

Planning Giving in 2009

Now is the time to talk with donors about planned giving. In the current economic environment this may sound counterintuitive, but statistics show planned giving requests can prove successful now.

Despite reports that annual fundraising is proving to be challenging in 2009, there is encouraging news regarding planned giving. The Philanthropic Giving Index (PGI), sponsored by the Association of Healthcare Professionals and prepared by the Indiana University Center on Philanthropy, states fundraisers reported a 72.9 percent success rate with planned giving, up from 67.6 percent just six months ago. Many clients and development staff continue to express concern about starting or continuing endowment and planned giving efforts in the current economic environment, however, this data shows the fundraising challenge is not insurmountable.

Fund Development Success

There are several factors that lead to endowment and planned giving success for your organization:



planned gifts don't require current cash to fund

people want to help your mission even if they can't give an outright gift

planned gifts historically rise during recessions and economic downturns

Since over 80% of planned gifts are bequests, now is a great time to start a legacy society, add in an extra luncheon for legacy society members, and promote bequests for your endowment fund.