

Productivity: The Key to Major and Planned Giving Success

Since 1973, Ruffalo Noel Levitz has helped over 3,000 higher education institutions meet fundraising and enrollment goals. Recently, we launched *RNL Major and Planned Giving Solutions*, a comprehensive program to identify, warm, and have conversation with potential transformational donors in your pipeline.

Why did we invest in changing donor qualification, an area which is most often handled solely by gift officer teams? We heard from hundreds of giving professionals that major barriers to gift officer success are holding them back, at a time when fundraising goals are just getting higher.

MAJOR BARRIERS TO SUCCESS



Large,
unqualified
donor pools



Gift
officer
turnover



Wealth
rating is
not enough



Scheduling
is difficult

RESULTS OF OVER 30,000 RNL DONOR CONVERSATIONS

With a coordinated approach, these barriers can be overcome to supercharge your major and planned giving programs. Using industry-leading donor conversation tactics, here's what RNL has accomplished for partners over just the past two years, **returning donor qualification grades with full contact reports to propel the gift conversation.**

CONVERSATIONS:

36,570

CONTACT RATE
HIGHER EDUCATION:

52.7%

HIGHER EDUCATION GRADE 1 OR 2
IDENTIFICATION RATE:

13.4%

Grade 1 and 2 donors have indicated an estate gift has been made and is ready to be documented, or wish to meet with a gift officer immediately to discuss a gift.

PARTNER ROI: EXCEEDS 10,000%

Results from RNL Major and Planned Giving identification conversations during 2015 and 2016

HERE'S WHAT A FEW RNL PARTNERS ARE SAYING:

“ The process was seamless, convenient, and professional. I felt confident on day one. ”

—Leader at small, private institution

“ RNL's philosophy is to make giving easy to talk about. It's not a technical conversation; it's from the heart. That's what we talk about with donors—the philosophy of RNL and our institution match. ”

—Planned giving leader at large, private university and health system

“ I have been so impressed by your tenacity and never-give-up attitude. The fact that RNL has never stopped looking for ways to improve has shown you are the type of company that I want to partner with. ”

—Leader at large, private charity

MAJOR AND PLANNED GIVING SUCCESS STORIES

Private Institution (West Coast)

RUFFALO NOEL LEVITZ IMPACT: 5 percent of the donors contacted identified themselves as being interested in making a planned gift. Within three months of the program, 12 planned gifts were confirmed with the average gift above the \$50,000 level.

Public Institution (Midwest)

RUFFALO NOEL LEVITZ IMPACT: Since the start of the program four fiscal years ago, the RNL program has uncovered 130 planned gift commitments worth over \$1.75 million in total value.

Private Institution (West Coast)

RUFFALO NOEL LEVITZ IMPACT: Documented gifts include \$10,000, \$100,000, \$430,000, and the sale of a home for \$1 million during the initial fall phase of a yearlong effort. Seven percent, or 57 prospects, were identified as being interested in immediately making a transformational gift to the institution.

PLANNED GIVING

Client partner realizes an ROI of \$650,000 against its \$50,000 investment

PHASE
01

- Donor screening and planning
- Pre-call postcard: 1,000 prospective donors
- High-impact survey call to prospects age 55-80
 - ✓ previous donors
 - ✓ 423 donors completed survey

PHASE
02

- 209 stewardship calls
- Connected with 160 planned giving prospects
- 121 planned giving leads
- 5% of respondents were highly likely to contribute a legacy gift
- Average gift of \$50,000 to date
- Many conversations continue

FM-007 05/17

RUFFALOSM
NOEL LEVITZ

ARE YOU READY TO DOUBLE THE PRODUCTIVITY OF YOUR GIFT OFFICER TEAM?

Head to RuffaloNL.com/MGPG today to schedule a consultation.