



DonorTrends

CASE STUDY

How an Environmental Organization used DonorTrends to Secure Planned Gifts

Overview

One of today's biggest areas of growth for nonprofit fundraising is Planned Giving. It is estimated that over the next 25 years nearly **\$6 trillion** will transfer to charitable organizations through bequests, trusts, and other planned gifts.

For an environmental organization their *Legacy Society* generated an average planned gift of \$42,000. As Boomers age, the Organization was committed to growing the *Society* to tap into the greatest wealth transfer of all time.

Challenges

- Welcome **100** or more new members to the *Legacy Society*.
- Identify the existing *Legacy Society* members who warrant additional expense/1-1 engagement.

Opportunity

- Take a deep data dive to uncover the donors more likely to join the *Legacy Society*.
- Profile/rank existing *Society* members to identify those who qualify for 1-1 relationship.

Solutions & Results

A typical response rate to legacy giving communication is 0.02%–0.15%. Many are shocked by these low rates. Keep in mind, identifying and cultivating these valuable donors could translate into millions.

The Organization relied heavily on expensive Newsletters that were sent to far too many donors. They needed a better way to identify the best prospects to improve efficiency.

Working with DonorTrends their donors' behavior was analyzed to uncover the best donors to invite to join the *Legacy Society*. They were able to reduce the number of newsletters by contacting the higher ranked donors more frequently and reducing mail/contact to the lower scored donors.

Our scoring tools predict future donor behavior to help fundraisers target the right donors, at the right time, with the right message.

The DonorTrends predictive scoring model was tested against the controlled RFM segmentation.

Joined Legacy Society

+223%

Control RFM	0.06%
DonorTrends Score	0.2%

Information Request

+125%

Control RFM	.24%
DonorTrends Score	.54%

Value of 2 Bequests

[Identified in This Campaign]

+\$46,588

*RFM = Recency, Frequency, Monetary Value



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