

Loma Linda University Health Accelerates Planned Giving Fundraising



Partnership Abstract

Opportunity

Loma Linda University Health wanted to discuss planned giving opportunities with the substantial number of highly rated donor prospects they had not yet contacted.

Partnership

LLUH worked with Ruffalo Noel Levitz to construct a planned giving donor survey and qualification program to make personal phone contact with donors and determine their interest in legacy giving.

Results

The successful planned giving donor qualification campaign, currently underway, has already generated 98 qualified leads for gift officers. These contacts have led to multiple high value legacy gift commitments, including a gift exceeding \$400,000. To date, with the partnership with RNL, LLUH has raised \$3,675,000 in gifts.

Opportunity

As Loma Linda University Health (LLUH) moves forward with their transformational “Vision 2020” campaign, they counted a high number of top-rated donors who had not yet been approached with an opportunity to make a legacy gift commitment. They identified 2,600 donors in the top-rated groups, with 2,000 of these donors not assigned to any gift officer portfolio. LLUH knew these donors were key to their transformational campaign goals. “We had to find a way to reach out to them,” said Todd Mekelburg, director of planned giving.

Partnership

LLUH's Office of Planned Giving put together a task force to prepare to reach out to these donors. “We approached this as a team,” said Mekelburg. Trusted partner Ruffalo Noel Levitz, who had been helping LLUH for several years in annual giving, was chosen to provide a comprehensive planned giving outreach program—including donor warming communications and personalized engagement calls to qualify donors and pass them on to gift officers for follow up and gift solicitation.

“I liked the way that Ruffalo Noel Levitz approached the process.” Mekelburg says. “If I'm going to turn over 2,600 of our best names, I need to have really high confidence in the partner and their ability to engage donors in a conversation.” After his visit to the RNL headquarters and meeting with the professionals who would be contacting donors, Mekelburg says: “I had no doubt in my mind that this was the program we needed.”



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Results

“The results were surprising,” says Mekelburg. The program immediately identified donors ready to make a commitment, along with even more donors requesting gift planning information. “When I heard how comfortable they were on the calls, I just felt great about what was happening,” says Development Associate Anna Ceballos. The Office of Planned Giving immediately began passing donors to major gift officers who began following up to secure gifts.

Mekelburg believes that the experienced RNL professionals that acted as an extension of their team was crucial. “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 philosophies of RNL and Loma Linda match.”

“I really liked the feedback we received,” says Ceballos, speaking about the daily contact reports on conversations provided by RNL. She personally heard several donor conversations and says she was really energized afterward. “When you hear how comfortable they were on the calls, I just felt great about them.” This comfort translated to the entire LLUH philanthropy team, says Mekelburg. “What’s happening in this program is raising the comfort level of our major gift officers.”

Ceballos said the information provided through the conversations greatly improved the Loma Linda team’s database and strategy. “It was very easy to tell the next steps,” she says, which included sending more information or moving to an immediate gift officer appointment.

One example of these quick results is a transformational commitment by a donor which exceeds \$400,000 and will have a lasting impact at Loma Linda. Within six weeks of identification by the RNL team, says Ceballos, **“The donor was visited one time, and documented a gift. That really goes to show how well the call from RNL was done to introduce the opportunity.”**

Fall 2016 Results

DONORS REACHED
399

Interested in Planned Giving

GRADE 1
51

GRADE 2
6

% HIGHLY QUALIFIED
14.6%

As advice to organizations interested in adopting this high impact donor identification, Mekelburg offers: “Make sure your system can handle the follow up.” With a high volume of interested donors identified, working with gift officers to respond quickly is crucial.

To date Loma Linda has raised \$3,675,000 since partnering with RNL on Major and Planned Giving initiatives.



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Todd Mekelburg
Director of
Planned Giving