

The Planned Giving Coursesm

Presented by

The Planned Giving Council of Greater Philadelphia

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The Planned Giving Council of Greater Philadelphia: www.pgcp.org
The Planned Giving Coursesm: www.theplannedgivingcourse.org

I. Description

The Planned Giving Coursesm is a 16 module, two-day workshop covering the fundamentals of planned giving. Inspired by market demands, informed by the NCPG Syllabus, and developed by leading planned giving experts in Philadelphia, the Planned Giving Council of Greater Philadelphia successfully launched the inaugural, CFRE-approved program in May 2008.

II. The Market Speaks

An increasing number of nonprofit organizations now seek fundraising professionals with at least general planned giving knowledge. Many are finding it difficult to identify such candidates. For their part, individuals who want a quality planned giving overview are discovering it challenging to find. A survey of PGCGP members and AFP Greater Philadelphia Chapter members found:

- 73.4% said they would be “Likely” or “Very Likely” to attend the Course
- 62.2% said taking the Course would help them find a job or get a promotion
- 51.4% said taking the Course would help them get a raise
- 92.6% of those in a position to hire staff said they would give “additional consideration” to those who have taken the Course when making hiring and promotion decisions
- 52% of those in management positions said they would give “additional consideration” to those who have taken the Course when making decisions about salary increases

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III. Timeline

The PGCGP board approved the concept for the Course in January 2007. The Council created a blue-ribbon committee to oversee the design and implementation of the Course. After initial planning, the committee tested its ideas with a market survey in June 2007. By December 2007, the bulk of the faculty was selected. In March 2008, we implemented the AFP Train-the-Trainers Seminar to enhance the teaching skills of our faculty. In April 2008, detailed module outlines and PowerPoint slides were submitted to the committee for review and approval. In March and April 2008, we also used email and direct mail to promote the Course. In May 2008, 17 months after our work began, we implemented the inaugural session of the Course.

IV. Results

The Council capped attendance at the Course at 35 to ensure a quality educational experience. We had a sell-out crowd with a waiting list. The response from attendees was extremely positive. Two attendees were attracted to join the Council in advance of the Course because of the discount for members. Three more attendees have become members of the Council, bringing the impact to date to five new members. The program also provided the Council with a cash surplus that will be used to further enhance future sessions of the Course as well as other Council programs.

V. Making the Course Available

The Planned Giving Council of Greater Philadelphia is currently exploring ways it might make The Planned Giving Coursesm available to NCPG and its regional constituents. This will save local councils an enormous amount of development time and expense. As the demand increases for development professionals to have at least a fundamental knowledge of planned giving, we in Philadelphia are happy to help our colleagues around the nation as they seek to enhance local educational programming.