

STELTER
Getting to the heart of the matter



2012 Stelter Donor Insight Report

Why They Give

Latest Research Reveals Motivations Behind Planned Giving

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Presenters



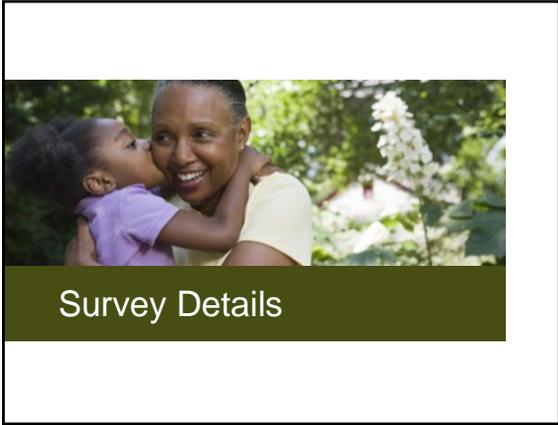
Bev Hutney
Director of Innovation and Research
The Stelter Company



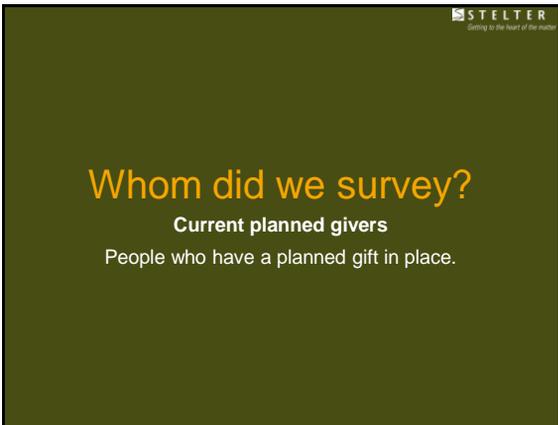
J. Ann Selzer, PhD
President
Selzer & Company, Inc.

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Survey Purpose







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Whom did we survey?

Best prospects for planned gifts
People who say they will definitely or probably do so in the future.

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Survey Details

Personal interviews via land line and cell phone
Approximately 15 minutes each
Conducted in June 2012 by Selzer & Company, Inc.

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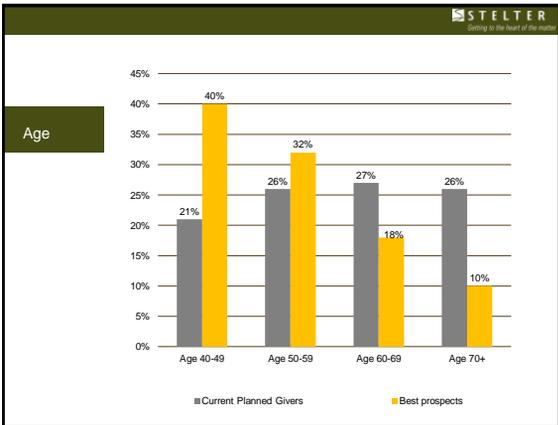
How reliable is our data?

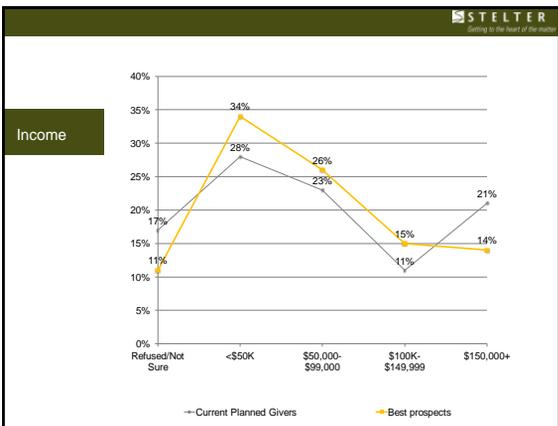
- 95% confidence
- 19 times out of 20 findings would not vary by more than margin of error

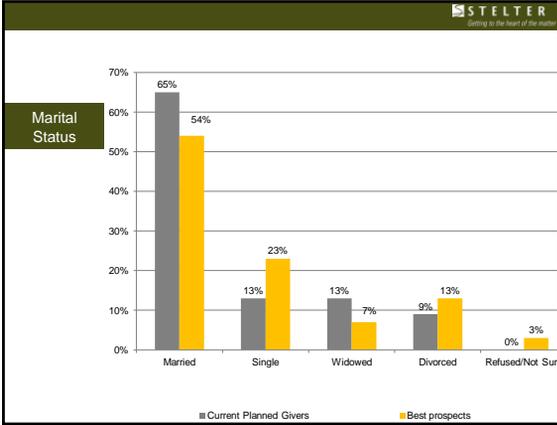
Margin of Error
+/- 4.9
percentage points

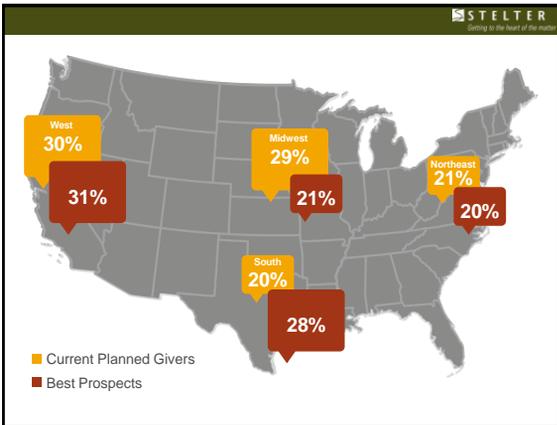
Number of Completes	Margin of Error
100	9.8%
200	5.9%
300	5.2%
400	4.9%
500	4.7%
600	4.6%
700	4.5%
800	4.4%
900	4.3%
1000	4.2%



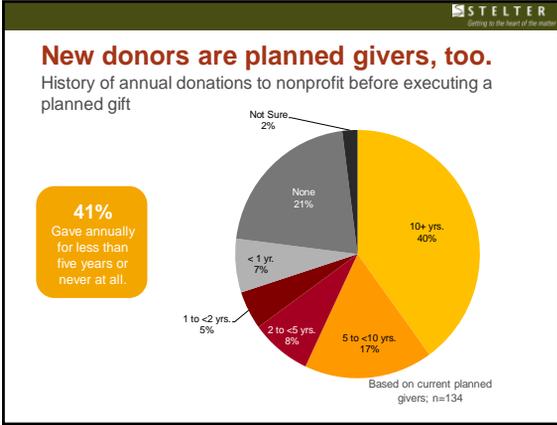


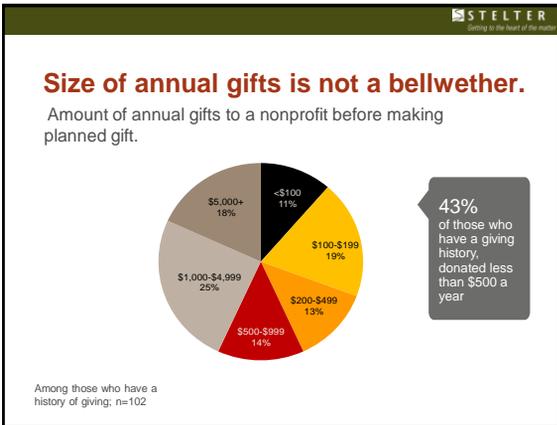


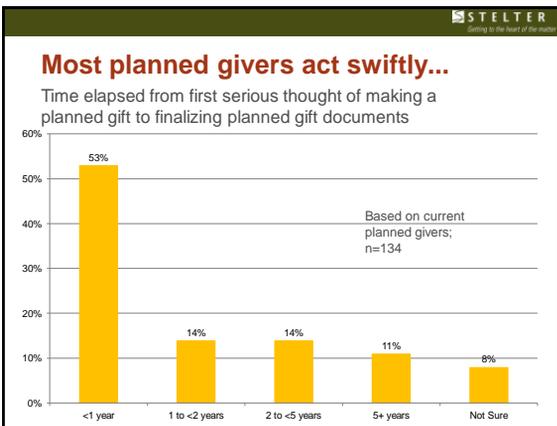


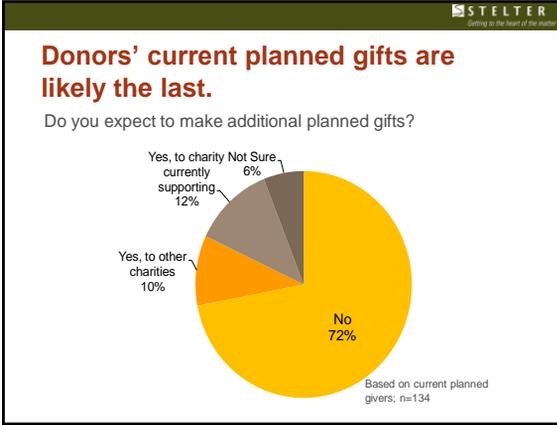


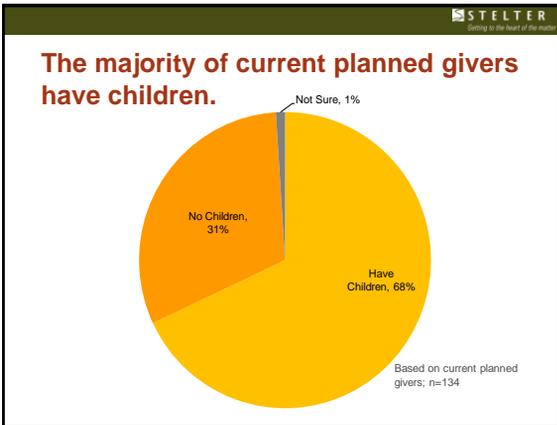


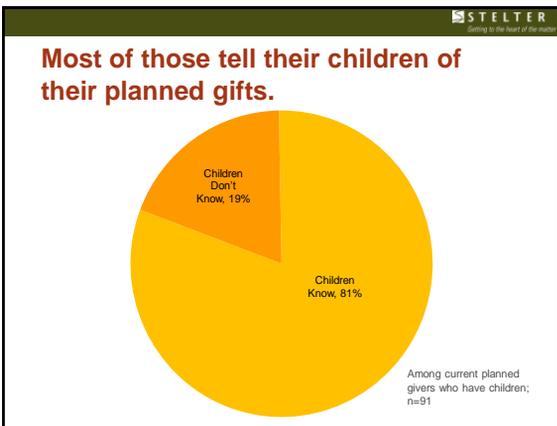


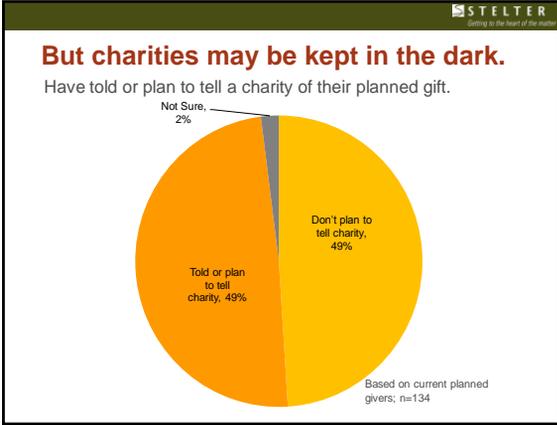




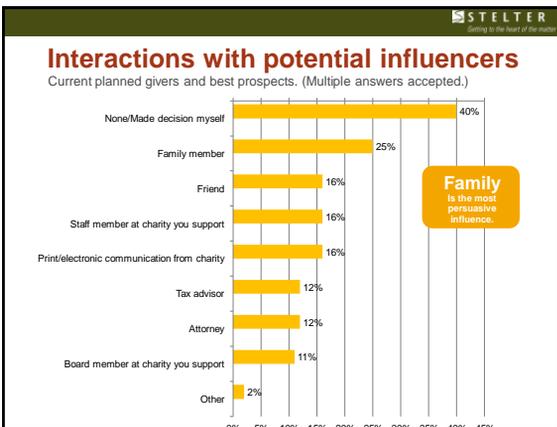


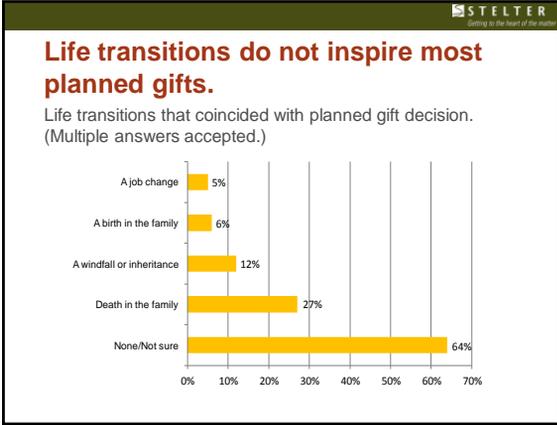


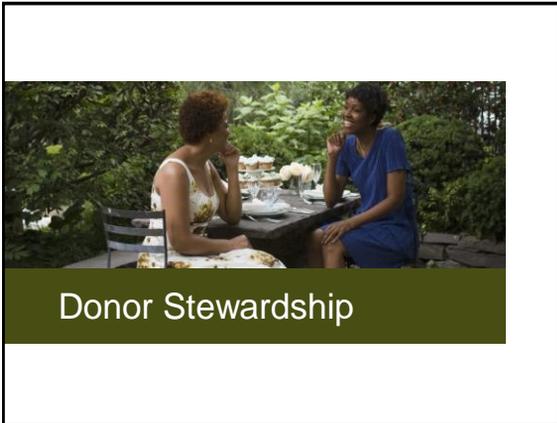


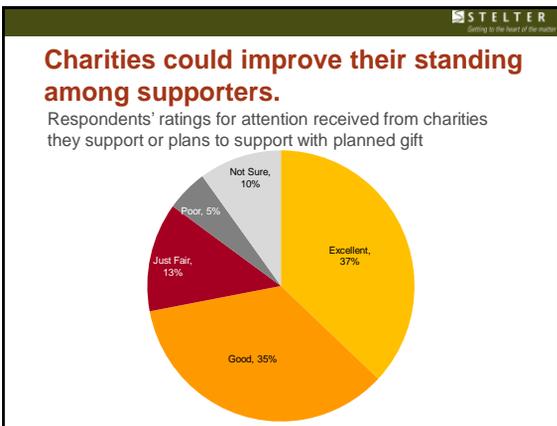












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Excellent ratings are more likely from:

- Women 42%**
Men 31%
- Married people 43%**
Widowed/divorced 29%
Never married 28%
- \$100K+ households 44%**
<\$50K households 29%
- Current Givers**
Who reveal their gift to the charity 62%

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If any, what type of additional communication would be welcome?

Communication Type	Percentage
Neither	54%
More written	24%
More in-person	12%
Both	5%
Not Sure	5%

Age 40-49
Most open to additional contact (53%), including 39% who would be open to more written.

Age 70+
Most (75%) said neither, the highest of any demographic group.

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Few are members of a legacy society.

Are you a member of a donor recognition club?

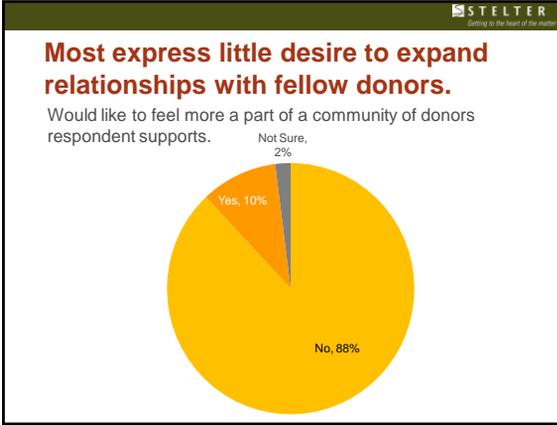
Response	Percentage
No	85%
Yes	14%
Not Sure	1%

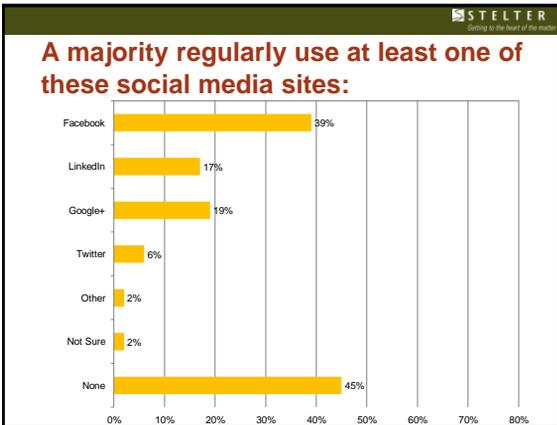
Would you like to be invited to be a member?

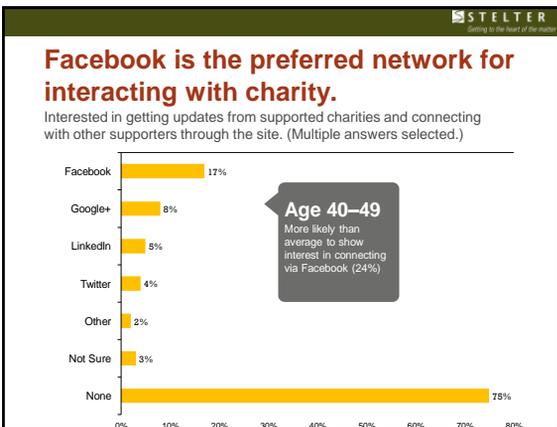
Response	Count
No	96
Not sure	1
Yes	3

Would you like to be invited to be a member?*

*Based on those who are not currently a member of a recognition club; n=344









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Would strongly influence decision to make a planned gift to charity:

- Charitable gifts make the world a better place (66%)
- Makes people feel good (56%)

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Would strongly influence decision to make a planned gift to charity:

- Can direct donations to specific causes (45%)
- Receive more back when giving to charity (44%)
- Good way to connect with like-minded community (40%)

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Would strongly influence decision to make a planned gift to charity:

- Giving reduces need for government to help needy (34%)
- Wise not to give heirs enough to do nothing (30%)
- People have an obligation to give (30%)

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Would strongly influence decision to make a planned gift to charity:

- Donors to charity are admired (20%)
- Good way to pay less in taxes (17%)

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Would strongly influence decision to make a planned gift to charity:

Factor	Percentage
Charitable gifts make the world a better place	66
Makes people feel good	56
Can direct donations to specific causes	45
Receive more back when giving to charity	44
Good way to connect with like-minded community	40
Giving reduces need for government to help needy	34
Wise not to give heirs enough to do nothing	30
People have an obligation to give	30
Donors to charities are admired	20
Good way to pay less in taxes	17





**Stelter's Top 5
Recommendations**

Begin communication to supporters by the time they are middle-aged.





**Stelter's Top 5
Recommendations**

Focus planned giving messages on your most engaged donors, regardless of giving history.





**Stelter's Top 5
Recommendations**

Harness the influence of family.

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**Stelter's Top 5
Recommendations**

Provide singles with more
and better attention.

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**Stelter's Top 5
Recommendations**

Rethink legacy societies and
innovate stewardship.

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Q&A



Bev Hutney
Director of Innovation and Research
The Stelzer Company



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Within the next few days you can visit us at www.stelter.com/webinars.html to access:

1. The recording of the webinar
2. PowerPoint handouts

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