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All organizations with a planned giving program make a point of counting how many planned gifts they receive each year and totaling their face value. Most divide up this information by type of gift: realized bequests, gift annuities, charitable remainder unitrusts, etc. You can gain valuable insight into what gifts and what types of donors are driving a planned giving program from even these simple statistics. With additional effort and some basic tools, however, your understanding of your organization's planned giving program can be far more sophisticated, enabling you to refine your marketing, predict outcomes, and perhaps persuade skeptical managers or board members that promoting planned gifts is well worth the time and expense.

Why Analyze?

Every charity has a unique constellation of supporters. Analyzing who has made planned gifts to your organization, what other gifts (annual fund, major) they have made and when, and the nature of their other connections to your organization, will help you build a profile of who your supporters are, or perhaps a series of profiles. With these profiles in hand, you will be in a better position to identify your best prospects for making a planned gift.

The kind of planned gift you approach a prospect about will depend on the profile the prospect matches. For example, you most likely will want to approach a person who matches your gift annuity donor profile differently from one who matches your remainder trust profile.

Data analysis not only can help you predict those likely to make a planned gift, but also evaluate the profitability of your planned giving program.

Unlike an outright gift, the timing and ultimate remainder value of a planned gift is not obvious. But careful analysis can yield valuable information about how your institution's portfolio of planned gifts may be expected to benefit your organization. Senior management will find this information highly useful in determining future budgetary and staffing support for your planned giving program. The beneficiaries of these gifts within your organization will also find this analysis helpful as they consider their own future spending plans.

What to Analyze?

What sort of information about your planned gift donors might be found in your donor database that will help you find other prospects? Here are a few helpful parameters:

1. How old are they?
2. What is their giving history? Are they repeat givers? If so, at what level?
3. Are they married? Do they have children?

If you have this information on your planned gift donors, you can build a profile of your gift annuity donors by establishing their age at the time of their gift, what gifts they had made previously, and their family status. By identifying patterns in these characteristics, you can pursue identifying other prospects in your database with the same characteristics.

In addition to learning the characteristics of who is making planned gifts to your organization, analysis can reveal the typical size of these gifts, how long they last before terminating, what fraction of the funding amount remains at termination, and other useful facts.

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