CASE STUDY

Bonterra DonorTrends

How an environmental organization used Bonterra 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 warranted additional expense or 1:1 engagement.

Opportunity

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

Solutions and 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 the Bonterra Donor Engagement DonorTrends solution (formerly EveryAction’s DonorTrends solution), 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 solution scoring model was tested against the controlled RFM segmentation.

<table>
<thead>
<tr>
<th>JOINED LEGACY SOCIETY</th>
<th>INFORMATION REQUEST</th>
<th>VALUE OF 2 BEQUESTS</th>
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<tbody>
<tr>
<td>+223%</td>
<td>+125%</td>
<td>+$46,588</td>
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Control RFM 0.06%
DonorTrends score 0.2%

Control RFM 0.24%
DonorTrends score 0.54%

*RFM = Recency, Frequency, Monetary Value

DonorTrends is part of Bonterra.

Visit bonterratech.com to schedule a demo.

See our solutions