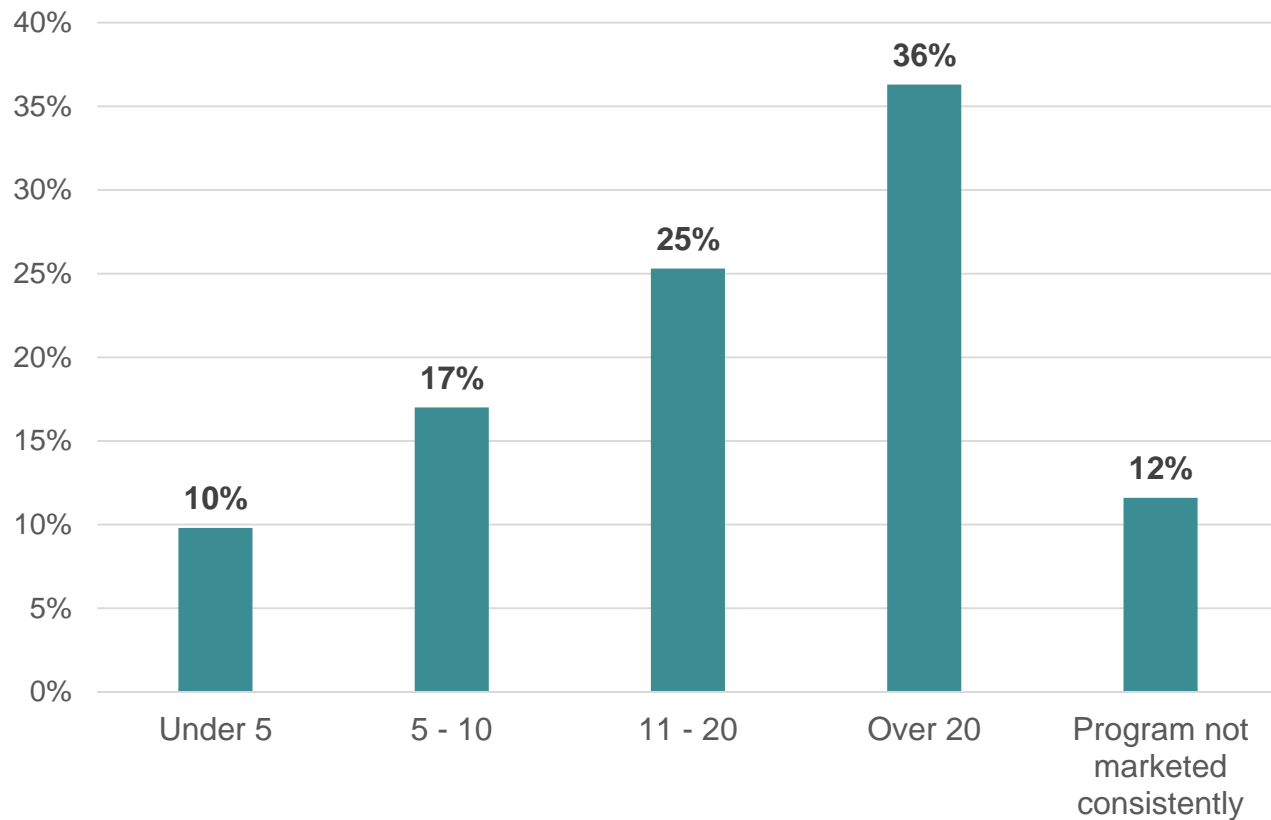
Total Fundraising Attainment:

- \$1,000,000-\$15,000,000
- \$15,000,000-\$75,000,000
- \$75,000,000-\$250,000,000



Marketing Planned Gifts

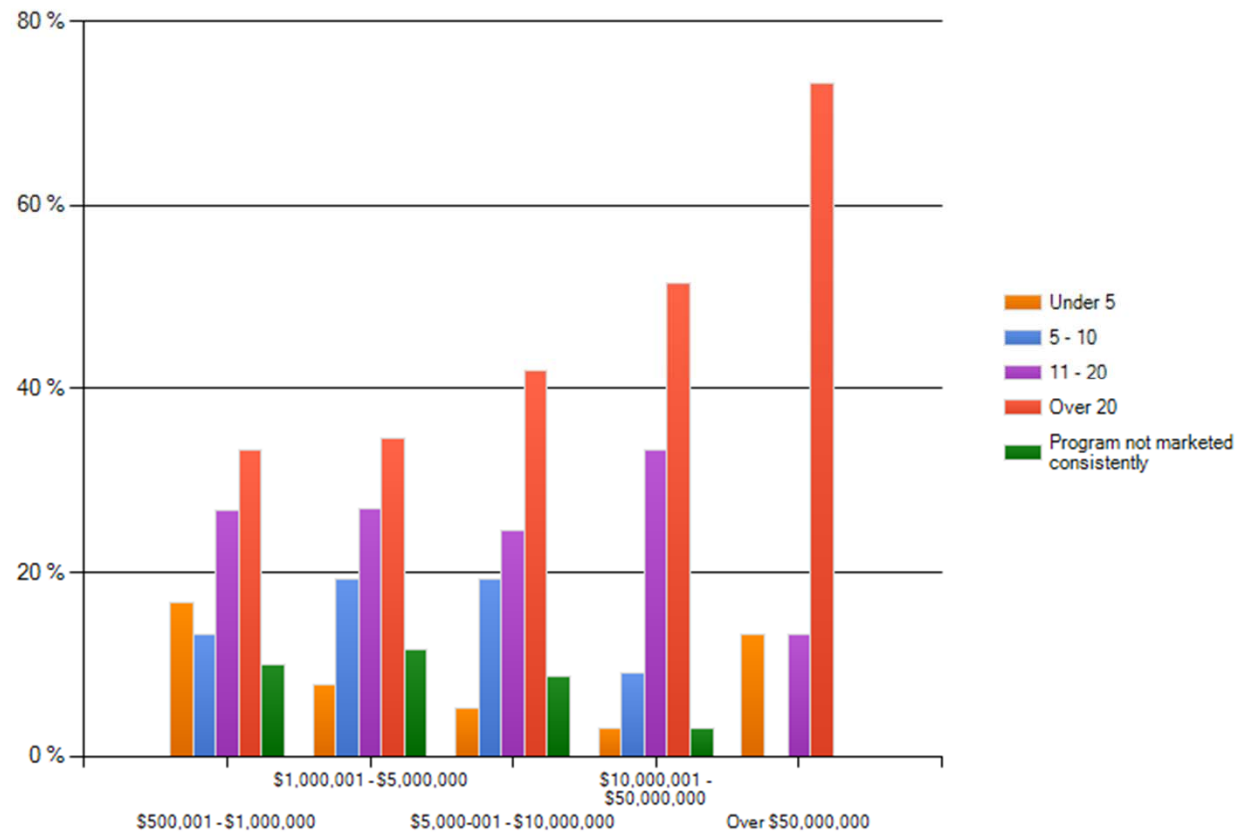
Length of time actively marketing planned gifts





Marketing Planned Gifts

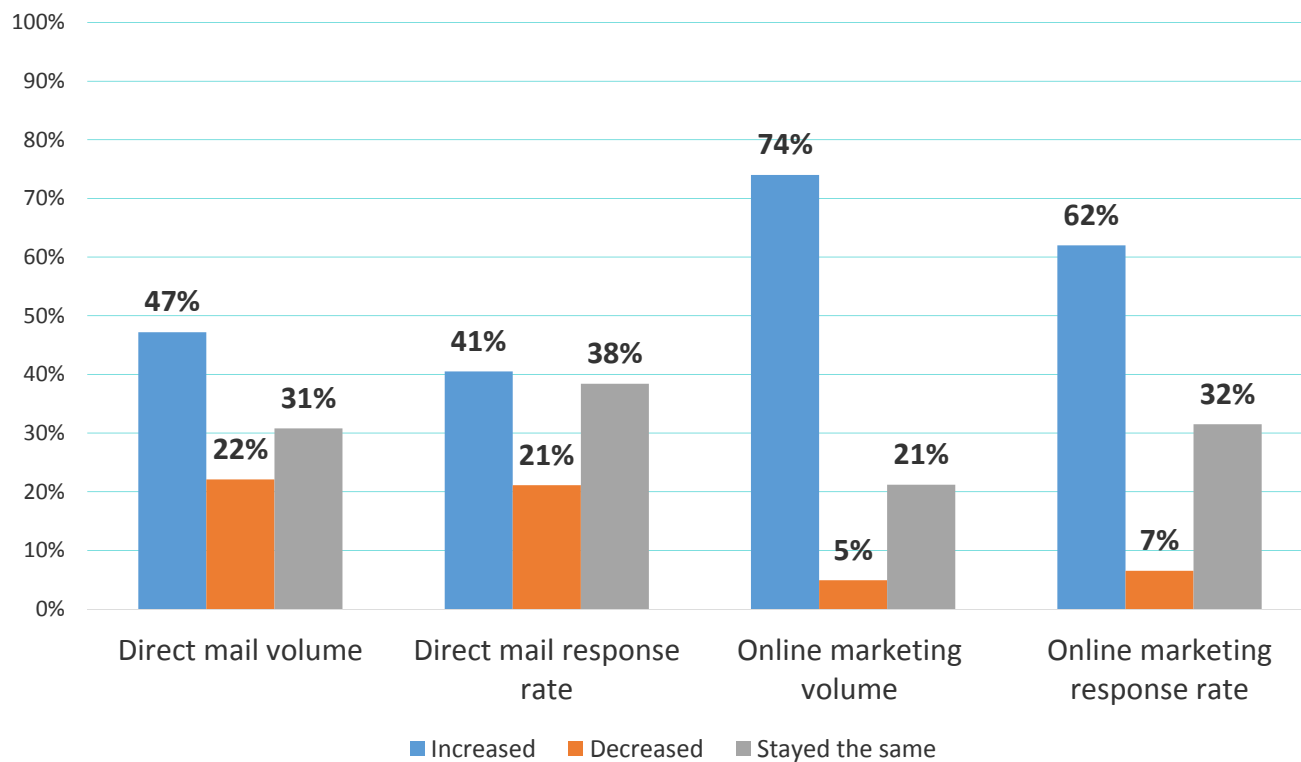
How long has your organization been actively marketing planned gifts?





Marketing Planned Gifts

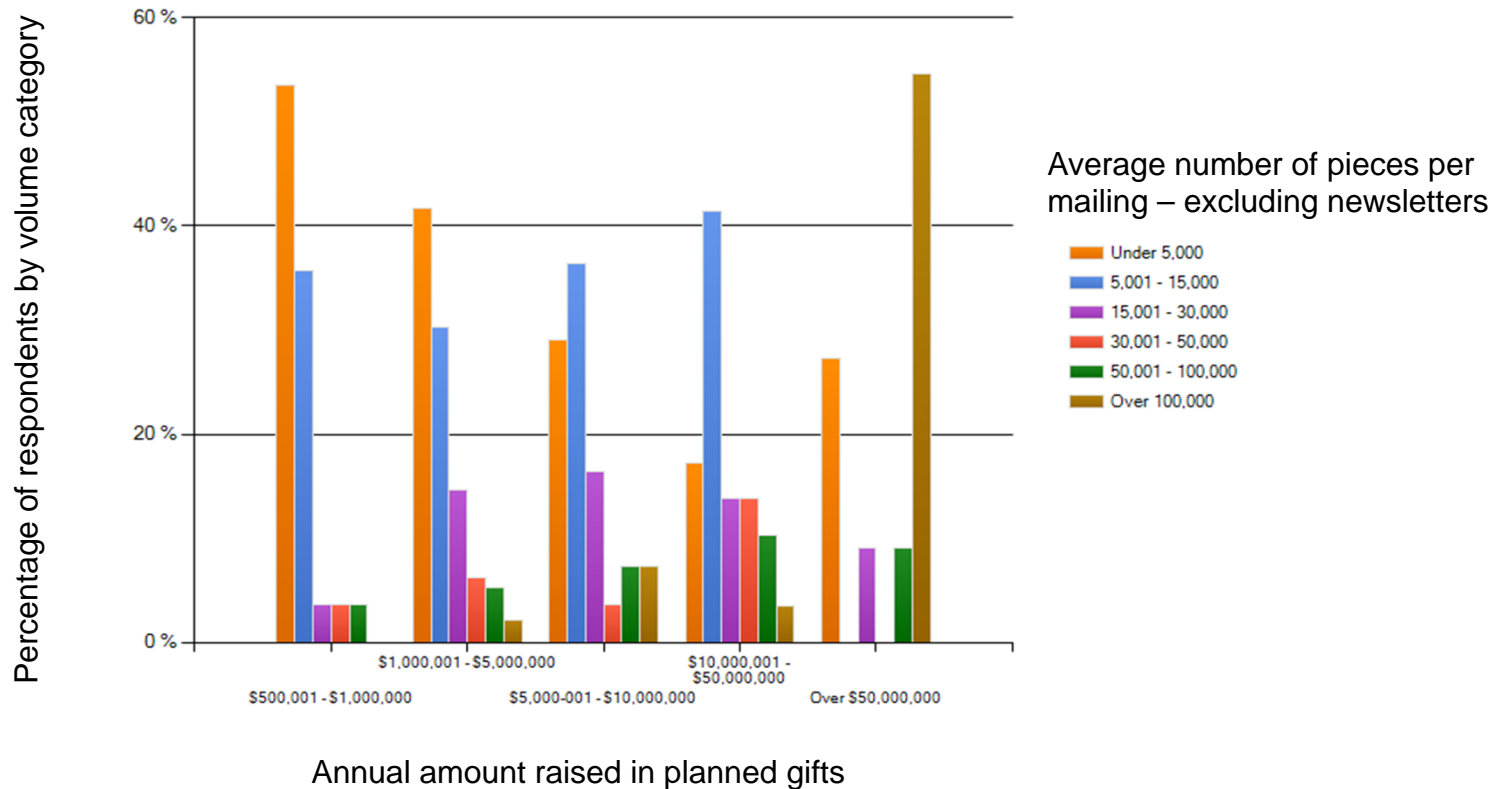
How has your organization's planned giving marketing changed over the last three years?





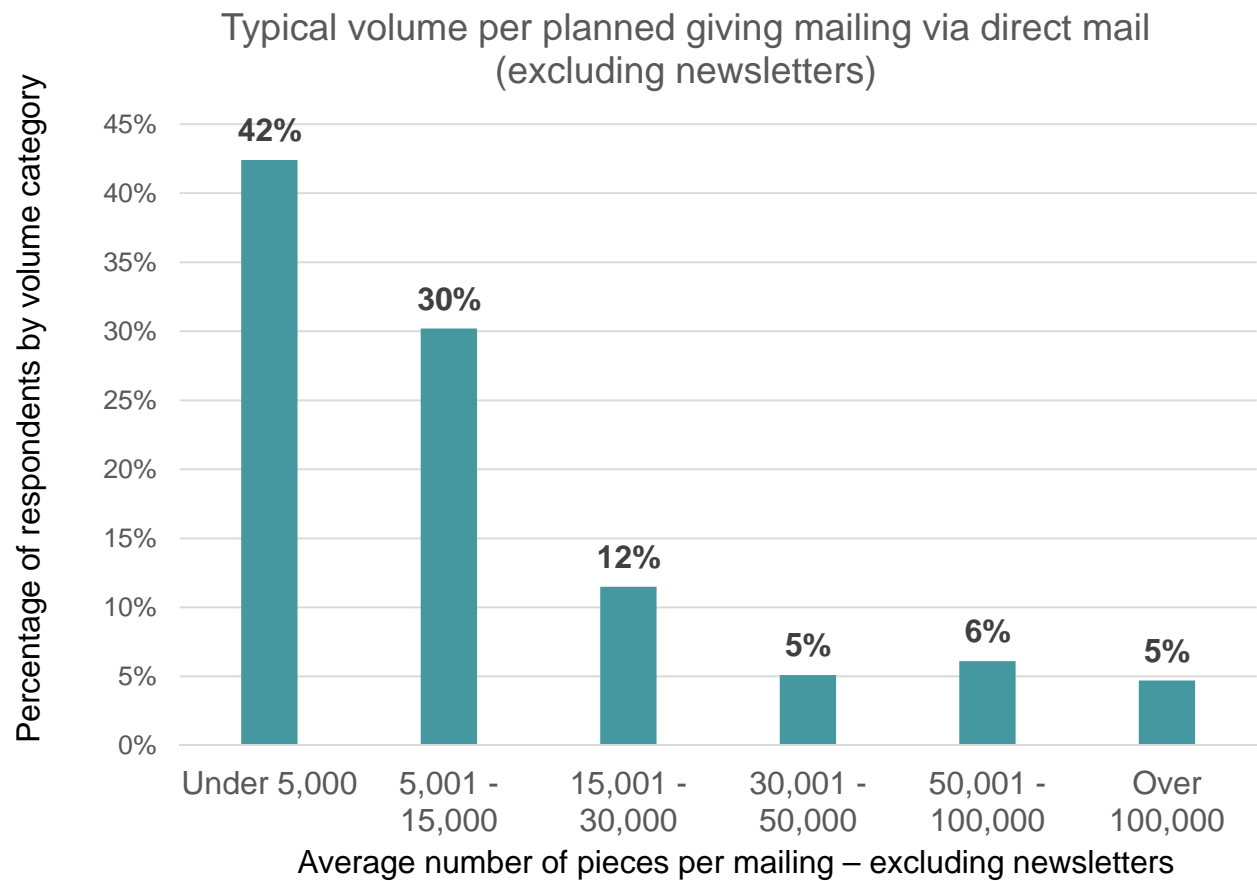
Marketing Planned Gifts

Excluding newsletters, what is your organization's typical volume (number of pieces) per planned giving mailing via direct mail?





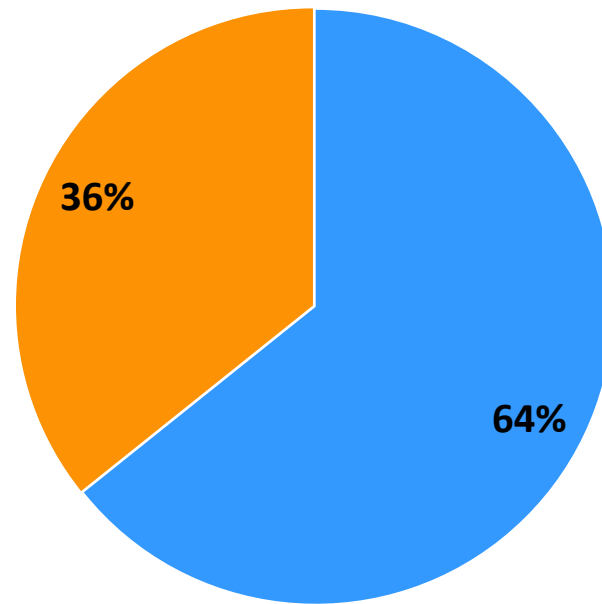
Marketing Planned Gifts





Marketing Planned Gifts

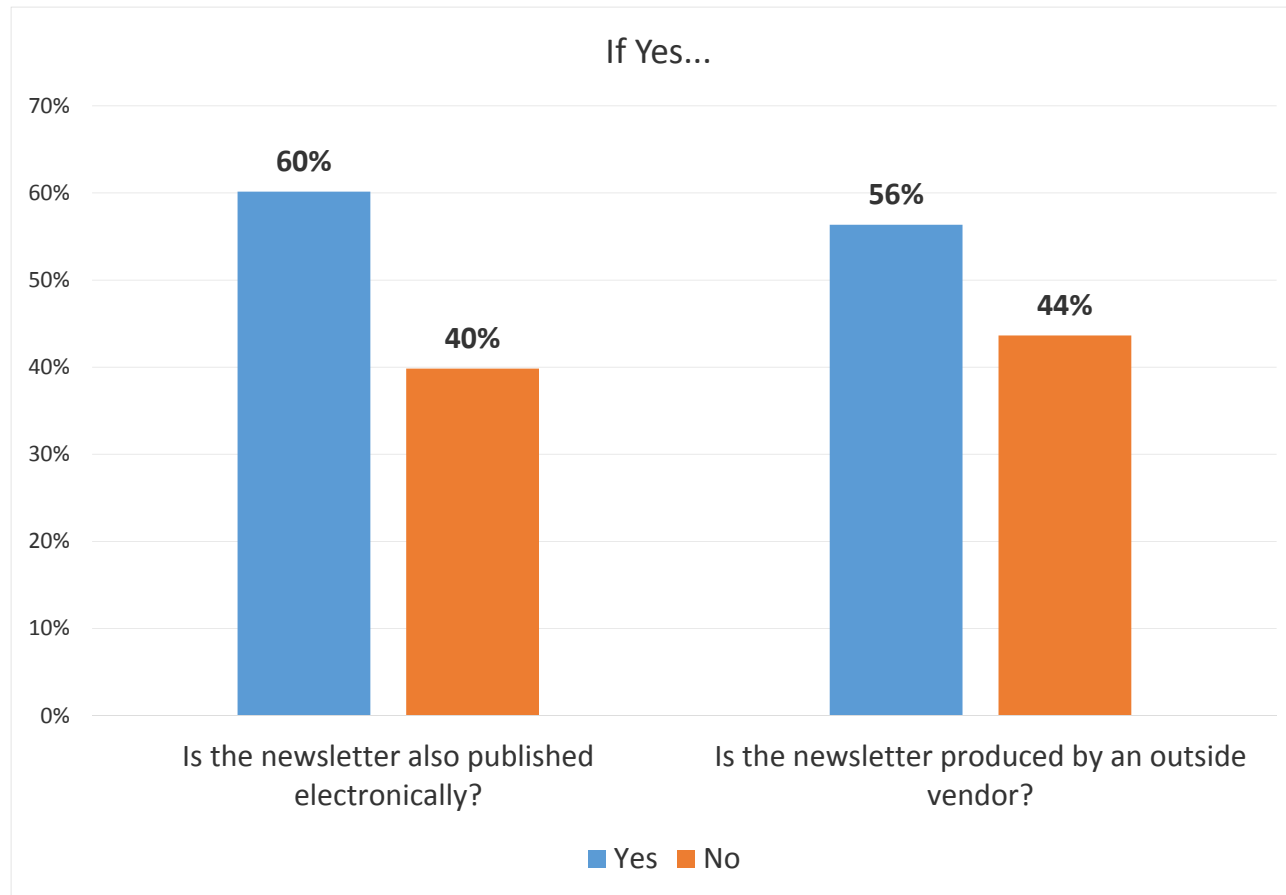
Does your organization publish a print planned giving newsletter



■ Yes ■ No



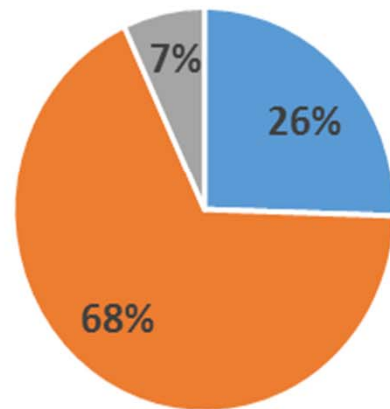
Marketing Planned Gifts





Marketing Planned Gifts

Organizations using social media to promote planned giving



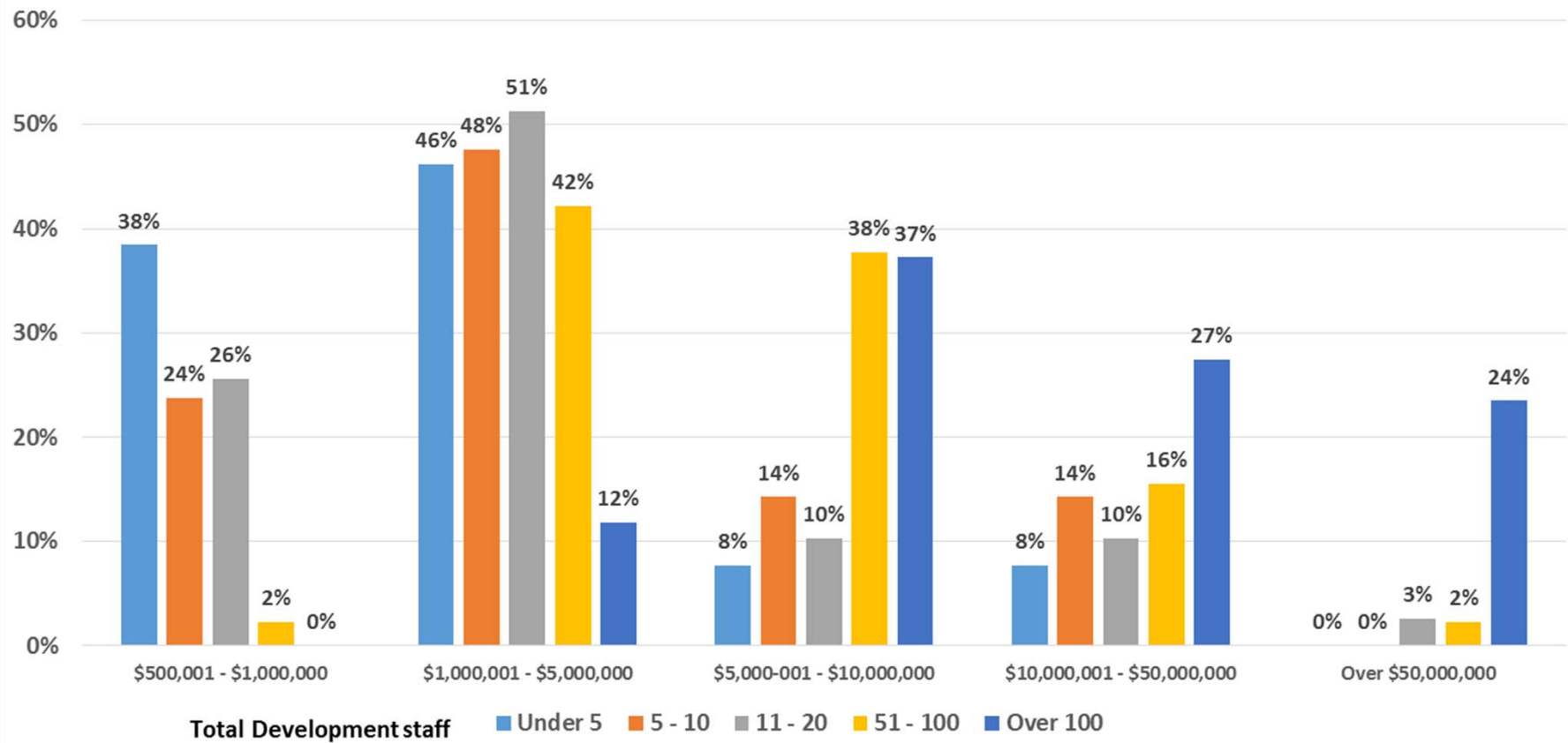
■ Yes ■ No ■ Don't know

Industry	Percentage
Education	68%
Healthcare	19%
Religion	8%
Social Services	6%



Staffing and Budgeting

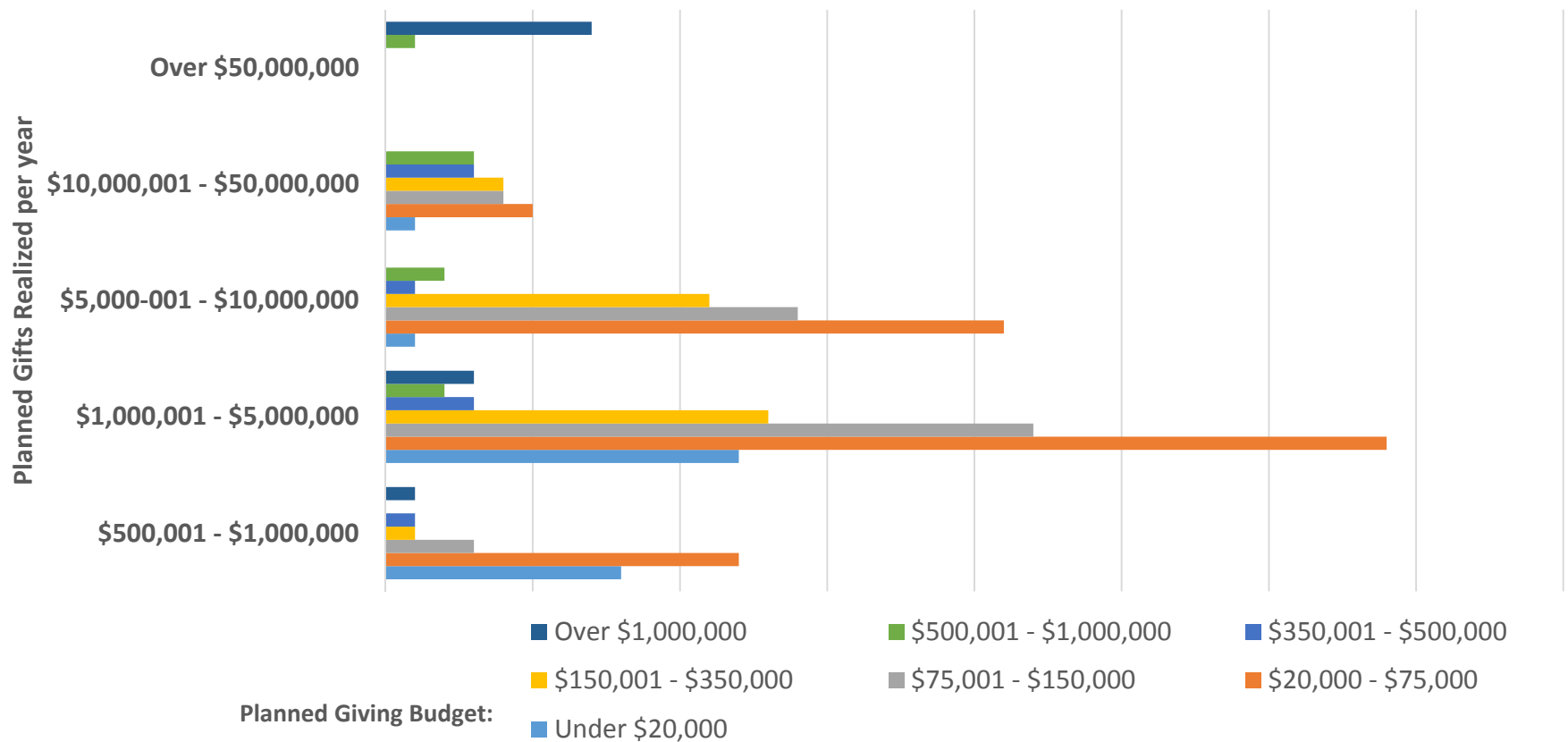
Total Development Staff Compared to Realized Planned gifts





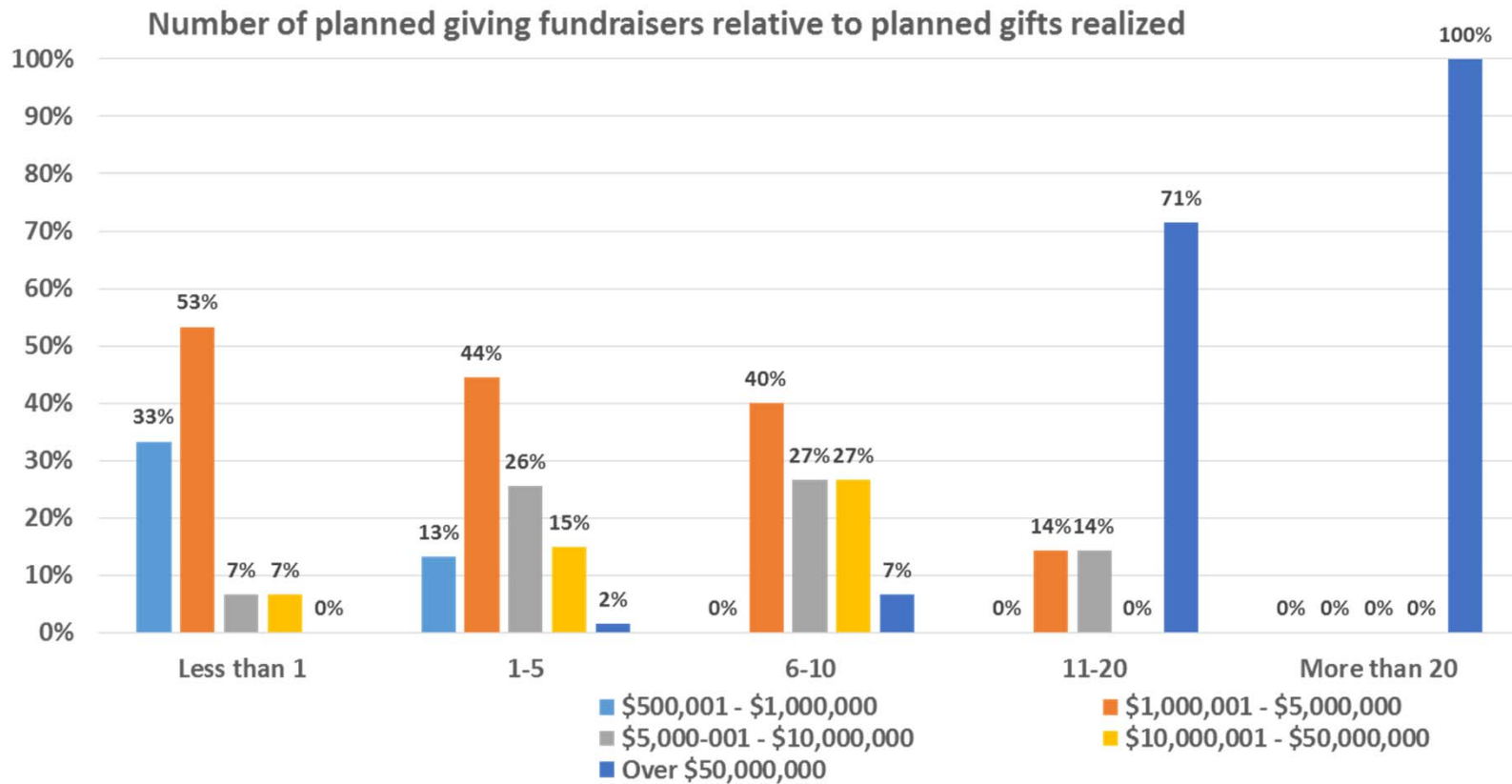
Staffing and Budgeting

Planned gifts realized compared to planned giving budgets





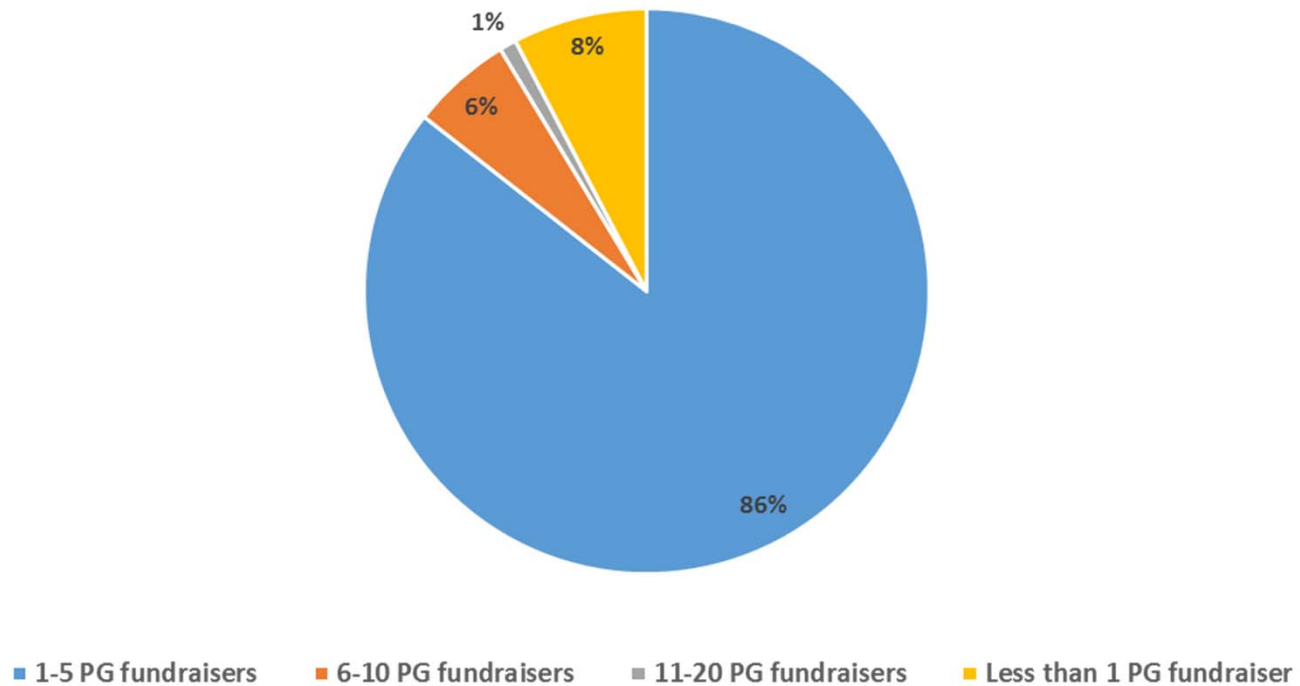
Staffing and Budgeting





Staffing and Budgeting

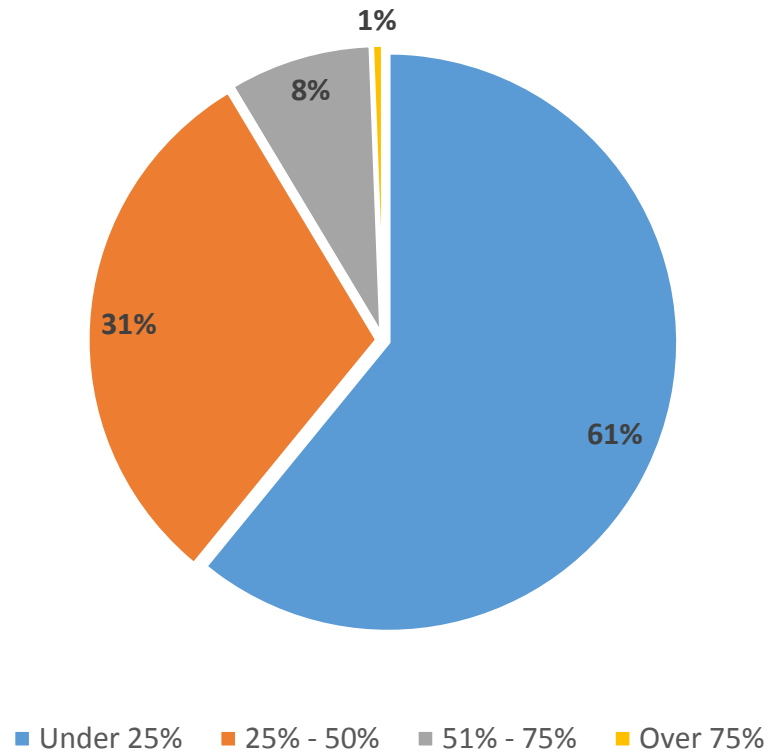
Planned Gift Fundraisers
at Organizations raising \$1M to \$5M





Recognition and Stewardship

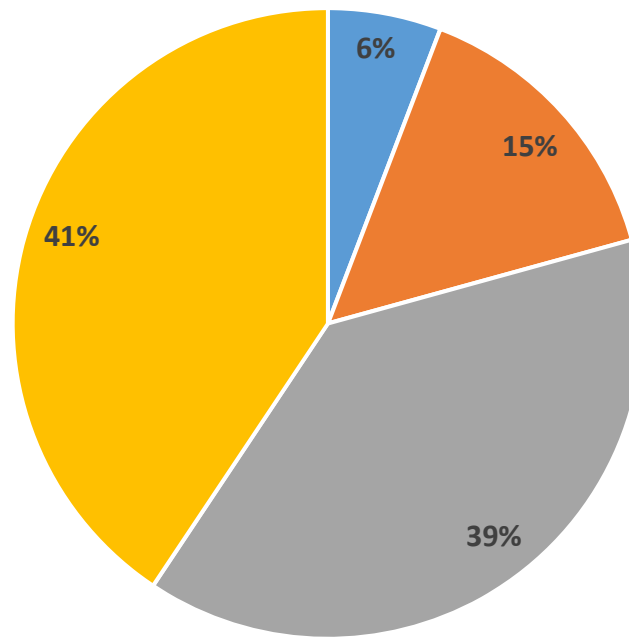
Time spent by planned giving staff is devoted to stewardship and recognition activities





Recognition and Stewardship

How many years old is your organization's legacy society?



■ Under 5 ■ 5 - 10 ■ 11 - 20 ■ Over 20

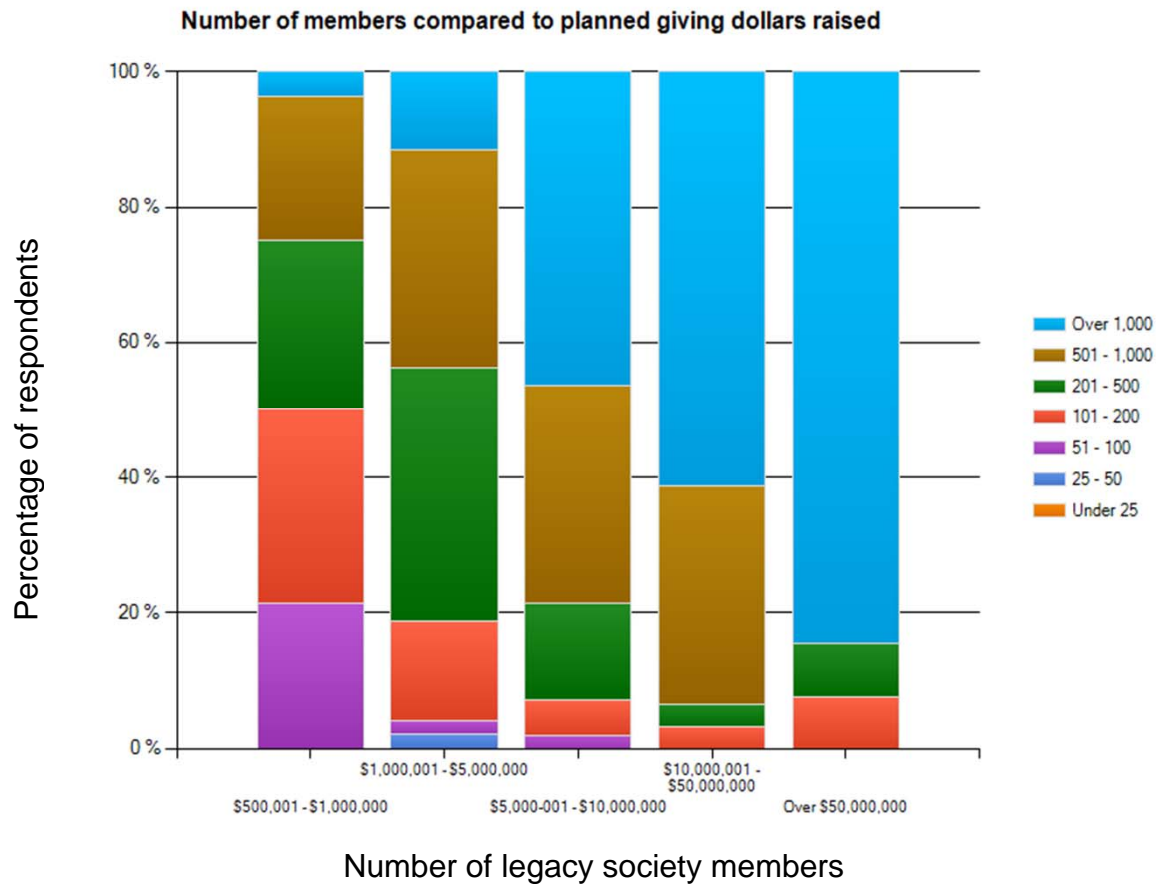


Recognition and Stewardship





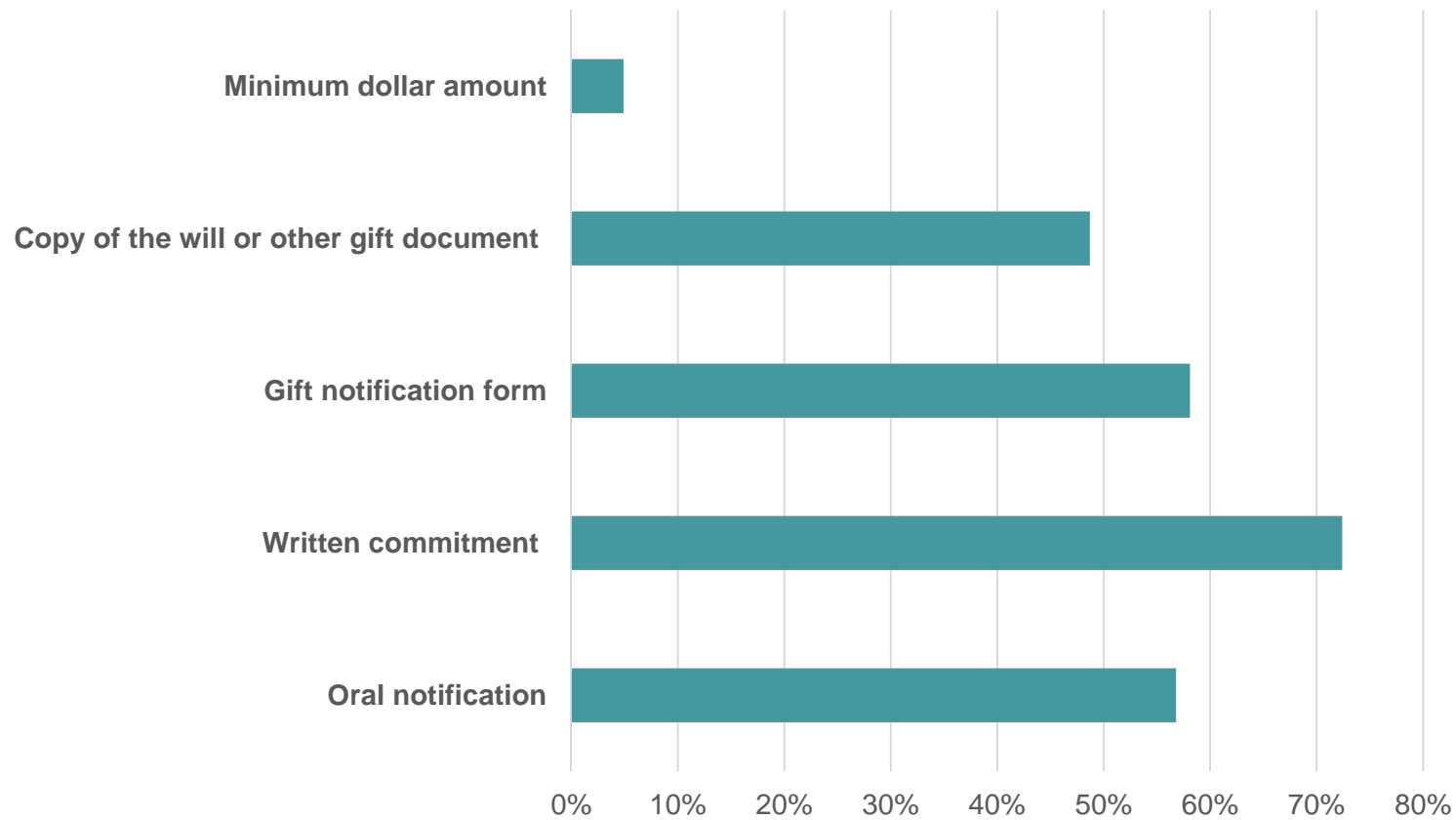
Recognition and Stewardship





Recognition and Stewardship

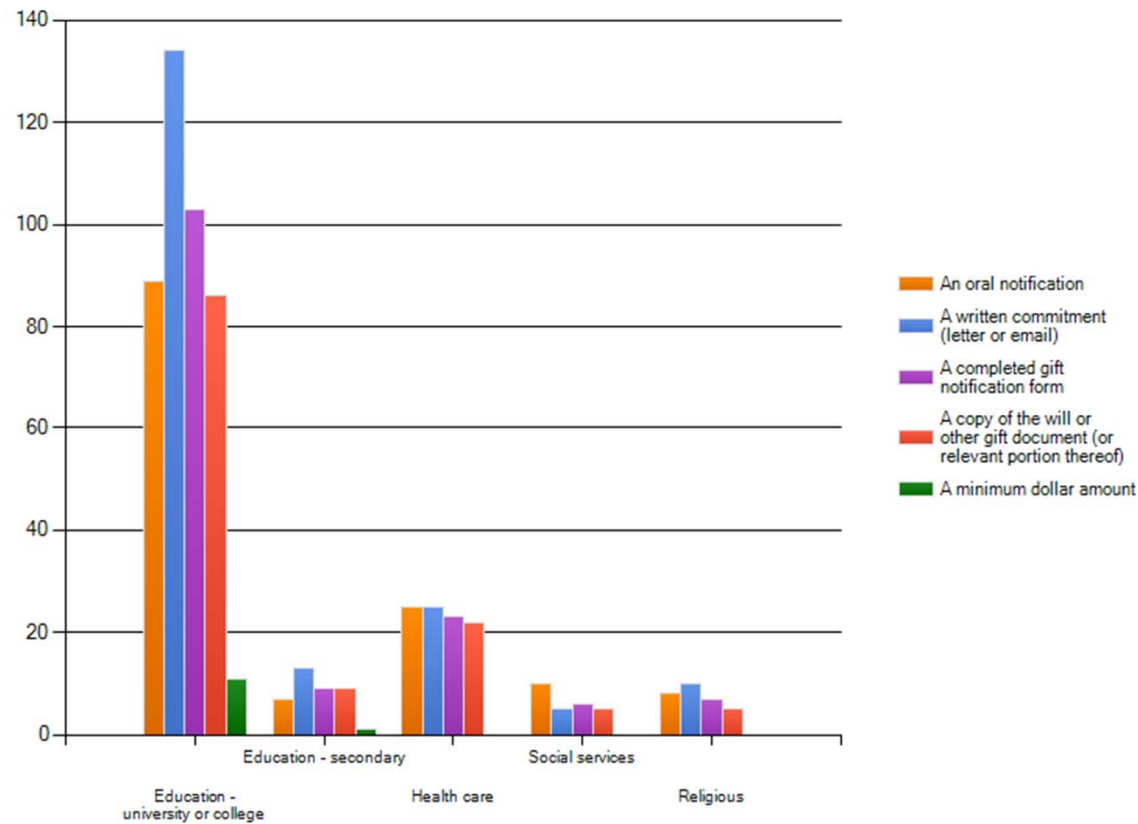
Legacy society membership requirements





Recognition and Stewardship

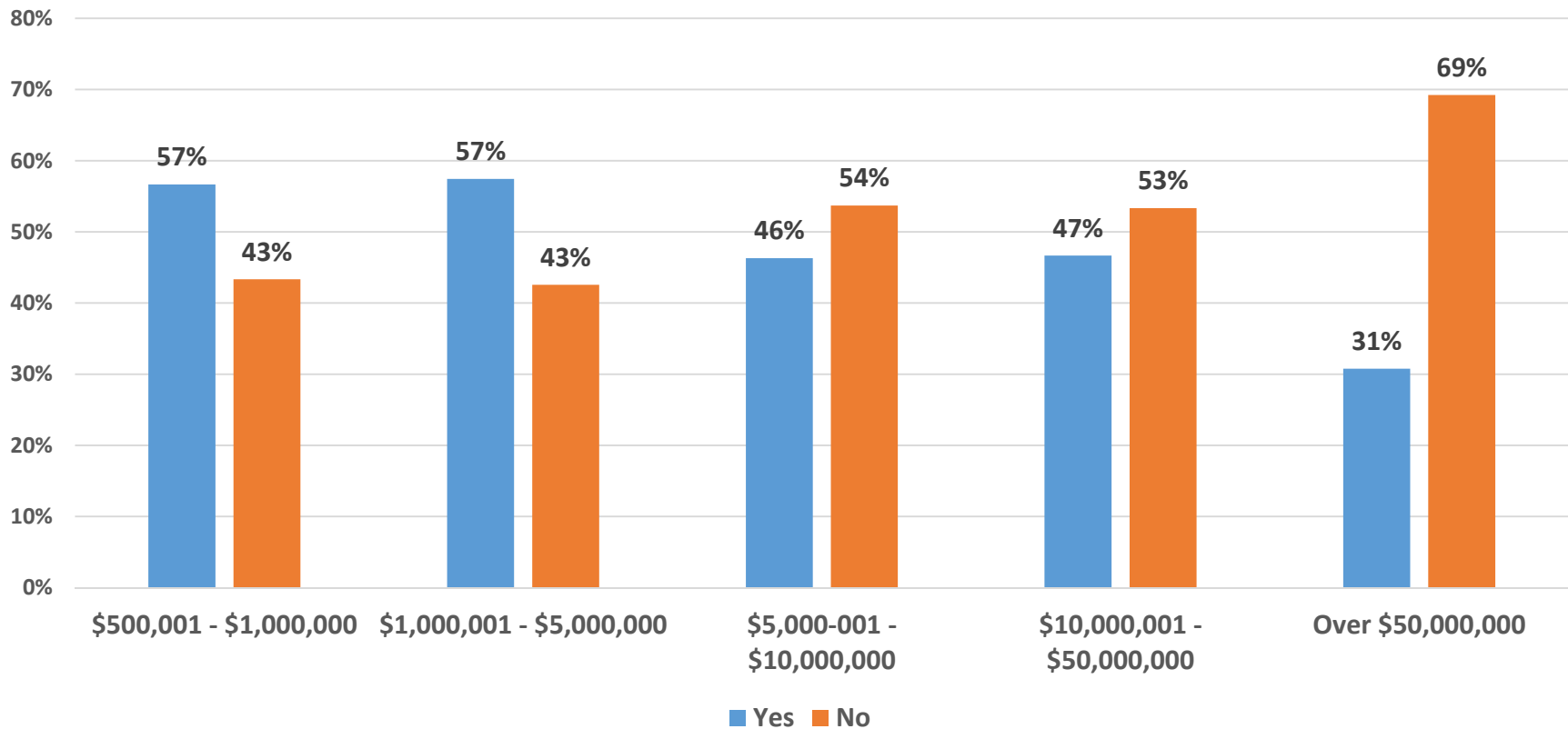
Legacy Society membership requirements by organization type





Planned Giving Metrics

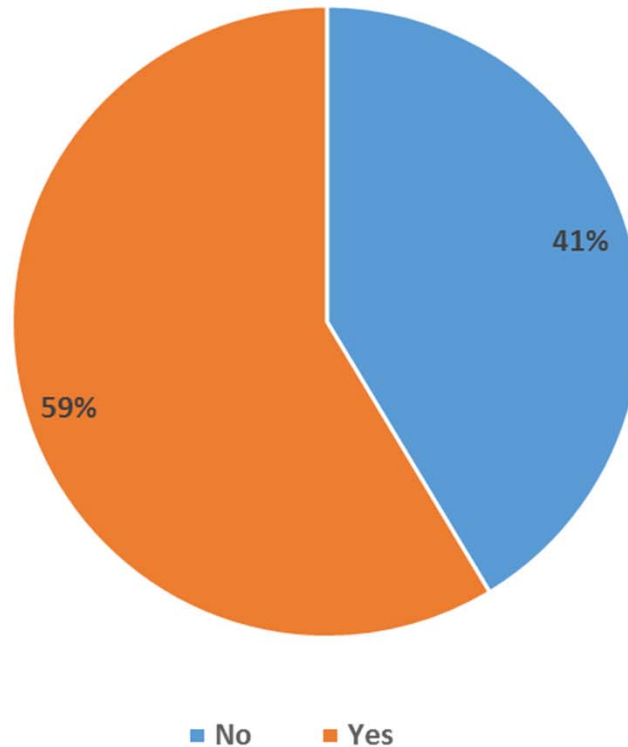
Is there a planned giving metric for non-planned giving fundraisers?





Planned Giving Metrics

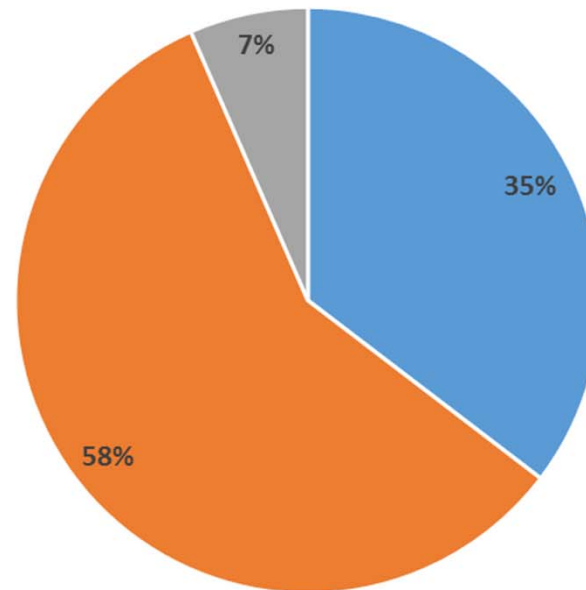
Did your organization have a planned giving goal in your last campaign?





Planned Giving Metrics

If yes, was the planned giving goal public, internal or both?

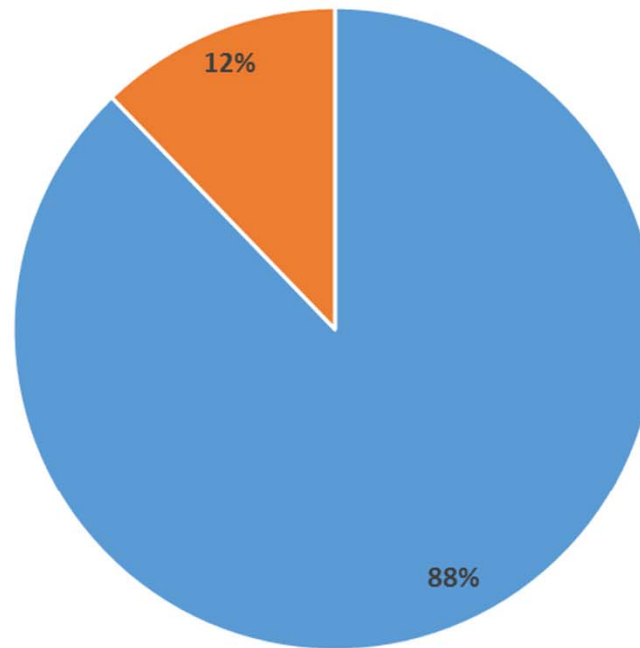


■ Both ■ Internal ■ Public



Planned Giving Metrics

Will your next campaign include a planned giving goal?



■ Yes ■ No



Summary

- Large shops can learn from the smaller shops
- For small shops a modest commitment can have a big impact
- The marketing landscape is shifting
- There is no “dabbling” in planned giving



Questions and Answers





Still Have a Question?

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