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Planned Giving Best Practices: A Benchmarking Study



Date: December 19, 2013
 Presenters: Jeff Lydenberg
 Vice President, Consulting
 Ann McPherson
 Marketing Consultant



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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

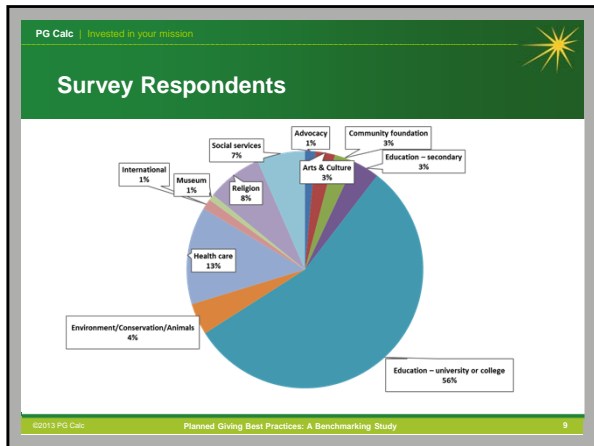
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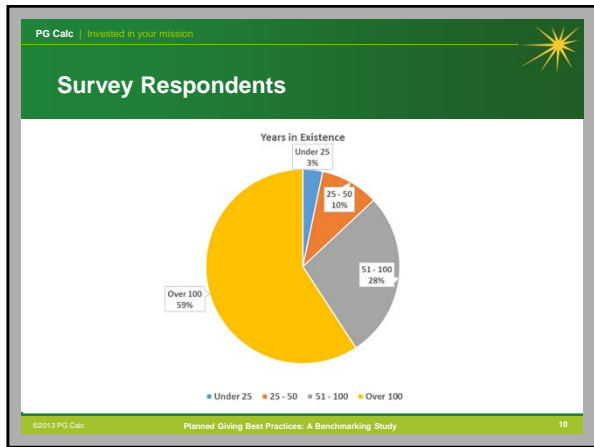
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Survey Respondents

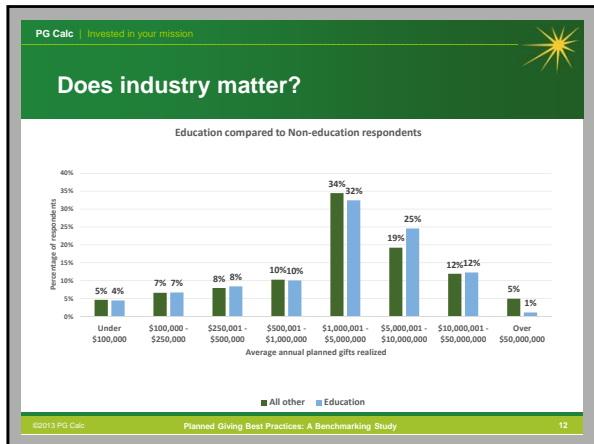
- 2,200 individuals - 310 organizations
- 495 responses (23% response rate)
- Colleges & universities accounted for 56%
- Healthcare accounted for 13%
- Other industries accounted for less than 10% each

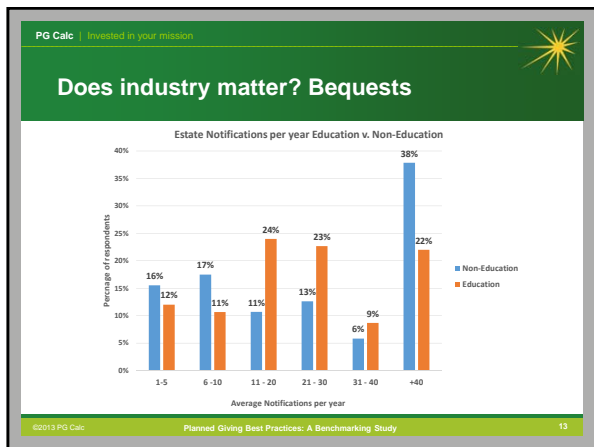
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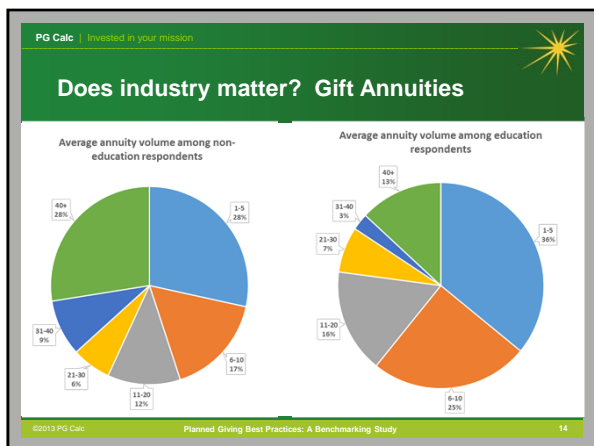


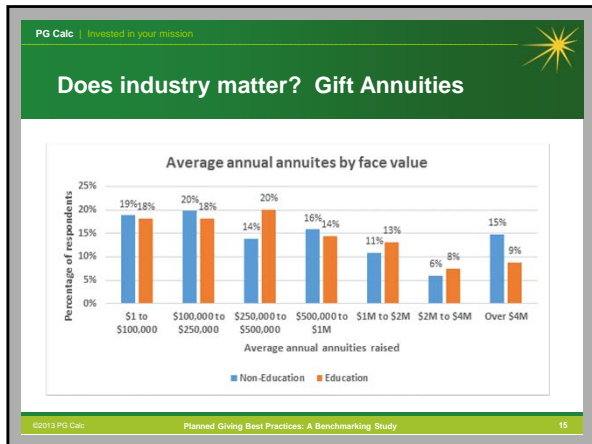


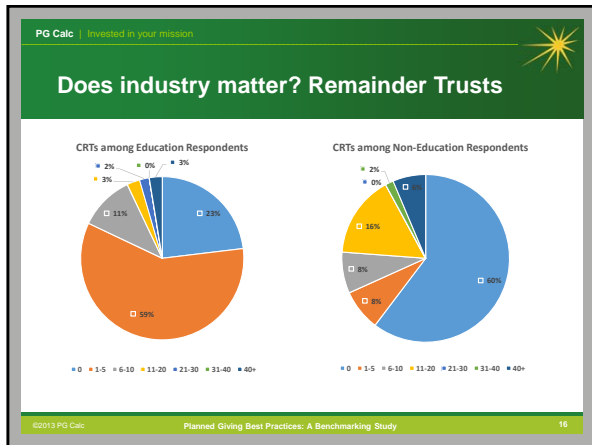


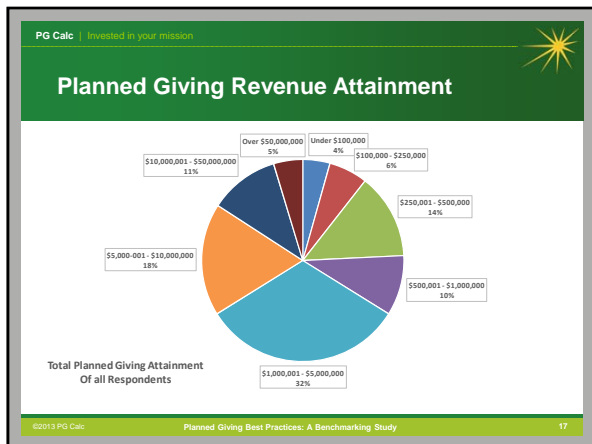


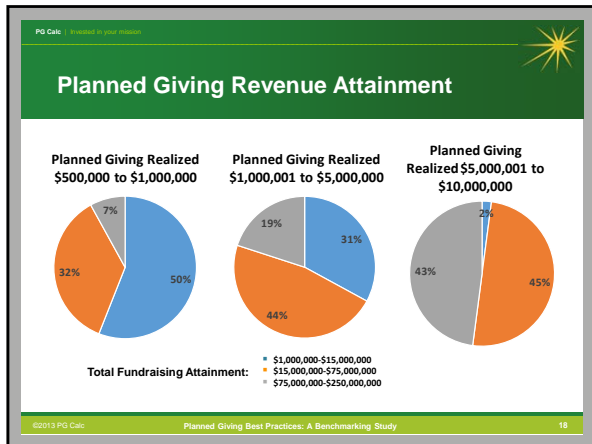






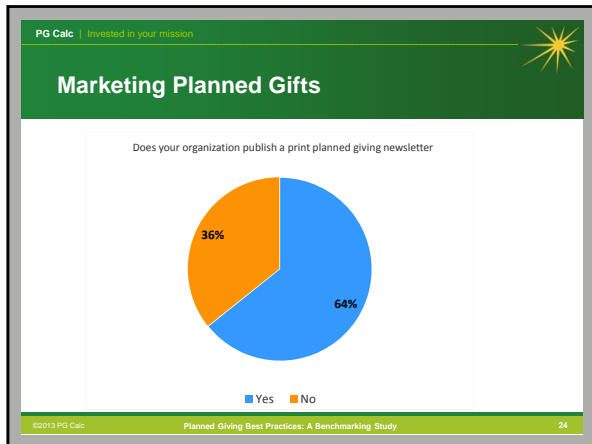






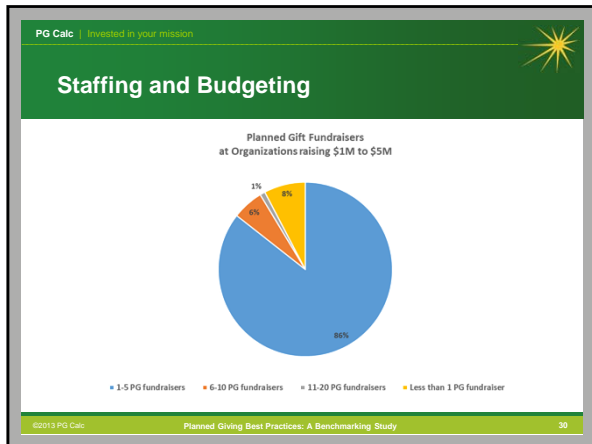


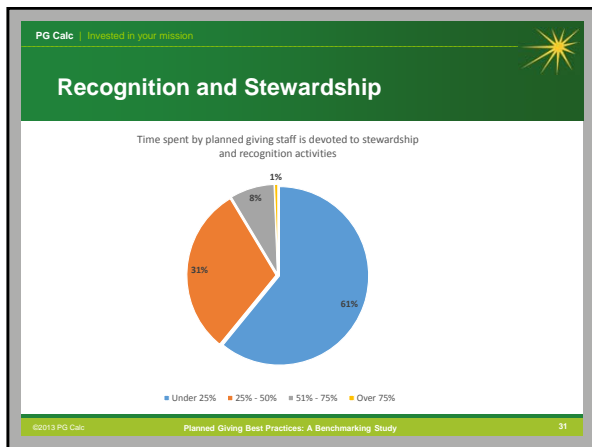


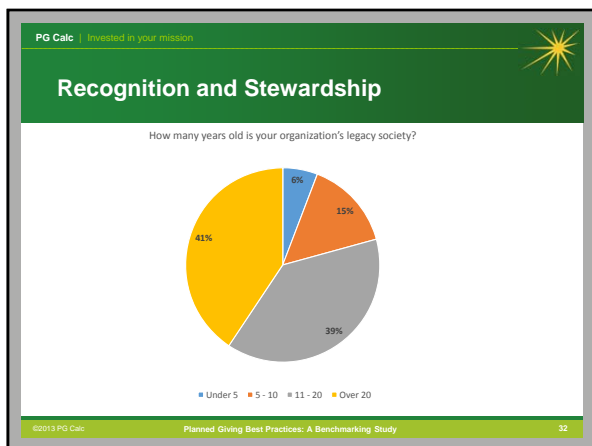


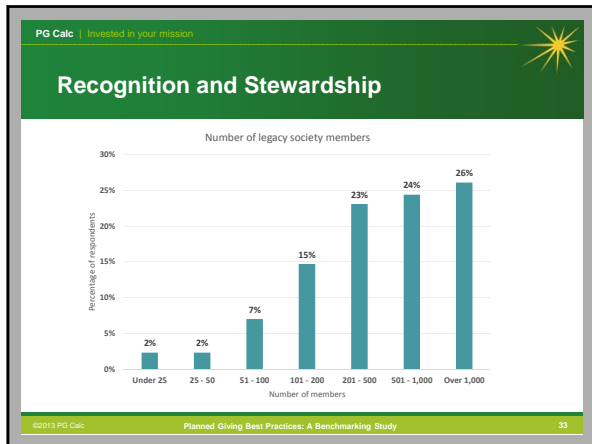


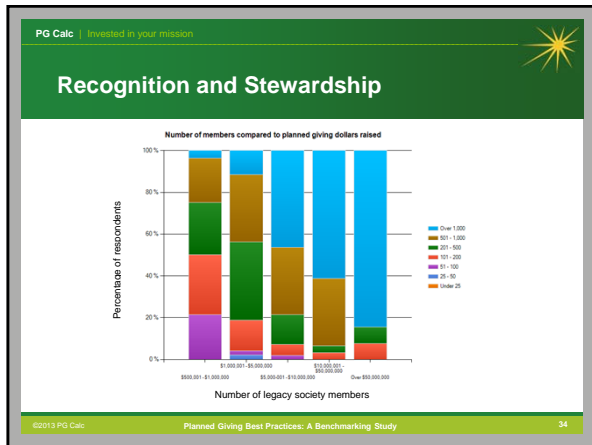


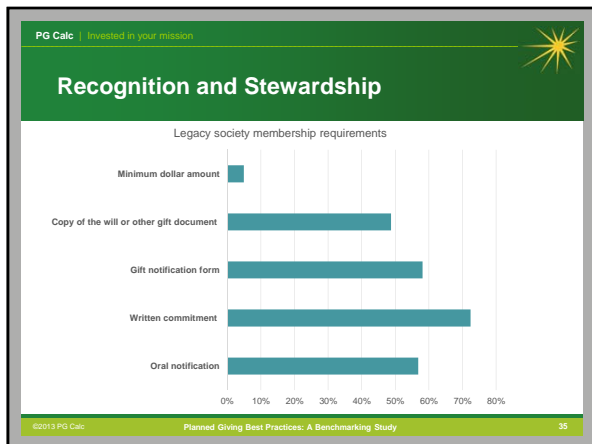


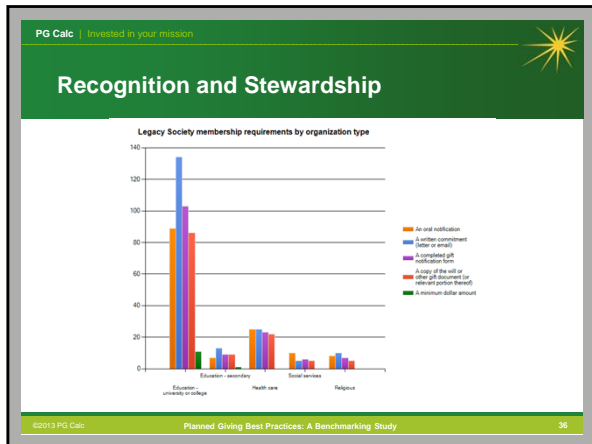


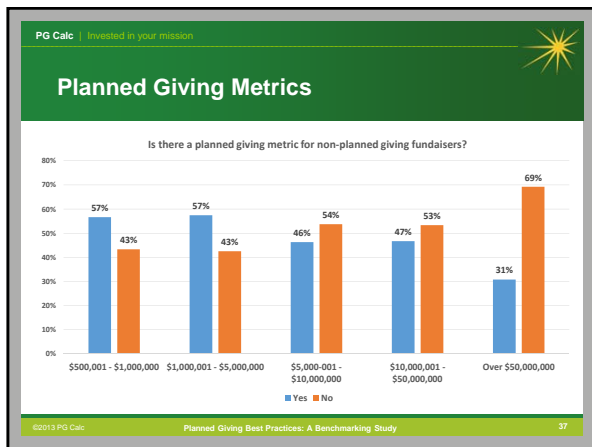


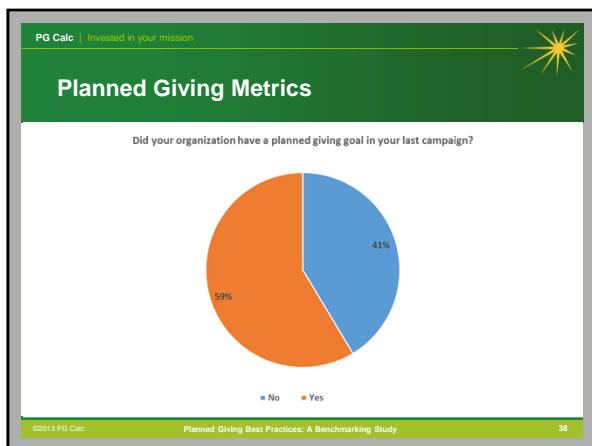


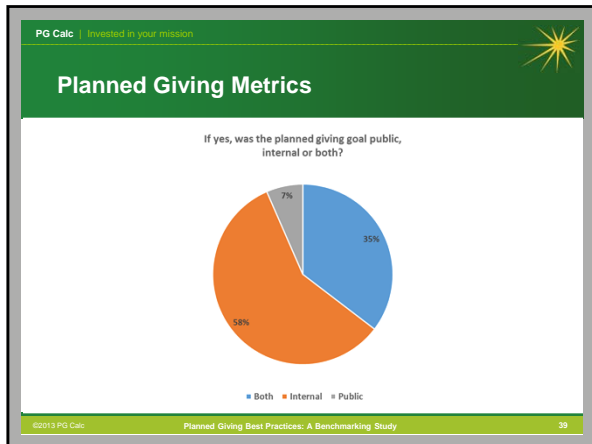


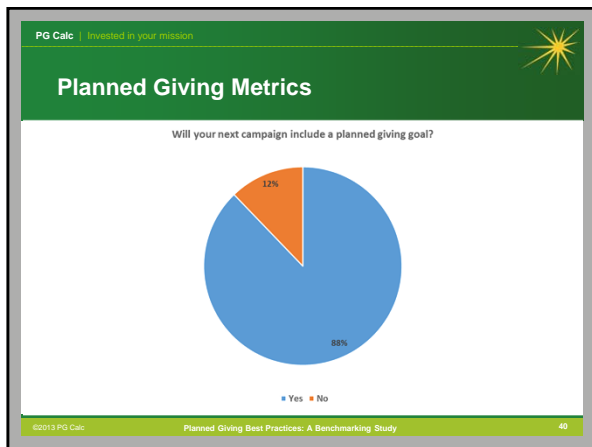












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Summary

- 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

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Questions and Answers



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Still Have a Question?

Contact: Jeff Lydenberg,
Vice President, Consulting
PG Calc
E-mail: jeff@pgcalc.com

Contact: Ann McPherson
Marketing Consultant
PG Calc
E-mail: ann@pgcalc.com

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