

# A Study of the Perceptions of Bay Area Planned Giving Professionals as to the Value and Effectiveness of Various Techniques Used to Market Planned Gifts

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This study conducted a mail survey of the entire member of the Northern California chapter of Planned Giving Council to ascertain the ways in which Bay Area planned giving professionals perceive certain marketing techniques to be effective in raising planned gift for the Bay Area nonprofit organizations. It further explored any differences in preference for various marketing techniques based on the professional experience of the planned giving professional, the annual budget of their organization, or the type of agency where they work.

The study found that, overall, respondents favored the relationship marketing techniques requiring more personal interaction with donors. There was some difference in the overall responses when analyzed by years of experience in the field of respondents, the annual budget of respondents' organization, and the type of agency where they work.