

PG Calc YOUR PARTNER IN PLANNED GIVING SUCCESS

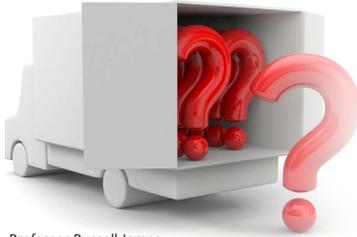


Using Donor Surveys in Planned Gift Marketing

Date: February 26, 2026
 Time: 1:00 – 2:00 Eastern
 Presenter: Professor Russell James
 Texas Tech University

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Using Donor Surveys in Planned Gift Marketing

Socratic fundraising in volume

Professor Russell James
 Texas Tech University

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Asking questions

Sometimes face-to-face, one-on-one conversations aren't feasible because of personnel, cost, time, volume, distance, etc.



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Asking questions

- Donor telephone conversations (one-on-one but not face-to-face)
- Donor focus groups (face-to-face but not one-on-one)
- Donor surveys (neither one-on-one nor face-to-face)

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Universal steps

- Connect the donor's identity (history, people, and values) with the cause, the charity, or the project [*Original Identity* → *Challenge*]
- Define a personally meaningful victory [*Victory* → *Enhanced Identity*]
- Make a challenge that promises the victory [*Challenge* → *Victory*]



Original Identity → **Challenge** → **Victory** → **Enhanced Identity**

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Questions won't work if people won't answer

Justify asking questions:

- I need your help or advice because
 - I'm new here
 - We have a problem
 - We have an idea
 - You're in charge
 - You're important
- I can help or advise you
- I'm interested in your story

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If you don't actually care, then don't ask

Reasons must also appear legitimate

- Don't add a donation request to a survey
- Don't ask a question with a forced answer

"Should we continue our award-winning work that is transforming the lives of so many in desperate need?"



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Connect with original identity

- Questions can connect the donor's identity (values, people, or life story) with the cause, charity, or project
- The reason for asking can be because of the donor's identity: *"Your insight is especially important because we need input from ... [women, Baby boomers, loyal donors, alumni from the 80s, people who care about X, etc.]"*

Challenge
↑
↓
Identity ← Victory



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Challenge
↑
↓
Identity ← Victory

Please rate the importance to you of the following

Being a good example for the next generation.

Making a lasting impact in the world.				
Ensuring that your values will be remembered by future generations.				

Highly important
Somewhat important
Slightly important
Not important

Values identity questions (Environmental cause)

- Writing what they wanted to be remembered for by future generations increased donations to an environmental charity by 45%.¹
- Reminders of values such as love or religious beliefs increased donations for other causes.²

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Learn something

Leaders at a charity focused on women's reproductive rights in the developing world assumed the key value was women's rights. Survey results revealed many donors cared only about population control.



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Life story identity questions (environmental cause)

In one experiment, using the first two sets of questions increased donation likelihood for an environmental charity, especially for bequest gifts

At what age did you first begin to think about the importance of conserving the natural environment?
 In childhood In high school In my 20s In my 30s or later
 Comments:

Which of the following have been important in your life?
 Time I have spent outdoors Time I have spent on a river
 Time I have spent in a forest Time I have spent on a lake
 My life experiences with wildlife My life experiences with wild birds
 My life experiences with trees and plants
 Comments:

When did you first learn about [org]? Within the last year Within the last five years Within the last ten years More than ten years ago

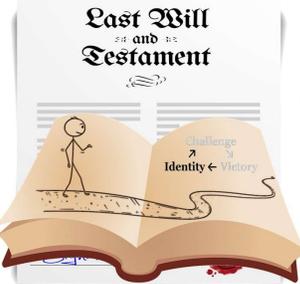
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Last Will and Testament

Life story connections are key for charitable bequests



- A key result from interviews, neuroimaging, and phrasing experiments
- Ex: The phrase "to support causes that have been important in your life" maximized interest in a bequest gift

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Learn something

- Answers are a great starting point for follow up questions ("Tell me more ...")
- Messaging might be informed by knowing that donations were most likely for those noting "life experiences with wild birds," and least likely for those referencing time "spent on a lake."



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People identity questions (environmental cause)

- First two questions also link to later question about honoring a family member with a gift in a will
- Answers are great starting point for follow up questions ("Tell me more ...")

Do you have more or less than two family members who consider conserving the natural environment to be important?
 About 2 More than 2 Less than 2

Were there any family members in your life who were particularly influential in shaping your views on the importance of nature conservation?
 Grandmother Grandfather Aunt Uncle Mother Father
 Sibling Other family member
 Comments:

We love to recognize our outstanding team members at [org]! Please share any memorable experiences you've had with anyone you've met at [org].
 Comments:

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Identity questions: Nudge towards more positive answers

- The most negative answer might be "probably not" or "unlikely," but omit "definitely not" or "never"
- The lowest group is "less than 2," omitting the "none" response
- Relationship started within the last year, five years, or ten years are not exclusive categories: Uncertainty nudges towards "safer" answer of longer category



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Challenge
 ↑
Identity ← Victory
 ↓

Victory questions (environmental cause)

Help the donor define a personally meaningful victory with a "victory menu"

On a scale from 0 = Absolutely no importance to 100 = Absolutely the greatest importance, please rate the importance of the work of [org] in the following areas

- Environmental conservation
- Preserve wetlands for wild ducks and other migrating birds
- Protect and restore ancient sequoia and redwood forests in the U.S.
- Protect sensitive coral reefs around the globe

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Victory questions (all causes research)

One experiment tested ten charities from five causes with three projects per cause. Average giving likelihood was:

- 14% when reading about causes
- 15% when reading about causes and projects
- 19% when rating the importance of causes
- 21% when rating the importance of causes and projects



James, B. N., III. (2018). Increasing charitable donation intentions with preliminary information ratings. *International Review of Public and Nonprofit Marketing*, 15(4), 363-411.

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Victory questions (environmental cause)

Using the cause and 3 projects below, donation likelihood to The Nature Conservancy [or World Wildlife Fund] was

- 11% [or 13%] when reading about causes
- 12% [or 13%] when reading about causes and projects
- 15% [or 16%] when rating causes
- 18% [or 19%] when rating causes and projects

On a scale from 0 = Absolutely no importance to 100 = Absolutely the greatest importance, please rate the importance of the work of [org] in the following areas

- Environmental conservation
- Preserve wetlands for wild ducks and other migrating birds
- Protect and restore ancient sequoia and redwood forests in the U.S.
- Protect sensitive coral reefs around the globe

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Victory questions (university)

A) "Annual alumni giving through the Penn Fund directly supports these priorities of undergraduate education."

- Student financial aid
- Student and academic life
- Residential life
- Special campus initiatives"

"Rich": \$192 avg; "Powerful": \$158 avg

B) Remove the checks from the boxes and add, "Tell us which is most important to you. (Please check one box)"

"Rich": \$463 avg; "Powerful": \$714 avg

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Questions can turn a victory into the donor's victory

- First giving people the chance to vote on a project increases donations and volunteering
- Describing a potential victory as important can help but asking works better than telling




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Challenge questions: Theory

Problem: A survey shouldn't ask for an immediate donation. (Doing this can de-legitimize the questions.)

Solution: The goal is to get the donor to predict a gift. It's still in the realm of opinion gathering, but it's surprisingly powerful.



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QBE Experiment

First asking how much people would “hypothetically” donate to a project increased actual donation 43% for a project helping turtles and 25% for one helping elephants.

2/26/2026 Johannes Stetsman, G., & Schwilke, H. (2008). Measuring hypothetical bias in choice experiments: the importance of cognitive consistency. The 44. Journal of Economic Surveys, 22(4), 1-30.

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Goal: Get a positive donation prediction

- QBE shows that people tend to change their behavior to match their predictions
- Lead-up questions showing identity connections and defining a meaningful victory can increase the giving prediction
- So, the gift prediction should come towards the end of the survey

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Many people who care about this cause like to give in different ways. How likely is it that you would consider any of the following gifts in the next six months?

	Definitely	Somewhat likely	Unlikely	Have already done so	Would like more info
Gift by volunteering time					
Gift by check or credit card					
Gift as an automatic monthly withdrawal					
Gift in a will (if you happened to sign a new will)					
Gift in a will in honor or memory of a loved one					
Gift that pays you income for life					
Gift of stocks, bonds, or mutual funds that avoids taxes					
Gift of real estate that avoids capital gains taxes					
Gift from an IRA/401(k) that avoids income taxes					

Challenge question examples

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Challenge options: Memorial bequest

In one experiment, mentioning this option increased interest in an estate gift for about one out of four people



- Gift by check or credit card
- Gift as an automatic monthly withdrawal
- Gift in a will (if you happened to sign a new will)
- Gift in a will in honor or memory of a loved one
- Gift that pays you income for life
- Gift of stocks, bonds, or mutual funds that avoids taxes
- Gift of real estate that avoids capital gains taxes

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Challenge options: A survey can teach!

- It can ask about a "gift that pays you income for life," a gift of inheritance rights (house or farmland) with an immediate income tax deduction, a named scholarship fund, a lectureship, an endowed professorship, a virtual endowment, etc.
- Curiosity leads to conversations



- Gift in a will (if you happened to sign a new will)
- Gift in a will in honor or memory of a loved one
- Gift that pays you income for life
- Gift of stocks, bonds, or mutual funds that avoids taxes
- Gift of real estate that avoids capital gains taxes
- Gift from an IRA/401(k) that avoids income taxes

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Challenge options: IRA Gifts

- Heirs inheriting any amount of IRA money pay income taxes on it but leaving to charity avoids these taxes.
- Donors over age 70½ can give directly from their IRA. (At 72+ this also offsets required distributions.)



- Gift in a will (if you happened to sign a new will)
- Gift in a will in honor or memory of a loved one
- Gift that pays you income for life
- Gift of stocks, bonds, or mutual funds that avoids taxes
- Gift of real estate that avoids capital gains taxes
- Gift from an IRA/401(k) that avoids income taxes

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James R. N. Jr. © 2025. Designing complex charitable giving instruments: Experimental study of behavioral finance terms and tax benefits. Georgetown Management and Leadership, 28(4), 437-452, 447.

Challenge options: Asset gifts & taxes

The final three questions lead with tax benefit. In one experiment, only 14% were "interested now" in pursuing a gift described as,

"Make a gift of stocks or bonds to charity."

This increased to 20% when it was described as,

"Avoid capital gains tax by making a gift of stocks or bonds to charity"



- Gift in a will (if you happened to sign a new will)
- Gift in a will in honor or memory of a loved one
- Gift that pays you income for life
- Gift of stocks, bonds, or mutual funds that avoids taxes
- Gift of real estate that avoids capital gains taxes
- Gift from an IRA/401(k) that avoids income taxes

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Challenge options: Asset gifts & taxes

In one study of over 5,000 people, the share "definitely" or "might be" interested in reading more was:

- 16% for "Giving stocks"
- 16% for "Giving stocks, bonds, or real estate"
- 24% for "Avoiding capital gains taxes by giving stocks"
- 28% for "Avoiding taxes by giving stocks"



- Gift in a will (if you happened to sign a new will)
- Gift in a will in honor or memory of a loved one
- Gift that pays you income for life
- Gift of stocks, bonds, or mutual funds that avoids taxes
- Gift of real estate that avoids capital gains taxes
- Gift from an IRA/401(k) that avoids income taxes

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Challenge options: Gifts of assets

- Asset gift questions reveal capacity because a person wanting information about gifts of real estate, stocks, or bonds likely has these available to give
- Just reminding people of their wealth (assets) triggers a larger reference point and increases giving



- Gift in a will (if you happened to sign a new will)
- Gift in a will in honor or memory of a loved one
- Gift that pays you income for life
- Gift of stocks, bonds, or mutual funds that avoids taxes
- Gift of real estate that avoids capital gains taxes
- Gift from an IRA/401(k) that avoids income taxes

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Challenge answers: What's missing

- There isn't a hard "no" option, just "unlikely." Predictions are powerful. We don't want donors committing to a hard "no."
- There isn't a "don't know" option. Forcing a choice requires more thinking about gifts of assets.
- A "don't know" doesn't invite follow up, but a "somewhat likely" does

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Challenge answers: "Have already done so"

- We want this information about the gift in a will. Including it for all gifts prevents the will question from standing out.
- Answering yes to initial questions (check, credit card) creates inclusion: "I am the type of person who makes gifts like these."

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Survey outcomes: Follow up

Definitely	Somewhat likely	Unlikely	Have already done so	Would like more info

- A donor might check, "Would like more information" or "Definitely" or "Somewhat likely" for an asset gift
- These give a reason for a follow-up contact
- This can lead to permission to present options (i.e., to make the ask)

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Follow up phone call:
1. Thank you / reminder

"Hello Sara? Hi, this is [name] from [charity]. Don't worry, I'm not calling to ask for a gift today. I wanted to thank you for your years of support of [cause]. Your gifts have really made a difference for [beneficiaries]."

"Also, I wanted to thank you for completing our survey a few days ago. This really helps our leadership. It's important for them to know what matters to loyal donors like you. So, thanks for that!" ...

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Follow up phone call:
2. Tell me more / I help donors

"I also wanted to follow up with you on one thing. You mentioned in the survey that you *[would like more information about / might be considering] a gift [of real estate / of stocks, bonds, or mutual funds / from an IRA]*. I work with many donors like you who've made these types of gifts. The extra tax benefits really make it a smarter way to give. Would you mind telling me if anything in particular prompted you to *[request that information / consider this type of a gift?]*" ...

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Follow up phone call:
3. Can I show you some options?

"I'd love to share some examples of what others like you are doing. I think you'll find some of the options interesting. This can also help with your giving to other causes, not just ours. I'll be in your area next Tuesday. Would your calendar allow us to meet at 2pm?" ...

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Follow up phone call:
4. Details?

“Great! I’ll put together some options for you. Before we meet, is there anything you want me to know about the [real estate / investments / IRA]? I know sometimes there are special issues with [property / certain types of investments].”

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Survey outcomes:
Follow up conversations

- Follow up conversations can lead to permission to present options
- This soft proposal gives examples of smart gifts and shows their impact in the areas most important to the donor (shown in the survey)



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Survey outcomes:
Follow up calculations

- Good follow up can’t work with big mailings
- How many follow up contacts can you make in a short time?
- Divide this by the expected response rate then divide by the expected share of surveys with positive answers to key questions
- Ex: (50 follow-up calls / .12 response rate) / .20 positive answers = 2,083 surveys MAX



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Survey outcomes: Teach something about the donor

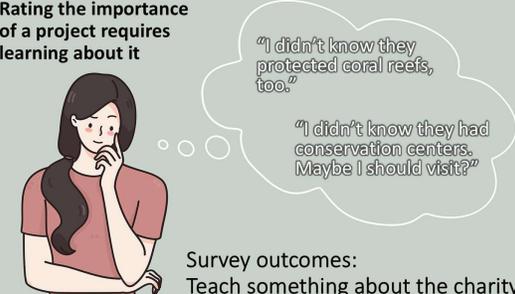
- Questions can help a donor learn something about herself
- They can help the donor to connect her values, people, and history with the charity and to define a personally meaningful victory
- This personal discover process can increase interest in giving

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Rating the importance of a project requires learning about it



"I didn't know they protected coral reefs, too."

"I didn't know they had conservation centers. Maybe I should visit?"

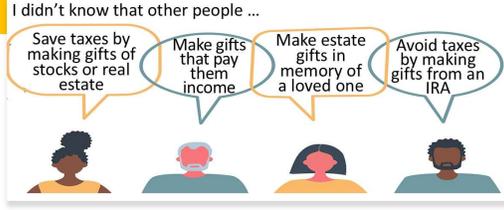
Survey outcomes: Teach something about the charity

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I didn't know that other people ...



Save taxes by making gifts of stocks or real estate

Make gifts that pay them income

Make estate gifts in memory of a loved one

Avoid taxes by making gifts from an IRA

Survey outcomes: Teach something about giving

Rating the likelihood of making a gift requires thinking about it

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**Survey outcomes:
Teach something by asking for guidance**

“Please compare the two stories and select which of the two stories made you feel the following.”

1. Made me value the work of [charity] even more.
2. Increased my connection to the cause.
3. Moved me emotionally.”



Diablo, L. & Piles, S. (2019, February 28-March 1). *Renouncing an established gift in will program*. *Gifts Revue*. *Amherst, MA*.

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**Survey outcomes:
Teach something by asking for guidance**

“It would be most helpful to me if when you read the booklet you note how it’s written. Do you like the style? Are the examples clear? Do you have any suggestions on how we might improve it?”

Which of these ads about giving stocks do you think others will find most compelling?



Cicotte, B. L. & Jacob, J. G. (2009). *Fundraising basics: A complete guide*. Jones & Bartlett Learning, p. 421.

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**Survey outcomes:
Teach something by asking for guidance**

“We need your help! Estate gifts have always been critical for [this charity]. But this is a sensitive topic. So, we need your advice. We’re considering using one of these two brochures. Would you share your thoughts by answering a few questions about them?”



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Survey outcomes: Timely reminders

- Being "top of the mind" is particularly important for rare event gifts such as before the sale of stocks or real estate or the drafting a new will
- A survey can remind donors of these gift ideas and sometimes the reminder will come at just the right time



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Survey outcomes: Learn something

First, a warning: This isn't survey research, it's Socratic fundraising.

"A good [donor] survey is not about information. It's about self-reflection. It's a conversation on paper."
-Aimée Lindenberg



Lindenberg, A. (2015, March 31). Why your donor survey is what you can do about it. [Slide deck]. AFR (2015, 2016). See [https://www.pgc.org](#)

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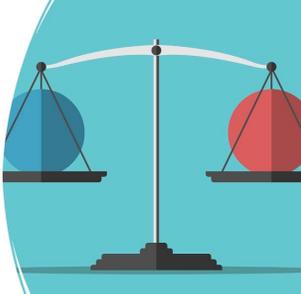
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Survey outcomes: Learn something

These are persuasive surveys. The responses are intentionally biased. This means relative levels will be more meaningful.

- How does interest in project X compare with project Y or Z?
- Relative increases in estate gift interest reflect progress.



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Survey outcomes: Learn something

- Appeal letters can test words and phrases for small gifts, but this is harder for major gifts of assets
- A survey can help because phrases or questions that increase predictions will also tend to increase donations



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Other survey issues: Print or online?

- The online survey is the cheapest
- Reaching more people requires more channels
- Ex: Mailing to the online non-responders then calling the online and mail non-responders



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Other survey issues: How long should it be?

Some donor surveys use just a few questions. (An appeal reply card might add just one or two.) Others are several pages long.

Which is better? It's a tradeoff.



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When more is better



- One experiment used some of the previous questions about the donor's (1) people, (2) values, and (3) life story connections
- Using all three types worked better than using any one or two alone

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When more is better



Another experiment found reading seven planned gift donor stories worked better than reading four, which worked better than reading none

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James, R. M. et al. & Moore, L. (2012). We're living: the effects of living and deceased donor decisions on family. *Journal of Planning Literature*, 47(1), 10-14.

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When more is better

In experiments, triggering more expressions of an attitude increases commitment to the underlying belief and also actions that match those beliefs



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Dehaene, S., Spivey, A., Fiez, A. J., & Sommers, D. (2010). On the generation of 2010: accessibility, the mirror, and the mirror's image. *Journal of Experimental Psychology: Applied*, 16(1), 1-10.

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The tradeoff: The longer the survey, the less likely it is to be completed

- But "length" here isn't just about page numbers or word count
- It's about how easy it feels to take the survey
- Simple words, short sentences, and active verbs help
- So does attractive design



Robstad, S., Adler, J., & Ryden, A. (2011). Response burden and questionnaire length: Is shorter better? A review and meta-analysis. *Medical care*, 49(8), 1120-1126.

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Attractive design increases response rates

One study showed the positive effects of

- "Use of accent color.
- Additional navigation cues to call out section headings.
- More than one blank line between survey questions.
- White space between survey question-response option block is larger than white space between a survey question and response options associated with the question.
- One or more blank lines between end of survey question and start of response options.
- A line or other demarcation between columns of survey questions.
- Visible or extra white space on the survey page"



Burkhardt, G., Orr, N., Brown, J. A., Hoyle, R. D., Cleary, P. D., Beckert, M. C., & Elder, M. N. (2013). Associations of mail survey length and response rates with questionnaire design characteristics.

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Attractive design increases response rates

- Most of these increase the physical length of the survey, but they make it feel easier and inviting
- These increased responses the most from the oldest respondents



Burkhardt, G., Orr, N., Brown, J. A., Hoyle, R. D., Cleary, P. D., Beckert, M. C., & Elder, M. N. (2013). Associations of mail survey length and response rates with questionnaire design characteristics.

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Conclusion

Asking questions is powerful. It might start with a social conversation, a formal campaign feasibility study, a focus group, a phone survey, or a paper or electronic survey, but the steps are the same.

Appreciative inquiry is compelling. Socratic fundraising works.

Challenge
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 Identity ← Victory
 ↓

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Questions?



Click the Q&A icon at the bottom of your screen.

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Still Have a Question?

Contact: Prof. Russell James

E-mail: russell.james@ttu.edu
or Connect with me on LinkedIn

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